



ANALYSIS REPORT

# GENERATIVE AI

## A CHANNEL IMPACT ANALYSIS

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# FOREWORD

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As I embarked on the plane in 2023, bound for CPEXPO in Las Vegas to present JSG's inaugural research report, I realized that despite joining the channel in 2019, I was no longer a novice. I had gained valuable experience and was now halfway toward achieving the coveted "10 years of experience" requirement often seen in high-paying jobs. As I arrived at the Expo, I made a conscious decision to shed my rookie persona and embrace a new role.

JSG's longstanding motto had always been "save the channel," and this mission was precisely what brought me to the event. However, upon arriving, I couldn't help but notice a significant absence – the topic of research. The event offered excellent food, inspiring speakers, and an uplifting atmosphere, but it lacked the critical aspect of research discussions. As a history PhD holder, myself I found this surprising and concerning.

Determined to make a difference, I immediately immersed myself in the show floor, keenly observing and actively listening to the conversations around me. What I discovered was not entirely unexpected – numerous complaints about the scarcity of data, reports, and skilled professionals in the industry.

On the return flight home, I devised a comprehensive plan to address this issue head-on. As soon as I landed, I set about assembling a dream team, carefully selecting individuals from ANS and JSG who shared my passion for research and my commitment to "saving the channel."

Together, we embarked on a journey to revitalize the channel industry's research landscape. Our first step was conducting a meticulous analysis of existing data and identifying the gaps that needed urgent attention. This guided us in understanding the crucial areas requiring comprehensive research and data insights.

Our commitment to the motto "save the channel" took on new meaning – it became a call to action for the entire community, uniting us in our shared mission to uplift the industry and secure its future prosperity. Through perseverance, dedication, and a shared vision, we are ready to successfully transform the channel industry's research landscape and leave an enduring legacy for years to come. Thank you so much for taking the time to read our work and please feel free to provide feedback or thoughts to [emily@jsgnow.com](mailto:emily@jsgnow.com)

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# INTRODUCTION

Picture this, another busy workday with an endless to-do list that keeps growing. Maybe you require a marketing plan for a brand-new solution, managed service, or service offering. Or, perhaps you must write an insightful LinkedIn post for your new CEO's appointment. Conceivably, you might need to document a client's entire cloud migration architecture. Or sales are sluggish, and you require new call and email scripts for prospecting. You jump on ChatGPT and have a decent requirements draft within seconds. Your to-do list is reduced, and time is created for whatever else might be on the agenda – like closing some much-needed sales. This phenomenon—known as generative AI—and its impact on the Channel is what we will explore in this article.



Wherever you go these days in the Channel, whether to a Microsoft Teams meeting or the showroom floor, the hot topic of discussion is AI. Seeking answers to our complex or straightforward questions, we have all utilized tools like ChatGPT to save time during workdays. The expanding Channel ecosystem and complex deal structures put pressure on Channel decision-makers to reduce costs while driving innovation and sales growth. Furthermore, as the Channel ecosystem has become increasingly complex, the need to utilize automation strategies, like AI, has never been higher.

In this report, JSG and ANS have joined forces to elucidate how AI can and will impact everyone in the Channel today and in the future, positively and negatively. We analyze the current impact of AI to paint a vivid picture of the Channel moving forward with the advancement of generative AI. By incorporating statistics and research outcomes, this article provides insight into the implications of AI in the Channel and serves as a roadmap for the AI evolution of our ecosystem.

# TRANSFORMATION OF WORK: THE IMPACT OF GENERATIVE AI

## LOWERING COSTS TO ACQUIRE CUSTOMERS

It feels like generative AI is transforming the world, but for this paper, we will stick to its influence on the Information and Communications Technology Channel (ICT) Channel. We can observe that AI has trickled into every aspect of our day-to-day Channel operations and is here to stay. From content creators to customer acquisition, AI has continued to save us time and money. For instance, one of the primary benefits we observe is the cost reduction of customer acquisitions for Channel partners.



AI allows for identifying ideal prospects using extensive databases and advanced filtering tools. Through AI, businesses can reduce costs through the evaluation of potential users with higher probability prospects that could result in more significant market penetration and improved closing ratios. According to a study by Salesforce, it was found that the businesses that leveraged AI for sales prospecting and customer acquisition experienced an average of 50% increase in leads and a 52% increase in conversion rates. The study highlights how AI-powered tools, such as lead scoring algorithms and predictive analytics, help sales teams prioritize leads, personalize outreach, and make data-driven decisions, leading to significant improvements in lead generation and conversion rates. [1] Previously, such data would consume much more time and be less precise in discovering market opportunities. By focusing on better prospects, sales time should be reduced while allowing for expansion into markets of opportunity. According to a Boston Consulting Group & Salesforce report published in 2020, companies integrating AI into their marketing strategies have witnessed a 7% reduction in customer acquisition costs. [2] Furthermore, effective personalization through AI integration can reduce acquisition costs by up to 50%. [3] Therefore, it is a unique opportunity for Channel partners to lower customer acquisition costs and invest their margins in their bottom line.



## LOWERING COSTS TO ACQUIRE CUSTOMERS (CON'T)

While generative AI can be immensely helpful in prospecting and customer acquisition, it still requires that human touch to make it truly stand out. A sales team being supported by a marketing team utilizing the power of generative AI is a force to be reckoned with. A skilled marketing team can take an idea generated by AI and give it the polish it needs to really stand out against the competition.



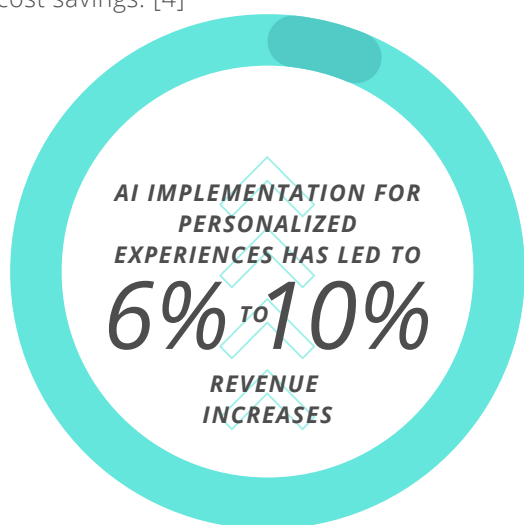
Let's discuss a real-world application of this innovative concept in the Channel that will be entirely possible within the next year and is partially achievable even today. A partner who has closed twenty security deals from four-hundred leads in the past six months can now use AI to not only mine the data regarding leads and closed deals to find commonalities but can now also use generative AI solutions to determine the best leads for the future.

They can also determine how to transform their campaigns to appeal to those leads and the changes required in everything from leads lists to lead follow-up. While this will not replace salespeople in your organization, it will lower the cost of leads, enhance sales productivity, and deliver more closed deals. This kind of game-changing behavior can help the Channel grow exponentially in the future years.

However, this strategy is not without risks. Risks are inherent in sharing customer data, exposing competitive data, and not applying human experience to marketing and sales outcomes. As a result, it makes this strategy a balancing act for the Channel. Utilizing generative AI to lower costs and improve outcomes without exposing the partner to excessive risks will become the hottest topic in the future.

## REDUCING MARKETING COSTS

AI integration in marketing strategies can also lead to cost reduction. JSG data from our Channel consulting practice indicates that by leveraging AI for personalized experiences and advanced digital technologies, companies have witnessed revenue increases of 6% to 10%. Consequently, they have two to three times faster revenue generation than those that do not utilize AI. Moreover, AI-based tools have been demonstrated to save marketers approximately five hours of work weekly, resulting in significant time and cost savings. [4]



Consider the impact here on the evolution of the Channel, of which much has long struggled with solutions and service marketing strategies, something vendors and distributors alike have been striving to address with varying success for decades. Therefore, a helping hand from generative AI could help reduce or potentially eliminate this issue. For instance, the researchers tried using generative AI recently to create a prospecting script for outbound calls for collaboration solutions– the script produced was impressive. It required a little tweaking to get the technology references accurate, but it was 95% there, as generated by the script. We would still need SDRs or prospectors to make outbound calls using the script, but the AI platform vividly addressed the marketing dilemma

dilemma of what to say. When we look at how channel partners are utilizing Generative AI today it is clear that the evolution has begun. A recent Channel Futures survey conducted by Sr. News Editor, James Anderson, showed that 33% of Technology Agents are using ChatGPT or other LLMs for parts of their business operations. Mainly for social media marketing and email. [5]

Furthermore, we have witnessed high-growth Channel partners starting to leverage generative AI to create Account Based Marketing (ABM) plans for their key accounts and prospects. ABM has long been the bailiwick of enterprise marketing teams at more significant partners and vendors. It often implies that smaller partners with accounts that could benefit from this marketing strategy could not utilize an ABM program to create richer, deeper, better customer experiences, ultimately delivering better business outcomes for the partner and the customer. With generative AI solutions for ABM available today for Channel partner use, we witness more high-growth-oriented partners utilizing these solutions to outshine their competitors.

## LOWERING SUPPORT AND DOCUMENTATION COSTS

Outside of marketing, AI also has the potential to reduce support and documentation costs. Regarding customer service and support costs, Gartner predicts AI will result in significant cost savings in customer service operations. [6] A study by Forrester suggests that AI can handle around 20% of all customer service requests, which can significantly minimize costs associated with human customer service agents for multiple partners. [7]



The amount of time saved within customer service departments is growing every day, as it is certainly one area of immediate AI impact for Channel partners who often create help desks, response lines, or customer care groups. Moreover, AI may be able to help partners with the massive documentation they typically do for cloud migration projects, collaboration workflow, and security documentation for customers. Reviews during our research were mixed as to the efficacy of AI in this area currently, but continual improvement in generative AI technology points to this as an area of both efficiency and cost savings for partners in the future.

## COST REDUCTION IN CUSTOMIZATION AND APP DEVELOPMENT

AI can even help reduce costs in customization and app development. For instance, AI can often minimize costs by automating and enhancing app development work and customization speed. A study by MIT and BCG found that AI-enabled organizational learning can lead to cost savings and improved efficiency. [8] It concludes that AI's ability to automate manual tasks traditionally performed by ISVs can reduce costs.

Furthermore: "AI high performers are 1.6 times more likely than other organizations to engage non-technical employees in creating AI applications by using emerging low-code or no-code programs, which allow companies to speed up the creation of AI applications. In the past year, high performers have become even more likely than other organizations to follow certain advanced scaling practices, such as using standardized tool sets to create production-ready data pipelines." This allows for using an end-to-end platform that they've developed in-house for AI-related data science, data engineering, and application development. [9] While currently, this will not ultimately provide all of the needed code.





# IMPLICATIONS FOR CHANNEL MARGINS

## PRODUCTIVITY AND EFFICIENCY GAINS

In this industry, we pride ourselves on productivity and efficiency. As noticed in the few examples cited above, generative AI enhances productivity, which should result in an improved bottom line. A research study by Accenture suggests that AI-based models could increase business productivity by up to 40% by 2035. [10] This is primarily due to eliminating repetitive and non-creative workflows that typically exploit resource time and eat up profits. As a result, the increased output achieved through AI tools may result in a different view on compensation within our Channel and throughout the technology industry.



The increased output achieved through AI-based tools and technologies and its positive impact on the Channel partners' margins could lead to some vendors discussing adjusting compensation rates or reward structures. These measures reflect the enhanced productivity in a world where channel distribution has become more expensive due to the evolution of the ecosystem and multiple partners and direct sellers in various deals. However, this strategy should be undertaken cautiously, as AI is early in the Channel. Over time, however, adjustments in commission rates or alternative incentive structures may be required to reward partners for their customer acquisition and services while acknowledging that many of the tasks, such as marketing, sales, service and support, covered by that compensation have been reduced using AI. Whether this has a positive or a negative impact on the ecosystem remains to be witnessed. Nonetheless, these are early days, and these measures are yet to be attempted by vendors or other stakeholders.

## RECOGNITION OF VALUE-ADDED SERVICES AND INNOVATION

Thanks to all the free time AI offers to the Channel, it is high time to determine what to do with it. In the technology Channel, it is all about innovation and fresh ideas. Partners investing in generative AI tools and services should be recognized and incentivized for their commitment to innovation and offering value-added services. Moreover, vendors and distributors should design strategies and launch programs to help their partners utilize this groundbreaking technology.

While compensation models can be attuned to incentivize partners' efforts in leveraging generative AI to deliver superior customer experiences and strategic guidance, it is still the lowest level of strategy for addressing this massive transformation in the ecosystem. High-growth vendors will meet their partners to correct their business directions and help them utilize generative AI tools. Subsequently, they will repurpose those partners to become a coach or role model for others to initiate their AI journey. It will speed up both Channel adoption and outcomes – generative AI can and will transform the growth trajectory of those who embrace it and utilize it to help partners thrive.

## COLLABORATION AND CO-CREATION

Imagine your ecosystem's daily collaboration efforts with direct sellers, other partners, and influencers in the corresponding markets. Contemplate the time and efforts spent by partners on these critical efforts and picture how much more a partner could do if they only had additional day-to-day hours. Generative AI encourages collaboration between tech companies and their partners and influencers. Programs can be evolved to leverage this technology to aid partner journeys and reduce the time required for collaboration efforts, all while improving their partnership.

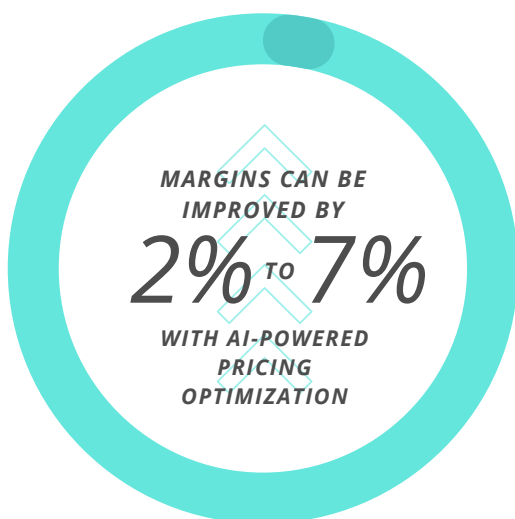
AI-powered solutions such as, PartnerTap, are already entering the marketplace and transforming the partnerships between partners and direct sellers. Imagine what would be possible if we added generative AI support programs for our ecosystem on top of these platforms. Several initiatives can be taken through generative AI, including intuitive content creation for campaigns, assistance with Account Based Marketing (ABM) for critical accounts, support and documentation creation, and, most critically, AI prompt training for partners. This way, they can adequately employ generative AI to drive more collaboration and, ultimately, more revenue for all the stakeholders.

# AI AND PRICING IN THE TECHNOLOGY CHANNEL

## DYNAMIC PRICING AND PREDICTIVE ANALYSIS

Countless aspects of our day-to-day jobs can benefit from AI-based tools. One of the early advantages of AI is in creating dynamic pricing models based on multiple factors, leading to optimized pricing and revenue generation. According to McKinsey, dynamic pricing can increase profits by 3-8% on average across various industries. It has long been the prevue of only large companies – e.g., Amazon dynamic pricing. Thus, this pricing approach can be at the Channel's fingertips. [11] Here is a scenario: if a partner offers security services and there has been a breach in their local market that has been in the news, the AI will promptly realize the situation to price up their security scanning and benchmarking services. Or, for instance, if the price of components is rising, think of Pandemic conditions and supply chain failures, predictive analysis can adjust your pricing ahead of the impact so that you do not sacrifice margin while procuring components. Pricing is the most ignored marketing factor in the Channel, often because it is a complex and specialized area of expertise. This lack of pricing expertise comes with a drawback– Channel firms' profits – so AI can fix the issue for Channel firms immediately and offer them an excellent upside for their future.

## COMPETITOR ANALYSIS AND PRICE OPTIMIZATION



We always face competition in this industry – either with another solution or another Channel. Whether it is to reduce costs, have more competitive products, or align with the best partners, "price point" is where the real conversation begins. Therefore, real-time monitoring of competitor prices and AI-driven price optimization strategies can positively influence profitability. Studies have illustrated that AI-powered pricing optimization can improve margins by 2% to 7%. Therefore, you may already be behind the market if you are not utilizing generative AI for price optimization. This is a quick fix for partners but, more significantly, for vendors who can invest in these tools globally. Consequently, they can make them available to their partners for resale transaction pricing in their local markets. However, care must be taken to ensure no pricing laws, or regulations, are trespassed in the process.

## PERSONALIZED PRICING AND AUTOMATED NEGOTIATION

Many stakeholders in the industry relish the art of negotiation. Thus, having great sellers with negotiation skills is crucial to profitable growth, even with all these generative AI pricing tools. However, generative AI tools are available for those who do not enjoy negotiating. For those who relish negotiating, AI-driven assistance will still allow you to win a few additional points.



Generative AI can produce better and more accurate proposal pricing strategies, facilitate personalized pricing and negotiation policies, and automate some elementary factors of the negotiation process. The data that is available now regarding prices paid, profitability, and price by customer, and type is overwhelming – unless you let the machines process it for you. Many industrial studies specify that personalizing prices based on customer preferences can improve revenue in all industries. Not to mention saving you time, AI can also eliminate the social anxieties of performing negotiations. Through valuable insights, it can help your best salesperson negotiate even better than before.

Finally, with more junior sales associates, many partners and vendors have a "pricing desk" to ensure that the pricing—and ultimately the negotiations—comply with pricing rules or strategies today to protect margins and ensure resource availability. These price desk functions often span a vendor, distributor, and partner organization, creating an excessive requirement for human resources who are vulnerable to errors and can be influenced to lower prices due to various inputs. However, when this process is automated and generative AI is responsible for issuing prices, it can add multiple margin points to deals and produce quotes and pricing far quicker than the pricing desks.

## SUPPLY CHAIN OPTIMIZATION AND FRAUD DETECTION

In this industry, security is not a joke. From cyberattacks and phishing attempts to malware and authentication issues, there is a constant fight against an invisible enemy. One area that has been brutally hampered is the supply chain. However, AI-powered fraud detection and prevention tools can save enterprises billions of dollars annually by mitigating fraudulent activities in their supply chain and interjecting criminals in their tracks. Juniper Research claims that AI-powered financial fraud detection expenditures will exceed \$10 billion by 2027. Regarding the supply chain, AI tools lead to cost savings and improved profitability. Juniper Research also stated that improving models and gaining more significant data access would lead to a virtuous circle of growth with forecasts of 285% profits. [12]



Furthermore, supply chain automation can also minimize costs and improve customer satisfaction. We only need to look back at the COVID-19 pandemic era to observe the state of the IT supply chain at its worst. Due to uncertainty, countless products were back-ordered, shipments lost, and items stolen. However, inventory and risks can be better tracked at the lowest levels through AI tools and platforms. But at a higher level, platforms like KYield can take thousands of data sources and project risks in the supply chain before they occur. This scenario transforms companies' contemplation of their supply chain and focuses on a risk-reduced future.



# AI AND COSTS OF SERVICES IN THE TECHNOLOGY CHANNEL

## AUTOMATION AND ROUTINE TASK REDUCTION

It is noticeable the frequent mentions of the free time that generative AI can create for your work environment. When it comes to the mundane, repeatable, and manual daily tasks of everyday channel life, why not reduce them? AI's influence on automating routine tasks can help reduce all service costs. For instance, according to a report by McKinsey, automation has already led to cost savings of 40% to 60% in various industries, such as banking and insurance. [13] At this point, it is clear that the Channel should incorporate generative AI into daily routine tasks.



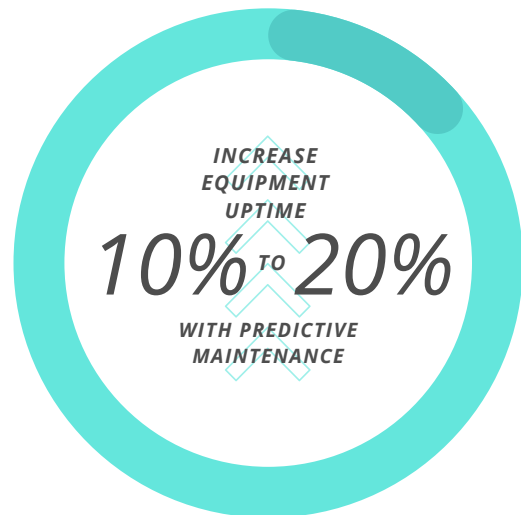
A few examples that can be highlighted as the most promising today for the Channel ecosystem are personalized assistants for calendaring and note-taking, documentation support, marketing content creation, sales funnel management, lead funnel management, customer support, and compensation management. Looking at one factor of compensation management, for example, the agent Channel. It has been observed that vendors, carriers, and suppliers have long struggled to get their commission management systems to work efficiently and accurately for partner compensation. Due to their partial—or even, at times, complete—inability to create accurate reporting and pay out of commissions for partners, many Technology Services Distributors (TSDs) had to build massive teams for commission management. The machines can handle these tasks of checking submissions, matching commission reports to sold data, matching commission by partner, and generating commission payables in a generative AI world. As a result, they can free up those resources to perform more high-value work to help build the business.

While generative AI is not yet the panacea for all the resources the Channel utilizes in their day-to-day businesses, it offers many reasons to believe in a less resource-intensive future for these routine and repetitive tasks.

## PREDICTIVE MAINTENANCE AND DATA ANALYSIS

Machines can fail, so maintenance processes, teams, and costs exist to maintain the corresponding equipment. However, AI and IoT sensors can further aid us with such failures. Using AI for predictive maintenance can substantially reduce service costs associated with failures. Research suggests that predictive maintenance of machines can save up to 40% and increase equipment uptime by 10% to 20%. [14]

We have long heard that the Internet of Things (IoT) and EdgeComputing would transform the world; that time is finally here. In the past, while field sensors were connected and throwing off data, it was often unactionable due to the time delay from data collection to data analysis to decision making. Enter AI. Using a generative AI program over the top of the data could help customers make decisions quickly and produce the work orders, instructions, and guidance to maintain equipment impeccably. For example, consider the case of grain produced in the United States, where mold has long been an issue in the storage and shipping of grains. Even after sensor installation in grain silos, trucks, and production facilities, the grain would often still mold because the time to respond to the conditions leading to mold was too long. However, this situation could soon end with generative AI issuing specific "how to fix" commands over the top of various IoT solutions and condition data. In this manner, generative AI can cut costs and improve conditions in almost every aspect of day-to-day professional life.



## BETTER DECISION-MAKING AND CUSTOMER SUPPORT

AI is all about embracing opportunities to save you money. What else can it possibly provide help with? We will discuss another significant avenue that ultimately results in cost savings but involves critical decision-making in areas currently (or previously) occupied with support employees. However, AI-powered decision-making processes and customer support systems reduce the requirements of these professionals, and generative AI then lays over the top of these multi-capable processes to produce exemplary customer service actions.

A study by Juniper Research estimates that chatbots will save businesses approximately \$8 billion annually by 2022. [15] AI-powered virtual assistants and chatbots have already offered cost-effective customer service options, and now coupled with generative AI solutions, they can develop novel solutions to complex issues, create content to share with customers to fix issues, and do many other tasks. These virtual assistants and chatbots offer our night owl workers some respite and aid their customers to self-serve. Customer service office hours or documentation resources are redundant when AI is on the job.

## TAILORED SOLUTIONS & RISK ASSESSMENT

Furthermore, AI can provide uniquely tailored solutions with specific risk assessment capabilities, reducing service costs through customization. According to a study by McKinsey, personalized and AI-driven solutions can enhance customer satisfaction rates by up to 20%. [16] Who doesn't love making customers happy while saving themselves time and costs?



Think of the applications in the Channel. Let's use security risk analysis as an example. Preparing customer-specific reports and risk assessments for a customer can be both time-consuming and costly. With generative AI, a base report template can be produced for the system, and the system can personalize a report for each client based on the AI-based data analysis. This is not only a time-saving endeavor but also a results accelerator. In addition, with security resource scarcity, it also allows us to repurpose security experts to perform higher-value work.

# A CHANGING TECHNOLOGY LANDSCAPE

## TAKING ACTION ON AI IN THE CHANNEL

Currently, we work and compete in the fastest-advancing industry in the history of modernization. As you have witnessed from this brief research report, generative AI's latest transformation and advancement are uniquely all-encompassing. It is an innovation that has an ever-growing impact on everyone. In the near future, every company of any size—from three or four-person start-ups to the largest corporations within the tech industry—will be impacted by the use of generative AI tools in the Channel.

As you can observe, the benefits are abundant and significant, and we have just scratched the surface with some of the initial productivity and cost impacts. The key to growth for partners, vendors, suppliers, carriers, influencers, and every ecosystem member is to step back and evaluate the impacts that generative AI could have on our business. Subsequently, we must create new businesses, sales, and marketing plans to take advantage of the limitless benefits offered by this innovative and revolutionary technology. At the same time, we must contemplate the processes to manage the relevant risks.

Here at JSG and ANS, we will continue our study of this transformative technology to witness current and upcoming short-term vicissitudes to ensure we continue to take a comprehensive look into the future of AI. Working with and for the channel we will strive to continue to identify real-world application areas where this groundbreaking technology can benefit the ecosystem and their bottom line while limiting downside risks.

The bottom line is that Generative AI is the hottest new technology that is here to stay for the long run in the channel. AI is making it easier to market and save time while still having a human touch that makes the channel unique. It will redefine our industry, and high-growth partners, vendors, suppliers, and distributors will embrace this technology and use it to create the next generation of the channel. Please continue to join us in being a part of the future and let us help you leave your mark on this industry. Come talk to one of our JSG experts about how you can use AI in your business today!

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