INNOSALE

# Highlights from the blog serie

Webinar presentation 29.5.2024

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VTT Technical Research Centre of Finland

# AGENDA

Practicalities:
- Please be muted
- Questions only after roundtable ( & use chat)
- Poll and results in chat

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## INNOSALE WEBINAR ON "AI-DRIVEN B2B SALES – LESSONS LEARNED FROM COLLABORATIVE RESEARCH PROJECT

- 14:00-14:10 Finnish time. Welcome, practicalities (Marko Jurvansuu, VTT) and introduction, Sari Järvinen, VTT
- 14:10-14:30 Possibilities in AI-driven B2B sales development, Ari Bertula, Konecranes
- 14:30-14:50 Highlights from the blog serie, Marko Jurvansuu, VTT
- 14:50-15:25 Lessons learned - roundtable, Konecranes, Molok, Wapice, LeadDesk, Software AG, VTT
- 15:25-15:30 End of the meeting

Poll!

INNOSALE WEBINAR ON "AI-DRIVEN B2B SALES – LESSONS LEARNED FROM COLLABORATIVE RESEARCH PROJECT"

In B2B sales, which require negotiation and customization, both the seller and the customer benefit if the best possible offer can be reached as quickly as possible. For this, AI can potentially improve the sales process by providing insight and offer recommendations. However, this requires use of multiple data sources and tight collaboration between data owners and data scientists to unlock the value of data.

In this webinar we will highlight both technical and business aspects of accessing data with AI-driven B2B sales. Findings have been gathered from collaborative research project InnoSale and presented in blog serie spring 2024. Blogs can be found at https://www.innosale.eu/.

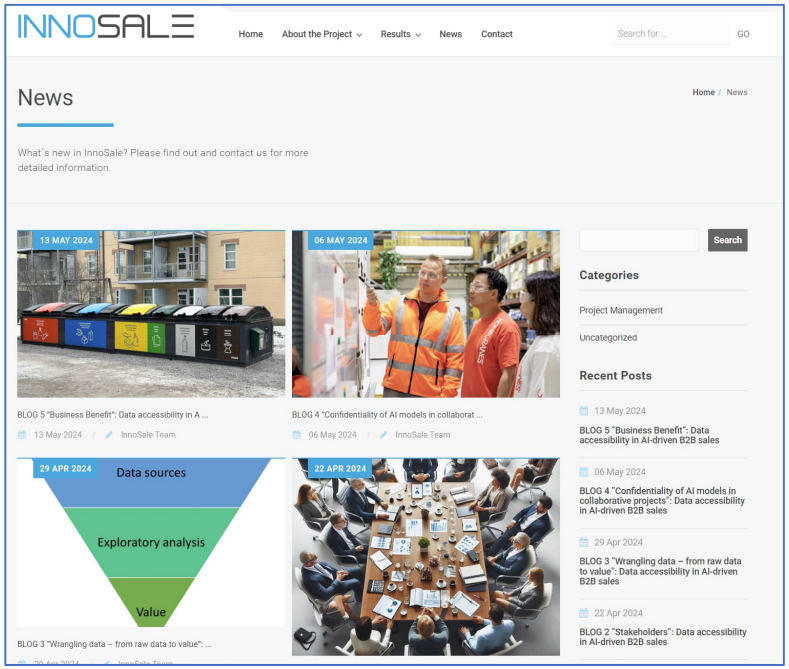
During the webinar, participating companies and research organization VTT will share lessons learned on their experiences related to data accessibility in AI-driven B2B sales.

The perspective will be especially on the following areas: 1) use cases, 2) stakeholders, 3) data wrangling, 4) confidentiality and 5) business benefit.

# Data accessibility in AI-driven B2B sales

## Blogs

- Aim to disseminate learnings from InnoSale research project
  - How to enable data sharing over siloed structures and over organisations in AI-driven B2B sales?
- 5 blogs (ENG+FI) published April-May 2024 in InnoSale web pages + LinkEdin
- Contents:
  - 1) challenges and 2) lessons learned
  - Company perspectives



# Blog #1

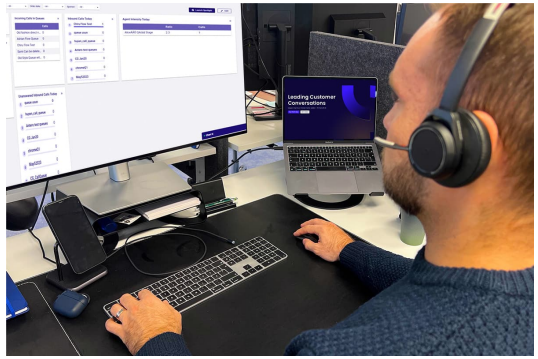
## Use cases

- B2B sales is demanding, requiring competence and knowledge
- Long negotiations, many iterations
- Aim: Improve offer quality and lead-to-order time

- USE CASE A: “Optimal offer recommendation”
- USE CASE B: “Telemarketing”
- USE CASE C: “Product Customization”

- Utilise ERP, CRM and service system data

A. Molok
Waste bins and accessories



B. LeadDesk
Contact center solutions

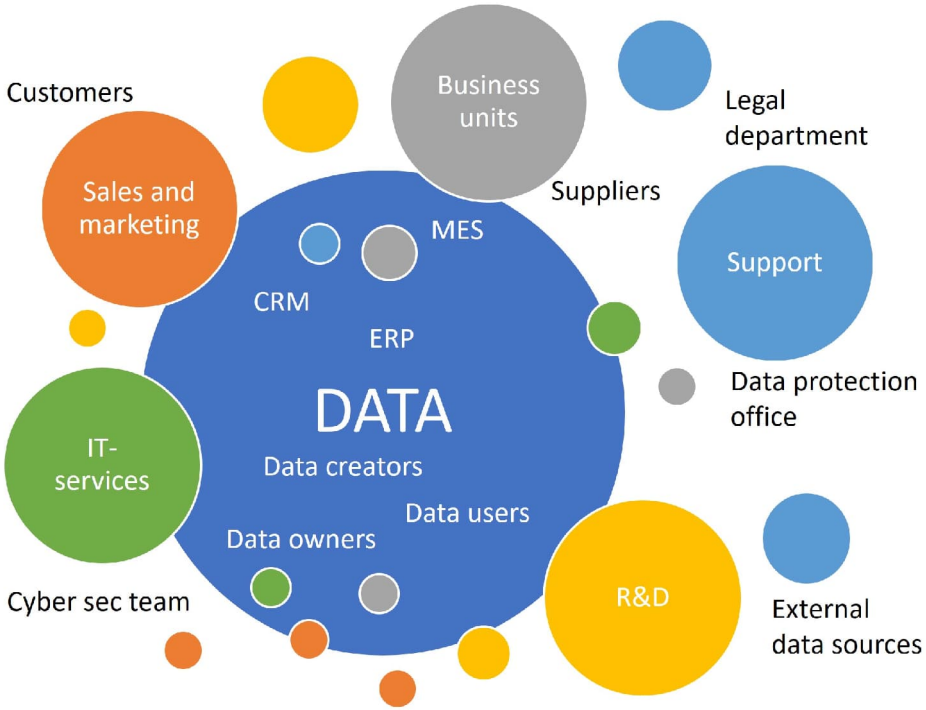
C. Konecranes
Lifting solutions

# Blog #2

## Stakeholders

- Siloed structures and IT-systems
- Data owners, data creators, users, IT-department, legal, cyber security team, company management, data protection office,..

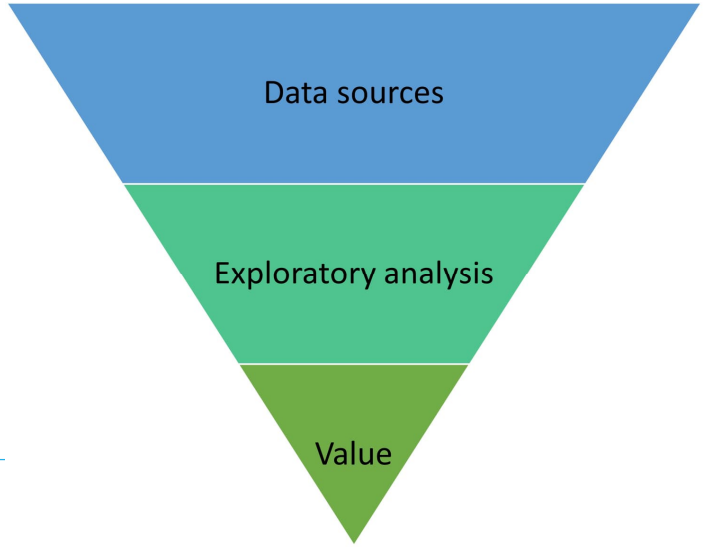
- Lessons learned
  - Early stakeholder engagement
  - Visualise AI benefits
  - Build trust for data sharing



# Blog #3

## Data wrangling

- The raw data is far from being directly making a value with AI
  - Multiple dataset and formats in different IT-systems
  - Data structures are not designed for AI and assisted sales use case in mind
- Exploratory analysis towards value
- Data wrangling steps
  - Data discovery
  - Structuring
  - Cleaning
  - Enriching
  - Validating
  - Publishing

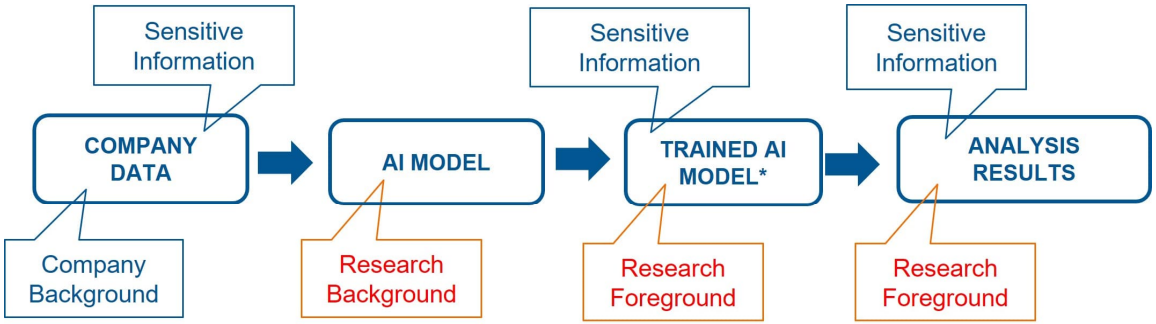


# Blog #4

## Confidentiality

- Research project agreement not suitable for demanding data activities
- Data specific elaboration
  - Type of data e.g. personal
  - Confidentiality
  - Cyber security
  - Ownership

- Lessons learned
  - Create data license agreement
  - Utilise experienced (in AI) legal team
  - Choose level of anonymization and pseudonymization of data




* May inherit patterns from original data

# Blog #5

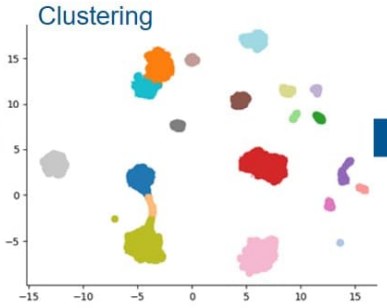
## Business Benefit

- Waste regulation and local variations directs strongly customer purchases
- For sales, it is time consuming to create optimal offer
- Can historical data (orders) provide means to generate recommendations of product configurations for the new offers?

**Segmentation**

- Area
- Customer type

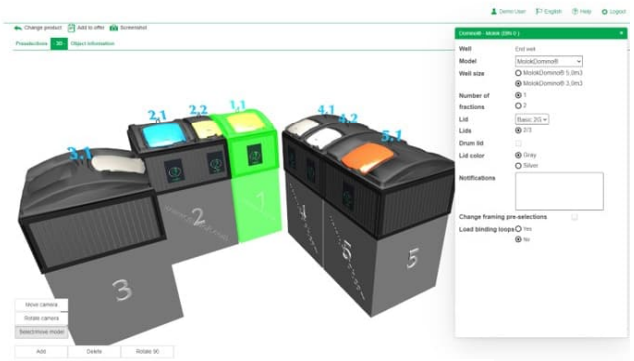
**Machine learning**




**Recommendation**

- Offer id's
- Configurations
- AI explainability

**Configurator**



VTT research

Wapice Summium

# Conclusions

## Common learnings

- The siloes are breaking - companies need to develop support processes and templates to enable data be used over boundaries

- Companies are integrating AI functionalities to their sales related systems such as configurators, contact center solutions and CRM systems

- Research has learned extensively on the manufacturing data analysis and developed AI tools, which are usable for other industries as well.

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# Partner perspectives on sharing data in a collaborative project

Roundtable discussion

# Participants

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Software AG

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