



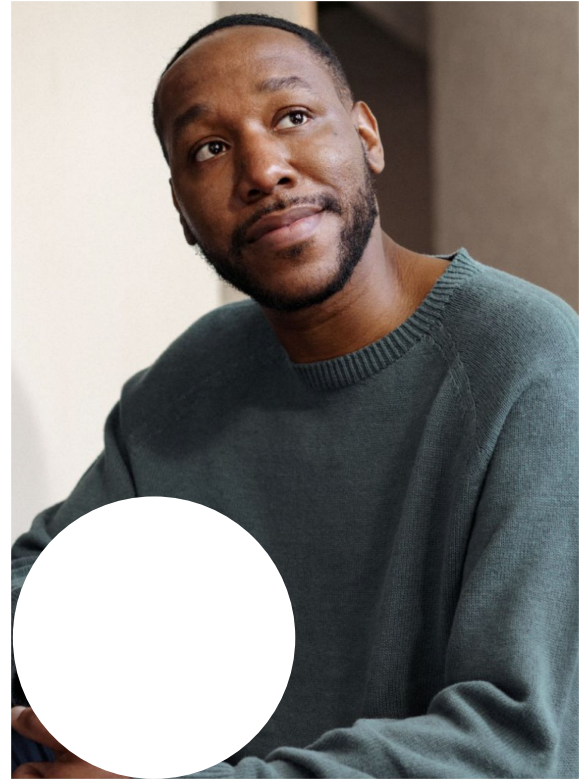
# CALM SUMMIT

20  
24

October 30, 2024 | New York, NY

We help you create  
winning AI Assistants  
and the capability you  
need to support them.

Auditing Education Consulting



MEET HANS VAN DAM



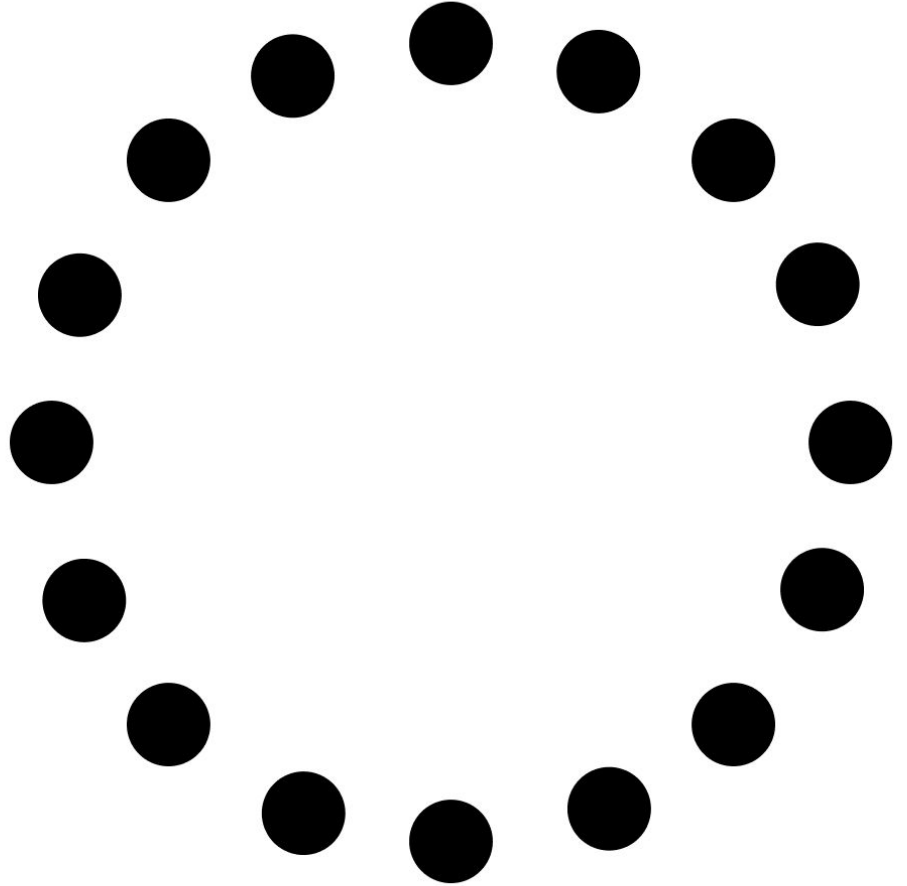
Founded in 2018

9000+ students

30+ countries

Technology agnostic

200+ enterprise clients worldwide



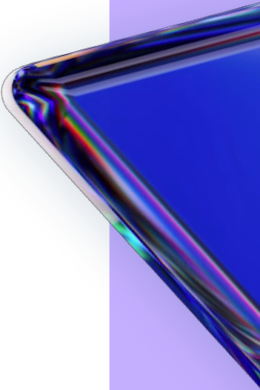
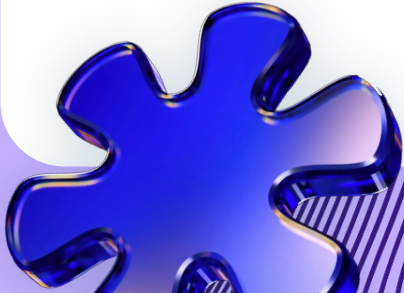
“I have been through my share of corporate educations, but this is hands down one of the best.”

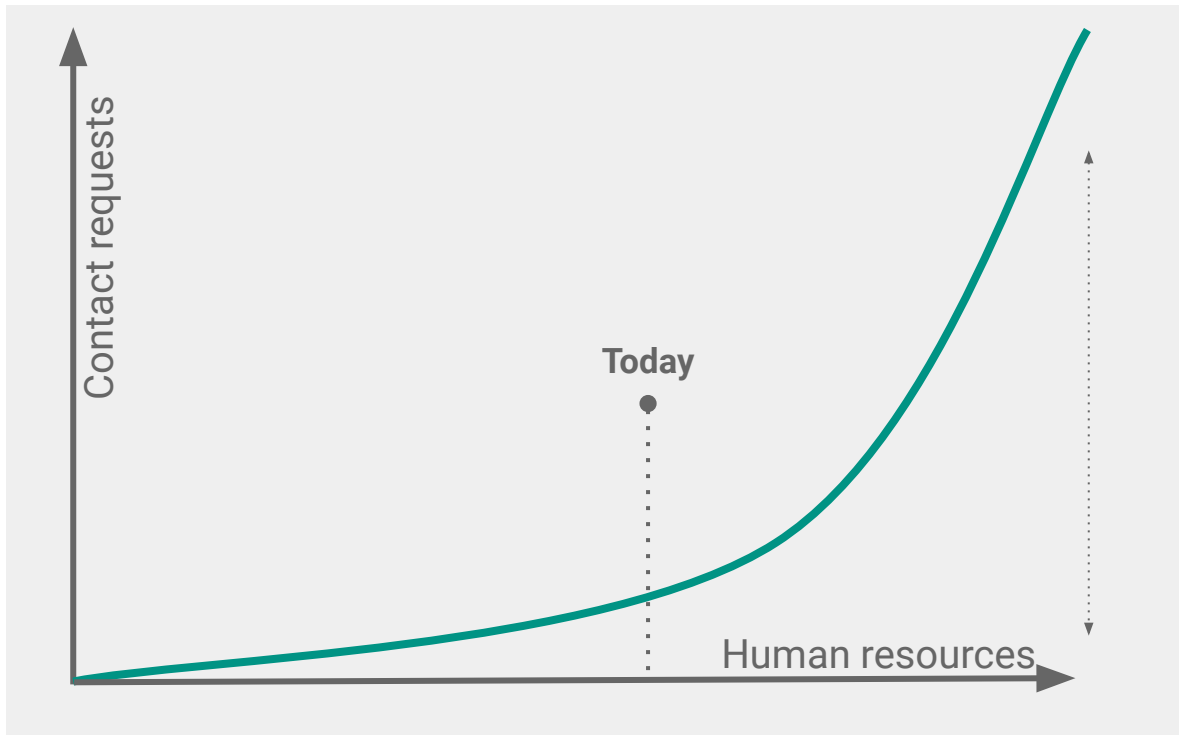
JAN JURJEVIC, INFOBIP



01

Everybody is trying to climb  
the same mountain





## Engagement Capacity Gap

---

Leading to investments in conversational AI Assistants

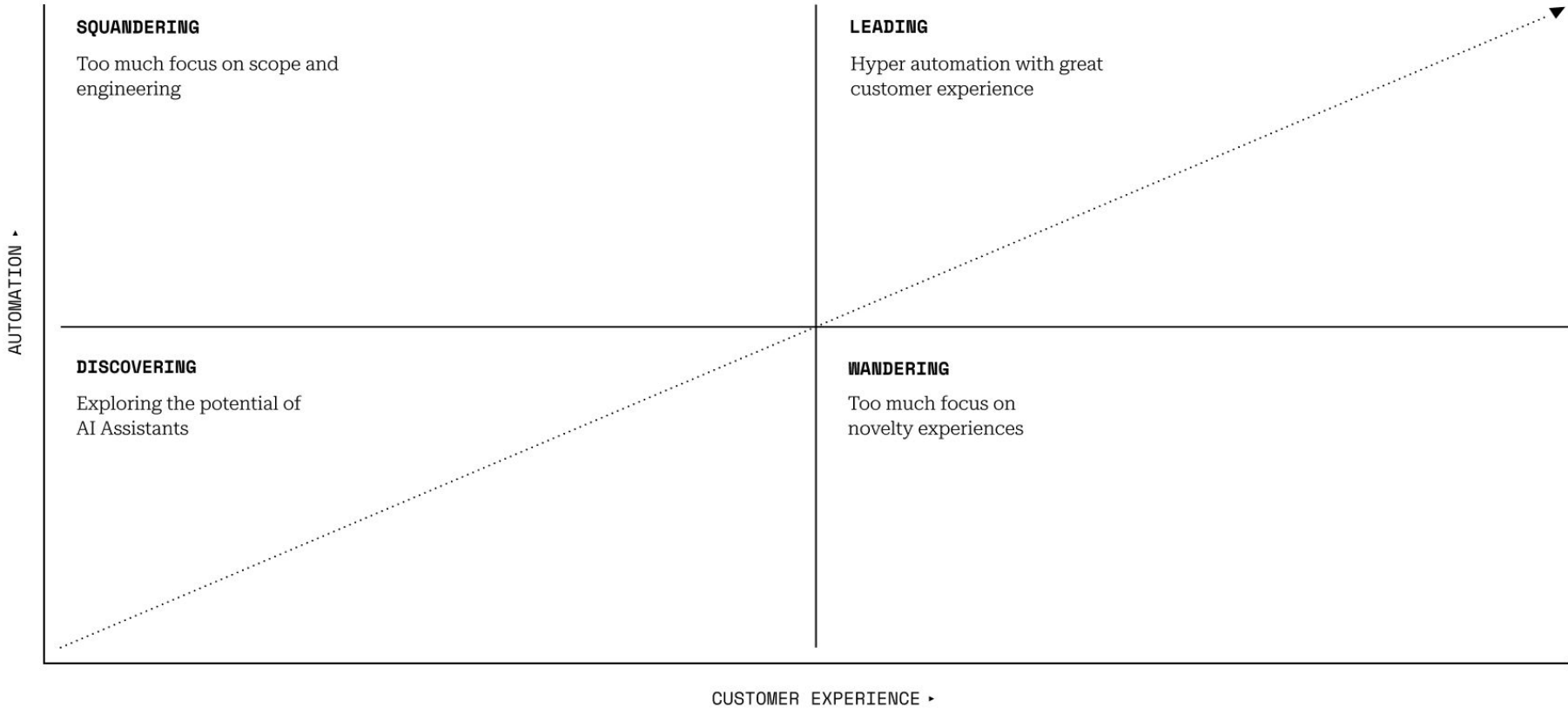
### Enterprises invest in AI Assistants to improve

---

Automation rates

Customer satisfaction

Cost-to-serve



### Enterprises invest in AI Assistants to improve

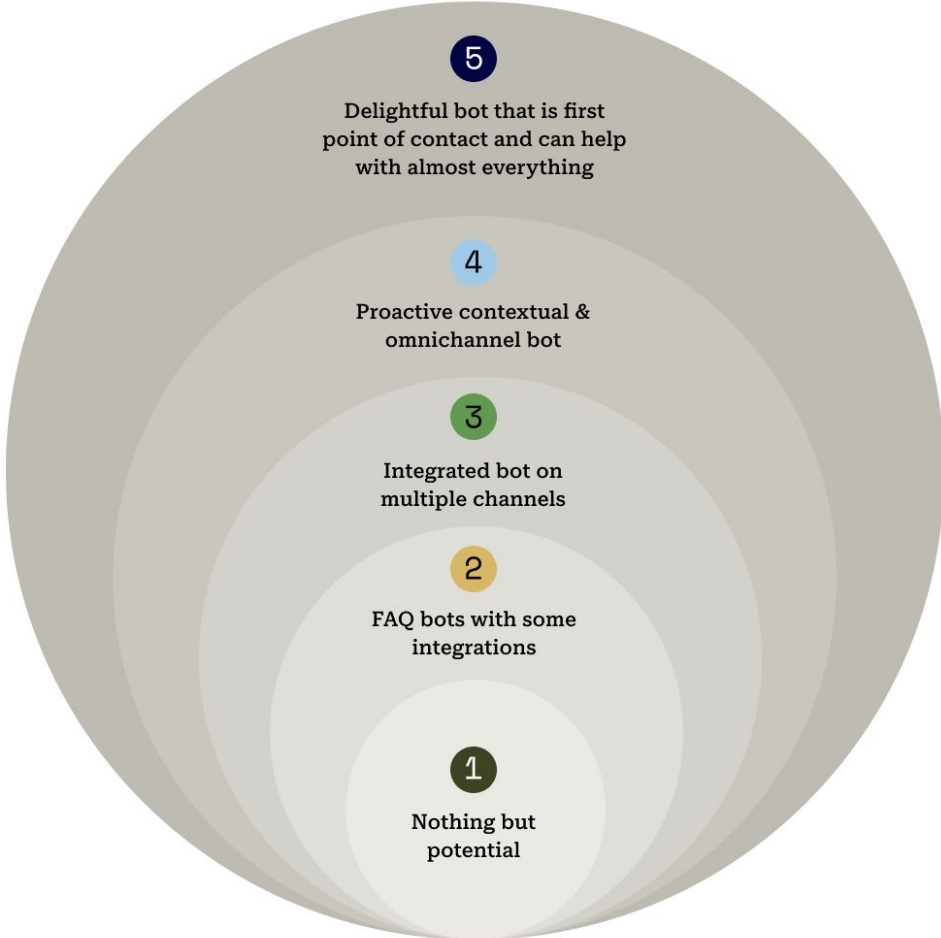
Automation rates

Customer satisfaction

Cost-to-serve




AI Assistants have to grow up, just like humans – and you have to invest in them.





02

# High performing organizations vs under performing organizations





Hans I'm flying to Barcelona next week and I need to check in a extra bag. How does that work?

Agent I'm sorry I can't help with that yet. I will connect you with an advisor.

Hans I'm flying to DC next Thursday and I need to check an extra bag.

Agent Sure thing. We can add an extra bag within two minutes. What's the booking code for your upcoming flight to DC?

**EXPECTATION  
MANAGEMENT**

Hans I need to talk to someone!

Agent OK. The average waiting time is 8 minutes but it looks like we can help you within 5. Does that work for you?

**ANCHORING**

Agent

Well, I have just run a few tests to make sure you get the support you need. Can I now ask you a few more questions?

**RECIPROCITY**

Agent

Well, when we don't receive the funds the system automatically closes the account. Do you have a minute to explore what might be going on here?

**DEPERSONALISATION**



## UNDER PERFORMER

- Reduction
- Deadlines
- Automation
- Containment
- Blockers



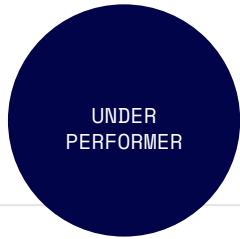
## HIGH PERFORMER

- Customers
- Relationships
- Satisfaction
- Growth
- Alignment

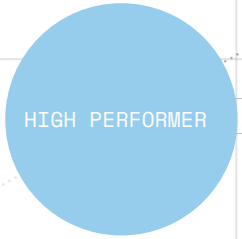
AUTOMATION ▸

SQUANDERING

LEADING

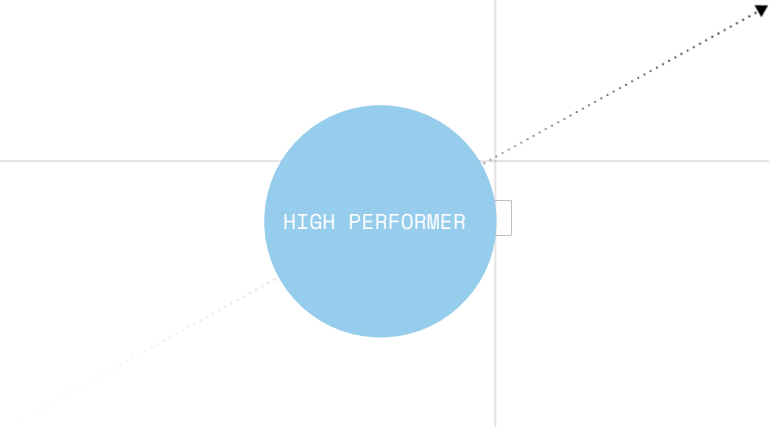


DISCOVERING



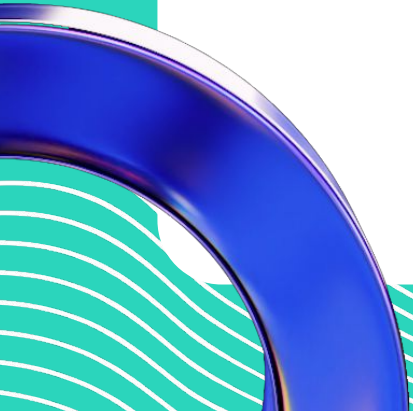
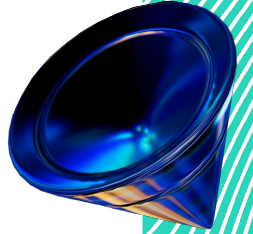
WANDERING

CUSTOMER EXPERIENCE ▸



03

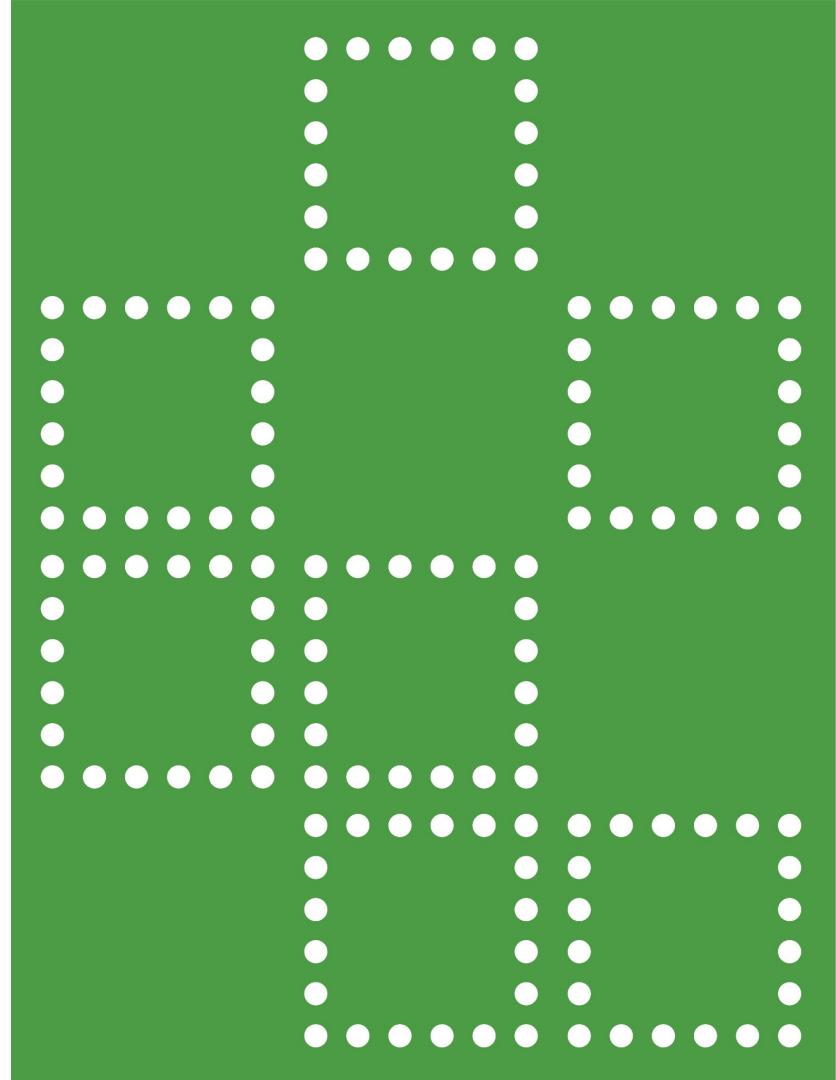
# CDI Standards Framework – a system for high performance



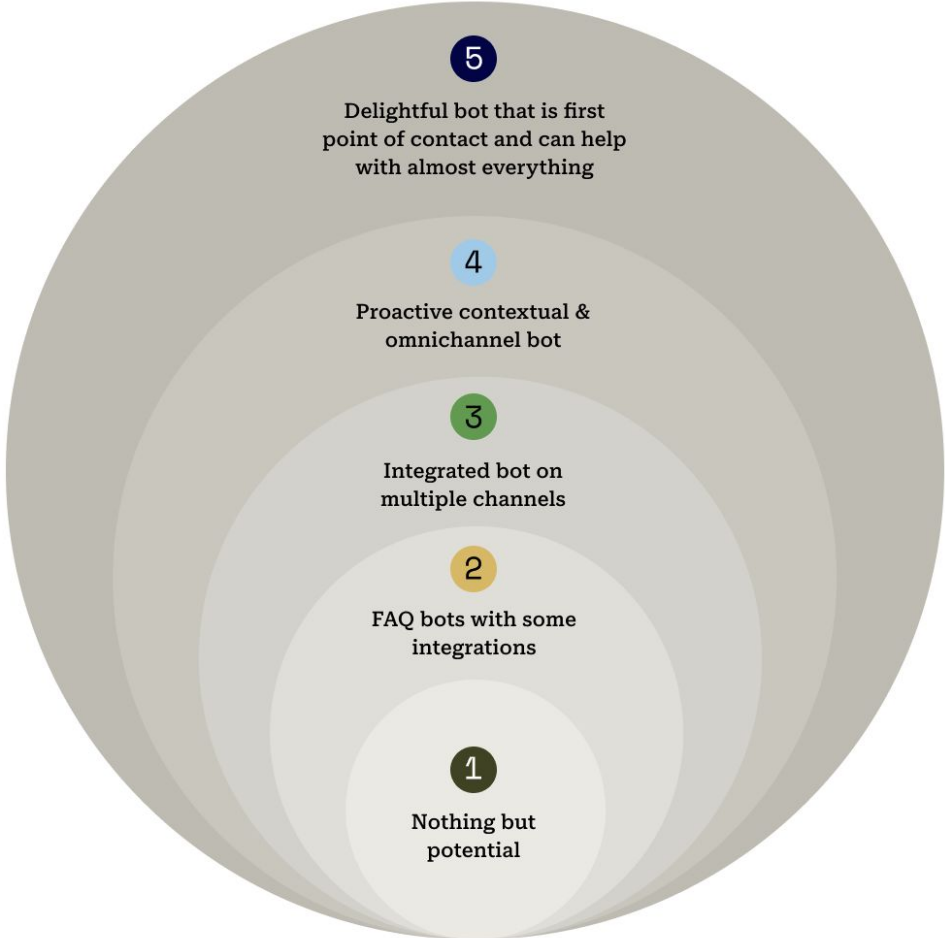


Foundation

CDI Standards Framework is a system that describes how high performing conversational AI capabilities operate.

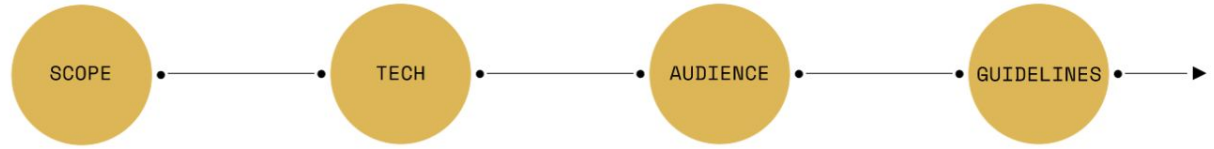


Does leadership know what it's building and are they resourcing it properly?



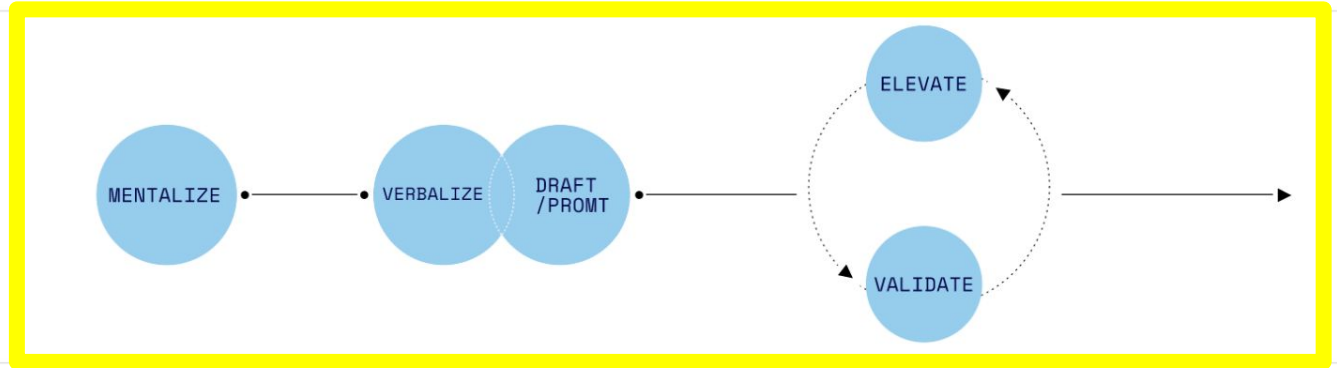
STAGE 1

# Strategize



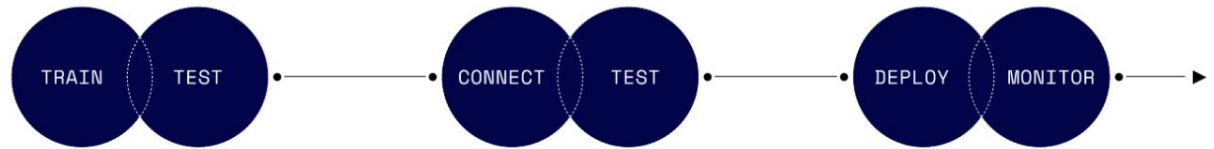
STAGE 2

# Design

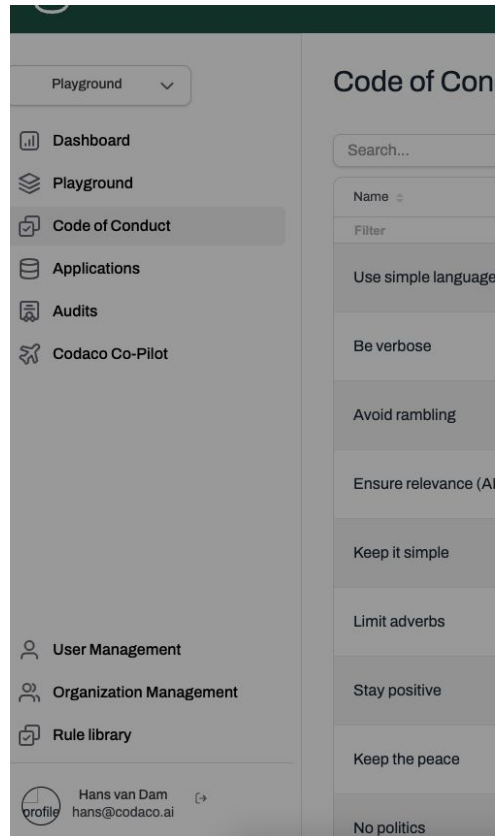


STAGE 3

# Build



# A code of conduct for your AI Assistant to mitigate risk, deliver better user experience, and comply with guidelines

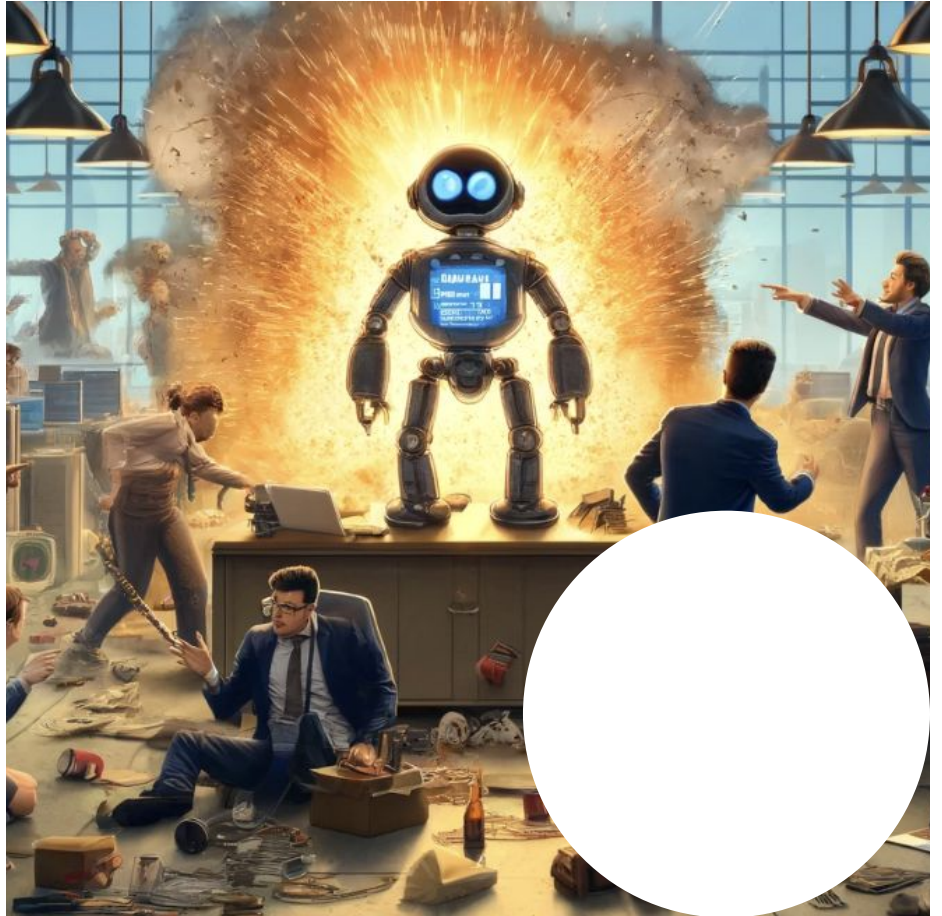


## Categories

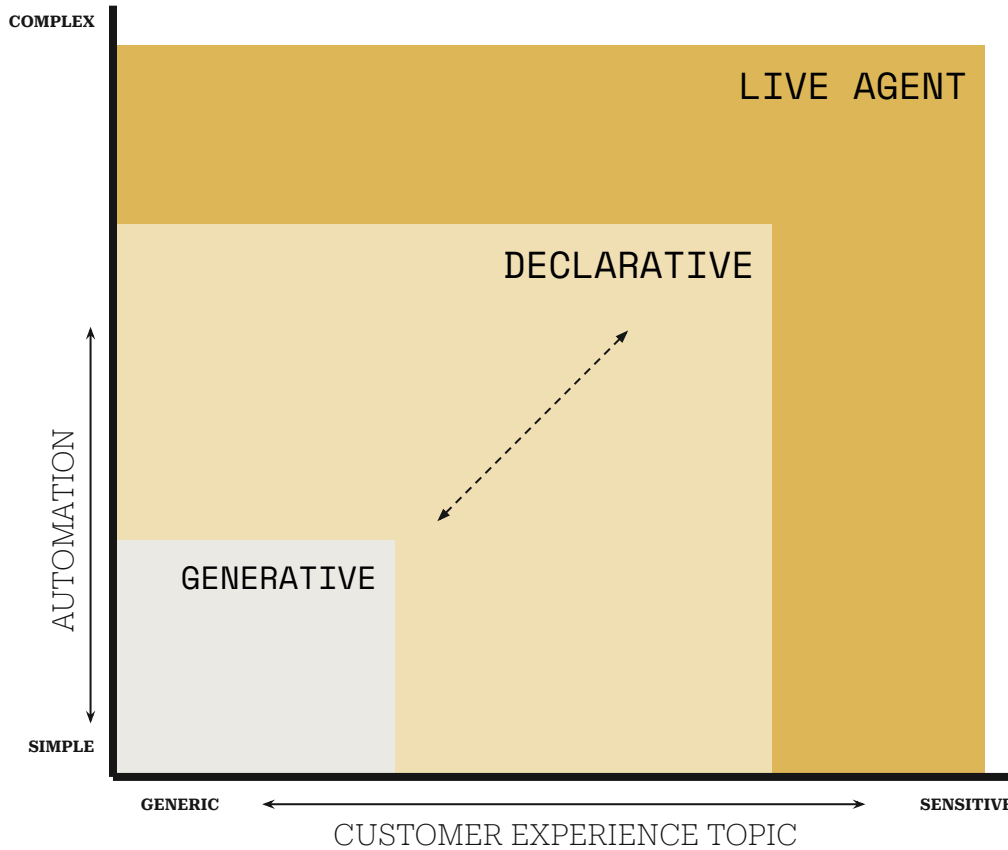
- Fundamentals
- Human-centricity
- Ethics
- Simplicity
- Style
- Compliance

<input checked="" type="checkbox"/> <b>Be verbose</b> Make sure you use a minimum number of characters	<input checked="" type="checkbox"/> <b>Avoid rambling</b> Make sure the messages do not become too long	<input checked="" type="checkbox"/> <b>Limit adverbs</b> Do not use too many adverbs, they make the conversation feel unnatural
<input checked="" type="checkbox"/> <b>Moderation (AI)</b> Ensure the message does not contain harmful content	<input checked="" type="checkbox"/> <b>Keep it simple</b> Do not use overly complicated terms, keep it simple	<input checked="" type="checkbox"/> <b>Stay positive</b> Ensure the tone of the message does not turn negative
<input checked="" type="checkbox"/> <b>Keep the peace</b> Avoid using British-specific 'sensitive' words/topics	<input checked="" type="checkbox"/> <b>No politics</b> Do not talk about politics	<input checked="" type="checkbox"/> <b>Use simple language</b> Replace complicated words with simpler alternatives
<input checked="" type="checkbox"/> <b>Persona Alignment (AI)</b> Retrieve specific words that do not fit the specific tone of voice	<input checked="" type="checkbox"/> <b>Inclusivity</b> Use inclusive terms where possible	<input checked="" type="checkbox"/> <b>Use contractions</b> Using contractions makes the conversation more personal
<input checked="" type="checkbox"/> <b>Stay on topic (AI)</b> Make sure the conversation stays on topic	<input checked="" type="checkbox"/> <b>Ensure relevance (AI)</b> If this rule triggered, the chatbot response was not relevant to the user question	<input checked="" type="checkbox"/> <b>End with a question</b> For an fruitful conversation you should ensure the message includes a question.
<input checked="" type="checkbox"/> <b>Center on the user</b> Make sure you put the	<input checked="" type="checkbox"/> <b>Avoid promises (AI)</b> Do not let the chatbot	

You can't YOLO  
a generative AI  
project







## guidelines

High performing organizations have clear guidelines on how to handle which use case based on.

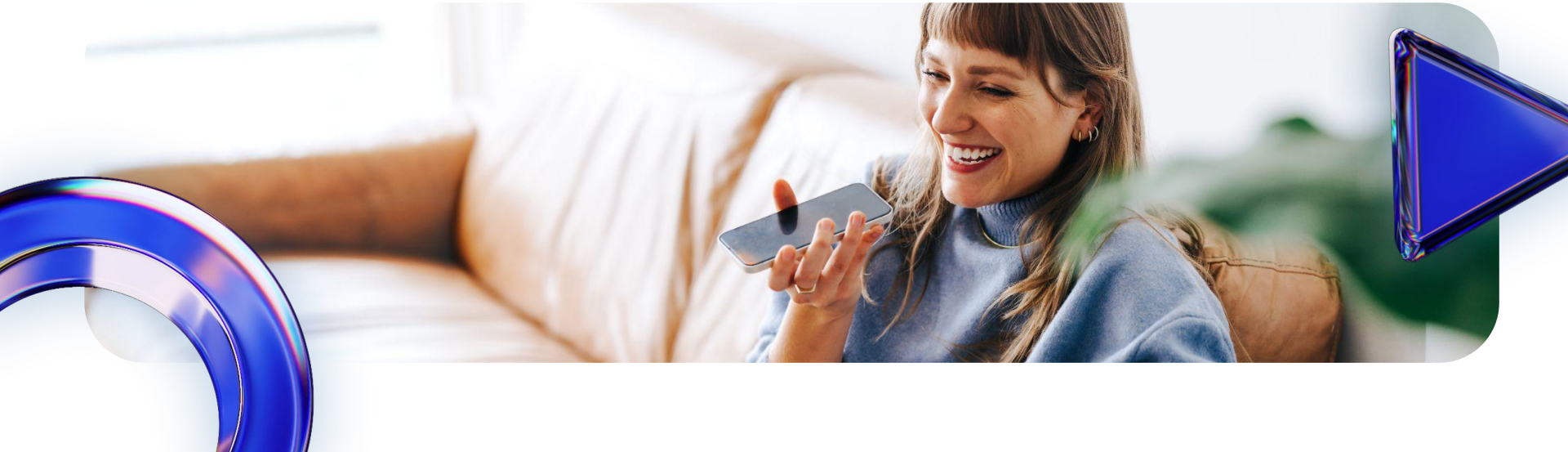
- Complexity
- Sensitivity
- Outcome
- Accuracy
- Cost of mistakes
- Risk tolerance

**The best time  
to plant a tree  
was 100 years  
ago**



# Got A Question?

Thank you for your Attention.  
Please don't hesitate to ask  
questions.



JOIN

US



ON THIS JOURNEY

# Get in Touch with me

**CALM**  
**SUMMIT** 



#### Address

XXX Street Name  
Name of City  
State, XXXX

#### Phone Number

+1-123-456-7890 (“Customer Support”)  
+1-123-456-7890 (“Customer Support”)  
+1-123-456-7890 (“Customer Support”)

#### Social Media

www.website.com  
info@name.com  
facebook.com/name  
linkedin.com/name