



Powering the Shareholder Experience With Artificial Intelligence

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CERTAINTY

INGENUITY

ADVANTAGE



Nice to Meet You



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Looking Back, Looking Ahead

The global events of the past 18 months have created a set of unique opportunities and challenges for all service organizations.

CUSTOMER NEEDS

- › Urgency in action
- › Emotionally charged
- › First time self-service/digital users
- › Complex issues
- › Personalized interactions

PROVIDER CHALLENGES

- › Distributed operation / WFH / New operating models
- › Employee onboarding
- › Support & supervision
- › Scalability and timescale
- › Technology/infrastructure



AI ADDRESSES BOTH



Adoption of Digital Channels and Interacting with AI is on the Rise

Accelerated Global Digitization

COVID-19 accelerated the rate of global growth of digital services by 3 years.

Increased Speed of Digital Innovation

Globally, companies also enhanced the share of digital offerings to customers, averaging 20%.

Digitized Customer Support Interactions

COVID-19 also accelerated the adoption of digital offerings by customers, including first time users.

Source: McKinsey & Company, 2020: <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/the-covid-19-recovery-will-be-digital-a-plan-for-the-first-90-days>

The AI Powered Shareholder Experience

Interaction & personalization

- › Chatbots
- › Virtual assistants
- › **Speak freely (Natural Language Processing)**
- › Identity and authentication

Improving the analog

- › Chatbots
- › Best agent pairing
- › Next best action
- › **Speech analytics**
- › Information management & desktop automation/RPA

Accelerate insights & actions

- › **Interaction analytics**
- › **Sentiment data**
- › **Scalability**
- › Citizen developer solutions

Spotlight – Speech and Interaction Analytics

- › Neural networks scan 100% interactions to derive meaning
- › AI converts interaction to data and helps gain customer insights
- › Beyond spoken words:
 - Escalation language
 - Fraud/Red flag alerts
 - FCR indicators
 - Sentiment and emotional indicators
 - Dead air context
- › Multi-channel taxonomy of content to understand driver events, trends, customer pain points
- › Intelligent dashboards and content categorization

**Insights
Driven Management**
to align with
organization goals

CUSTOMER SATISFACTION

SENTIMENT ANALYSIS

COMPLIANCE
MANAGEMENT

QUALITY MANAGEMENT

Human and AI Collaboration

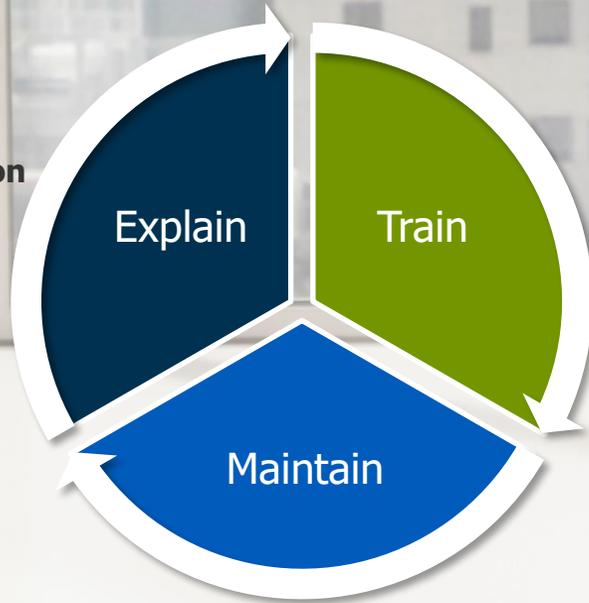
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Robots and AI will replace human jobs

REALITY

Technology compliments human activities and augments the customer experience

Interpret and report on outcomes, gather insights, define new opportunities



Teaching your AI / bots what do

Monitor and manage the bots, tune their performance, calibrate their actions



The impact of AI on the ESG agenda

How AI can help drive the agenda for Environmental, Social and Governance objectives

THE IMPACT OF AI ON ESG

- › How AI impacts the **environmental** aspect of ESG:
 - › Reducing customer activities that have a detrimental environmental impact such as:
 - › **Printing**
 - › **Footprint from analog/in-person activities**
 - › Help sustainable investors to quickly process large amounts of data that hold essential information for ESG investing.



Q&A





THANK YOU

