

BIZ-I5

BIZ-I5 — AI for Customer Engagement

Business — Intermediate / Intermediate

Audience	Customer-facing teams, marketing managers, sales leads, customer success managers
Prerequisites	BIZ-F1 — AI Literacy for Teams (recommended)
Duration	1 day
Delivery format	Workshop — customer strategy and tool evaluation
Group size	8–18
Materials provided	Customer AI strategy template, chatbot evaluation checklist, content governance policy template, customer metrics framework

Description

This one-day workshop teaches customer-facing teams to scale engagement and personalisation using AI while maintaining authentic customer relationships. Participants develop a customer AI engagement strategy with clear use cases and boundaries, evaluate chatbot solutions, design content governance policies, and establish metrics that matter. Focus on the balance between automation and human touch, and the trust implications of AI in customer interactions. Includes live tool demonstrations, strategy development exercises, and competitor analysis.

Key Modules

Module 1 — AI in customer communication: where it accelerates and where it damages

When AI improves customer experience versus when it damages trust. Real examples from retail, finance, SaaS, and service sectors. Customer expectations and when AI feels helpful versus impersonal. Building a framework for responsible AI in customer interaction.

Module 2 — Personalisation at scale

Delivering relevant communication without losing authenticity. Using AI for segmentation, content customisation, and targeted messaging. Ethical personalisation versus manipulation. Privacy considerations and customer consent.

Module 3 — AI chatbots and conversational interfaces

When chatbots add value versus when human support is essential. Chatbot evaluation criteria: NLP quality, handoff mechanisms, failure modes. Deployment checklist: training, monitoring, escalation procedures, customer communication.

Module 4 — AI-generated marketing content

Quality assurance for AI-generated copy, email, social content, and product descriptions. Brand consistency and tone of voice control. Governance policies that prevent low-quality output while maintaining efficiency. Customer perception testing.

Module 5 — Maintaining the human element

Designing AI into customer experience, not over it. When to automate and when to stay human. Transparency about AI use. Customers' right to human support. Building customer confidence in AI-assisted service.

Module 6 — Measuring AI impact on customer outcomes

Metrics that matter: engagement rates, conversion, satisfaction, trust, lifetime value. Isolating AI impact from other variables. Feedback loops and continuous improvement. Reporting to leadership on customer value.

What You Will Be Able To Do

1. Develop a customer AI engagement strategy with clear use cases and ethical boundaries
2. Evaluate AI tools and chatbots using practical, customer-focused criteria
3. Design and implement content governance policies that maintain brand quality and authenticity
4. Build measurement frameworks that prove AI impact on customer satisfaction and business outcomes
5. Plan chatbot deployment including training, monitoring, and escalation procedures
6. Communicate AI strategy to customers with transparency and maintain trust

Delivery Notes

Meeting room with internet, projector, and group work tables. All participants require laptops. Live access to 2–3 major chatbot platforms for hands-on evaluation. Pre-load customer data examples and competitor AI implementations for case study work. Sector-specific customer communication samples if possible. Trainer should have customer-facing or marketing operations background. Optimal group size 10–16, mixed roles (marketing, CS, sales leadership) recommended.

Pathway Position

Comes after: BIZ-F1 — AI Literacy for Teams (recommended)

Feeds into: BIZ-I6 — Advanced Prompting for Business / BIZ-A8 — AI Strategy and Transformation

Ready to book this course?

Contact Io Technologies to discuss delivery at your organisation.

All courses and engagements are delivered on request — on-site, remote, or blended.