

IBM Watson Discovery

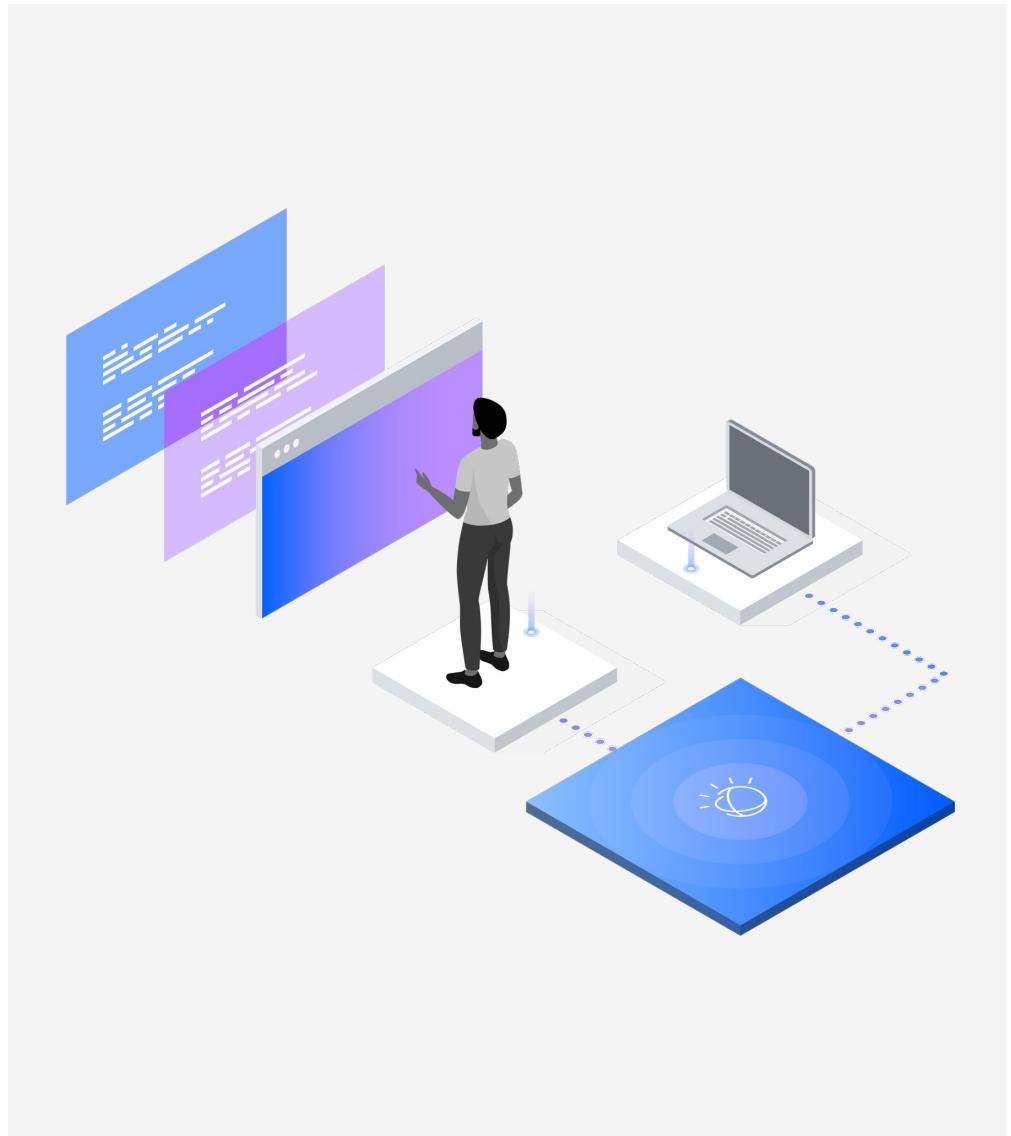
Product overview for sellers,
technical sellers,
and business partners

Vladimir Stojanovski
Principal, Sales Enablement
and Skills Content

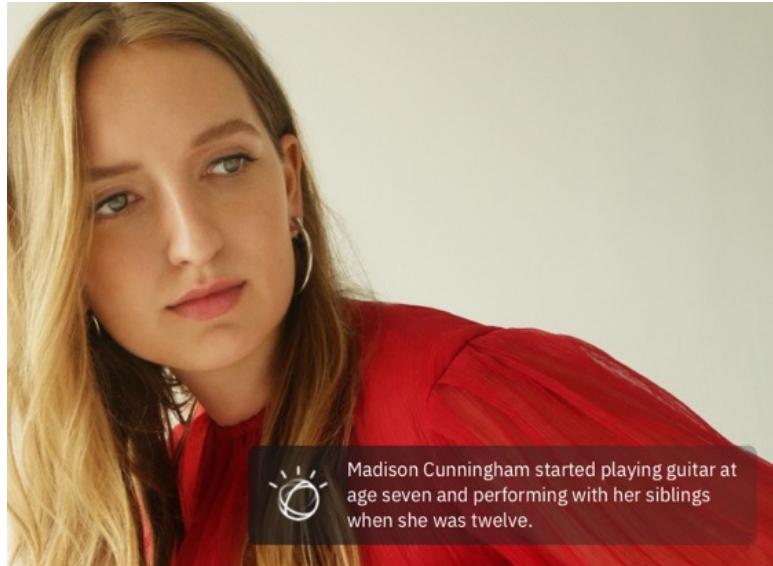


Presentation outline

- [Market opportunity](#) →
- [Use cases](#) →
- [Product features](#) →
- [Opportunity identification and prospecting guide](#) →
- [Progressing and closing deals](#) →
- [Pricing and deployment plans](#) →
- [Competitive information](#) →
- [Call to action](#) →
- [More information](#) →
- [Demos](#) →



Recording Academy® Grammy Awards



How do the next generation
of workers gain institutional
knowledge of the current
and the past?

Your most valuable
intelligence isn't artificial
...that's why you need AI



The challenge

1 Billion

Knowledge workers around the world need access to information

57%

Believe the difficulty of finding information is key cause of lagging productivity in the office

30%

Knowledge workers' time spent looking for information required to do their work

The opportunity

Employees with more efficient information access can grow revenue **5%** with ROI of **383%** in three years

Watson Discovery is more than just search

“As businesses evolve to become digital and to generate more structured and unstructured content, the need for insight engine technology to surface relevant facts, content, and knowledge to stakeholders is critical.

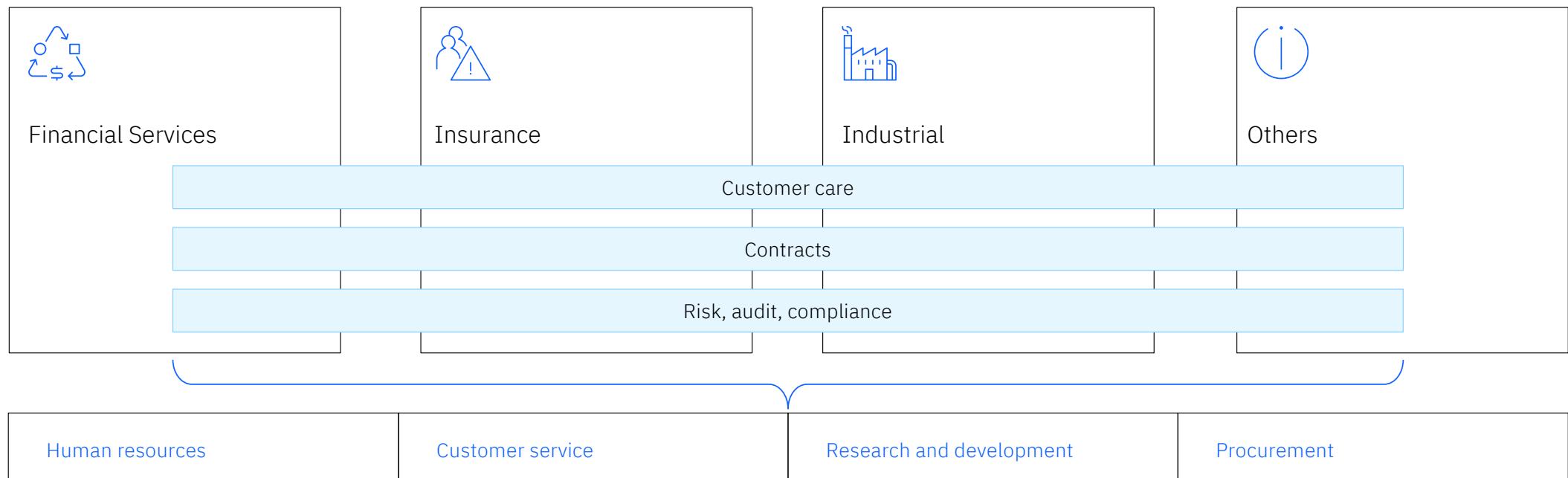
From a value for money standpoint, insight engines offer flexibility and broad applicability when it comes to getting and pushing knowledge to the broadest set of customers and employees.”

Gartner Magic Quadrant for Insight Engines 2021

Watson Discovery is evolving beyond an enterprise search solution, and into a powerful platform providing both document and language understanding to uncover hidden insights employees need when working on complex processes, such as:

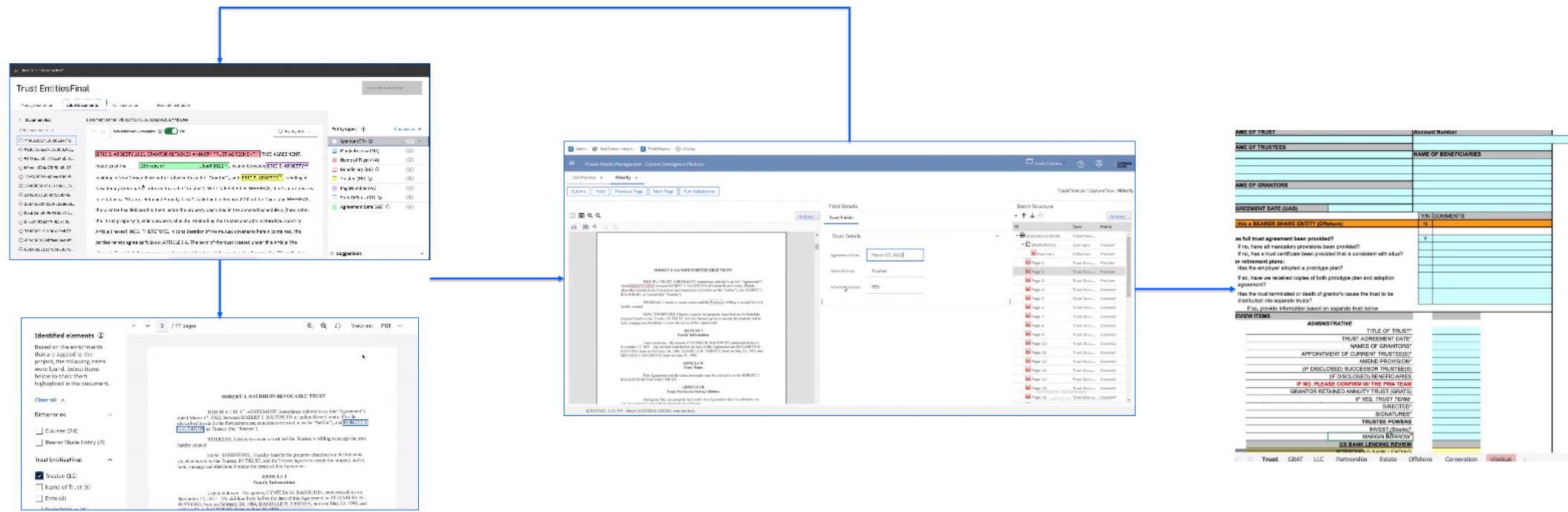
- Insurance Underwriting
- Investment Research Analysis
- Research and Development
- Contract Understanding
- Customer Care

Use cases: Vertical and horizontal markets



Private wealth management – client onboarding

Feedback loop - Validated documents are fed back into the entity extraction workspace; builder validates the feedback, retrains and redeploys the model

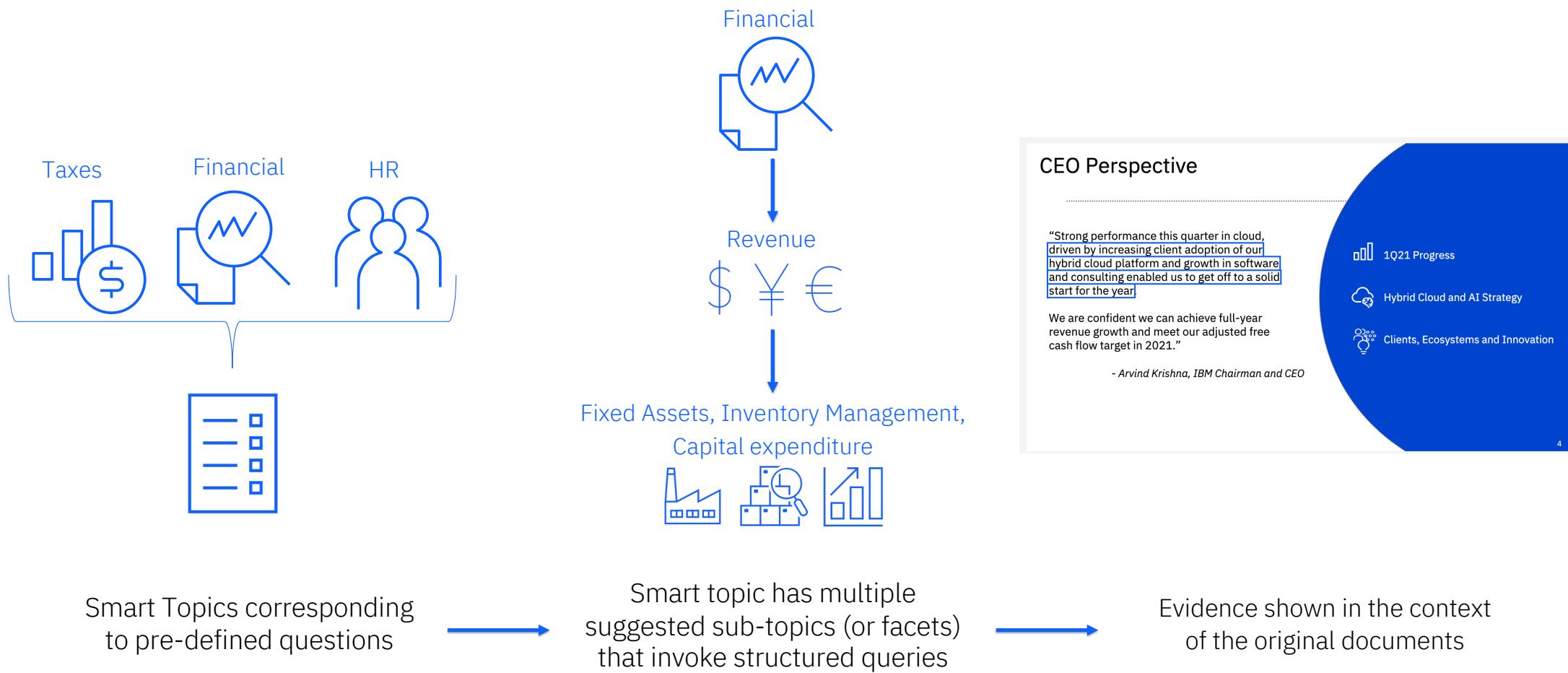


Builder
Subject matter expert trains Watson Discovery

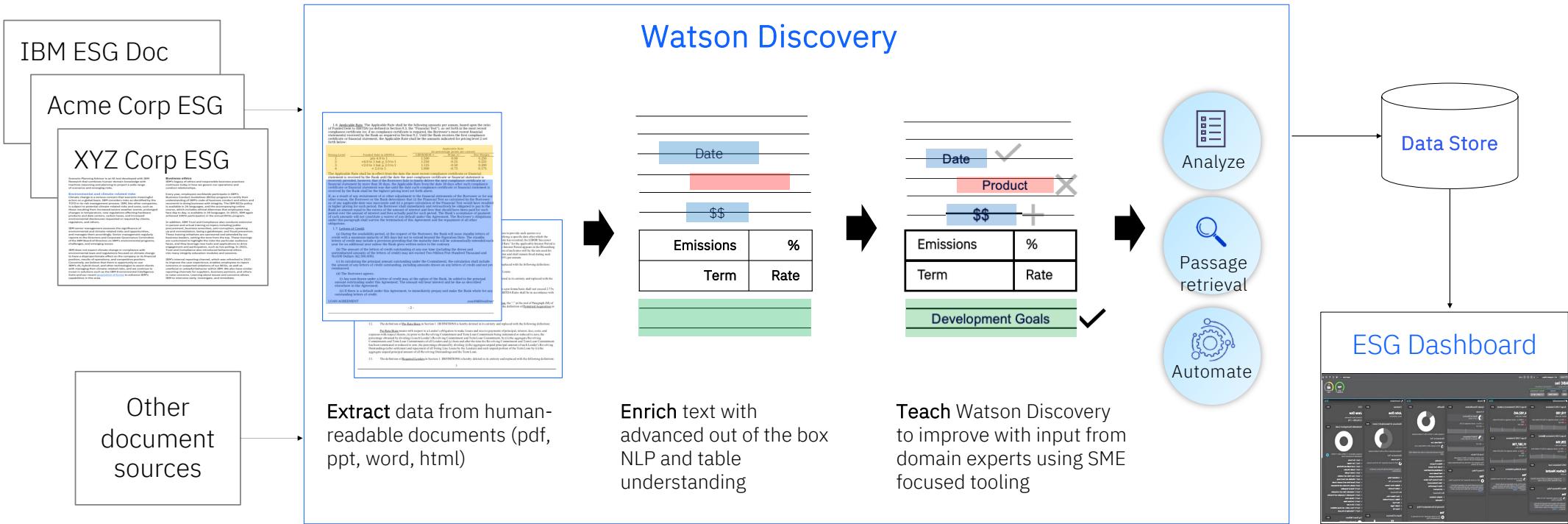
End user
Subject matter expert validates low confidence fields as part of their daily tasks or workflow

Data uploaded into master

Due Diligence



Analysis of ESG documents displayed on a dashboard



Use case

Financial services

Use case description

Financial organizations spend lots of time and money to manually process and understand complex financial documents. These include annual reports, commercial mortgages, and financial statements.

Example users

Financial Analyst, Risk Advisor, Tax advisor

Key functionality

SDU, NLU Enrichments, Dictionaries, Patterns, Table Understanding

Business benefits

Businesses need AI to “read” these documents the way a human expert would — to find key sentences, tables, statements, and clauses that indicate shifts in performance and risks. Watson Discovery can be trained to detect that language to help humans make decisions and take actions.



Use case

E&Y

M&A due diligence

Industry: Professional Services

Geography: EMEA (United Kingdom)

EY Diligence Edge provides EY transaction professionals with an outside-in view of a target company and its competitors.

EY Diligence Edge can consolidate and analyze a range of external information, including news, financial and social media data, to assist M&A practitioners in providing strategic recommendations at the click of a button.



10-20%

Effort reduction

3-5 days

Up to 50k

Documents processed
each month

vs 2-3 weeks
for insights

Use case

ABN AMRO

Call Center Agent Assist

Industry: Banking

Geography: EMEA

Increasingly popular, digital fintech banks offers faster, more convenient, and more affordable financial services when compared to traditional banks, while setting a high bar for customer experience. To keep up with this industry shift, Dutch banking giant ABN AMRO Bank N.V. worked with IBM to bridge this digital transformation.

The engagement involved building two virtual assistants, which address varied questions that can't easily be anticipated and optimized for. The first, named Abby, is an internal virtual agent available through the bank's portals to support its technology services teams. The second, Anna, is an external-facing customer service virtual agent that assists the bank's retail and commercial banking customers.

1 million

Number of conversations
Anna has with customers
each year

90%

Percentage of customer
requests Anna can answer
without a live agent

Use case

Insurance claims

Use case description

Insurance companies spend thousands of hours reading and analyzing policies and health plans to find quote policies and handle claims.

Example users

Underwriters, Insurance Claims Adjuster, Insurance Broker

Key functionality

SDU, NLU Enrichments

Business benefits

Insurance claims automation increases efficiency and lowers operational costs, by reducing staffing levels and ensuring that experienced claims adjusters can be dedicated to higher value tasks & complex processes.

**Large managed
health care company**



Use case

DXC Technology

Call Center Agent Assist

Industry: Insurance

Geography: North America

CSRs at DXC's Life Insurance and Wealth Management contact center were overwhelmed with ten software systems needed to find information to help customers.

Now, they pull both customer and policy information from ten systems and compile it into one dashboard to use while addressing the customer. Additionally, Watson Discovery and Watson Assistant power a virtual agent, giving CSRs the ability to quickly search for direct answers while on a call with the customer.

30%

Reduction in
call-handle time

Double digit

Increase in
employee
productivity

50%

Reduction in
customer hold time

Use case

Understand risks and comply with regulations

Use case description

In a complex and changing regulatory environment, understanding and ensuring compliance is essential to minimizing risk and maintaining trust.

Example users

Compliance officer

Business benefits

Reduce compliance costs, speed up reviews with higher quality content. Average cost of compliance today is 6-10% of revenue.

Reduce regulatory risk and potential fines.
Over \$200B+ in fines since 2008.

Build competitive advantage and client trust.
87% of execs view reputational risks as more important than other strategic risks.



Use case

Citibank

Understand risks and comply with regulations

Industry: Banking

Geography: North America

With one of the largest corporate audit departments in the world, Citi has 2500 auditors going through documentation reviews and risk assessments. Citi needed to plan and scope audits more effectively.

IBM helped Citi save hundreds of thousands of billable hours each month, reducing the processing time for the thousands of transcripts between their agents and customers.

2,500

Internal auditors

100,000s

Billable hours saved monthly



Use case

Contract understanding

Use case description

Enterprises hire thousands of people to manually process legal agreements. Watson Discovery can combine multiple AI technologies to identify, then abstract data from legal agreements, in order to reduce client staffing and increase focus on higher value work.

Example users

Procurement Officer, Financial Lender, Real Estate Agent, Insurance Broker, Insurance Agent

Business benefits

Reduce operational costs by 70% and simplify complex content workflows. Automate data extraction and generate insights.

Reduce Onboarding time by 88%.

Reduce Human Error-Related liabilities by 40%. Improve decision making with accuracy and manage risk better.



EISNERAMPER



Use case

ContractPodAI

Contract Lifecycle Management

Industry: Legal

Geography: EMEA (United Kingdom)

With one of the largest corporate audit departments in the world, Citi has 2500 auditors going through documentation reviews and risk assessments. Citi needed to plan and scope audits more effectively.

IBM helped Citi save hundreds of thousands of billable hours each month, reducing the processing time for the thousands of transcripts between their agents and customers.

>400,000

Contracts in
inventory

50%

Faster contract
renewals



Use case

Contract center insights

Use case description

Use Watson Discovery's Content Miner post-call (offline) to find insights in vast amounts of conversation logs, in order to improve contact center performance and understand customer behavior.

Tire Manufacturer

Example users

Quality Managers, Quality Assurance Manager, Compliance Manager, Contact Center Supervisor



Key functionality

NLU Enrichment, Content Miner

Business benefits

Improved call center performance and customer satisfaction.

Global Consumer Electronics Company

[DTE demo →](#)

Use case

Global Consumer Electronics Company

Contact Center Insights

Industry: Consumer Goods

Geography: Worldwide

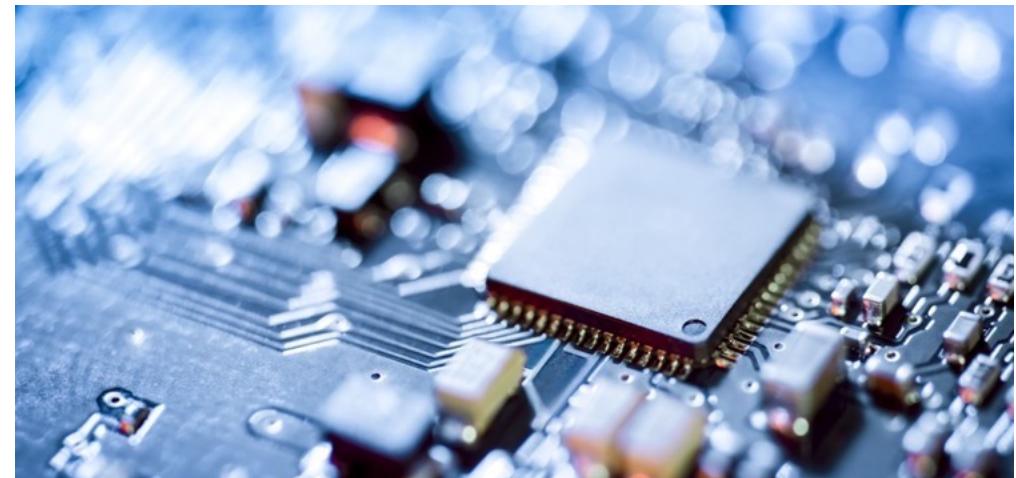
Highly successful in building an effective brand image by developing innovative products, this company saw a decline in the appeal of their products. They launched an initiative to better align their product-planning efforts with the needs and opinions of their customer.

Watson Discovery gathers over 2 million customer inquiries in 15 different languages from its call centers, in addition to customer messages about its products from social networks like Twitter and Facebook. The resulting analysis of customer opinions provided insight into the needs of their customer base, enabling the client to sort specific demands by demographic categories such as gender, age, region, and intended purpose of the user.

Maintain leading market share

50%

Increase in sales



Use case

Tire Manufacturer

Contact Center Insights

Industry: Consumer goods

Geography: Japan

This client needed the ability to measure the ROI of its marketing campaigns, their effectiveness, and to be able to modify ineffective campaigns in near-real time. The goal was to discover the public's reaction to product campaigns by evaluating and analyzing the content of social media sources.

This manufacturer can now make changes to its campaigns based on analysis of information in social media postings. The solution can analyze and reveal previously obscured opinions, giving the company new insight into how and why its campaigns succeed or fail. With this enhanced consumer insight, this client expects to increase sales and improve its image by developing more flexible and cost-effective marketing strategies.



120%

Sales growth

160%

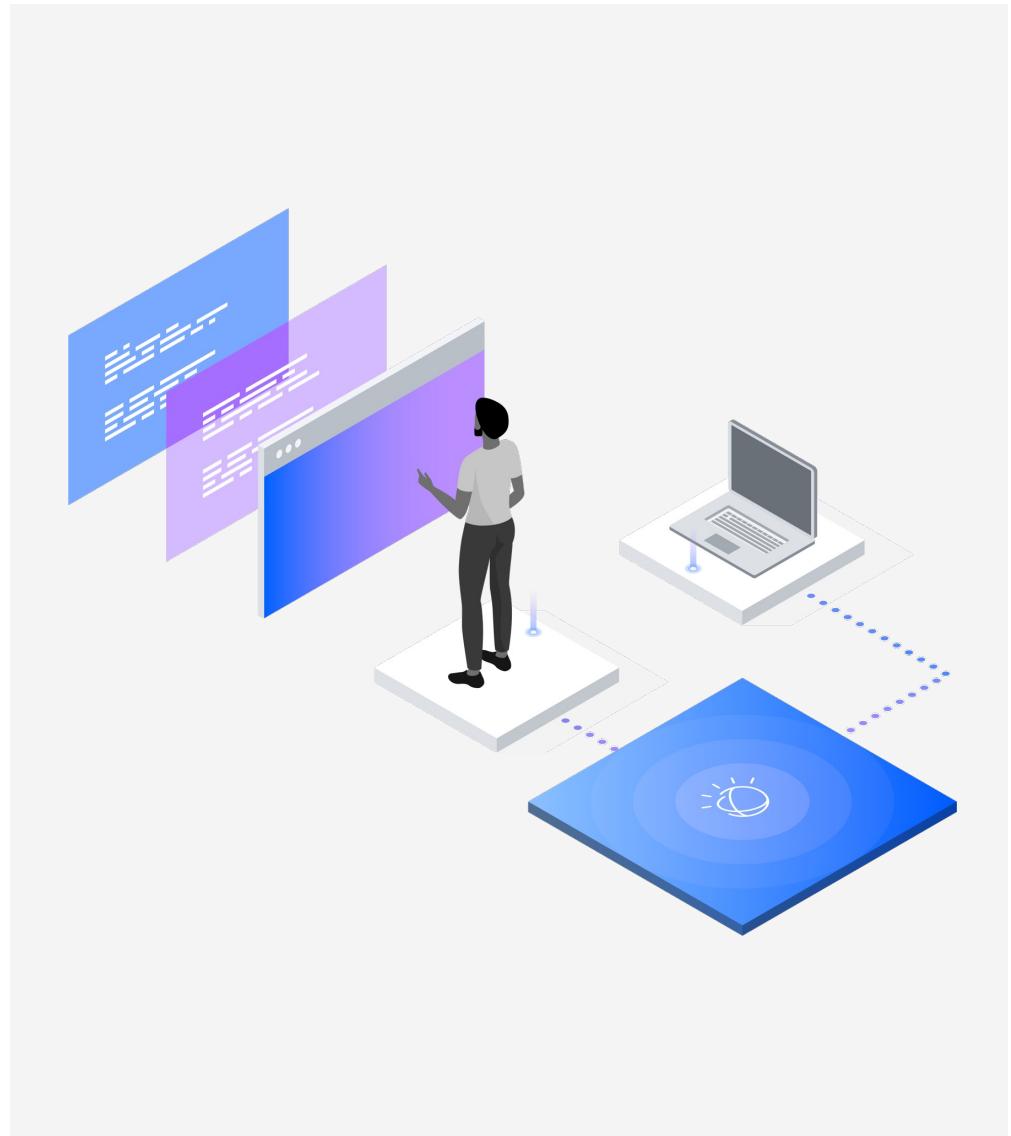
Profit rate growth

190%

Operating profit growth

Additional Data and AI Client References

- [Data and AI References Seismic page →](#)
- [Full deck of one pagers on Seismic →](#)
- [Client Story Repository on Box →](#)
- [IBM Case Studies site →](#)
- [IBM Watson blog →](#)
- [IBM Cloud blog →](#)



Watson Discovery today

A complete solution for Document and Language intelligence that accelerates high value insight processes across the Enterprise

IBM's primary offering for [understanding the language of business](#)



Extract

Extract data from human-read documents (pdf, ppt, word, html)



Enrich

Enrich text with most advanced out of the box NLP



Enhance

Teach Discovery to improve with input from business users



Analyze

Analyze data at scale to find answers, insights, patterns

Feature: Extract

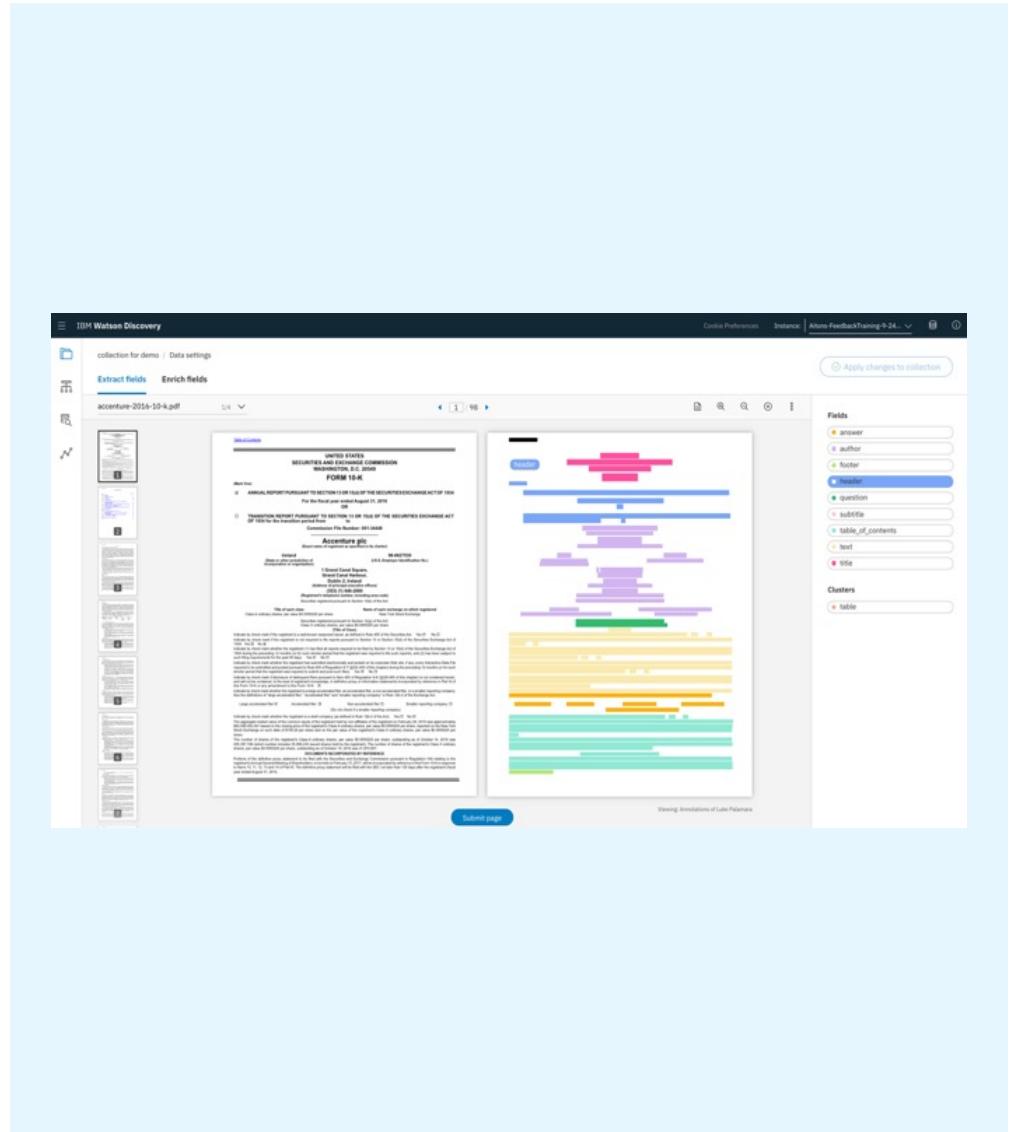
Smart document understanding

Visually teach Watson Discovery how to interpret document structure and components

- A single trusted view of data
- Improving speed to decisions
- Overcoming difference errors
- Enforced data governance

Enables a user to:

- Get more accurate insights and answers



Feature: Extract

Table identification and retrieval

- Identify tables that contain answers to a user's natural language query
- Out of the box table extraction and table structure training finds most the relevant table

Enables a user to:

- Find answers in previously hidden or difficult to evaluate content
- Get results in the context of the original source to provide stronger evidence

The screenshot shows the IBM Watson Discovery interface. At the top, there is a search bar with the text "Silver Card". Below the search bar, there is a sidebar titled "I want to ..." with several options: "Customize display", "Extract meaning" (which is selected), "Teach domain concepts", "Define structure", and "Improve relevance". The main content area displays search results for "Silver Card". It shows three table cards, each with a title "INTEREST RATES AND INTEREST CHARGES" and a brief description: "Purchase Annual Percentage Rate (APR) - 15.99% to 22.99%, based on your creditworthiness." Below each card is a link "View table in document". The cards are part of a collection named "Collection: Table Test". On the left side, there is a sidebar titled "Top Entities" with items like "U.S.", "United States", "Richmond", "VA", and "Chase Bank". There are also sections for "Collections" and "Available collections".

Feature: Extract

Enhanced document preview

Visualize search results and outputs from applied enrichments, in the context of the original PDF documents.

Enables a user to:

- Preview the outputs of the enrichment capabilities of Watson Discovery
- Gain insight if the out-of-the-box enrichments are enough for the client use case, or if additional enrichments are necessary
- Available on pre-built [Keywords](#) → & [Entities](#) → enrichments

The screenshot shows a web-based document viewer interface. At the top, there's a navigation bar with 'Contract Understanding / Improve and customize / ← Point 360 - Bank of America Libor.pdf'. Below the navigation is a toolbar with icons for search, refresh, and other document operations. The main area displays a PDF document titled 'AMENDED AND RESTATED STANDARD LOAN AGREEMENT'. The document contains several sections of text, some of which are highlighted in blue, indicating identified elements. To the left of the document, a sidebar lists 'Identified elements' such as 'Number (128)', 'Organization (6)', 'Date (2)', 'Location (1)', and 'PhoneNumber (1)'. On the right side, there's a sidebar titled 'Matches found' with filters for 'Organization', 'Location', 'PhoneNumber', 'Number', and 'Date'. The 'Number' filter is currently set to '1' and has a 'Reset' button. The overall interface is designed to help users visualize how enriched data is integrated into their original PDF documents.

Feature: Enrich

Custom Natural Language Processing (NLP)

Out of box models that understand:

- Keywords
- Entities
- Concepts
- Document sentiment

Advanced NLP customization through:

- Watson Knowledge Studio custom models
- Advanced Rules Models
- Watson Explorer Content Analytics Models
- Dictionary and Character Pattern Annotators

Enables a user to:

- Teach WD the language of their business domain to surface more insights

The screenshot shows the IBM Watson Knowledge Studio interface. The main window displays a document titled "2004-02-001.docxml". The text content is as follows:

- 1 Vehicle 1, a 1995 Honda Civic was traveling north on a two lane undivided roadway, negotiating a curve to the left on an upgrade.
- 2 V1 went over the right lane line, overcorrected and went over the left lane line into the southbound lane.
- 3 V1 overcorrected again and went across the northbound lane over the right lane line.
- 4 The vehicle departed the right shoulder and entered a 2-foot ditch, impacting the embankment with its front right.

On the right side of the interface, there is a sidebar with a legend titled "Entity Mention". It includes columns for "Type", "Subtype", and "Role". The legend entries are:

Type	Subtype	Role
e	ACCIDENT_OUTCOME	
c	CONDITION	
i	INCIDENT	
m	MANUFACTURER	
l	MODEL	
y	MODEL_YEAR	
p	PART_OF_CAR	
s	PERSON	
b	STRUCTURE	
v	VEHICLE	

Feature: Enhance

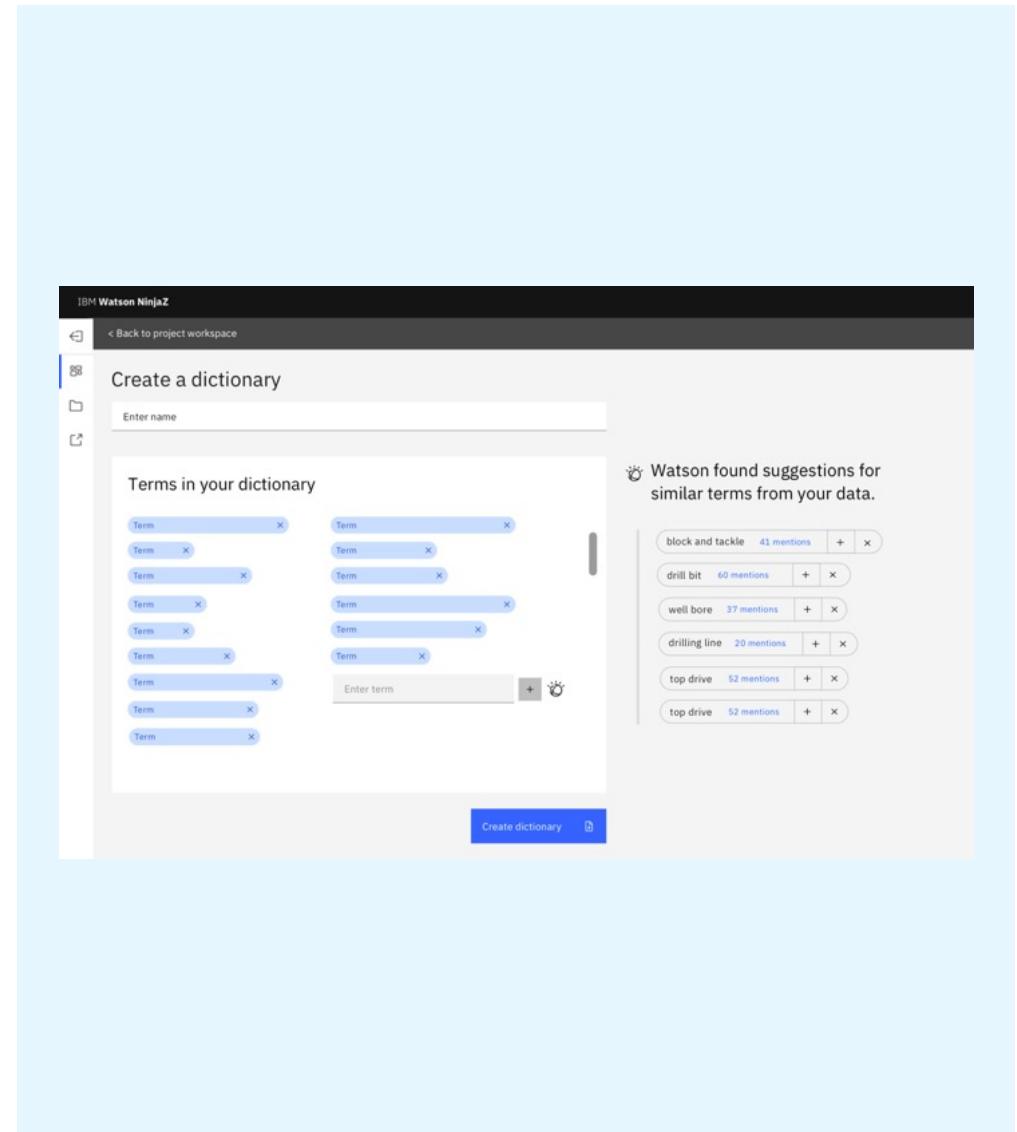
Rapid Model Development

Build a custom dictionary for use as annotations or facets quickly

- UI provides recommendations for similar terms to quickly build the dictionary
- Requires no additional software – learns from knowledge that exists in your corpus
- Can be performed by business user or anyone with domain knowledge

Enables a user to:

- quickly build a dictionary from scratch to provide deeper understanding of the user's business and domain



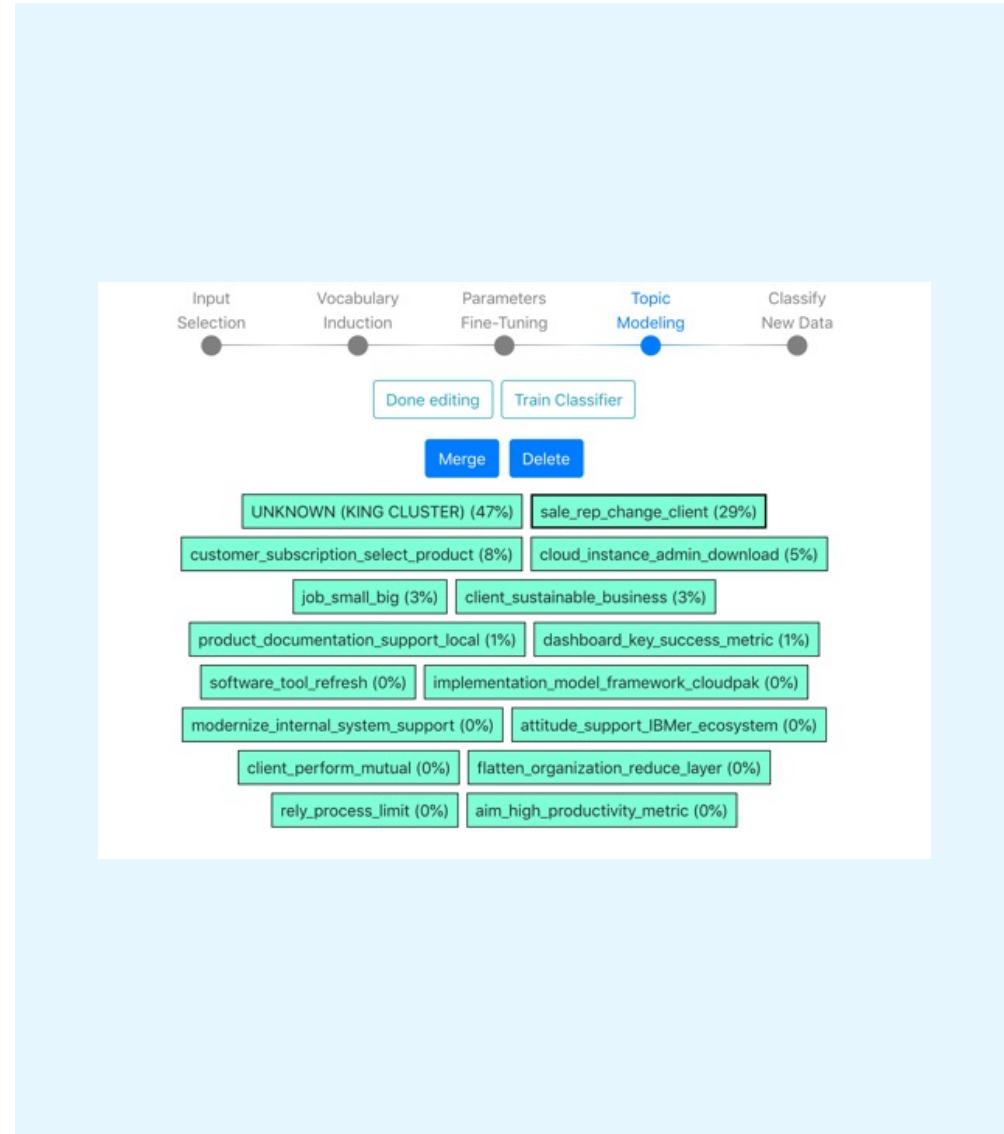
Feature: Enhance

Advanced Topic Clustering (Beta)

- Automatically identify topic clusters from documents
- Workflow enables refinement of clusters through merge, delete, split and custom dictionaries
- Can perform temporal analysis to identify emerging topics in a changing data set

Enables a user to:

- Trending topics or issues for customer support
- Content clustering for enhanced search navigation



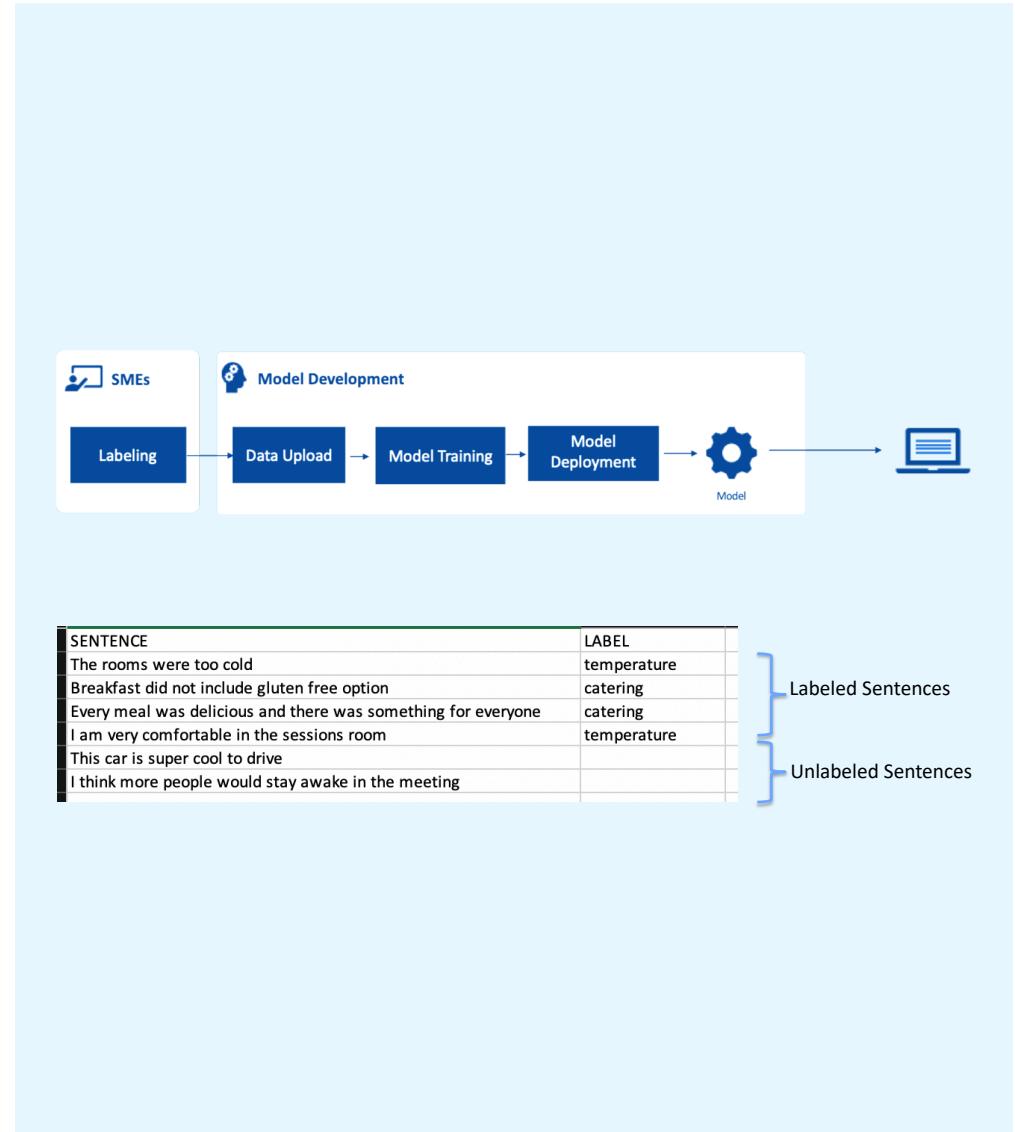
Feature: Enhance

Sentence and Document Classification (Beta)

- Train Discovery to classify sentences or documents for a custom domain utilizing current state of the art language model for NLP
- Leverages customized BERT model built on top of pretrained base

Enables a user to:

- Voice of the customer analysis
- Call recording and transcript understanding
- Governance document understanding



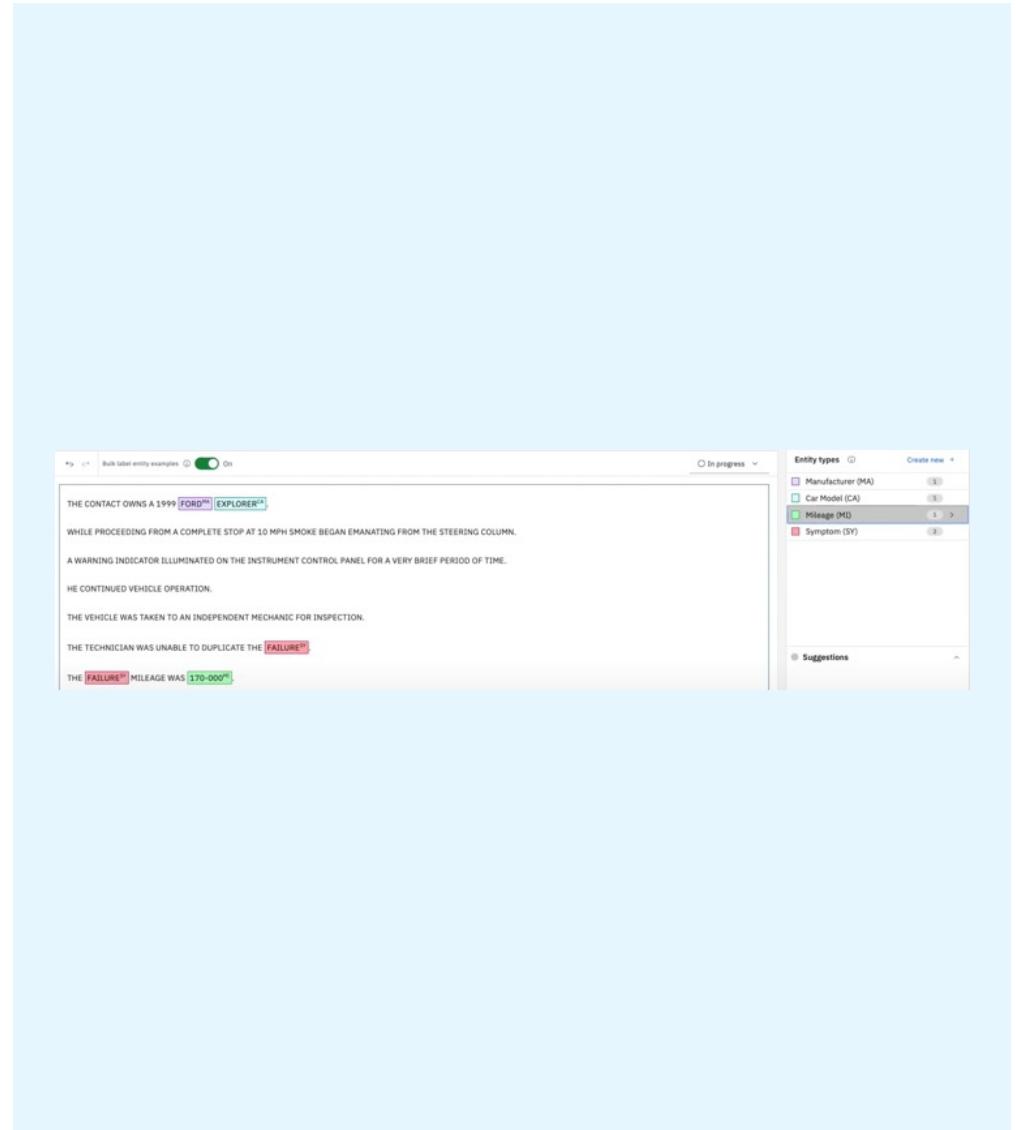
Feature: Enhance

Entity Extractor (Beta)

- Define entity types, iteratively label and train models, analyze the model's performance, deploy, and apply to your collection
- A single, unified, business-user friendly UI
- Search facets are automatically created when applying the model to your collection

Enables a user to:

- Label examples in a rapid and consistent way to effectively infuse domain customization capabilities into their application



Feature: Enhance

Pattern Induction

Combines the expertise of domain experts with automatic learning capabilities to quickly develop a high-quality extractor to surface insights from hundreds and thousands of documents

Potential use cases:

- A financial analyst needed to extract a company's revenues from quarterly reports and market analyst reports
- A quality assurance professional extracting product numbers to solve customer complaints

Enables a user to:

- Automate the complexity of manually building rules to teach Watson Discovery how to extract similarly patterned information from your data to find insights at scale

The screenshot shows the Watson Pattern Induction interface. At the top, there is a header with 'Create pattern' and a 'Save pattern' button. Below the header, there are sections for 'Pattern name' (set to 'IBM Reports 2016 Second-Quarter Earnings.txt') and 'Language' (set to 'English'). A green banner at the top indicates that enough examples have been identified. The main area contains a text input field with sample text from an IBM earnings report. Below the text, there is a 'Validate suggestions' tab and a 'Review examples' tab. The 'Validate suggestions' tab is active, showing several extracted entities with their confidence levels (e.g., 'Revenue: \$20.2 billion' with 95% confidence). The 'Review examples' tab shows a list of extracted entities with their confidence levels.

Entity	Confidence (%)
Revenue: \$20.2 billion	95
Strategic imperatives revenue of \$30.7 billion	90
Cloud revenue of \$11.6 billion	85
IBM (NYSE: IBM) today announced second-quarter 2016 earnings results.	80
...llion and invested nearly \$2 billion in capital expenditures, while returning more tha...	75
...ation software) -- revenues of \$8.3 billion, down 2 percent (flat year to year adjust...	70
... run rate for cloud revenue of \$13.1 billion in the quarter, up 26 percent year to year ...	65
o Revenue: \$24.4 billion:	60
...mings per share of at least \$13.90.	55
...duted earnings per share of \$14.37 to \$14.92, and operating (non-GAAP) diluted ear...	50
...ystems software) -- revenues of \$1.3 billion, down 11 percent (down 9 percent adjust...	45

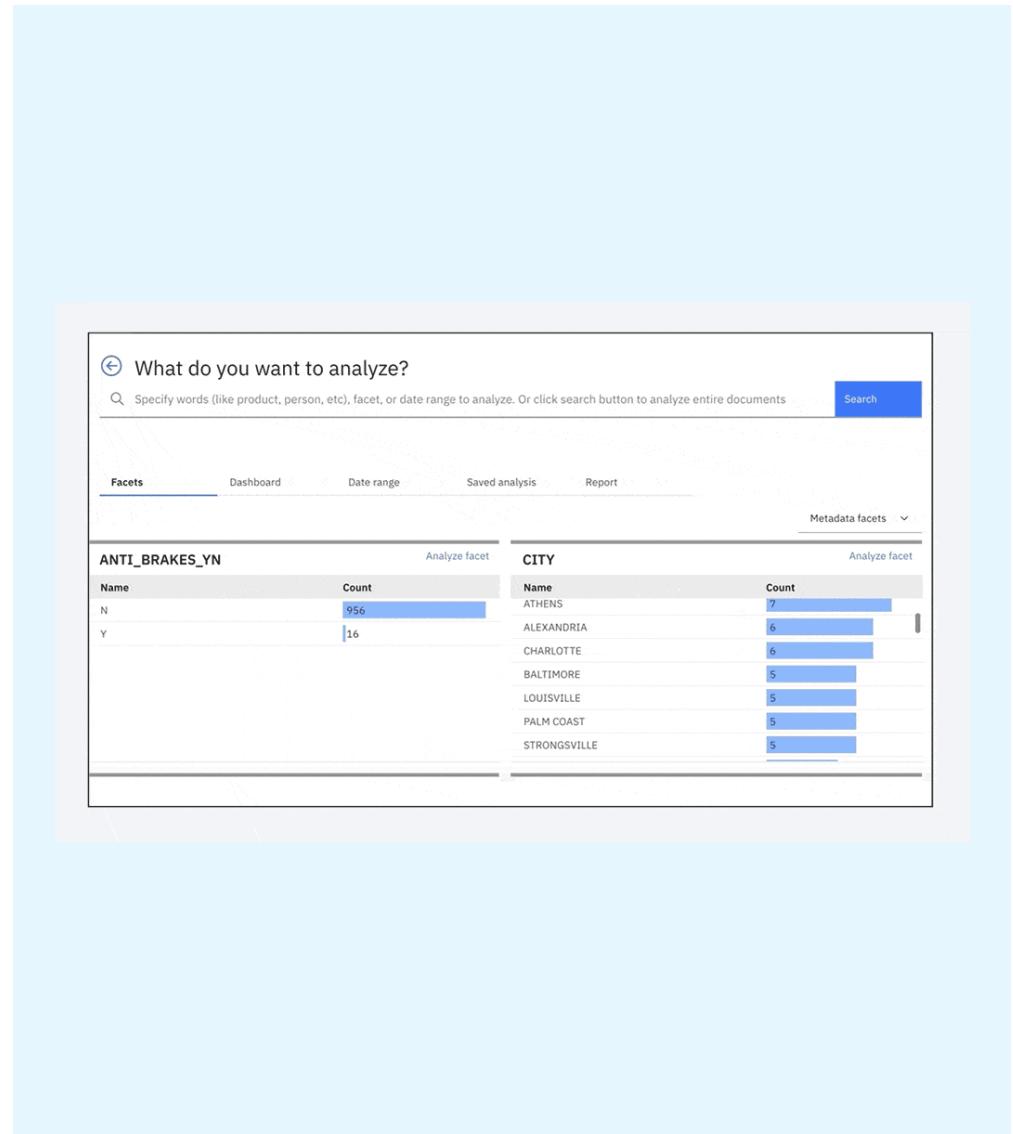
Feature: Analyze

Content Miner on Watson Discovery

- Uncover hidden insights and relationships using deep analytical techniques
- Simplified setup flow to get non-technical users started more quickly

Enables a user to:

- work advanced customer care analytics use cases
- Deeper insight in Voice of the Customer
- Root cause analysis for product issues
- Analyze effectiveness of sales and marketing



Feature: Analyze

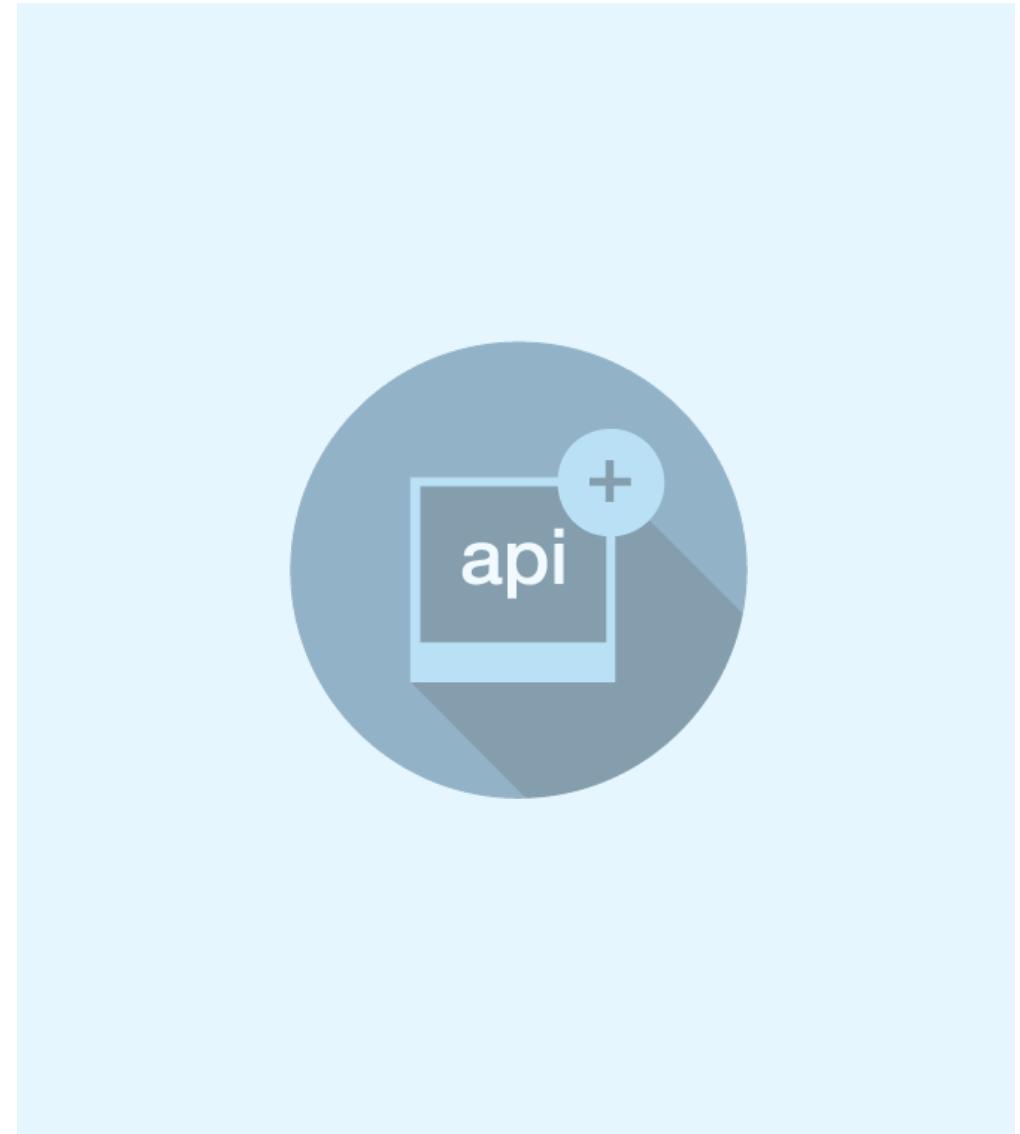
Analyze API

Analyze the output of individual documents from the Watson Discovery NLP pipeline without storing the source documents

This approach is ideal for business automation purposes

Enables a user to:

- Classify emails by using Analyze API to synchronously call Watson Discovery, get a classification of the email, and use the output of that classification in business logic as one example



Feature: Analyze

Answer Finding

Previously, Watson Discovery would identify the best “passages” that correspond with queries. Now, Answer Finding is much more precise through a new process:

- Retrieves candidate paragraphs from the set of enterprise documents
- Searches for the precise answer to the question at hand
- Produces a concise answer

Enables a user to:

- Return a fact or short answer from a long passage

The screenshot shows the Watson Assistant interface. At the top, it says "Watson Assistant". Below that, a message bubble says "Hello. How can I help you?". A user input bubble contains the question "how long do expanded unemployment benefits last?". The AI response starts with "I searched my knowledge base and found this information which might be useful:" followed by "up to 13 weeks". It then provides a detailed explanation: "Under the CARES Act states are permitted to extend unemployment benefits by up to 13 weeks under the new Pandemic Emergency Unemployment Compensation (PEUC) program". There is a "Show more ▾" link. Below the main response, there is a partial message "I am about to exhaust my regular unemploy...". At the bottom, there is a text input field with "Type something..." and a send button with a right-pointing arrow.

Feature: Analyze

FAQ extraction

- Quickly train a chatbot to answer common questions
- Watson crawls web pages to detect FAQs, then uses the content to automatically create intents

Enables a user to:

- Avoid spending hours or days training or updating their virtual assistant

The diagram illustrates the workflow for extracting Frequently Asked Questions (FAQs) from a web page and integrating them into a Watson Assistant environment.

Left Side (Web Page Extractor): A screenshot of a web browser window titled "Watson Discovery: FAQ". It shows a search bar with the query "How can I keep my home safe?", followed by a list of extracted questions and answers. One question is highlighted: "What cleaning products should I use to protect against COVID-19?". Below this is a "PDF" button with a red icon. The URL in the address bar is "https://www.watsonassistant.com/watson-discovery/faq-extraction.html".

Middle (Watson Assistant Preview): An arrow points from the web page to the right side of the interface. The preview shows a conversation log:

- User: Hello. How can I help you?
- Assistant: What qualifies as a meaningful interaction?

A message box displays: "I searched my knowledge base and found this information which might be useful:

A message that your user sent into your assistant that received a response is a meaningful interaction. Welcome messages at the beginning of a new conversation are not charged.

Below this, there are buttons for "Show less" and "Show more results".

Right Side (Watson Assistant Interface): A screenshot of the Watson Assistant interface. At the bottom, there is a text input field with the placeholder "Type something..." and a send button with a right-pointing arrow. The main area shows a conversation log:

- User: What qualifies as a meaningful interaction?
- Assistant: A message that your user sent into your assistant that received a response is a meaningful interaction. Welcome messages at the beginning of a new conversation are not charged.

Feature: Analyze

Watson Assistant Search Skill

Simple integration between Watson Assistant and Watson Discovery can provide answers to all customer and employee questions:

- Improve the coverage of your assistant by calling out to a “search skill” from any dialog node
- Search results are formatted automatically by search skill
- Ingestion and Sync to common knowledge base and CMS products, like Salesforce Knowledge, Box, SharePoint, and more

Enables a user to:

- Create a conversational assistant with no “dead end,” without training for all possible customer questions

The screenshot shows the 'Skills / DemoSkill' configuration page. On the left, there's a 'Configure Search Response' section with fields for 'Title (optional)', 'Body (optional)', and 'URL (optional)'. Below it is a message template with sections for 'Message', 'No results found', and 'Connectivity issue'. On the right, a 'Try it out' panel displays a preview of search results for the query 'is lost luggage covered'. It shows a card with the title 'Lost Luggage' and a subtitle about benefit amounts for lost items. Another card below it is titled '["Travel and Emergency Assistance Services"]' and contains a bullet point about lost luggage locator services.

Geographic Investment: Language Support

Arabic	Hindi
Bosnian	Italian
Chinese Simplified	Japanese
Chinese Traditional	Korean
Croatian	Norwegian (Bokmål, Nynorsk)
Czech	Polish
Danish	Portuguese (BR)
Dutch	Romanian
English	Russian
Finnish	Serbian
French	Slovak
German	Spanish
Hebrew	Swedish

[Check the latest language support here →](#)

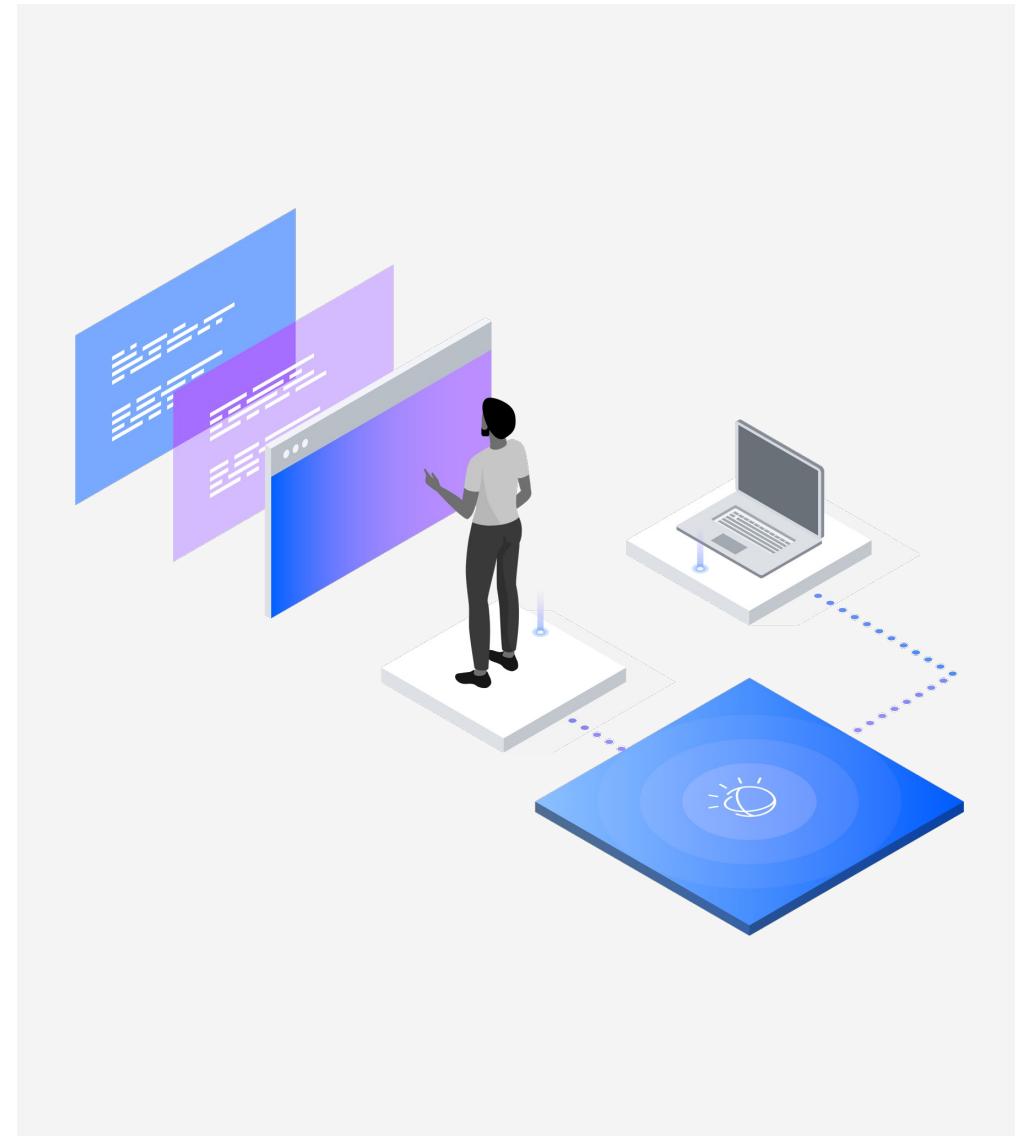


Deprecation of Watson Discovery v1 and migrating to v2

Watson Discovery version 1 deprecation was announced publicly on July 12th, 2022

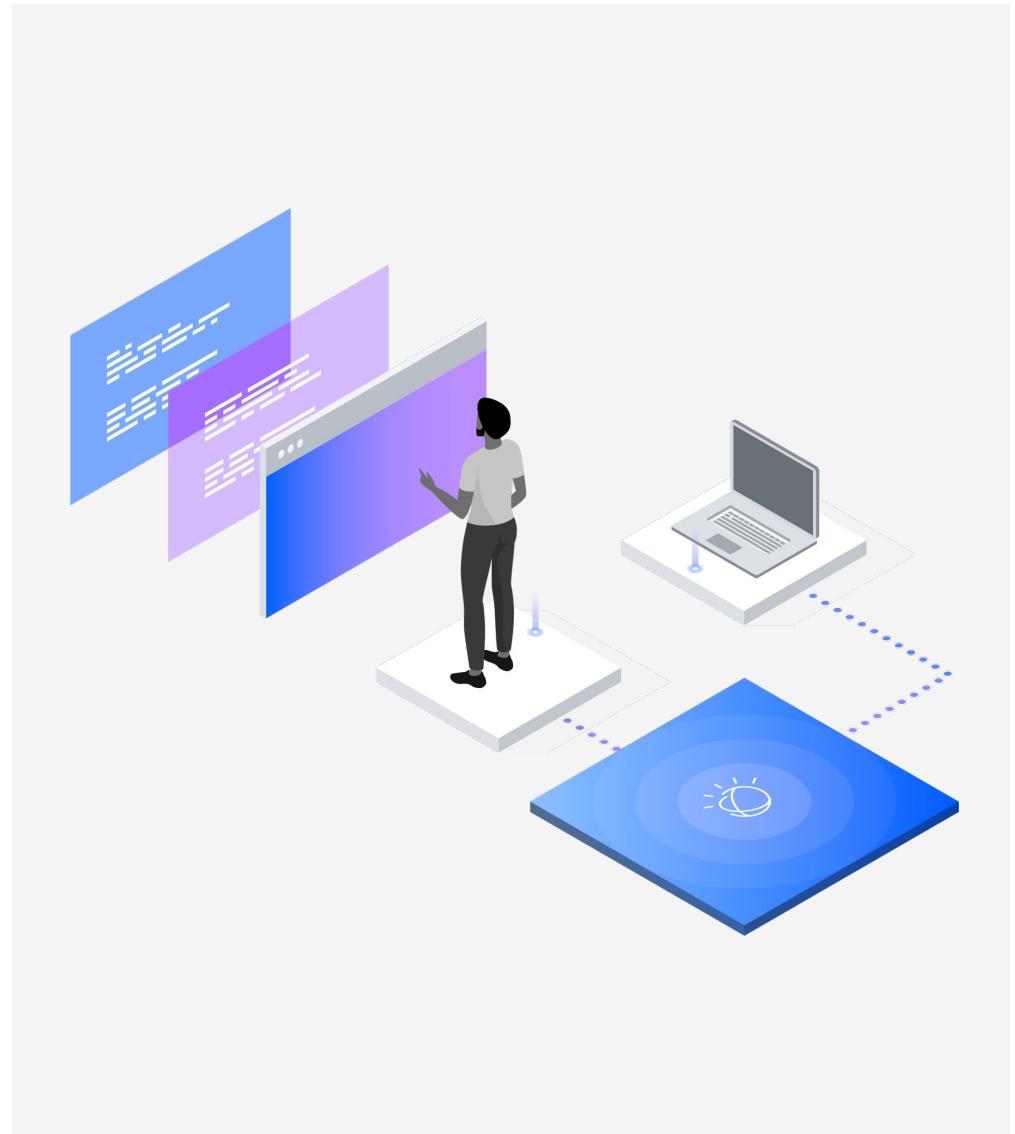
Click [here →](#) for more information on the migration guidance

Existing customers who use Watson Discovery version 1 on IBM Cloud are asked to migrate to Watson Discovery version 2 on IBM Cloud by the end-of-support date of July 11th, 2023



Opportunity identification

- What to look for when starting OI
- Recap of client and industry need
- Find your target accounts and contacts
- Build your own client pitch
 - A 30-second pitch
 - Value proposition
 - Key questions to ask
- Launch your sales campaign



Pain points

- Unwieldy amounts of unstructured information to research and analyze for answers; manual review processes and missed insights
- Complex business document structures make it challenging to maintain compliance or identify inherent risks, and to minimize regulatory fines due to human error
- Knowledge workers don't know what they don't know leading to insights staying hidden unless they know exactly what question to ask and where to look
- Employee frustration with repetitive, time- and labor-intensive work that leads to increased employee turnover
- Inability to link customer information across multiple systems and repositories can negatively impact the customer experience leading to poor NPS scores and customer churn

Value position

Pinpoint answers from anywhere in business documents

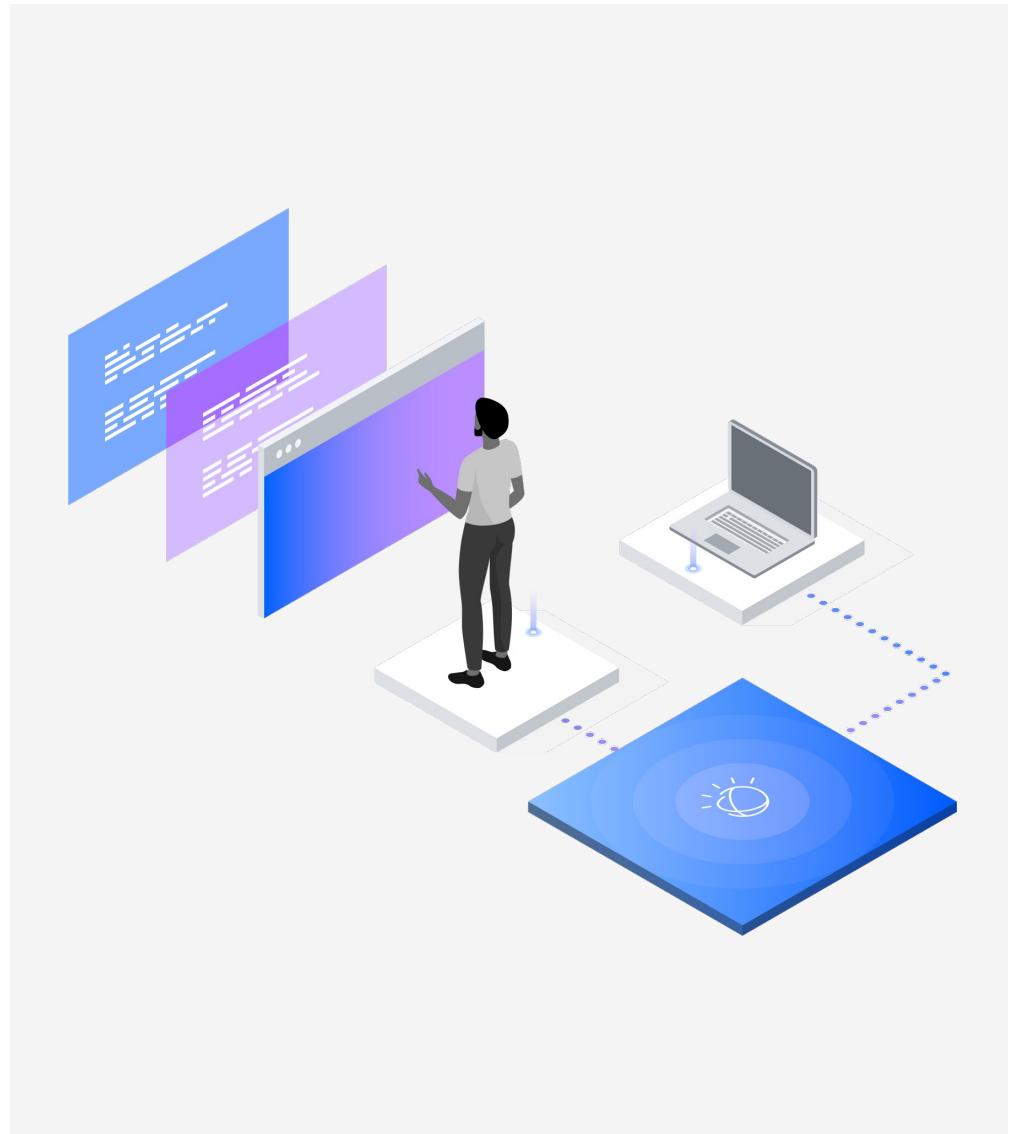
AI that combines the understanding of the visual structure of documents, with the understanding of natural language to provide highly relevant answers in whatever form users need: tables, facts, FAQs, dialogs. Reduce experts' time spent on looking for information by 70%.

Rapidly adapt to any business domain

Start out-of-the-box, improve with simple suggestion-based learning, and build up to advanced ML approaches, all designed for business users, allowing them to realize value incrementally with less training time and more focus on end results.

Deploy and scale anywhere, confidently and securely

Deploy on any environment, cloud, hosted, on-prem, hybrid with Cloud Pak for Data. Build for enterprise scale and security.



Know your buyer

Decision makers

Chief Compliance Officer, Chief Safety Officer

Responsible for maintaining regulatory compliance and meeting critical standards. Deal with long, complex documents that outline laws, policies, and regulations.

Chief Technology Officer, Chief Procurement Officer

Oversees the development, acquisition and deployment of solutions that improve products and services.

VP, Mergers and Acquisitions (M&A)

Responsible for ensuring efficient business processes where manual review of complex documents and information from several sources (both internal and external) are key elements.

Avoid this audience:

[Contact center agent or agent manager](#) – sees automation as a threat and is protective of their team.

Decision Influencers

- 1 Financial Analyst, Risk Advisor, Business Analyst, may include the VP of M&A: Responsible for understanding markets and company movements. To do so, they comb through complex financial documents. These include annual reports, financial statements, and market data.
- 2 The Build Team that comprises developer, domain expert, and data scientist roles.

What is the difference between a “decision maker” and an “influencer”?

A “decision maker” is usually an executive who owns the final decision.

An “influencer” is someone that has a say in the decision-making process. They do not have authority to say “yes,” but usually have the power to influence a “no”.

Target accounts and contacts

- While the Enterprise Search capabilities of Watson Discovery are important, especially for Customer Care use cases, customers' enterprise search needs are just one piece of a larger puzzle. Watson Discovery automates and accelerates processes for complex business problems by intelligently understanding the structure of documents and language of the business domain to provide insights in the right context.
- Use prospecting tools at your disposal such as LinkedIn Sales Navigator and others that give you insight into your territory, accounts, and client contacts.
- Save each account in LinkedIn Sales Navigator and IBM Sales Cloud ("ISC"). Use ISC as the "home base" for your prospecting efforts – [remember to log all calls, tasks, and activities](#).

Create a target account list

Target organizations looking to:

- Address complex business problems like Due Diligence, Risk/Audit/Compliance, and Research & Development.
- Accelerate the understanding and extraction of relevant insights from domain specific business documents by supporting knowledge workers with the automatic parsing of documents to identify and extract key information.
- Accelerate business decisions and processes, especially involving complex, domain-specific documents that require deep understanding for Knowledge Workers to work with (for example, financial services, contracts/legal, R&D).
- Maintain compliance, minimize risk and avoid regulatory fees (especially in regulated industries) by continuously analyzing and reviewing complex documents, finding key sentences, tables, and clauses that indicate shifts in performance and risks.
- Improve their customer care across any industry – essentially any client that services their customer base.

Research accounts and prospects

Research increases the likelihood of a response on your first touch point and occurs at the account and individual prospect level

- What are the corporate strategic initiatives
- What is the YoY top line revenue? How does this benchmark in their industry
- What are the customer satisfaction metrics and goals?

Step 1 Research your account

Industry trends

Read the top news related to the client's industry

Company research

- 1 Understand which areas they are looking to improve by reading their annual report
- 2 Understand the risks they are facing by reading the 10-K report

Opportunity/Contact History in ISC/Atlas

Ensure that there is not already an active opportunity in your accounts via ISC. If there is, connect with the Opportunity Owner before reaching out

Step 2 Research your prospect

Job role changes

Read the top news related to the client's industry

LinkedIn TeamLink

Find a colleague at IBM that knows the prospect and can provide a warm introduction.

[What is TeamLink? →](#)

Activity Level

If the prospect is active on LinkedIn, this can help narrow down the tools and channels you use to prospect

30 second pitch

In business, time is money, and time spent on searching for answers among a vast volume and variety of natural language information sources to make decisions, is money left on the table.

With Watson Discovery, you can accelerate business decisions and processes to achieve more revenue and cost savings by empowering your experts with Natural Language AI and Smart Document Understanding to discover answers and insights faster. By reducing the 30% of their day spent on looking and understanding information by 75%, your experts will have more time to create and deliver value to their stakeholders through impactful work. That means faster business results, satisfied customers, happier employees, and an increase in revenue by 5% or more.

Key questions for clients to customize your pitch

- How do knowledge workers in your company access the information they need to do their job effectively?
- Are you leveraging Natural Language Processing techniques to turn your data into information that can be readily leveraged by your employees?
- Do you have processes in your company that require workers to read complex documents (like a loan application or a repair manual) in order to complete a task or make a business decision?
- Do you have a solution that provides answers to questions where the relevant information is buried in complex documents, or across multiple systems?

Steps to crafting an elevator pitch

1

Market landscape

Introduce the need to focus on employee productivity and automation

- Digital transformation has accelerated the need for organizations to operate efficiently, especially post-pandemic
- We're seeing an increased focus on the need to increase productivity of knowledge workers
- Customers are employing AI to increase automation of labor-intensive manual processes

2

Customer problems

Open the conversation by showing an interest in the client's current struggles

- Have you been exploring ways to better support knowledge workers to increase productivity and allow them to focus on higher value tasks?
- Do you have initiatives to leverage AI to reduce the amount of time spent reviewing complex business documents?

3

The solution

Discuss how the Watson customer care portfolio can help

- Watson Discovery has 12,000 customers saving up to 75% of time searching for information resulting in millions of dollars in savings ([Case Study →](#))
- Watson has been named as the #1 Market Leader in AI for 5+ years running ([IDC →](#))

Customer pitch

Create an elevator pitch,
customized for your client

1. Select a client prospect
2. Review use cases from this presentation
3. Choose a use case that is relevant to their business
4. Craft the elevator pitch and a compelling reason to act leveraging the steps in the preceding slide, the value drivers on the following slide, and what you've learned in this presentation
5. Practice your pitch with your manager or peers, and deliver it to your client

Launch the 9-touch Sales Blitz

Start prospecting your targeted list using the multi-touch outreach provided in the following slides

[Why engage in Multi-Touch Outreach?](#)

It takes approximately 9 touches to book a meeting with a client you do not already have a relationship with.

[Why personalize my outreach?](#)

90% of C-suites ignore emails that do not have a personalized touch.

[Why should I use LinkedIn InMail over Email?](#)

- Your email may go to your client's junk folder
- InMail allows your client to research who you are and learn that you are a credible source at IBM
- LinkedIn facilitates a continued conversation. The more you post to your network, the more you show up as a SME for your clients



Day 1

Steps 1 & 2
Research &
Email / InMail



Day 3

Steps 3 & 4
Call & Social



Day 6

Step 5
Email/InMail



Day 7

Steps 6 & 7
Call & Social



Day 11

Step 8
Email/InMail



Day 15

Step 9
Email/InMail

Day 1, Step 1 – Research & Connect

If you have not already connected with your prospects on LinkedIn:

- See if there are any mutual connections that can provide a warm introduction
- If you don't have any mutual connections, send a personalized connection request using the messaging below:

Hi {name}, it would be great to connect with you and see if there is any synergy between {company} and IBM to leverage your current data infrastructure to provide your organization a way to find answers, monitor trends, and surface patterns in high-value documents. Looking forward to having you as part of my professional network!

IBM has innovative tools to improve your operations in customer care, finance, and operations. Let's connect so we can discuss how we may be able to help you and {company} leverage these tools.

I help clients learn more about how IBM provides seamless and unified customer experiences while reducing the pain of agents searching for information by locking data and using AI to deliver the right information when your agent needs it. If your top initiatives involve the above, let's connect and have a conversation around how IBM can help you and {company} accomplish them

Once they accept your connection request, send them a message thanking them for accepting, introduce yourself further as their IBM representative, and what industry/solution area you cover.

Like or comment on a post they've shared and/or tag them in a post concerning customer care related topics.

Note: Make note on your Lead List, ISC, etc.
that you have completed these steps

Day 1, Step 2 – Email or LinkedIn InMail

Subject: Is your Content Intelligent?

Hi {first name},

As the {title} in {company} you might also be working on ways to establish more intuitive and streamlined chatbot functionality for your customer experience.

IBM has been working with {industry} organizations to eliminate complexities, improve time-to-value, and provide the capability to scale up and down as needed. Recently, Gartner ranked Watson Discovery as a leader in the Magic Quadrant for Insights Engines. You can check it out [here](#). →

Are you available this week or next to discuss how we can work together to support {company} in its AI initiatives.

Thanks, and look forward to hearing back on a day/time that works best for you.

Note: Consider these response rates for email subject lines: "Re:" =92%*



Day 1

Steps 1 & 2
Research &
Email / InMail



Day 3

Steps 3 & 4
Call & Social



Day 6

Step 5
Email / InMail



Day 7

Steps 6 & 7
Call & Social



Day 11

Step 8
Email / InMail



Day 15

Step 9
Email / InMail

Day 3, Step 3 – Phone / Voicemail

Hi {first name}, This is {your name} from IBM just following up on my email.

I'm curious to learn about how we can work together to uncover meaningful business insights from documents, webpages and big data, to cut research time by more than 75% for {company} and make better-informed decisions while improving overall customer service. Please give me a call back when you have 15 mins.

[Leave your contact information]

IF YOU GET THEM LIVE:

Questions to ask to start the conversation:

1. How do your knowledge workers access the information they need to do their job effectively?
2. Are you struggling with unwieldy amounts of unstructured information (or documents) to research and analyze? Does it take too long to look for answers, or to review processes? Do your experts spend excessive time looking for information?
3. What challenges do you experience around call center employee training, productivity and overall retention?
4. What solution are you currently using to provide answers where the relevant information is buried in complex documents or across multiple systems?

Thank you for sharing. Based on our conversation, it sounds like there is a great opportunity for us to provide you with actionable resources and even assistance with an introductory call. Are you available next Tuesday or Wednesday?

Thank you, I look forward to connecting then {first name}.

Note: Set a reminder in ISC that you need to complete this step two days after Steps 1 & 2

Day 3, Step 4 – Social Post

Share the latest announcements, third party articles, blogs and any upcoming webinars in your personal LinkedIn & Twitter accounts. Personalize your post by including your own thoughts or commentary. IBMers may have access to EveryoneSocial, which makes personalizing and sharing content as easy as a few clicks.

Day 1
Steps 1 & 2
Research &
Email / InMail

Day 3
Steps 3 & 4
Call & Social

Step 5
Email / InMail

Day 7
Steps 6 & 7
Call & Social

Day 11
Step 8
Email / InMail

Day 15
Step 9
Email / InMail

Day 6, Step 5 – Email or LinkedIn InMail

Subject: Re: IBM – Lets talk increasing revenue

Hi {First name},

Are you interested in reducing the 30% of time an expert spends searching for information by up to 75%?

By partnering together, we can not only augment an expert's ability to understand complex, high value documents needed for a business decision, but provide immediate access to concise, trusted and personalized information. This has been shown to grow revenue by more than 5% with an ROI of 384% over three years.

If you would like to discuss how {Company} can achieve similar results, please send over the best day/time to connect and I'll send you a calendar invite.

Looking forward to connecting soon!

Note: Consider these response rates for email subject lines

- “Re:” = 92%
- “Re: follow up” = 90%
- “Re: update” = 89%
- “Re: introduction” = 88%
- “Re: checking in” = 87%

Day 1
Steps 1 & 2
Research &
Email / InMail

Day 3
Steps 3 & 4
Call & Social

Day 6
Step 5
Email / InMail

Day 7
Steps 6 & 7
Call & Social

Day 11
Step 8
Email / InMail

Day 15
Step 9
Email / InMail

Day 7, Step 6 – Phone without Voicemail

IF YOU GET THEM LIVE:

Questions to ask to start the conversation:

1. How do your knowledge workers access the information they need to do their job effectively?
2. Are you struggling with unwieldy amounts of unstructured information (or documents) to research and analyze? Does it take too long to look for answers, or to review processes? Do your experts spend excessive time looking for information?
3. What challenges do you experience around call center employee training, productivity and overall retention?
4. What solution are you currently using to provide answers where the relevant information is buried in complex documents or across multiple systems?

For this play, focus on the following topics: digital transformation, artificial intelligence, omnichannel customer support, natural language processing (NLP), consumer experience, call center transformation, text analytics, insight engine, smart document understanding, compliance.

Day 7, Step 7 – Social Post

Share the latest announcements, third party articles, blogs and any upcoming webinars in your personal LinkedIn & Twitter accounts. Personalize your post by including your own thoughts or commentary. IBMers may have access to EveryoneSocial, which makes personalizing and sharing content as easy as a few clicks.

Day 1
Steps 1 & 2
Research &
Email / InMail

Day 3
Steps 3 & 4
Call & Social

Day 6
Step 5
Email / InMail

Day 7
Steps 6 & 7
Call & Social

Day 11
Step 8
Email / InMail

Day 15
Step 9
Email / InMail

Day 11, Step 8 – Email or LinkedIn InMail

Subject: Re: IBM Meeting – working smarter, not harder

Hi {First name},

Given the constant changes in customer expectations, I want to learn how we can assist you with your objectives.

I know you're busy, so I won't get into the details, but I do want to highlight some IBM client experiences that we can replicate with you in the near future:

- [Woodside Energy](#) → increased employee productivity up to 75% and saved millions of dollars by improving their current processes.
- [ESPN Fantasy Football](#) → scoured millions of unstructured data sources- like news feeds, analysts, and fan chatter- to deliver contextually relevant insights on players.

I'm excited to be your guide to our wealth of experience and resources to see how IBM Watson can help you make better-informed decisions and improve customer experience.

May I suggest aiming for a call next Tuesday or Wednesday?

Note: Consider these response rates for email subject lines

- "Re:" = 92%
- "Re: follow up" = 90%
- "Re: update" = 89%
- "Re: introduction" = 88%
- "Re: checking in" = 87%



Steps 1 & 2
Research &
Email / InMail



Steps 3 & 4
Call & Social



Step 5
Email / InMail



Steps 6 & 7
Call & Social



Step 8
Email / InMail



Step 9
Email / InMail

Day 15, Step 9 – Final Email / InMail

Subject: Re: {Company} and IBM

Hello {First name},

It seems like right now might not be the best time to talk about your [enter sales play relevant client initiative here](#) plans, but I look forward to that conversation when you are ready.

As you work on what's next at {Company}, I thought you might find this [blog → update blog text with play specific hyperlink](#) to be informative. I will be here whenever you are ready to discuss.

OR

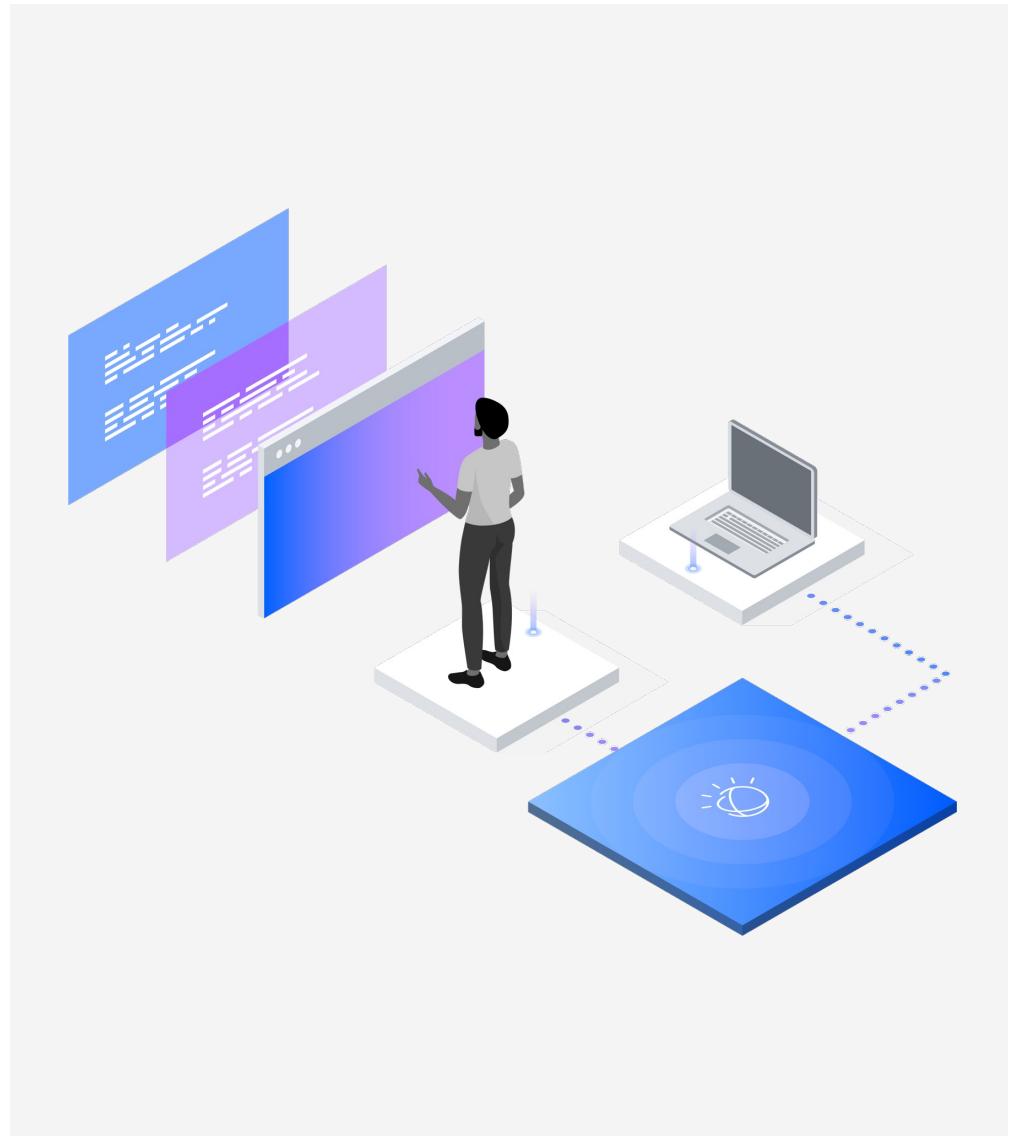
As I continue engaging with business leaders within {industry}, I find that being able to find answers and gain insights from critical business documents is imperative.

The power of IBM's content intelligent solution enables organizations like yours to unlock hidden value in unstructured data to find answers, monitor trends, and surface patterns in high-value documents.

I'll give our direct communications a break, but I am here if you would like to move forward to gain value from our enterprise search to elevate your business.

Progress and close your opportunity

- Re-emphasis of customer and Industry need
- What it takes to win
- What's your client's objection?
- IBM differentiators to solidify your position
- Key questions for customers



What it takes to win

Work with customers to identify processes and activities where knowledge workers are spending time manually researching and analyzing complex business documents.

Build a strategy to communicate key value to disparate stakeholders with the respective viewpoints on the right.

Business Value/ Political Win

[Know the key stakeholders, champions, detractors, decision makers](#)

- Use client workshops or engage in an MVP to ensure that project aligns with key business initiatives
- The CFO is convinced that deploying the solution will save significant costs and enable additional revenue
- The Key stakeholders validate that the outcome of deploying the solution will result in tangible business value

Financial Value Win

[Alignment with key business initiatives, TCO, ROI, Economic benefit](#)

- Use the 2021 Forrester Total Economic Impact Report to highlight tangible Return on Investment >350%, return of over \$6M over three years, and 50% reduction in data gathering tasks
- Share customer success stories

Technical Win

[Demonstration of technology, POCs, trials, use cases](#)

- Review architecture for similar client use cases to validate technology stack
- Work with technical team to show customized demonstration meeting technical requirements
- If necessary, leverage promo code to perform short POC on an IBM cloud account to prove conceptually

Client objections: [easy](#)

	Client objection	IBM short answer	More details
Business / Political Win	CEO says our current business processes are fine and due to the current business climate we are not making further investments	Watson Discovery has been proven to increase employee productivity up to 75% and save millions of dollars by improving current processes	Woodside Energy Case Study →
Financial Value Win	We could probably deploy a similar solution by using a suite of Open-Source technologies	IBM embraces and leverages open-source and can help you avoid losing valuable time-to-market. Also, take advantage of IBM's support and future innovation	Gartner Research →
Technical Win	We are currently evaluating several technologies and want to make sure we make the right decision for our company	Recent Analyst Reports from Gartner and Forrester show IBM as a leader in Discovery insights and our development organization continue to innovate in Natural Language Processing	Forrester Report → Gartner Report →

Client objections: [intermediate](#)

	Client objection	IBM short answer	More details
Business / Political Win	We are still shaping our corporate AI strategy and want to ensure we pursue a holistic overall rollout strategy across our business	IBM is a leader in AI, has integrated AI technology across our offerings and can also offer consulting services	<u>Unlock AI in your organization →</u>
Financial Value Win	We are not certain that deploying this solution will result in compelling business value	We will perform a complimentary AI workshop to ensure that this solution will have a positive financial impact on meaningful Business Processes	Set up a workshop to identify use cases and find relevant client success stories to show how IBM has delivered positive outcomes and ROI
Technical Win	Our documents are complex, contain many tables and a lot of industry specific language which is historically challenging for computers to understand	Using Smart Document Understanding and Watson Knowledge Studio, we have the ability to customize our solution to meet your needs	Demo Watson Discovery Advanced Natural Language Processing (NLP) features

Client objections: advanced

	Client objection	IBM short answer	More details
Business / Political Win	We are a conservative company and culturally we don't want to be on the "bleeding edge" of technology in our Industry	Watson Discovery is a proven technology with over 12,000 clients globally gaining significant business value	Client references →
Financial Value Win	We need to ensure that the Total Cost of Ownership and Return on Investment for this project are credible and compelling	We can share the results of the investigation that Forrester did across multiple clients in this area	Forrester Total Economic Impact report →
Technical Win	Our environment is complex, and our security rules do not allow our data to leave our premises. How can we be sure it will work?	Our Watson Anywhere approach will allow you to deploy on premises and our technical team can work with you to ensure you have all the technical validations you need	Watson Discovery Sales Kit with links to Sales Plays →

“How is Watson Discovery different from a content management system, or a knowledge management system?”

A content management system does what it says it does – it manages your content. Watson Discovery is about getting to the right answer, the right message, and the right table in a specific document across thousands, if not millions of documents. It gets you to that specific insight, that will help you get to a critical business decision faster.

Key questions for clients

Pre-empt objections and identify roadblocks to opportunity progression and closure

[When do you anticipate go-live for this project?](#)

Many projects can be classified as “Nice to Have” but we need to focus on “Need to Have.” A clear and compelling go-live date will highlight the level of urgency associated with this project.

[What is the impact of keeping the status quo?](#)

If there are clear financial or regulatory pressures which are driving this project, then working with the client to provide a clear understanding of the TCO and ROI will aid in keeping the project on the agreed timeline.

[How will funding for this project be approved?](#)

Always understand who are the gatekeepers, the influencers, and how the ultimate purchasing decision is made. Always validate the answer to this question.

Watson Discovery plans

[Latest pricing deck →](#)

Multi-tenant (Public Cloud)

Plus (v.2)

- Paid plan with Trial to encourage productive usage at a low entry cost and drive to Premium with scale
- SMB target for self-serve
- PoC/Dev for enterprises
- Free 30-day trial

Enterprise (v.2)

- For businesses looking for more scale
- Additional features (i.e. Content Miner)
- Tiered pricing

Single-tenant (Public Cloud)

Premium (v.2)

- For businesses with high security needs
- Data isolation and high SLA uptime
- Tiered pricing

Deploy anywhere (Cloud Pak)

CP4D (v.2)

- For businesses who needs to run on-prem or other clouds

Amazon Web Services

Products:

- Amazon Kendra
- Comprehend
- Cloud Search

What will they use against IBM?

“Amazon Kendra offers pre-built, out-of-the-box deep learning models across 14 industry domains, allowing it to extract more accurate answers across a wide range of business use cases.” – While Amazon does offer domain expertise for several industries, it is limited in scope. If a customer wants to extend the domain-specific understanding, the only option is creating a synonym list with specific terminology to enrich searches. Watson Discovery’s tooling (like Smart Document Understanding and Sentence Classification) allows customers and SMEs to truly teach Discovery the language of their industry and job role in order to provide deeper insights.

“Experience Builder allows users to deploy a fully functioning and customizable search experience without any coding or ML experience.” – Amazon Kendra’s Experience Builder does allow LOB users to deploy a customizable search experience, but it lacks tooling built for LOB to use their subject matter expertise to train Kendra. This will limit Kendra’s ability to understand nuances within the client’s data and extract deeper insights.

“Custom Document Enrichment provides a custom integration pipeline to pre-process documents before they get indexed into Kendra.” – IBM has a similar tool to pre-process documents called Smart Document Understanding. However, to achieve the robust capabilities of Smart Document Understanding, Amazon’s Custom Document Enrichment requires calling additional Amazon AI services such as Comprehend and Textract while SDU is entirely within the Watson Discovery platform.

How IBM wins

Enable advanced use cases quickly using more powerful features – Kendra has no equivalent to Smart Document Understanding (SDU), their “domain optimization” is limited to adding synonyms via thesauruses and parsing FAQ pages, and classification occurs at the document level (not sentence level like Watson Discovery). Watson Discovery’s features unlock more complex use cases for your knowledge workers to take on and accelerate their high-value business processes.

Leverage deeper understanding and insights to accelerate business processes – Watson Discovery extracts and applies optical character recognition to more content types than Amazon, allowing your knowledge workers to utilize a greater variety of data for their business processes.

Reduce time-to-value by quickly empowering your LOB users – While Amazon Kendra’s Experience Builder does allow LOB users to deploy a customizable search experience, it lacks tooling built for LOB to use their subject matter expertise to train Kendra to provide deeper insights. Watson Discovery has been built from the ground up for LOB and SMEs, so all users can get started quickly and confidently while scaling use throughout the enterprise, speeding up time-to-value.

Microsoft

Products:

- Azure Cognitive Search
- Text Analytics
- Product Knowledge Exploration

What will they use against IBM?

“Microsoft provides great tools for developers and developer-centric organizations” – Watson Discovery is a flexible platform built for all types of users. IBM balances providing business user friendly tooling, allowing for adoption and scale, with robust tooling and choice of UI or API to build out applications.

“Azure Cognitive Search integrates a variety of AI capabilities” – While Microsoft continues to add AI capabilities to Azure Cognitive Search, many of these services come at an additional cost. Recently, AI enrichment was added to Azure. Watson Discovery has had this as a core capability providing powerful features like Smart Document Understanding and Optical Character Recognition, allowing you to find insight from complex data at no additional cost and held completely within the Watson Discovery platform.

“Azure Cognitive Search uses semantic search to truly understand the intent of the user” – Microsoft’s semantic search is currently in preview. Meanwhile, IBM already provides deep NLP for semantic search capabilities. With Answer Finding and Table Extraction, not only can Watson Discovery understand the intent of the user’s question, but it also provides the specific answer from the passage or provides the table from within the document where the answer resides.

How IBM wins

Understand more of your data to surface insights with less effort – Watson Discovery provides robust capabilities to extract and enrich data. From Document and Sentence Classification, to Answer Finding and Table Extraction, these features allow for deeper insight of data from your documents, so you know more with less effort.

Create more robust solutions quickly by empowering your LOB users – Microsoft Cognitive Search lacks tooling built for LOB to use their subject matter expertise to train Azure to provide deeper insights. This can adversely affect adoption and scale. Watson Discovery has been built from the ground up for LOB and SMEs, so all users can get started quickly and confidently decreasing time-to-value.

Build customized domain knowledge to address advanced use cases – Search is just one part of the complex high value processes knowledge workers are engaged in today. Watson Discovery enables clients to verticalize their system with their own domain knowledge, while reducing SME cognitive burden with a variety of out-of-the-box models. Azure customers end up relying on their own in-house capabilities, or other 3rd party vendors. This restricts the knowledge worker’s capability to extract key insight from data and extends the time it takes to complete their business processes.

Mindbreeze

Product:

- InSpire

What will they use against IBM?

“Mindbreeze offers a broad platform (flexibility to work across the enterprise with different requirements)” – IBM offers the same platform flexibility by making it easy to create multiple Watson Discovery instances across the organization, while leveraging previous utilization of tools like relevancy training and custom dictionary. This allows for knowledge workers across the enterprise to engage Watson Discovery for a variety of complex business processes, such as R&D or risk/audit/compliance without having to retrain Watson Discovery to understand domain specific jargon within the enterprise.

“InSpire has contract management with AI” – Watson Discovery provides out-of-the-box domain intelligence for contracts, empowering knowledge workers to apply NLP to domains and enabling use cases like business automation and governing document review. Additionally, models can be customized and adapted to the customer’s domain to find the most pertinent information within the contracts.

“Mindbreeze offers best-in-class performance and scalability” – Finding insights is one thing; being able to get contextual answers and insights into the hands of the knowledge workers to complete manual, complex processes is another. Watson Discovery uses AI to bring answers back for any application, user, or expert process. Whether that is a natural language query, connecting Watson Discovery to Watson Assistant Search Skill or other chat bot service, or utilizing Content Miner to explore data sets and uncover hidden insights. This can all be done on-prem, in the cloud, or hybrid, so Watson Discovery can be deployed wherever your environments are.

How IBM wins

Personalize experiences to fit the needs of your advanced enterprise use cases – IBM Watson Discovery has powerful tooling, including sentence classification, custom dictionaries, and Smart Document Understanding, which allow it to understand the client’s language and their business. Deep industry and business understanding, along with flexibility to integrate with various touchpoints (like Watson Assistant for customer care), provide the right insights to the right knowledge worker, with seamless integration to their workflow by working with your current infrastructure.

Leverage in-house LOB and Technical expertise to reduce time-to-value – While Mindbreeze allows for easy, low or no code Insight App Designer for customers to create their own custom insight apps IBM takes this further by providing the tooling within Watson Discovery, such as sentence classification, dictionaries, and Smart Document Understanding, built from the ground up for LOB to use their expertise to train Watson Discovery to provide deeper insights. Technical experts leveraging the same tooling can quickly build custom models to deploy quickly which increases time-to-value.

Cut through the data to extract succinct information with context – Quickly search through complex, domain specific documents and find the insights needed with key capabilities like Answer Finding, Table Extraction, and rapid dictionary creation, all within the proper context of the data. Now knowledge workers can pinpoint answers needed for customers, surface key insights for due diligence, or identify important details in contracts affected by red lining- all to get more done in less time.

Lucidworks

Product:

- Lucid Fusion

What will they use against IBM?

“With Lucid Fusion I can understand and act on user behavior” – User behavior is only part of the equation when looking to provide the right insights to your customers. The other part is identifying patterns hidden in data which expose answers to questions that the user never knew to ask. Watson Discovery’s Content Miner provides the interface for knowledge workers to explore data sets and uncover hidden insights using deep learning analytical techniques. With a simplified flow for non-technical users, Content Miner can be used by LOB and SMEs alike to identify deep insight about customer behavior, root cause analysis for product issues and analyze effectiveness of sales and marketing – all without leaving Watson Discovery.

“Lucid Fusion has eliminated zero results (Never Null)” – Never Null’s primary use case is for eCommerce search. Watson Discovery’s natural language query provides relevant passages showing the location of results within complex documents leveraging features like Table Retrieval, Contract intelligence, and Answer Finding for multiple business applications and manual processes, including Customer Care use cases.

“Lucidworks makes my chatbot more intelligent (Smart Answer)” – Smart Answers by default will return complete documents to answer questions. While Lucidworks does offer short answer extraction, the machine learning model used was trained on Wikipedia articles and answers gleaned from those articles. This means that the model may produce uneven results when applied to more informal content. Watson Discovery’s Answer Retrieval returns a specific fact as a result to a query, and the Watson Discovery Search Skill enables users to retrieve both pre-trained answers, as well as more complex content found in knowledge-base articles, marketing pages, or internal documents. This ensures that all questions, regardless of how complex, are answered.

How IBM wins

Pricing flexibility to meet your needs – Lucidwork’s pricing is among the most complex in the market. Complex pricing models make it harder for customers to forecast cost and compare vendors. Watson Discovery pricing plans for public cloud or on-premise are flexible to meet customer needs and scale throughout your enterprise.

Deliver insights through multiple workflows to take on more complex, advanced use cases – Finding insights is one thing. Being able to get the contextual answers and insights into the hands of the knowledge worker is another. Watson Discovery uses AI to bring answers back for any application, user, or expert process. Whether that is a natural language query, connecting Watson Discovery to Watson Assistant Search Skill or other chat bot service, or utilizing Content Miner to explore data sets and uncover hidden insights.

Scale throughout your enterprise to increase productivity – Delivery of insights is no longer restricted to separate touchpoints that draw user attention away from their main tools. Watson Discovery provides several business and technical integrations (including CP4D), allowing Watson Discovery to run on the customer’s cloud of choice, rest API allowing quick embed into a customer’s own applications, and AppConnect flows. This allows the user to both connect to data sources and send results of Watson Discovery to other applications, thus enabling intelligent processing workflows. This ensures proper integration to your knowledge worker workflows, and to increase productivity and scalability in order to meet demand throughout the enterprise.

Google

Products:

- Cloud Search
- App Search Engine
- Cloud Natural Language
- Document AI

What will they use against IBM?

“Google offers enhanced search functionality through common word query support, filters, and operators” – The filtering capabilities are limited, and it is difficult to filter across multiple data sources. Google lacks sophisticated faceting and aggregation capabilities. Watson Discovery has query expansion, content mining, and facets available to enhance and narrow query results. Also, in large documents only the first several thousand words are searchable with Google. Watson Discovery does not have this limit.

“Google Cloud Search seamlessly integrates with Google Workspace, all on our Google Cloud” – Google Cloud Search is built to serve as the primary search tool for G Suite. Google Cloud Search is available as an add-on of G Suite’s business and enterprise editions. Thus, in order to access the software and enjoy its capabilities, you need to purchase either the G Suite Business or Enterprise editions. With IBM Cloud Pak for Data, clients can now deploy Watson on any cloud or on-premise. This means clients aren’t locked down to just one cloud provider.

How IBM wins

Build customized domain knowledge to address advanced use cases – Google Cloud Search serves all industries, rather than being a platform that can be used to develop solutions for specific industries, functional domains, and situations. This limits Google’s ability to understand their clients and clients’ needs. Watson Discovery is at the forefront of the market by bringing the latest AI and ML breakthroughs from IBM Research (Answer Retrieval, FAQ Extraction, and Sentence Classification). This enables clients to verticalize their system with their own domain knowledge, while reducing training time with a variety of out-of-the-box models, in order to accelerate manual insight processes.

Power of one platform vs. needing to buy and subscribe to multiple products – With Google you must pair Google Cloud Search with the Google Query API and Indexing API to create a solution that has similar capabilities to Watson Discovery. Watson Discovery has a built-in natural language query capability, without the need to integrate with another solution. With less integration, it is easier to maintain the system over time and scale throughout your enterprise.

Sinequa

Product:

- Sinequa ES

What will they use against IBM?

“Sinequa’s AI is use-case focused.” – Sinequa’s AI capability is focused on depth across few use cases rather than breadth. Watson Discovery provides rapid domain adaptation capabilities so that our client’s SMEs and domain experts can verticalize their Watson Discovery platform with their own domain knowledge, while reducing SME cognitive burden with multiple of out of the box models to address a variety of use cases and domains.

“Sinequa has one of the most flexible sets of deployment options in this market.” – With IBM Cloud Pak for Data Customers can deploy Watson Discovery (and other Watson services) on any cloud or on-premise. Sinequa’s hosting capabilities on other clouds is limited to Google, AWS, Azure, and IBM.

“Sinequa has robust AI search capabilities.” – Watson Discovery does have similar tooling to Sinequa focused on AI search capabilities, such as query intent detection. In addition, Watson Discovery offers Content Miner which can be used to explore data sets and uncover hidden insights using deep analytic techniques. This allows the user to find insights even when they don’t know exactly what they are looking for.

How IBM wins

Enable advanced use cases quickly using more powerful features – IBM Watson Discovery has powerful tooling such as sentence classification, dictionaries, and Smart Document Understanding to understand the language and business of the client. These features unlock more complex use cases for your knowledge workers to take on, and to accelerate their high-value business processes.

Understand more of your data to surface insights with less effort – Watson Discovery provides robust capabilities to extract and enrich data. From Document and Sentence Classification to Answer Finding and Table Extraction, these features allow for deeper insight of data from your documents, so you know more with less effort.

Deliver insights through multiple workflows to take on more complex, advanced use cases – Finding insights is one thing; being able to get the contextual answers and insights into the hands of the knowledge worker is another. Watson Discovery uses AI to bring answers back for any application, user, or expert process. Whether that is a natural language query, connecting Watson Discovery to Watson Assistant Search Skill or other chat bot service, or utilizing Content Miner to explore data sets and uncover hidden insights.

Coveo

Products:

- Coveo Platform
- Coveo for Salesforce
- Coveo for silicone
- Coveo for Dynamics 365
- Coveo for ServiceNow

What will they use against IBM?

“Coveo has “smart snippets” that provide answers to my queries.” – While Coveo’s “Smart Snippets” may provide answers to queries on the results page, this ability appears limited to more FAQ-type documents and is governed by a similarity score threshold. Watson Discovery’s FAQ extraction feature automatically crawls FAQ documents and websites to create Q&A pairs. Outside of FAQ pairs, Watson Discovery’s Answer Finding provides a precise, fact-based answers from a natural language question against the client’s data.

“Coveo’s Machine Learning tailors results to my search needs.” – Coveo’s ML analyzes search behavior patterns to tailor search results for users. But what happens when you are trying to solve a complex problem like due diligence, where you require broader understanding of your data? Watson Discovery applies a multitude of Out-of-the-Box NLP enrichments to allow users to navigate through documents and surface insights beyond Coveo’s capabilities.

How IBM wins

Rapidly adapt to any business domain – Coveo focuses primarily on customer care use cases. IBM Watson Discovery has powerful tooling such as sentence classification, dictionaries, and Smart Document Understanding to understand the language and business of the customer, in order to address customer care use cases, as well as more complex ones like contract understanding and due diligence.

Extract deep insights by understanding any type of business and customer content – IBM Watson Discovery combines the understanding of the visual structure of documents (Smart Document Understanding) with understanding of natural language to provide highly relevant insights from wherever text lives, including in tables, images, FAQs, conversations, and more.

Deploy and scale anywhere, confidently and securely – Deploy on any environment, cloud, hosted, on-prem, hybrid with Cloud Pak for Data, and build for Enterprise scale and security.

Elastic

Product:

- Elastic Stack (ELK)

What will they use against IBM?

"ELK offers powerful machine learning capabilities." – Elastic's use of machine learning techniques are largely focused on modeling the behavior of your data to identify issues and root cause analysis. Watson Discovery has this capability with Content Miner, and it also applies a multitude of Natural Language Processing enrichments to your data and works with custom models to apply domain, industry specific knowledge to provide deep insight.

"The data visualization capabilities of Elastic are superior" – Watson Discovery's Content Miner provides data visualization capabilities built for Line of Business (LOB) users who are the subject matter experts (SMEs) but don't always have the technical capabilities to utilize data visualization tools. This allows the experts in your enterprise to drill down and explore the data themselves to unlock insights, instead of being reliant on others to find for them.

"I can run Elastic however I want" – Watson Discovery also allows you to deploy on any environment, cloud, hosted, on-prem, hybrid with Cloud Pak for Data and build for Enterprise scale and security.

How IBM wins

Understand more of your data to surface insights with less effort – Watson Discovery provides robust capabilities to extract and enrich data. From powerful out-of-the-box NLP capabilities to Answer Finding and Table Extraction, these features allow for deeper insight of data from your documents, so you know more with less effort.

Rapidly adapt to any business domain – IBM Watson Discovery has powerful tooling such as sentence classification, dictionaries, and Smart Document Understanding providing document and language intelligence to understand your business while addressing customer care use cases as well as more complex ones like contract understanding and due diligence.

Scale throughout your enterprise to increase productivity – Delivery of insights is no longer restricted to separate touchpoints that draw user attention away from their main tools. Watson Discovery provides integration and deployment flexibility, such as running on the customer's cloud of choice, rest API allowing quick embed into a client's own applications, or AppConnect flows allowing the user to both connect to data sources and send results of Watson Discovery to other applications, thus enabling intelligent processing workflows. This ensures proper integration to your knowledge workers' workflow, in order to increase productivity and ease of scaling to meet demand throughout the enterprise.

Expert.ai

Product:

- Expert.ai Platform

What will they use against IBM?

“Expert.ai offers a hybrid AI approach to get the most out of machine learning.” – Expert.ai’s hybrid AI is comprised of symbolic AI (ontologies, taxonomies, and linguistic rules) as well as some ML capabilities. Watson Discovery utilizes these capabilities on top of capabilities Expert.ai simply doesn’t have (i.e. Smart Document Understanding, Answer Finding, Cross-document analysis with Content Miner) to provide deep understanding of your documents while making the tools LOB friendly.

“Expert.ai has accurate, scalable, and multi-language NLU.” – Watson Discovery offers 13 types of enrichments OOTB with NLU that is accurate, scalable, and multi-lingual. Additionally, Watson Discovery supports guided labeling to allow customers to define their own enrichments using active learning techniques, which allow Watson Discovery to suggest new enrichment rules after just a small number of training examples.

“The OOTB knowledge graph provides me with the domain and business knowledge I need.” – IBM Watson Discovery has powerful tooling such as sentence classification, dictionaries, and Smart Document Understanding, providing document and language intelligence to understand your business while addressing customer care use cases, as well as more complex ones like contract understanding and due diligence.

How IBM wins

Understand more of your data to surface insights with less effort – Watson Discovery provides robust capabilities to extract and enrich data. From powerful out-of-the-box NLP capabilities, to Answer Finding and Table Extraction, these features allow for deeper insight of data from your documents, so you know more with less effort.

Leverage in-house LOB and technical expertise to reduce time-to-value – Watson Discovery has been built from the ground up for the LOB with tooling such as sentence classification, dictionaries, and Smart Document Understanding, so SMEs can use their expertise to train Watson Discovery to provide deeper insights. Technical experts leveraging the same tooling can quickly build custom models to deploy quickly, which decreases time-to-value.

Deploy and scale anywhere, confidently and securely – Deploy on any environment, cloud, hosted, on-prem, hybrid with Cloud Pak for Data, and build for Enterprise scale and security.

Get started

1 Free trial

Anyone can learn about the power of Watson Discovery at their convenience with the 30-day free trial.

Get access to concise, trusted, personalized information, and reduce the time you spend searching for information by up to 75% and focus on the tasks that matter.

[Get started with the 30-day free trial →](#)

2 Jump start

Jump Start is an MVP engagement that includes IBM technology, IBM assets and IBM expertise to deliver use cases into production. It provides proof of AI's business value, with minimal disruption to current client initiatives, and often at no cost to the client. For more information, visit the links in the speaker notes.

- Identify Jump Start opportunities
- Prepare and submit requests for approval
- Implement a successful MVP and watch your opportunity progress into a Sale

Additional information and assets

[Customer Care Solution Sales Kit →](#)

Customer Care portfolio assets (Watson Assistant, Watson Discovery, and Watson Speech)

[Watson Discovery Customer Care Page →](#)

Key assets for Watson Discovery broken down by sales stage

[Watson Discovery Sales Kit →](#)

In-depth Watson Discovery assets ranging from education and demos to analyst content

[How to provision Watson Discovery →](#)

A guide for sellers showing how to provision Watson Discovery on IBM Cloud for themselves and their clients

Learn the Watson Discovery demos and hands-on labs

To learn how to demo Watson Discovery, take the Watson Discovery Level 3 course for sellers [IBM →](#) | [BP →](#)
or for technical sellers [IBM →](#) | [BP →](#)

Expert assist

Employees can leverage Watson Discovery to get information using natural language queries

- [Link →](#)
- [Walkthrough →](#)

Data and AI DemoBuilder

Watson Discovery can help employees accelerate business processes

- [Link →](#)
- [Walkthrough →](#)

Watson Discovery Hands on Lab 1

Train a model using Visual Document Structure

- You need to have an instance of Watson Discovery to do this demo; see instructions on the previous slide on how to provision one
- [Walkthrough →](#)

Watson Discovery Hands on Lab 2

Highlight how Watson Discovery can Analyze Contractual Agreements

- You need to have an instance of Watson Discovery to do this demo; see instructions on the previous slide on how to provision one
- [Walkthrough →](#)

Watson Discovery Hands on Lab 3

Highlight how Watson Discovery can help with an Annual Report Analysis

- You need to have an instance of Watson Discovery to do this demo
- [Walkthrough →](#)

The course includes sample videos, additional guidance, and leads to an intermediate badge.

