PLANNING

PLANNING

Define Problems, Goals

- What problem(s) are we trying to address?
  - Inconsistent experience
  - Frequently repeated questions via phone and email
  - Limited support availability
  - Long call queues and email response times
  - Offer personalized responses to customer inquiries
- How will an AI chatbot address the problem?
  - Additional self-service channel
  - 24/7 support with context-aware information
  - Automate responses to high-volume, repetitive questions
  - Logs and analytics can drive operational improvements
  - Providing integrations using authoritative sources of information (i.e. PeopleSoft)

PLANNING

Choose the Right Platform

- Develop in-house?
- Request for Proposal
  - Content and UI/UX (30%)
  - Platform Features (20%)
  - Technology and Integrations (20%)
  - Cost (30%)

PLANNING

Select High Impact Departments

- Phase 1
  - Enrollment Services
    Admissions, Financial Aid, University Registrar
  - Student Business Services/Bursar
- Phase 2
  - Office of Administration
    Dining/Vending, Campus Store, Copy/Print/Delivery, Cougar Card, Cullen Performance Hall, Parking,
    Already supported Ocelot chatbot, contract expiring
  - University Information Technology
    Already supported custom live chat application

PLANNING

Define KPIs and Metrics

- What are the current KPIs?
- What are new KPIs to track?
- What are the desired trends we want to see?
  - Less phone calls and emails
  - Shorter phone calls or calls that require more personalized engagement, free of commonly asked questions

RESOURCES

RESOURCES

Departmental Chatbot Customer Service Manager (CCSM) Role

- Customer Service focused team member
- Subject matter expert
- Chatbot support responsibilities need to become party of their job duties
- Work with UIT to enhance chatbot

RESOURCES

Technology and Content Sources

- Identify critical website sources
- Integration sources and Webhook development
  - Data Source: *PeopleSoft Campus Solutions*
    - What is my balance?
    - Did you receive my transcripts?
    - What is my residency status?
    - Did you receive my FAFSA?
- Custom Responses
  Supplement generative responses

RESOURCES

User Training and Chatbot Training

- Twice-weekly Office Hours meetings
- Gravyty chatbot Skills Assessment
- Gap Analysis
- Testing generative chatbot responses and building custom responses where needed
  - *Supplement the Gap Analysis*
    What are other common questions unique to our department?
  - *Variants*
    What are the different ways the visitor may ask the same questions?

RESOURCES

University Information Technology

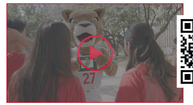
- Dedicated Functional Analyst, FTE
- Liaison between CCSMs, technical teams, Gravyty
- Conversation review, promote best practices, and make recommendations for enhancing responses and workflows
- Chatbot performance reporting

LAUNCH

LAUNCH

Marketing and Awareness

- Marketing video
- Digital signage and social media
- Targeted campus-wide emails



Ask Shasta! Introducing UH's new AI Chatbot
youtube.com/watch?v=U-N3uhvqSt8

LAUNCH

Documentation

- Quality Assurance document for both admins and users
  - Identify key steps for onboarding, chatbot maintenance
- Gravyty knowledgebase
- Develop a process for requesting new integrations
- Service Level Agreement

LAUNCH

Maintenance Best Practices

- Set expectations for conversation review interval
- Revisit Gap Analysis
- Revisit Cluster Analysis
- Recurring content audit

LAUNCH

Monitor and Measure

- Chatbot Performance Dashboard
- Trends across metrics

LESSONS LEARNED

LESSONS LEARNED

Assess Customer Readiness

- Is this department ready to support a chatbot? (time, personnel)
- Leadership and staff buy-in
- How do they currently measure success and how will that change?
- Is their content optimized for chatbot crawling?

LESSONS LEARNED

Define the Chatbot's Tone and Voice

- For many, the chatbot is a first point of contact with the University – make a good impression
- Friendly, eager to help - explain and offer context to answers, inclusive language
- Avoid technical phrasing, remain conversational
- Prompt Programming:

When crafting responses, write in a tone that is friendly, enthusiastic, and helpful—like a knowledgeable friend who's proud to be part of the Cougar community. Avoid robotic language, technical jargon, or negative phrasing.

Keep things conversational and upbeat, always include enough context to help the user understand why the answer is relevant or useful—don't just give an answer; give a little guidance too, like Shasta is walking them through it. When appropriate, feel free to sprinkle in a little school spirit to make Shasta feel more connected to our students and campus culture. Instead of Cougar, refer to students, faculty, and staff as "Coogs".

LESSONS LEARNED

Identify the CCSM and Engage Technical Teams Early On

- Who should be CCSMs, and what is the expected commitment?
- Determine what systems need to be integrated with chatbot and how to initiate future integrations

LESSONS LEARNED

Optimize Sources for Chatbot Crawling

- Accessibility is equally as important as accuracy
- Start with the highly visited pages with critical content
- Eliminate stale or low-value pages to reduce ambiguities
- Review chatbot response sources and look for information gaps

BY THE NUMBERS

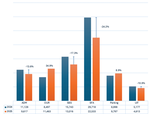
BY THE NUMBERS

Since Soft Launch - Feb 10, 2025

- 11 departmental chatbots
- 32,034 chatbot conversations
- 82% Resolution Rate (Target: 85%)

Comparison of Call Volume Changes in Genesys Call Centers
August-September 2024 vs. 2025

- ADM call volume decreased by 13.6% between the periods.
- OUR calls increased significantly by 34.9%.
- SBS and SFA show declines of 17.3% and 24.2%, respectively.
- Parking call volume increased by 8.9%.
- UIT Customer Service dropped 10.9%.



UIT Chatbot performance for Aug/Sept 2024 vs 2025

Date Range	Conversation Count	Resolution Rate	% of After-hours Chats
8/1 - 8/31	2851	83%	20%
9/1 - 9/27	2034	87%	17%
Total	4887		

Live Chats	2024 (old platform)	2025 (Shasta)	% Difference (+/-)
8/1 - 8/31	1629	334	-80%
9/1 - 9/27	786	300	-62%

Call Volume	2024	2025	% Difference (+/-)
8/1 - 8/31	3417	2807	- 18%
9/1 - 9/27	1641	1653	+ 0.7%

Key Takeaways

- Clear demand for self-service options, even outside of business hours
- With over 30K chats, hundreds of staff hours saved
- 18% of chats unresolved -- still room to fill in information gaps

LOOKING AHEAD

LOOKING AHEAD

What's Next?

Phase 3 – Begin Q4 2025

- Alumni and Advancement
- College of Natural Sciences and Mathematics
- Graduate College of Social Work
- Graduate School
- Human Resources
- Law Center
- Undergraduate Student Success Center

Web Content Review Report– Q4 2025

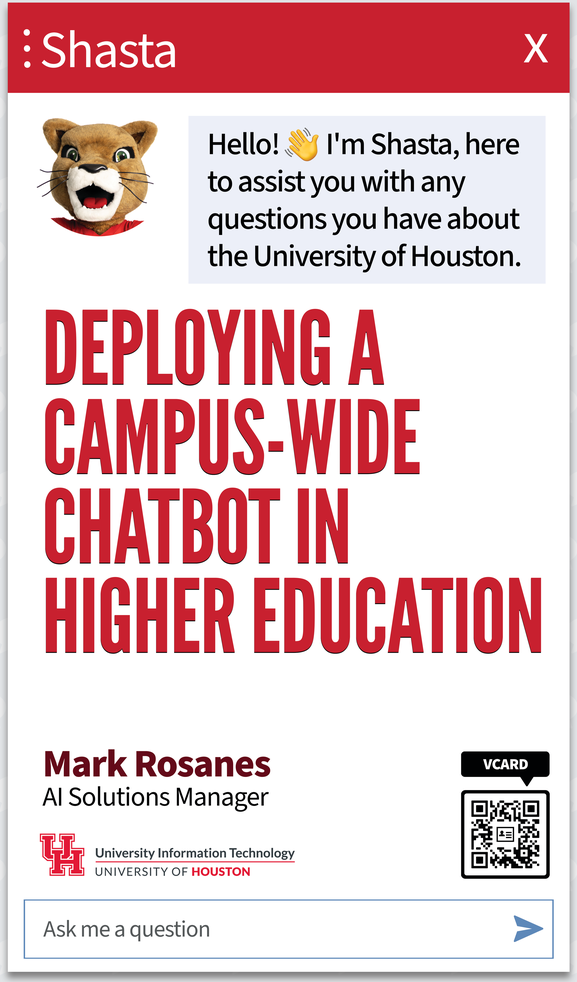
- Top 25 high impact content changes to improve AI chatbot crawlability
- Guidelines: Gravyty's best practices and general web accessibility standards
- Starting with Phase 3, but will revisit the first 2 phases

SMS and Voice Support Via IVR– Q4 2025

- Interact with bot 1st with ability to escalate to live agent
- Meet the customer where they are
- University Information Technology pilot
- Q4 2025 launch

Build on Gravyty Partnership – 2026+

- Push the chatbot product forward with enhancements to chatbot and IVR
- Wish list:
  - Improved data dashboard API
  - Enhancements to voice flow options
  - Teams IVR integration to handle the voice calls from start to finish



DEPLOYING A CAMPUS-WIDE CHATBOT IN HIGHER EDUCATION

Mark Rosanes
AI Solutions Manager

University Information Technology
UNIVERSITY OF HOUSTON

VCARD

Learn more about Shasta
uh.edu/shastabot

THE DETAILS

PLATFORM
Ivy & Ocelot from Gravyty

LAUNCH
Phase 1 - May 2025
Phase 2 - Aug 2025

CURRENT DEPARTMENTS

Phase 1
- Office of Admissions
- Office of Scholarships and Financial Aid
- Office of Student Business Services/Bursar
- Office of the University Registrar

Phase 2
- Auxiliary Services, Dining and Vending
- Campus Store
- Copy, Print, and Delivery Services
- Cougar Card Office
- Cullen Performance Hall
- Parking and Transportation
- University Information Technology

DOWNLOAD PRESENTATION
uh.edu/infotech/about/presentations