CONNECTED CAMPUS, DREAMFORCE - EMBRACING AI, CRM & SERVICE FOR ENQUIRIES

VIDEO TRANSCRIPT

Accenture and Salesforce

good afternoon everybody um thank you for for making some time this afternoon to come see us um i was told a good way to loosen up for one of these events such a big room with so many people was to introduce some humor or a joke at the start unfortunately i just tested a joke on my boss and she said that my humor doesn't travel so uh there'll be no joke to start it's our pleasure to have you here today to walk you through the exciting elements of our latest delivery milestone at qut we've been leveraging the latest and greatest data cloud and einstein products to enhance the digital connection the university has with its students i don't have a joke but i i do want to start off with a with a question service experience ways of working have largely been geared toward reactive question answering transactional interactions that only left people feeling a number in a large complex organization but what if what if we transform our service at business and digital architectures such that our frontline teams are

no longer just service centers but rather experience centers through which we can drive better connection and relationships across key stages of a person's journey good afternoon i'm james rail the program director at queensland university of technology and i'm alex calder the accenture sales force education lead in queensland australia that thought provoking question that we just asked you is the same question that qut is asking itself we're asking it because we've been motivated for change on a number of fronts first we're seeking new ways to attract connect and interact with our learners now more than ever people are leveraging technology to learn work and connect the flexibility to be connected anywhere anytime and in ways that are relevant to a person's experience are essential to that quality in the experience that they receive to remain competitive we know of the strategic imperative to respond to current demands while also being able to scale and extend our capabilities to stay instead we are driven to improve our business intelligence and harness the insights that can be gained from that single view of person and their previous interactions and engagements with us to do so we recognize the need to reduce information segmentation across systems and resolve inconsistencies in our data and data practice and to do so we would be connecting everything and everyone together in new ways data will also inform our leaders so they can make strategic decisions and operational improvements with confidence and in ways they haven't been able to before and we're also motivated to create a connected digital campus through a simplification of our application portfolio and a reduction in in like systems we have to improve our digital and service resilience by removing duplication and transitioning to an enterprise technology mindset so in turning this motivation into action qut has since 2022 been investing in enterprise change with one crm at the center we are proud

of our story we have around 53 000 students at qut we pride ourselves on being university for the real world qt attracts many different people all individual journeys so we have to think about how we service all of those markets and that's quite complex students want to interact with their university like they interact with any other provider they want to be able to access our services anytime anywhere they want a good digital interface they want people who know them and they want people who care that's where salesforce will come to the full with us being able to help us understand who our students are all the way through their journey and being able to take the busyness out of work that we do to make sure we know who these groups are what they're doing and what they want at any point in time like most universities qut experienced a number of disparate systems one of the main challenges we were facing in the marketing and conviction department was not having a single crm platform and there were too many systems we're using at the same time not having a unified platform where we can operate all knowledge and engagement for future students through our investment within salesforce we have brought together the pieces we need to better connect with our learners within the academic environment data is everything we have to be able to bring evidence to any of the decisions that we make but as a large organization we often have multiple data sets and we have to be able to find the source of truth for what we're trying to do we also have to build the story around the data and i think that's a really important part as well to understand the people who are the data who make up those stories and where we go with that qut is using all components of salesforce for education we're bringing together sales service marketing and commerce clouds underpinned by education data architecture we're bringing together 20 different parts of the university systems so it's a fantastic integration process that will give us

that data to drive the various approaches we want to take for qut the future is strong ensuring that we adopt an enterprise technology mindset will support us in our ambitions for improving lifelong learning the real world approach will always be part of qut's dna and i can see that continuing but we know the world has changed and we have to prepare our graduates to face that and thrive in what's a very uncertain environment at the moment my one wish for qut is to provide the same opportunity for the country girl that i was and to let her have the career that i've had through education thank you james for setting the scene and the asking the why so i know we're here today to talk about data cloud and ai and einstein but the platform and the journey that we've been on up until now has been much much more laying the foundations of the core crm made the next part of the journey that we're about to talk about possible and logical the building blocks to those foundations have touched a wide range of qut's operations our wheel of fortune here depicts how so starting at the crm building a true 360 degree view of the person rationalizing a person's data who's maybe been an employee a student a corporate partner alumni all of them together with different contact information so we've got that in salesforce now so that's that's the tick marketing cloud provides the university with a single platform ingesting a huge amount of data from the crm socials and the application processes to segment relevant audiences providing the power of a true enterprise-ready solution that can reach out to people but most uh sort of reach out and speak to people but most importantly at the right time at those moments that matter for a person's learning journey sales and experience cloud giving the university the ability ability to manage their products and offerings and making them accessible to domestic and international students and then adding commerce cloud to

that so allowing those products and offerings to be bought and paid for online which is integrated with qut's payments platform and lastly service cloud allowing students and staff to reach the university support and future student nurturing teams automating processes that's given much better experience to staff members translating to a much better and personalized experience to those reaching out for help this wheel of fortune as alex describes it the technology building blocks that are forming the digital spine of qut as i describe it ensuring that qut is managing its relationships in meaningful ways as we approach the end of 2024 we will celebrate 24 separate and distinctly different business groups using a single org as an enabler to their service ecosystem across those groups 750 frontline agents will use the platform to provide personalized support and over two million pieces of data have been aggregated and ingested to ensure that we have a real time rich view of the people that we're supporting and we've been able to simplify our digital ecosystem in the process by removing like systems local databases and spreadsheets i do enjoy killing off a spreadsheet to introduce commonality and consistency in our practice to spotlight a specific change we've introduced with salesforce recently a particular highlight has been the improvement we made to the prospect experience in approaching the challenge to redesign how we do things we were guided by the ambition to make it easier for a person to make the decision to study with us and in doing so they make that decision not just on qut's real world education promise but because they had a positive and responsive experience that confirms that we are their education partner not just an education provider so how did we go about it to improve that personalization we were leveraging that single view of person no longer do our advisors need to navigate multiple systems to know who

they're supporting instead we've aggregated that data to provide a rich record of a person's interactions and engagements with us they're in participation in digital marketing their education profile and other key in web interactions at key moments pre post and during study this means that our advisors are better armed to be personal in their approach and our future students feel like they're setting their goals once instead of multiple times depending on who they're talking to across all those various business groups to complement our direct outreach activities we're being more specific in our communications to ensure that our future students are receiving the messages that are relevant to them based on a deeper understanding of who they are their interactions and their prior engagements with us we are building our campaigns to be more specific to ensure that we surface the messages across the channels that individuals engage with the most at those right times and lastly to ensure that we continue to provide effective support and monitor performance we've introduced the suite of dashboards and data insights necessary to give service leaders the operational insights they need to make the right decisions for their service to remove bottlenecks to scale up and scale down to meet demand and to view the outcomes of their team's activity in real time with the foundation set and the results already been seen we didn't want to stand still the challenge for an implementation of this size and complexity and pace is not to sit back and appreciate just what's been done it's to think about how we can continue to drive innovation harnessing what we have and staying true to our value proposition and strategic imperative to enrich the experience we provide so looking at the building blocks of our ai and data cloud implementation so after another salesforce event in sydney at the beginning of the year world tour our cunning plan came together uh as a team we'd already been discussing um data

and ai at length um but the key note at world tour with the demonstration of co-pilot and prompt builder being made generally available tipped things over the edge and it became real we looked at where these capabilities could be put to best use not just in our salesforce ecosystem but in our service ecosystem with our most recent release centered around the nurturing and servicing of future students driven by service cloud and case management functionality this seemed like a very logical starting point an area where we believed ai especially could drive tangible benefits to learners experience whilst building efficiencies in the way that team members could complete their duties the plans that were hatched to develop a rapid implementation using out of the box einstein custom prompts and data cloud functionality to deliver that added value a four week yes four week development schedule was drawn out to make this a reality that was a very stretch goal but the team knocked it out of the park the capabilities were there and we knew they were on offer so we started small looking at gaining value quickly building knowledge and learnings was an accepted part of the journey to a certain degree we knew we were starting something completely new together james and i brought a team together not all in brisbane unfortunately by the way everybody should spend some time in brisbane if you haven't visited before any of you willing to uh maybe move there i'm recruiting at the moment we had team members in sydney india the philippines and of course sunny brisbane leveraging the power of our network and resources who were best placed and skilled to deliver this new technology the five targets we agreed to be utilized were co-pilot case classification einstein knowledge articles prompt builder and of course data cloud okay so the first problem how can we easily bring together everything we know about a case or an interaction quickly in a way that's easy to digest

and make a meaningful decision copilot that's how agents are engaging in copilot using a natural language with questions and instructions to receive clear trusted and actionable responses assisting future student agents in their daily tasks by summarizing records such as case sawing or the contact or querying specific information that they might need which is they can do with a click rather than going searching for it in short the team member can ask co-pilot a question to summarize the history of a case especially if it has a long history and co-pilot will surface the key interactions and actions taken today this reduces the time the agent needs to spend researching data in the system themselves and creating their own summary this is very powerful it saves some time it improves accuracy of the information gathered it provides the team member with all the information and the precise information that's been asked for giving the agent meaningful information to help them resolve their cases by improving the accuracy of data being used to make decisions and ultimately servicing all of the background information before responding to a person who's raised the case agents have more time to be able to make the actions that are being taken make sure that they are right for the person they're responding to and improving personalization personalization is key to qut qut's goal of you know building trusted relationships with their learners creating lifelong learning relationships so we're using the nutshell analogy in a nutshell the the benefits boosting the agent's productivity reducing the time spent searching for information and summarizing things like leads contacts case and other case record information so agents are able to quickly quickly grasp the information they need and are looking for the next problem a total of 15 percent of all cases raised when they came to us didn't have a category especially those originating from email whatsapp and our

socials interestingly 75 percent of cases received via email prior to now had no discernible category an advisor therefore needed to spend time to decipher what that case was about categorize it and then summarize it during their triage processes it takes time and something that had to be done every time so what could we use to help us with this automated case classifications that's how einstein is again giving back time to our advisors by analyzing the information in an inquiry and based on the content and historical data captured from other categories that's either linked to it or similar to it einstein can automatically classify and summarize that case for us and by classifying the case on creation we derive faster insights into where our demand is at any point in time and can prioritize our advisors to respond quickly as time goes on this functionality will become more accurate and more powerful however to begin with we've put guard rails in place to ensure that we had confidence thresholds if einstein rates its confidence threshold at 95 percent or higher it would automatically populate that categorization of that case it can be checked by the agent but is unlikely to be wrong if the confidence level is between 50 to 95 users can validate the best recommendations and or select different value as needed providing feedback to the models as they go if the confidence level is lower than 55 50 the users can use one of the top three suggestions from einstein or select a different value entirely again providing feedback to the model as einstein learns categorization accuracy improves and user confidence is assured therefore we can ch adjust those guard rails to a to suit at any point in time training on the importance of validating the recommendations is also key users need to know that the categorizations they assign help to improve the quality and accuracy overall the benefits in a nutshell we've reduced time spent in the process of case categorization we're ensuring

consistency in the case classification and our understanding of it and most importantly we're helping to ensure that the person at the other end of the case is being advised correctly on their inquiry from the outset the next problem helping our agents to make sure that they're providing the right guidance and advice when they're responding to questions or service requests so how are we doing it einstein knowledge base recommendations that's how let's imagine an agent is opening a new inquiry it's an inquiry with maybe a couple of parts to it how do i apply for the course that i'm interested in or where do i get help with accommodation now that i know that there's a job opportunity in brisbane einstein knowledge recommendations will analyze the request and query it against our rich data set of knowledge articles the best most likely options are serviced to the agents to review before they provide that guidance with the list of articles ordered by and marked with a relevant score again it will learn and the accuracy of the recommendations will improve as all the knowledge material is used an agent provides helpfulness as they use these articles the benefits in a nutshell an agent no longer needs to search for information that would have otherwise been buried or hard to get to it's all in one place on one platform an advisor can use the recommended articles by attaching them to their response this makes it possible to tailor a response with information that is completely relevant to the person needing help and again we're ensuring that the person on the other end of the case is getting the most relevant information and support when they need it okay on to another problem how can we be more efficient and accurate and wrapping up and documenting a case once the inquiry has been resolved at the moment this is a very manual task einstein prompt builder that's how we're going to fix it or how we have fixed it so we've got two two elements of prop builder so part one using custom prompts

builder we're able to help einstein know where to look for information and the data to enable it to successfully document the wrap-up something that needs to be done for every case and an interaction once they're closed it references data such as the case information what was documented and raised by the learner actions taken the case status changes and then and a group of other specific fields that are used during the flow of the service interaction it's summarizing all of the conversation between qut and the future student once the prompt was live with a click of a button the case is automatically summarized with all the relevant information data so it can be reported against or referred to at a later date the agent would have the agent would once have actually remembered everything that had happened and documented it themselves which was a a process which took time once trained in providing the right information this is done for them giving them time to focus on more qualitative inputs into each case or or moving on to help the next person but back to data standardizing the data captured and having it readily available to report a report against offers another benefit it also allows the leadership to deep dive into the closed cases and do qa on actions taken and the solutions provided part two imagine you've got a case it's a very lengthy case there's been multiple emails uh some of them as long as a as a short story how does someone pick that up after it's gone cold we've been waiting for somebody to to return to the person that's been managing the case or if somebody else picks it up at a later date um they don't have a lot of time to read through all of those emails again and the historic data but but using the prompt builder everything that is added to a case in salesforce is analyzed and summarized in its key elements actions and what the current status is into one magical field the description summary field so somebody new picking up the case can see instantly a

rationalized summary of what's taken place and what stage of the process in case that that the person is in and their next actions this saves the agent a great deal of time and they can get on with helping resolve the case and then moving on to the next even better than that the case summaries picked up by einstein case categorization categorization as james has just covered um allowing it to help the author the automated categorization process from this rationalized view of the history so that's ai helping ai which is uh which is great so the benefits in a nutshell 10 reduction in average voice chat and email handling times up to 50 reduction in the inquiry wrap up and follow-on tasks uh an element of the agent's role and increased quality management with a 10 reduction in audit and quality assurance time the last element data cloud um a more complex problem how can qut begin to leverage a simplified and dynamic data model bringing together all of the data from crm marketing and eventually beyond pulling all the data putting all the data sorry in the user's hands empowering einstein too data cloud so what we did was we built a unified view of the student in data cloud that was our first priority having that available was key the learner is center of everything we do on the digital connections program three data sorry 23 data streams were being used ensuring there is complete coverage required leveraging data cloud to enable digital marketing to simplify the way they can build segments in the future is also a priority so we've we've integrated it with the out of the box marketing cloud connector as well as email studio allowing data cloud to ingest that email data sms is to follow and but there is much more to do in data cloud but this is sure to be the center of the customer data in the future the analysis and the automation of data to be executed in one place driving insights from data trends across more than just the sales force clouds that we've got in place just like before

we're not going to stand still after another successful implementation of a new capability we will continue to build on our ai and data cloud capability to drive trusted experiences with crm service and voice in fact we've got to go live in about three weeks of new capability for personalization and proactive engagement when it matters we will look to data cloud to support us in audience segmentation and activations and to allow us to tap into new data sources to create data streams and gather insights that could be fed into our campaigns and provide us with actionable insight we will continue to focus on advisor efficiency with einstein in the flow of work we will continue to build out custom prompts to boost productivity when triaging responding to and wrapping up cases across multiple service channels in particular voice will real-time categorization will be a game changer in providing our agents with quick visibility of what the call is about whilst it's happening and building on knowledge with real-time next best actions will ensure that our agents are further armed to respond to cases regardless of complexity first time right we're already seeing the success of ai grounded by our rich data sets we've been able to add value at speed it took us four weeks to develop and deploy those capabilities that we shared just now but for those seeking to do the same our

business covering the tasks that the team spends the most on adding ai into an integral part of your team's day-to-day will only extenuate the benefits and the capability that you can provide but most importantly all of your staff will reap the benefits of efficiency and automation unburdening them of the tasks and things that add value and ultimately focus on what's important and for qut that is always our students thank you very much for your time this afternoon guys i hope what we presented has been useful or given you some insights thank you very much for coming thank you. You.

potentially little value adds to your business operations and most importantly ai is not about replacing your staff ai is about freeing them up to do what they do best allowing your people to excel at their duties empowering them to do better by cutting out the tasks that take time and the administrative burden that goes along with it in turn this will allow them to spend time on those five key pieces of advice are this first and foremost know your data ai is only as good as the data you put into it the better the quality and consistency of data the better the results and outcomes you'll have educating your team members is important too building the right habits and practices needs to be second nature to them a true understanding of the power of data is important to impart when onboarding new team members during and after all of these go lives next don't do ai for the sake of doing ai ai is most powerful when it's deployed with purpose picking the areas and functions that align to your business and customer goals will allow it to have the biggest impact next start small build trust and grow with ai find the use cases that are traceable to pain points or friction points something low risk but high impact to the tasks your team completes regularly keep it simple initially as the power of einstein reveals itself to your user groups and business stakeholders you will build the trust you need to keep going to keep pushing those boundaries to keep building on those initial use cases in ways that will ultimately try transform your practice as a whole embed ai in the flow of work don't let it be an optional extra off to the side in a separate tool add it where possible into the flow of how you do