Have these decks open

https://docs.google.com/presentation/d/1pTYFf0A89mebGu_IfCZQyzW4vSeWU1Px/edit#slide=id.p1

https://docs.google.com/presentation/d/1GS7KJTknCquFtaNa7ZX0pW-kxKYcQFPu/edit#slide=id.p7

Have bot builder open to show some of the assisted dialog flows

Have open - Fortune Brands HR link -

https://demo.kore.ai/demo/template/newsdk5/UI/index.php?botid=st-493e509e-2222-5321-9960-310bd7836992&id=1105

Okay, I am super excited to be here and go through our IT assist demo with you! So,what we will show you today will be around the employee facing experience, an example of a technology onboarding use case, a review of the dataset you had shared with us and how we can impact your organization immediately and then a high level of our pre-built solution workbench.

(Next Slide)

andrew.symonds

12345

So, for the employee facing experience we will review how employees can engage in their channel of choice, show how self-serve options will automate their experiences, reduce the number of repetitive and mundane tasks that your IT support would have to handle, along with the ability to customize and personalize the employees needs.

Before I can access anything, I have to login and authorize myself. (login Andrew.symonds 1234) And the layout you see here is all able to be personalized or customized for your organization, with branding and the phrases that are used, or maybe you need to incorporate some internal jargon and be sure the VA can understand that.

Now that I am authorized, as an employee this will be my first go-to for IT questions.

Here I have a list of options presented to me - these options are just suggestions and what comes as OOTB functionality. You can choose to use these or turn them off as you start to use the platform.

So, now that Andrew is logged in for the day. He is having a problem logging into his SSO application - so instead of calling the helpdesk, he can simply select the option here to reset his password or unlock his account.

This password reset can be set up so that it is authenticated/connected with your back-end system of record and tracked and/or you have the ability to limit or control what applications can have a password reset done on them and we can talk about that in a little more detail once we get into the backend side of this.

So, within a minute, Andrew has reset his password and can start his day.

A little while later, he had a zoom call scheduled and forgot to add someone to the invite that he needed on the call. He needs to move quickly as people are joining the call so, he uses the VA (asks - **Can I invite guests to zoom?**) And see how to do that and he can continue on with that meeting.

Andrew overheard a few rumors in the office that there were some outages going on, and he wants to make sure he stays on top of what is happening. Since he has been getting great responses from the VA- he tries again. (**Are there any outages reported?**) We are connecting to other backend applications and pulling in the notifications when something is down.

Andrew is now informed as to what is happening and feels good about being informed.

A little while later, his outlook started to act up on him so, once again he wants to try out the VA for some help. **My outlook is not working**

The VA does a double check to see if any outages have been reported for this and confirms that nothing has been reported. Andrew wants to report this, as it is a problem for him.

(fillout ticket)

Now, he can see the ticket is created and gives that reference number, should he need it. This ticket is connected to that backend for Service Now. He can also go and view that ticket at any time.

(**Show ticket details**)

You always add additional comments or just check the status of that ticket, so that i don't need to make a call to the help desk for an update.

Those were a few examples for the employee side and showcasing how we can assist with reducing those contacts to the help desk and allow employees to self-serve and help to keep them productive with minimal downtime.

"Excel troubleshooting" Can also pull back some FAQ's for an easy reference also

Offboarding - under HR Assist

Log-in andrew.symonds 1234

What is the offboarding process?

This is just an example, and the workflow you had provided to us can be built and use our process flow to push the requirements through the process of pushing to a manager and removing the various accesses to applications using API connections,

(go to slides) Teams Integration

In this example we will show you how we can integrate with that backend system (this one is with service now) and integrate into Teams so that your employees can have that seamless experience.

(**go through the ordering process**)

Also important to call out that is incorporated into a workflow so when a manager needs to approve something, the manager would be notified. Then they can go in and approve and keep the process moving along.

john.smith 1234

For manager to see the open tickets.

(**back to slides**)

Talk to the automation of what was sent

So, what does all this mean to your organization - we analyzed the 32K tickets you had from the last few years and used only the ones that were in English which was about 24k and of that 24K we saw that 40% of them could be automated and have use cases directly tied to our OOTB solution options.

(Next Slide)

We broke down the 24K tickets by categories - and then determined from there the use cases that fell into our areas of automation that we offer out of the box on the platform. Some of these use cases were exactly what I had just demonstrated.

(Next Slide)

Now lets take a look what is driving this.

Our Solution Workbench has over 50 pre-built use cases and is an environment that allows you to customize, personalize, and extend IT Assist and is truly representative of the “low-code”, “no-code” platform. And allows you the ability to utilize the strong analytics package that is included in the platform.

(**flip to workbench**)

Workbench has been designed to address the commonly faced challenges of an Admin, which means it is quick and easy for the admin to make changes, test and publish updates.

Admins can – (go to branding)

- Personalize the look and feel of IT Assist
- Modify conversational flow and messages
- Configure or pre-train IT Assist to respond to queries
- Enhance the capabilities of IT Assist to support custom use cases
- Monitor IT Assist for continuous improvements

Under Modifying Message Response – *this is where you can use company jargon and commonly used words to give your employees the experience of a human-like interaction.*

Default messaging – allows you to modify the virtual assistant’s default message during the various conversation flows. Which include – welcome, end of the conversation, disclaimer, failure, fallback and help messages.

You can configure disclaimer messages for digital channels and voice channels separately. The admin can also configure when to trigger the disclaimer.

Welcome messages are displayed when the chat session is first launched. You can modify the welcome message and you can configure welcome messages for both digital and voice channels separately.

Along with the message, you can also show any number of buttons to the employees for different actions. You can create two types of buttons:

URL or

Postback- Post a given message to the assistant to take further action. This is typically a user specific question (utterance) that will trigger a Use Case.

Help me message – allows you the ability to select which options you want to display to your employees

Small Talk refers to the casual conversations a virtual assistant can have with end-users, such as greetings, welcomes and farewells. The human-like ability for a virtual assistant to engage in Small Talk helps to engage the user. IT Assist comes with pre-built Small Talk groups which can be modified to fit the culture of your employees.

The ***Assistant Configuration*** menu has these 7 main parts.

There are some basic features that are common to many of the use cases provided here - (under assistant config)

Like - Enabling or Disabling Features, Modifying Response Message (***give the ability to use company jargon or internal acronyms***) ,

Flow modification (***offers various configuration fields for different features that can be used to change the flow of the conversations between assistant and employees, thereby changing the actions the assistant takes following the conversation***)

Any of these use cases can be disabled if it doesn't apply to your situation or if you want to build your own version of the use case.

Ticket Search

This section has the settings related to the 'View Tickets' intent of IT Assist. The intent allows employees to view their tickets (such as reporting a dysfunctional application or requesting equipment) and perform secondary actions on the tickets, like adding or viewing comments, escalating or closing tickets, etc.

Use the toggle button on the top to **enable** or **disable** this feature in IT Assist.

Incidents

You can manage Incidents related configuration properties in this section. Incidents are tickets that involve technical problems such as an app not loading or a keyboard not working.

To enable or disable this feature in IT Assist, use the toggle button on the top of the page.

Requests

You can configure how employees make requests for equipment and software.

Outages

Under Outages, you can configure the assistant's response and behavior to outage information, like enabling or disabling this feature, modifying the conversation flows, systems to fetch the outage reports from, and formatting of the information displayed to the employees.

Knowledge Search

This section lets users access articles, guides, and/or blogs relevant to a particular topic or issue without using a separate search engine.

Accounts and Password

You can configure the Access Management dialog that helps employees unlock their accounts or reset their passwords directly from IT Assist. Password reset and unlocking account depends on the policies set by the underlying SSO application, like generating temporary passwords or providing instructions to take the actions.

Notifications

IT Assist exposes a notification API that enables backend applications like ServiceNow to push notifications to employees. For example, when a new request is raised by an employee, and the backend application workflow requires the manager's approval before accepting the request, the notification webhook can be used to notify the manager about the request.

Notification API is exposed as a webhook and can be invoked by third-party applications to:

- Send notifications in real-time.
- Send one or more notifications at once
- Send notifications to a specific employee, all employees of a specific department, to a specific email id, to all the parties involved in a workflow, or send a broadcast notification to all the employees of the organization.
- Send notifications through any channel of communication that the employee is logged into.

Manager Actions

You can configure the properties for the 'My approvals' intent designed for managers and supervisors. This intent allows them to view and manage tickets raised by their reportees. You can enable or disable the actions that the managers can take on the tickets, such as whether or not they can add comments, approve or reject requests. You can also change the conversational responses of the assistant.

ML Training Changes

Utterances are words or messages that train the assistant for the intents or tasks. They directly impact the assistant's understanding and ability to extract information from the conversations. You can use this section to train the assistant with different user utterances based on the employee lingo and the terminologies used in the organization. For example, suppose incident tickets are more commonly referred to by other names in the company, like issues or bugs or Jiras. In that case, you can use this section to train the assistant accordingly.

Workbench comes pre-trained with a set of utterances for each of the inbuilt intents or capabilities, as shown below.

Custom Intents

And is where you build your custom bot.

Agent Transfer

Agent transfer feature helps employees connect to an agent in case of critical issues which need immediate attention. This section is used to configure the prompts related to the Agent Transfer dialog. You can connect an Agent Desktop or simply provide a phone number to the employee so they can reach out when they are ready.

Settings

Where admin can add and delete team members and manage their roles. Workbench comes with a set of defined roles. Each of which have specific access to different parts of the workbench.

Add

Delete

Change the role

Change Logs - shows the recent changes made in the assistant config or setup which can be helpful when troubleshooting new issues

Languages – shows the languages available and enabled.

Environments – has three

Development, Testing and Production

Only published changes can be promoted from one environment to another.

Integrations

Adapters –

Workbench makes it possible to integrate IT Assist with the backend of any system of record or knowledge base system. This integration is done using service adapters designed and implemented for specific applications. Service adapters for the most widely used applications are available out-of-the-box with IT Assist; however, in order to integrate with a custom application in the backend, you will need to create your own custom service adapter for the application.

Channels – Various widely used communication channels.

IT Assist can be configured to work with various widely used communication channels making it easy and convenient for the employee to perform all of their everyday tasks within their preferred channel of communication.

If you click on a channel, a panel will appear with two two tabs: Configurations and Instructions.

Use the **Configurations tab** to enter the app specifications. The **Instructions tab** provides step-by-step details on how to associate IT Assist with the specific channel and enables interactive components of the channel to work with IT Assist.

TEST and DEPLOY –n this quickly – to show you how

Batch testing – testing multiple utterances at once. Gives you insight as to if the bot is understanding the requests

Or using Utterance Testing – you can type in your question here to see how the response is being decided. This is something unique to Kore where we use the 3 NLU's to make the best decision on which intent should be used.

Our Ranking and resolver will tell you how it was decided upon to get this answer.

Analytics

The Analytics section enables you to gauge the real-time usage and performance of IT Assist to give you insights into how to help your IT Assistant become more intelligent and efficient.

Conversational Analytics

Analytics give you various reports to assess key performance indicators like the usage of IT Assist by the employees, business metrics to learn about the employee’s needs, and NLP metrics to assess the IT Assist efficiency. You can define additional dashboards or widgets using the available metrics. You can also export metrics (Via REST API) to your existing reporting tools.

Access to this data means that you can better understand how your employees interact with the assistant, what capabilities they use and what capabilities they attempt to engage in that don't currently exist. This data can be used to build out your conversational AI roadmap to build new use cases and create opportunities.

Usage, Containment and Business Metrics

These sections show you a variety of data sets displayed as values, percentages and graphs. The metrics include current activity, completed tasks, failed tasks, total messages, drop offs, agent transfers, conversation sessions per day and more.

When testing out the bot – there are 2 different ways to test

Batch testing is the execution of a series of tests in order to get a detailed statistical analysis of the performance of the ML model of the assistant. The tests help you gauge if the assistant can correctly identify the intents and entities from the given set of utterances.

You can collectively import or add an array of utterances in a batch file as a test suite. This file should contain the utterances and the expected intent against which the utterance is to be tested. Optionally, it can also define the list of expected entities.

***Utterance Testing* – see how they are process using the NLU and ranking and resolver.**

Utterances are used to train the IT assistant how to respond to different user queries. An utterance should route the employees request to the appropriate task (Use Case).

So, whenever new utterances are added to the assistance, it is best to perform utterance testing with positive and negative test cases to verify the behavior of the assistant in interpreting a diverse set of expressions and scenarios.

Testing is done against the Universal bot (which includes both the Solution bot and the Custom bot) to help improve the training. Although you can view the results, developers are unable to train from the Testing screen to fix any issues they discover.

Publish- (and promote to the other environment)

In order to promote your changes to the next environment and to make your changes visible to your users, you will need to Publish your changes.

Custom Intent – Tasks – show the list of custom intents already built.

Bot Builder – where you can add new tasks, add or extract FAQs.

Change Logs – shows you the log of everything that has happened to

your custom bot.

Agent Transfer -

Provides metrics for the KPI’s

You can test and deploy

Has adapters for API calls.

FB Innovations

As I log-in as WINN employee - 87654321

When was Moen founded and by whom?

What is the development review process for hourly employees?
How much vacation do I get during the first year?
I am a new employee, how do I enroll in benefits and how long do I have to enroll?
What is the deductible for Bronze Health insurance?
What is the difference between a HSA and a FSA?
My child is getting married, will they be removed from my coverage?
How will I get the rebate for my employee discount?
How much of a discount do I get on our products?
Can you provide some examples of what my HSA can be used for?

NLP Metrics

This section has six additional panels of information which includes:

Intent Found: Number of identified intents

Intent Not Found: Number of unidentified intents

Failed Task: Number of unsuccessful tasks

Performance: Monitor all the scripts and API services and capture the number of failed services or scripts during the interactions

Pinned: Specific records can be pinned to highlight them for easy access and viewing

Debug Log: Custom Debug logs include user conversations from across all channels and are used for analyzing your assistant

Conversation Flows

This is a visual representation of the users journey.

Intents Flow: This view provides an aggregated view of how each of the virtual assistant's intents is executed. The intents are rolled up to the top-level, irrespective of what stage of a conversation they were initiated by the users. For example, intents invoked at the beginning of a conversation as well as any other stage during the conversation are all rolled up to the top level.

Session Flow: This view provides the user journeys across the different intents in the order they were executed during a conversation session. Every flow starts with the intent used to initiate a conversation session and is followed by the other intents invoked in that session.

The Conversation Flows can be used to identify the following:

Popular utterances – Utterances that are used to invoke the virtual assistant's intents. Utterances are automatically grouped by similarity to provide a simplified view.

False Positives – A quick review of the utterance groups will help you in identifying utterances going to an incorrect intent. You can analyze these utterances and make the necessary training updates.

False Negatives – Utterances that did not result in any intent identification are presented as 'Not Handled Utterances'. You can analyze these utterances and add them to the training corpus if required.

Popular Intents and Flows – Helps in understanding the popular intents of your users and the flows used to execute these intents

Drop-off Points – Analyze the specific areas of the conversations that are resulting in drop-offs. A conversation is marked as drop-off if the user has abandoned it without providing a valid input.

Agent Hand-offs – View the flows that are leading to Agent and-Offs. Agent Hand-offs are conversations that resulted in navigating to the Agent Node from any of the Dialog Tasks.

Key Takeaways

· IT Assist is a **no code/low code** platform that gives you control over your IT assistant.

· You can personalize the look and feel of IT Assist to reflect your brand values and personality.

Solution Workbench allows you to modify conversation flows, automate responses, enable or disable tasks intelligently based on your organization's needs.

· You can effortlessly test, deploy, and publish to multiple channels.

You can create adapters in order to communicate with the backend of other applications.

You are able to measure and optimize your AI deployment's performance for better efficiency.