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CX ROADMAP: A PATH TO AI AND

AUTOMATION

CX ROADMAP A PATH TO AI AND AUTOMATION

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CX ROADMAP A PATH TO ALAND AUTOMATION

EXECUTIVE SUMMARY

Developing an effective Customer Experience (CX) Roadmap that effectively integrates AI and automation involves several key steps. These steps help ensure that the implementation not only aligns with the company's strategic goals but also enhances customer satisfaction and operational efficiency. Here are the key steps to consider:

Strategic Vision. Start by creating an overarching AI strategy that articulates a vision and approach for AI/CX emphasizing how it will enhance experiences for customers and employees. This strategy should be communicated with transparency to help customers understand the benefits and to inspire and direct employees.

Identify Opportunities. Identify and collect relevant literature on the topic. This includes academic research studies, industry reports, white papers, and other publications related to AI and customer experience in digital transformation. Review and analyze the literature to identify key themes, trends, and gaps in the research.

Pilot Initiatives. Pilot each AI initiative around your primary CX design and drive smart automation transformation through many smaller-step changes and successes. This approach can lead to superior results.

Empower CX Teams. Empower CX teams with an entrepreneurial and innovative spirit, generating new channels, products, and services. Support these initiatives by providing incentives and funding, allocating dedicated time, collaboration, and data sharing.

Measure Impact. Establish a process and standards for measuring the impact of AI/CX initiatives, determining the ROI of your efforts. This systematic approach will help in understanding the effectiveness of the AI/CX initiatives.

Leverage Ecosystem. Leverage your ecosystems in creative ways to fill your skills gaps. This may be the most expedient path toward achieving AI/CX goals.

Balance Automation and Human Interaction. Strike the right balance between automation and human interaction, recognizing that a positive customer experience depends on finding the right mix. Over-automation risks diminishing empathy and understanding, while insufficient automation may result in inefficiencies and increased costs.

Adopt a Design Thinking Approach. Adopt a design thinking approach to ensure that the customer remains at the center of all initiatives.

CX ROADMAP A PATH TO ALAND AUTOMATION

INTRODUCTION

Creating a successful Customer
Experience (CX) roadmap for integrating
Al and automation involves a structured
approach that begins with understanding
the existing CX landscape and
identifying specific improvement goals.
It's crucial to select Al and automation
technologies that align with these
objectives and seamlessly integrate
them into various stages of the
customer journey.

A robust data infrastructure is also essential for supporting these technologies, along with rigorous pilot testing to measure effectiveness. Equally important is preparing the team through training and change management to adapt to new processes. Continuous evaluation through key performance indicators and customer feedback is vital for iterative improvement.

The roadmap should also account for scalability, ethical considerations, and compliance with data protection laws. Staying informed about emerging technologies in Al and automation ensures the roadmap remains relevant and effective in enhancing customer satisfaction and operational efficiency.

The role of AI and automation in shaping customer experiences is highlighted by several key trends for 2024:

Efficiency and enhanced experiences using Robotic Process Automation (RPA) can improve the efficiency of contact center operations by 60%. Additionally, 69% of consumers are open to the use of AI to improve their experiences, with 65% expecting at least part of their customer journey to be automated.

Social media's growing influence continues to be a vital customer service channel, with 59% of businesses recognizing its increased value. Moreover, 75% of consumers are likely to share their positive experiences on social media, and 74% are influenced by social media ads.

The emergence of omnichannel experiences, including the metaverse, are becoming increasingly important. 81% of consumers have shopped across at least three channels in the last six months, and one in three have used digital agents with 35% experiencing retail environments in VR. Furthermore, 72% believe metaverse interactions might one day replace or supplement real-world brand interactions.



THE IMPACT OF ALAND

AUTOMATION ON CUSTOMER EXPERIENCE

Al and automation are transformative forces significantly enhancing the customer experience by delivering personalized, efficient, and accessible services. These technologies empower businesses to better understand and cater to their customers, offering scalability and cost-effectiveness. However, optimizing their impact on CX, requires a delicate balance between technological integration preserving the human touch, while also addressing potential challenges.

THE IMPACT OF

AI & AUTOMATION ON CUSTOMER EXPERIENCE

Today's traditional customer experience models face several pain points and challenges, including disconnected customer journeys. Outdated business models contribute to disconnections in the customer journey. Important touch-points are independently run and often do not connect or communicate with each other the way customers expect them to.

Despite the availability of various software tools, CX journeys often lack personalization. No single platform can comprehensively manage end-to-end personalization, resulting in an inability to effectively tailor experiences. Inability to handle large data volumes with traditional CX programs cause companies to struggle handling the sheer volume of data generated by customers, leaving many unable to capitalize on a goldmine of CX

Companies are still stuck in the past when it comes to CX, with inadequate understanding of true customer experience. Traditional models often fail to answer fundamental questions about the customer experience, such as what parts of the experience are broken and how it is affecting satisfaction and retention. Who owns CX and what functional areas are responsible cause companies to silo certain aspects of the experience.

Although moves to the cloud have helped with deploying better CX tools, the tools used in traditional models often fall short. Important capabilities like understanding customer history and providing personalized responses beyond simplistic FAQs are often not available in current solutions. Lack of real-time awareness and action cause retrospective fixes and are unable to be proactive and take action to reduce friction and frustration before it results in churn or costly issue resolution.

SPECIFIC ENHANCEMENTS THAT

AI & AUTOMATION BRING TO CX

AUTOMATED CUSTOMER SUPPORT

Al-powered digital agents (also known as Intelligent Virtual Assistant, IVA) can handle routine inquiries and transact, providing immediate responses to customers 24/7. This not only improves efficiency but also allows human agents to focus on more complex issues.

PERSONALIZATION

Al can analyze customer data to offer personalized recommendations and solutions. This tailored approach improves customer satisfaction and engagement.

PREDICTIVE ANALYSIS

Al can predict customer needs and behaviors by analyzing past interactions. This helps in proactively addressing issues, potentially reducing customer complaints and improving their overall experience.

SENTIMENT ANALYSIS

Al tools can assess customer sentiments through their interactions, allowing businesses to tailor their approaches and responses accordingly.

EFFICIENCY IN HANDLING COMPLEX QUERIES

Al is particularly adept at handling complex customer service requests. They can seamlessly integrate information across various channels and provide accurate, context-sensitive responses.

REDUCING RESPONSE TIME

Al can significantly reduce response times by instantly processing customer requests and providing quick solutions. For example, in healthcare insurance, Al can reduce the cost and time of processing claims.

QUALITY ASSURANCE

Al can monitor and analyze customer service interactions to ensure quality and compliance, providing insights for continuous improvement.

EMPLOYEE ASSISTANCE

All can assist customer service agents by providing them with real-time information and recommendations, enhancing their efficiency and effectiveness.

OMNICHANNEL SUPPORT

Al supports a seamless customer experience across various channels, ensuring consistency in service and information.

CONTINUOUS LEARNING AND IMPROVEMENT

All systems continuously learn from interactions, leading to ongoing improvements in service quality and accuracy.

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REAL-WORLD EXAMPLES OF

AI-DRIVEN CX IMPROVEMENTS

Al is increasingly being used to enhance customer experience across all industries. These examples show how Al is being creatively applied across various industries to improve customer experience, offering personalization, efficiency, and enhanced interaction quality.

REAL-WORLD EXAMPLES OF

AI-DRIVEN CX IMPROVEMENTS



Retail: All in retail is revolutionizing the shopping experience. For instance, Amazon uses Al for product recommendations based on previous purchases, browsing history, and items in the shopping cart. This personalization improves customer experience and increases sales.

Banking and Finance: Banks like JPMorgan Chase utilize AI for personalized banking experiences. AI algorithms analyze spending patterns to offer tailored financial advice or products. AI-powered digital Agents like Bank of America's Erica provide 24/7 customer service, answering queries and assisting with transactions.





Healthcare: All in healthcare is used for personalized patient care and support. For example, Al-powered digital agents provide patients with medical information, remind them of medication schedules, and even assist in symptom analysis before directing them to human doctors for further consultation.

Hospitality and Travel: The Hilton hotel chain, in collaboration with IBM, uses an AI robot named "Connie" to assist guests by providing information about local attractions, dining recommendations, and hotel features, enhancing the guest experience.





E-Commerce: eBay uses AI for image recognition in its mobile app, allowing users to search for products using photos, which significantly enhances the shopping experience by making it more intuitive and efficient.

Telecommunications: Companies like Verizon use AI to predict and solve service issues before they impact customers. AI is also employed in optimizing network performance and personalizing customer interactions.



REAL-WORLD EXAMPLES OF

AI-DRIVEN CX IMPROVEMENTS CONT.



Automotive: Tesla's Autopilot is an example of AI in customer experience, where machine learning algorithms process data from the car's sensors to provide features like self-driving, lane centering, and adaptive cruise control.

Entertainment and Media: Netflix and Spotify use AI to personalize recommendations based on individual user preferences, viewing history, and contextual information, enhancing user engagement and satisfaction.





Customer Service Across Industries: Many businesses use Al-powered digital agents for customer service. These agents can handle a range of customer queries efficiently, reducing wait times and improving overall customer experience.

Manufacturing and Supply Chain: All is used for predictive maintenance in manufacturing, reducing downtime and ensuring smoother operations. In supply chain management, All helps in demand forecasting and inventory optimization, indirectly impacting customer satisfaction through timely product availability.



Artificial Intelligence is set to revolutionize customer experiences across all industries. It can analyze large amounts of data and provide personalized recommendations, helping businesses understand their customers' needs and preferences better. Al-powered digital agents can provide immediate assistance, while Al-enabled marketing campaigns can enhance engagement and conversions.

IMPROVE

HELP

lead generation, drive sales, improve customer retention, and much more. Understanding AI in customer experience is essential in today's digital world. As technology continues to evolve, businesses are leveraging AI to improve customer satisfaction and loyalty.

optimize employee satisfaction, while helping businesses answer the question of how to improve customer experience. Al can provide customers with a great experience and content suited to their preferences. Companies can use data collected from these interactions for customer experience research, thereby improving user experience.

ENHANCE

ARTIFICIAL INTELLIGENCE WILL

customer experience by making it easier for companies to craft personalized, positive experiences at all customer touchpoints. Unlike traditional data analytics software, Al can analyze customer behavior and data and continuously learn and improve throughout the process. With that information, it can then predict future customer behavior.

the way we do business and significantly improve customer experience and engagement in digital transformation. Through the effective use of Al technologies, businesses can provide superior customer experience and gain a competitive advantage in the digital marketplace.

CHANGE



DEVELOPING A STRATEGIC PLAN FOR

AI AND AUTOMATION IN CUSTOMER EXPERIENCE

Goal Setting

Define success criteria, objectives, and KPIs, including CX and satisfaction rate, automation containment rate, and others. Ensure alignment across functional areas to measure and improve performance.

Customer Data, Insights, and Needs

Collect and analyze customer data through tools and techniques like CRM, surveys, and data integration. Transform data into actionable insights for enhanced personalization, understanding customer behavior, and meeting expectations.

Personalization Experiences at Scale

Leverage AI for detailed customer profiling, predictive analytics, customized recommendations, dynamic content personalization, and sentiment analysis. Shift from a generic to deeply personalized customer experience, driving satisfaction and loyalty.

Omnichannel
Customer
Experience

Integrate AI and automation across touchpoints for seamless customer journeys, 24/7 availability, personalization at scale, efficient problem resolution, and enhanced data collection. Provide a consistent and engaging brand experience across channels, optimizing customer satisfaction.

GOAL SETTING

Define the criteria for success. What are your objectives? What will you measure? Identify the key performance indicators (KPIs) crucial for your business. Who owns them? Who is responsible for the success? How will you gain alignment across all the functional areas of the organization? Do you measure these today?

CX and Satisfaction Rate	Personalization
Automation Containment Rate	Data Insights
Customer Engagement	Agent-assist
Customer/Agent Engagement	Sales Growth/ Customer Acquisition
Average Handle Times	Brand Impact
Speed to Agent Proficiency	Sentiment Analysis for Emotional Engagement
First Contact Resolution	Compliance
Real-time Decision Making	
Return on Investement (ROI)	9
Agent Productivity	HAL.
Cost Reduction	

CUSTOMER DATA, INSIGHTS, AND NEEDS

Al can analyze vast amounts of data from various sources (like transaction histories, social media, feedback surveys, and browsing behaviors) to gain a deep understanding of customer preferences, needs, and pain points. This understanding allows businesses to tailor their offerings and communications to meet customer expectations better. Here are some strategies:

Data Collection Techniques: Start by collecting individual customer-level operational and financial data. This can include interaction, transaction, and customer-profile data. Data can be collected from various sources across the customer journey, including chat, calls, emails, social media, apps, and IoT devices.

Use of CRM and CCaaS Systems:
Customer Relationship
Management (CRM) and Contact
Center as a Service (CCaaS)
systems are a primary source of
customer data. They can provide
valuable insights into customer
behavior and preferences.

Customer Surveys: Although traditional, customer satisfaction surveys can provide direct feedback from customers about their experiences and expectations.

Data Integration: Integrate data from different sources to get a comprehensive view of the customer. This can help in tracking customer behavior across interactions, transactions, and operations.

Data Analysis: Use advanced analytics tools to analyze the collected data. This can help in identifying patterns and trends, predicting future customer behaviors, and making data-driven decisions.

Leverage Al: Use Al to analyze large amounts of data quickly and accurately. Al can provide predictive insights and tailor strategies based on customer behavior, preferences, and demographics.

Privacy and Security:
Ensure that all data
collection, storage, and
usage adhere to privacy
and cybersecurity best
practices. Customerdata protection can
serve as a source of
competitive advantage.

Collecting and analyzing customer data is crucial for understanding customer behavior and improving their experience. The key is to turn the collected data into actionable insights that can enhance the customer experience. This understanding allows businesses to tailor their offerings and communications to meet customer expectations better.

PERSONALIZATION

Al is a pivotal tool for achieving hyper-personalization leveraging data insights to craft individualized customer experiences. This involves recommending products, customizing marketing messages, or tailoring services to each customer's unique preferences and past behavior, leading to higher engagement and satisfaction.

Here's how AI can help you achieve personalization

- Detailed Customer Profiling: Al algorithms can process vast amounts of data to create detailed customer profiles. By analyzing past purchases, browsing behavior, social media interactions, and other data points, Al can understand individual preferences, interests, and behaviors, enabling highly personalized experiences.
- Predictive Analytics: Al uses historical data to predict future customer behavior, preferences, and needs. This can inform personalized product recommendations, targeted marketing campaigns, and proactive customer service initiatives, such as reaching out to customers likely to need support or are at risk of churning.
- Customized Product Recommendations: E-commerce platforms use Al to analyze browsing and purchase history, providing customers with personalized product recommendations. This not only improves the shopping experience but also increases the likelihood of purchase.
- **Dynamic Content Personalization:** All can tailor the content of websites, emails, and apps in real-time to match the interests and past behaviors of each visitor. This ensures that customers always see the most relevant offers, products, and information.
- Personalized Customer Service: Al-powered digital agents provide personalized support by accessing a customer's history and preferences. They offer solutions and information tailored to the individual's specific context, enhancing the support experience.
- **Sentiment Analysis:** Al tools can analyze customer feedback, reviews, and social media posts to gauge sentiment and tailor responses accordingly. This enables businesses to address customer concerns more empathetically and effectively.
- Automated Personalized Marketing: All can segment customers more accurately and tailor marketing messages to align with individual customer segments' unique needs and preferences, increasing the effectiveness of marketing campaigns.
- Real-Time Interaction and Responsiveness: All enables real-time interaction with customers, adapting responses and recommendations based on the customer's current actions and feedback.
- Voice and Language Personalization: Al-powered digital agents can personalize interactions by learning and adapting to a user's speech patterns, language preferences, and communication style.

By harnessing these personalization capabilities, AI transforms the customer experience from a one-size-fits-all approach to one that is deeply personalized, resulting in higher customer satisfaction, loyalty, and ultimately, business success.

OMNICHANNEL CX

Integrating AI and automation across all customer touchpoints significantly enhances the overall customer experience (CX). Ensuring a consistent experience across channels—be it a website, mobile app, social media, or in-person interaction—builds trust and strengthens the brand's overall perception. AI and automation play a big role in creating a seamless omnichannel experience by integrating data from various channels. This integration enables customers to switch between channels without redundancy, as each channel is aware of interactions from others. The benefits of this approach include:



Seamless Customer Journey: Integrating all channels (online, mobile, social media, etc.) ensures a seamless customer journey. Customers can switch between channels effortlessly without losing context or having to repeat information. This continuity enhances their overall experience and satisfaction.

2

24/7 Availability and Immediate Response: Al-powered digital agents can provide customers with immediate responses to their inquiries at any time of the day. This 24/7 availability ensures that customers get the help they need whenever they need it, significantly improving satisfaction and engagement.

3

Personalization at Scale: Al algorithms can analyze customer data from various touchpoints to deliver personalized experiences. This could include tailored product recommendations, customized marketing messages, or individualized support, making interactions more relevant and engaging for the customer.

4

Efficient Problem Resolution: Automation streamlines routine tasks and processes, enabling quicker resolution of customer issues. All can identify and categorize customer queries to route them to the appropriate department or provide automated solutions, thereby reducing resolution time and improving customer satisfaction.

5

Predictive Support and Proactive Engagement: All can predict customer needs and behavior based on past interactions and preferences. This capability allows businesses to proactively engage customers, offering help or recommendations before the customer even realizes they need it.

6

Enhanced Data Collection and Analysis: Al systems continuously collect and analyze data from customer interactions, providing valuable insights into customer behavior, preferences, and trends. These insights enable businesses to make data-driven decisions to improve the customer experience.

7

Reduced Human Error: Automation reduces the likelihood of human error in customer service processes. Consistently accurate information and responses enhance the brand's reliability and customer trust.

8

Empowering Human Agents: By automating routine inquiries and tasks, Al frees human customer service agents to focus on more complex and nuanced customer issues, allowing for more effective and empathetic human interactions where they are most needed.

9

Dynamic Feedback Loop: Al and automation enable a dynamic feedback loop where customer interactions are continuously analyzed to improve future interactions. This ongoing improvement cycle ensures that the customer experience is always evolving and improving.

EMPLOYEE TRAINING AND SUPPORT PROGRAMS

Preparing the human workforce for AI requires training programs for customer service representatives, sales, IT staff, and other staff who will use or benefit from AI. Start with a simple training curriculum that includes a basic understanding of how AI is rapidly changing the way we do business. Creating an AI training curriculum for employees and customer support agents involves a mix of foundational AI knowledge, practical applications in customer service, and understanding of ethical and procedural implications.

1. Introduction to AI and Machine Learning (ML)

- (a) Understanding AI: Definitions and basic concepts
- (b) History of AI: Evolution of AI in technology and customer service
- (c) Types of Al: Different forms of Al (e.g., machine learning, natural language processing)
- (d) Applications of Al in Daily Life: Familiarizing with Al in everyday scenarios

2. Al in Customer Service

- (a) Al Tools in Customer Support: Overview of Al tools used in customer service
- (b) Role of Al in Enhancing Customer Experience: How Al improves efficiency and personalization
- (c) Case Studies: Success stories of AI in customer service

3. Working Alongside Al

- (a) Human-Al Collaboration: Best practices for working alongside Al tools
- (b) Escalation Procedures: When and how to take over from AI
- (c) Al as a Tool, Not a Replacement: Understanding the complementary role of Al

4. Ethical Considerations and Data Privacy

- (a) Ethical AI: Principles of ethical AI use in customer service
- (b) Data Privacy and Security: Importance of data protection and GDPR compliance
- (c) Bias in AI: Recognizing and mitigating biases in AI tools

5. Practical Training

- (a) Hands-on Sessions with Al Tools: Real-world exercises using Al tools in customer support scenarios
- (b) Role-playing Scenarios: Simulating Al-human interaction in customer support
- (c) Troubleshooting Common Issues: Handling typical challenges encountered while using AI in customer service

6. Advanced Topics in AI (Optional)

- (a) Future Trends in Al and Customer Support: Emerging Al technologies in customer service
- (b) Customizing Al Solutions: Basic understanding of tailoring Al tools to specific business needs
- (c) Feedback and Al Improvement: Contributing to Al tool improvement and adaptation

7. Assesment and Certification

- (a) Knowledge Test: Written or online test covering all modules
- (b) Practical Assessment: Demonstrating proficiency in using AI tools in customer support
- (c) Certification: Awarding a completion certificate for the course

This curriculum is a starting point and can be customized based on the specific AI / IT tools, business requirements and customer service protocols of your organization. It's important to keep the curriculum dynamic and update it regularly to reflect the fast-evolving nature of AI technologies. Continuous learning with regular updates is a requirement for keeping up with the latest developments in AI and customer service.

BUDGETING & RETURN ON INVESTMENT

Building a business case for the integration of AI in CX requires a structured approach that outlines the needs, benefits, risks, and expected outcomes of the integration. Integrating AI can be a strategic shift that can fundamentally change how businesses approach CX and how customers view their brand.

BUDGETING AND ROI

Following are some key points for a business case integrating AI in CX:



Al integration should be treated as a significant strategic and cultural shift for the business, not simply the installment of a new technology. It requires a high level of quality data and the use of best practices in the design and implementation of Al algorithms.

Enhanced Customer Experience

Al can provide personalized and efficient customer experiences, leading to increased customer satisfaction and loyalty. It can reveal insights that help employees rapidly make informed decisions that impact CX, from refining their overarching CX strategy to providing real-time responses to customer inquiries.

Operational Efficiency

Al can streamline processes, enhance efficiency, and personalize customer interactions. It can also handle increasing volumes of sales, inventory management, and customer service issues, reducing the need for additional staff.

Return on Investment

Organizations expect a 5 to 15 percent return on investment (ROI) from their AI/CX efforts. Almost half plan to achieve this within two to three years, and 61 percent say they are on schedule.

Challenges

Despite the benefits, integrating AI into CX comes with challenges. Data is often spread out among many different channels and systems, and much of it is siloed. Businesses must balance leveraging customer data for personalization and maintaining trust by protecting customer privacy.

Future-Proofing

An evolving business model that integrates people and processes is essential to creating the seamless experiences that customers now expect. This requires a holistic framework for the use of AI in CX.

CONCLUSION

The potential of AI in CX is transformative, offering a paradigm shift in how businesses interact with and understand their customers. AI enables the delivery of highly personalized and efficient customer service, utilizing technologies such as digital agents, natural language processing, and machine learning. These tools can provide instant, 24/7 customer support, tailor recommendations and solutions to individual customer needs, and predict customer preferences, enhancing overall satisfaction.

Additionally, Al-driven analytics offer deep insights into customer behaviors and trends, enabling businesses to make informed decisions and proactively address customer needs. This integration of Al in CX not only elevates the customer experience to new levels of personalization and responsiveness but also significantly boosts operational efficiency, leading to increased customer loyalty and business growth.

However, the integration of AI into CX also presents challenges, including data privacy and the complexity of AI integration. Companies should be mindful to avoid several pitfalls that could undermine the effectiveness and success of their initiatives by adopting a strategic and holistic approach. First, you need to ensure that the organization has a strong foundation of key capabilities, such as CX governance and clean customer data. This includes addressing data privacy and security concerns, ensuring transparency around AI usage. Second, businesses should focus on training and adoption for human agents and customers to help them understand how to use and interact with new AI and automation tools. This includes striking the right balance between automation and human interaction. Third, businesses should ensure that their AI/CX efforts tightly align with the IT strategy of their organizations to avoid working in a vacuum. The key is to continuously monitor, maintain, and improve their AI and automation systems to ensure their effectiveness in delivering high-quality customer experiences.

Given the transformative potential of AI in enhancing CX, it is highly recommended to initiate a pilot program to test AI in CX. This targeted approach allows you to test AI applications in a controlled environment, minimizing risk and providing valuable insights. The pilot should focus on specific areas where AI can bring immediate value and measurable impact, such as personalization, predictive analytics, and process automation. The pilot should be designed with clear objectives, measurable outcomes, and a robust feedback mechanism to continuously improve and adapt. It's also crucial to ensure that the program aligns with the overall business strategy and CX vision. The pilot program will not only provide valuable insights into the practical challenges and benefits of AI integration but also help in building a strong business case for broader AI adoption in the organization.

The synergy of AI with CX is a cornerstone for businesses aiming to thrive in the digital era, offering a competitive edge by transforming the traditional customer service landscape into a more dynamic, intuitive, and customer-centric model.

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