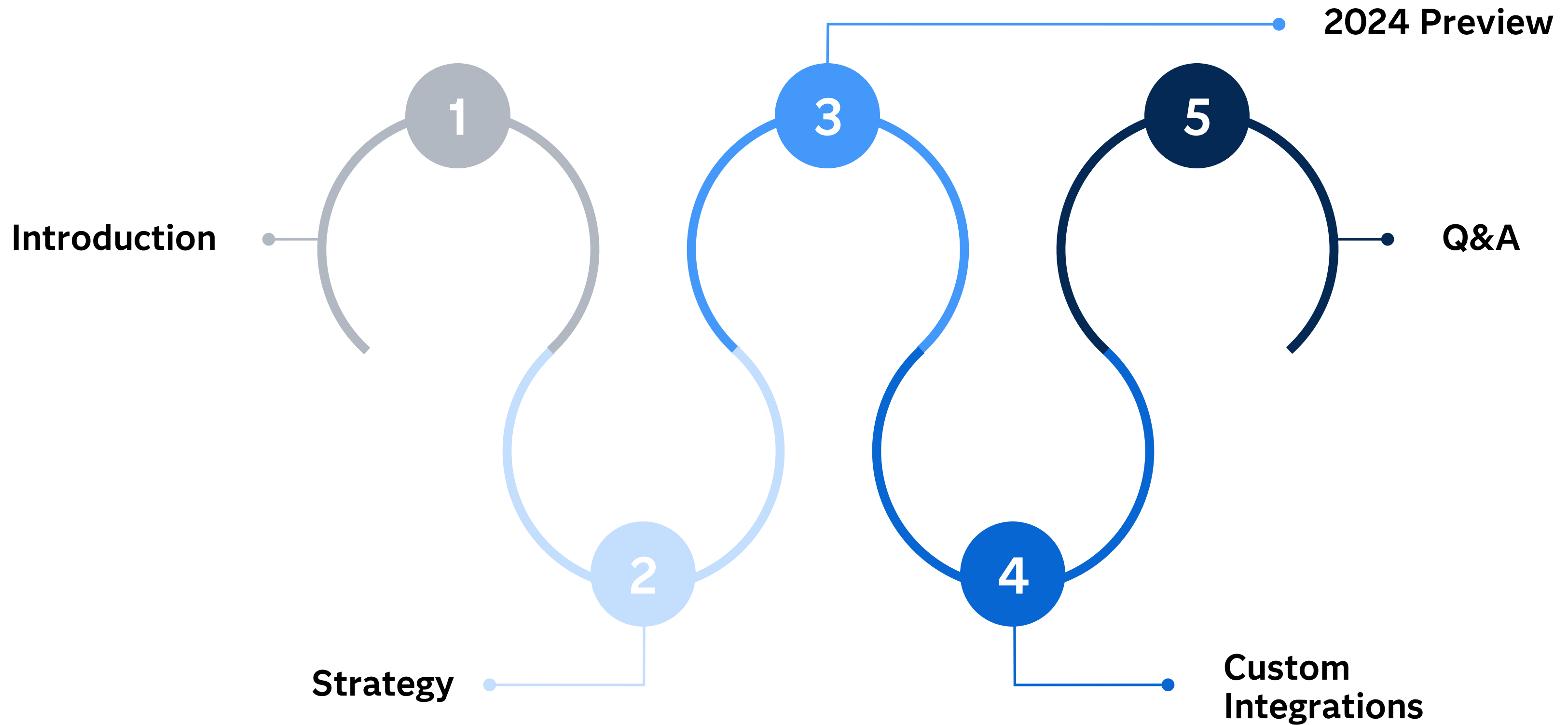


CI360 and Generative AI

Mac Carlton, Global Customer Intelligence Practice



Agenda



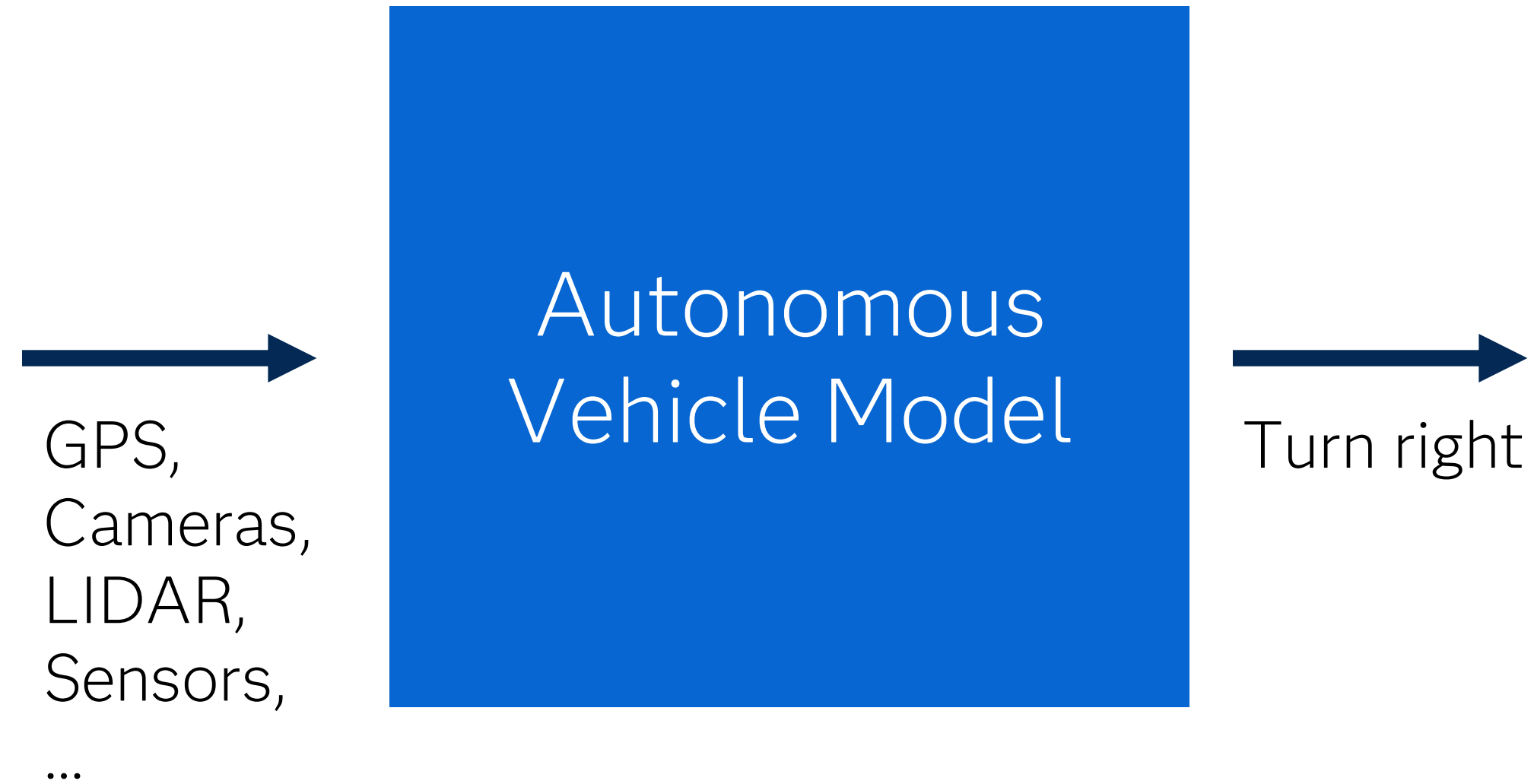


How do we effectively integrate Generative AI into solutions?

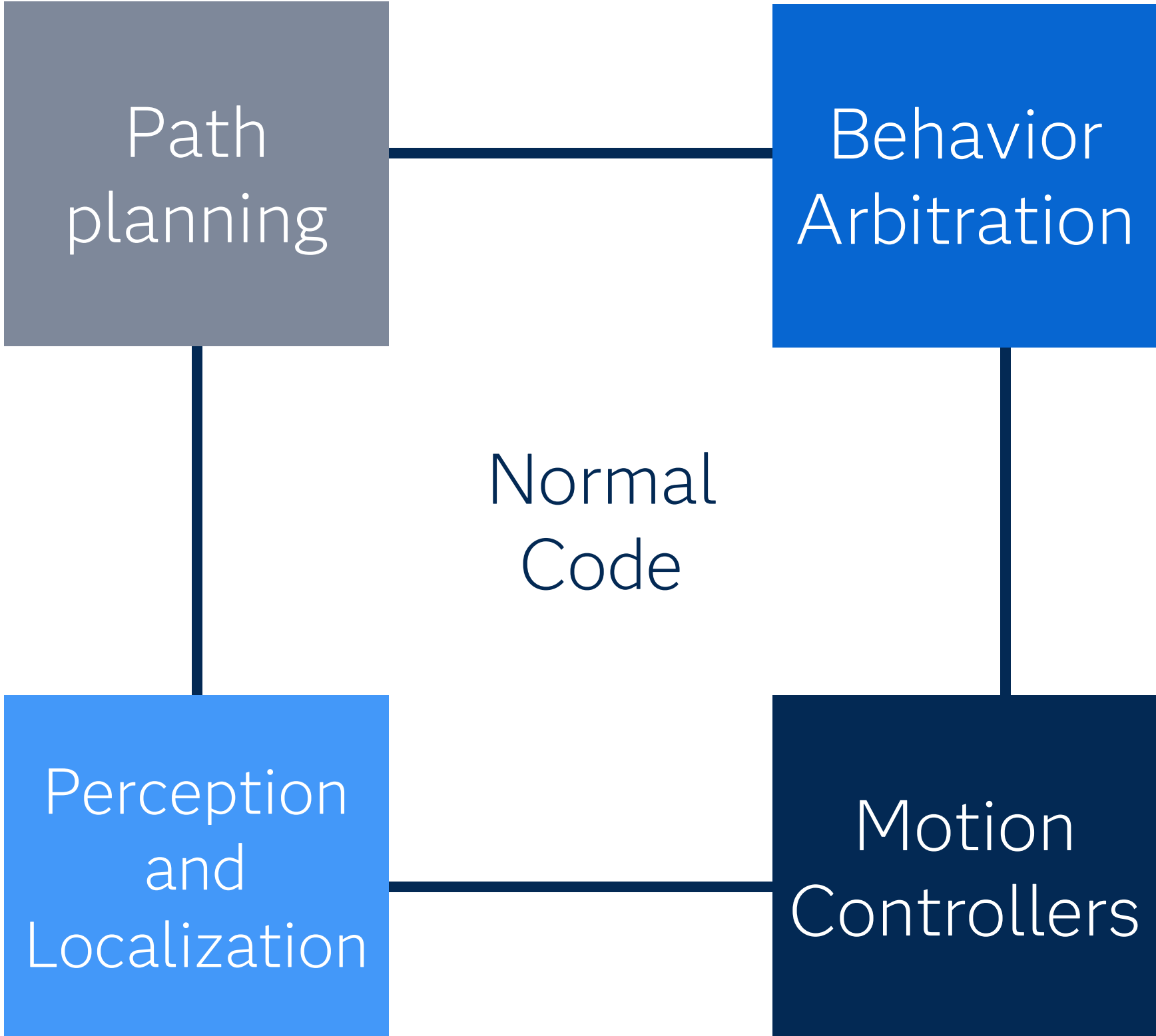
We think that using these models are as simple as...



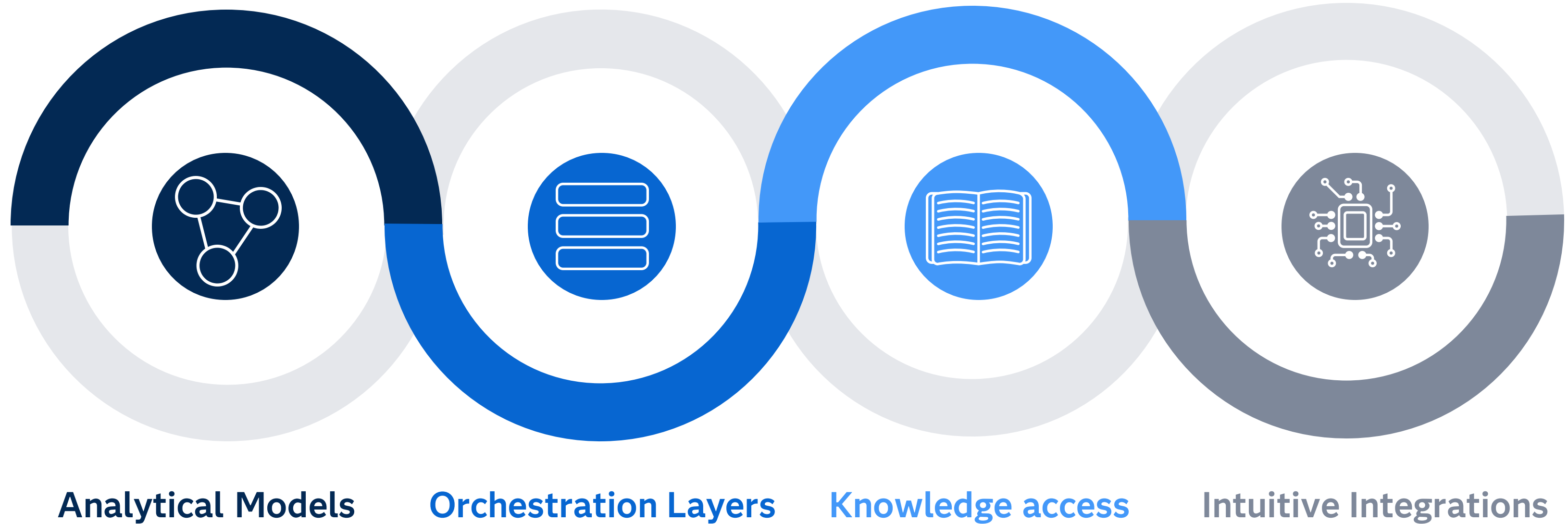
Example – autonomous vehicles



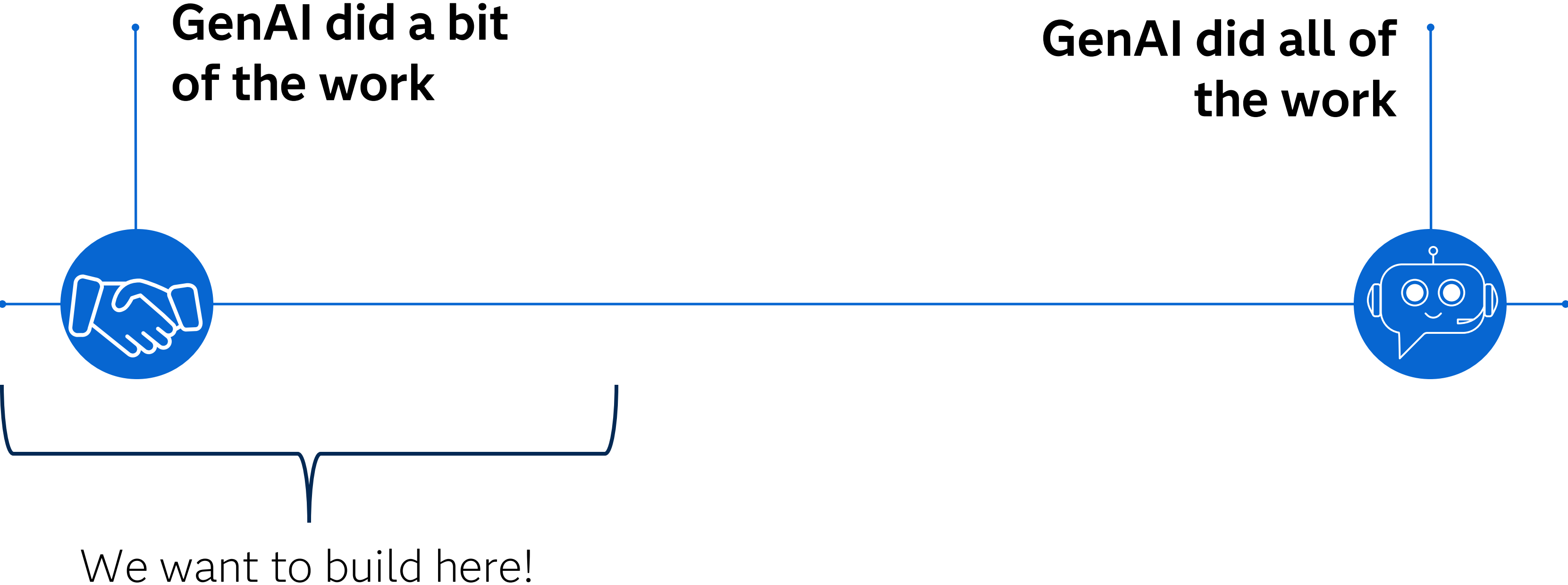
Reality – many models + lots of code!



Valuable GenAI tools require much more than a single 'super model'



Differentiating (and providing value) with GenAI



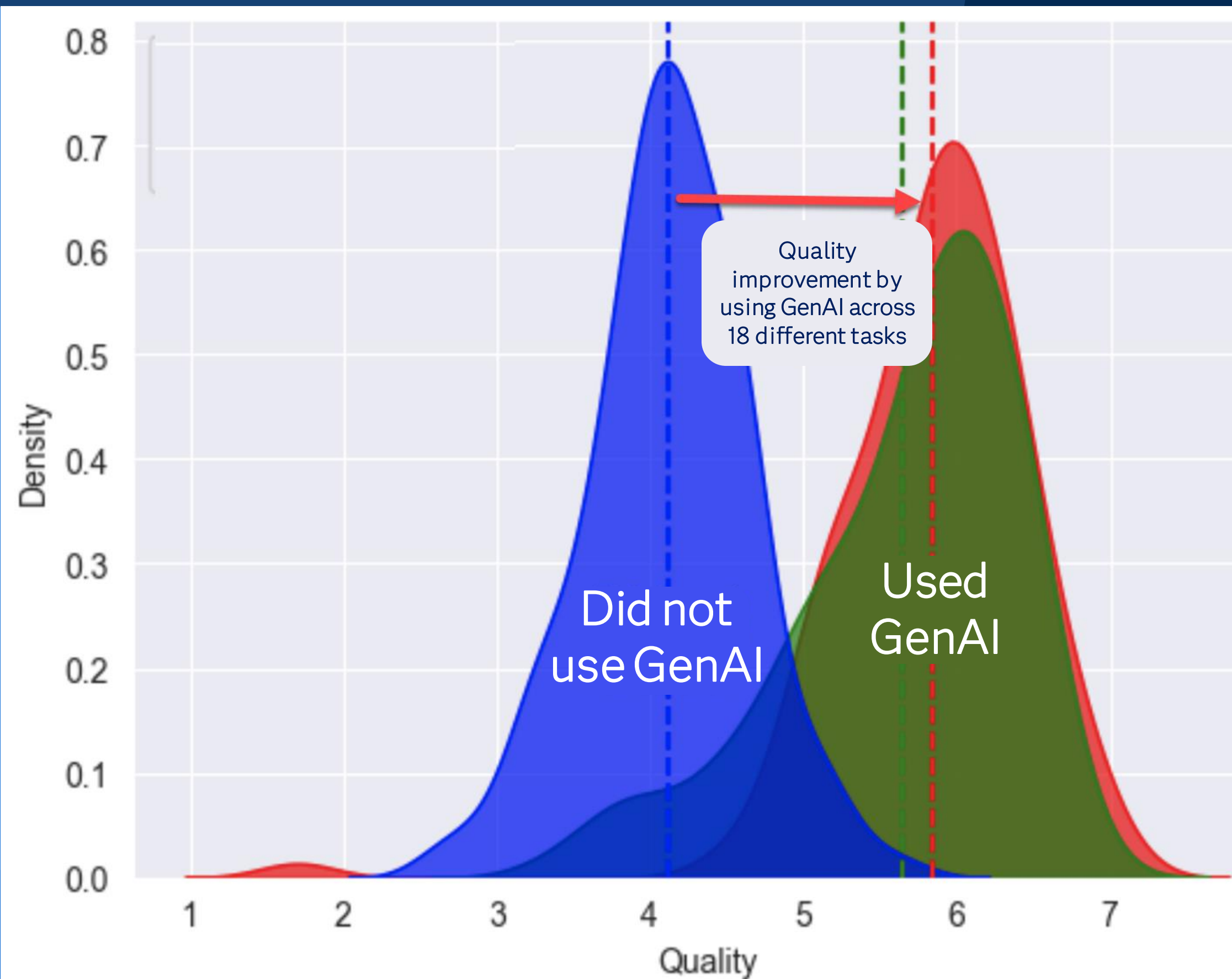


How do we know that integrating Generative AI is useful?

Can GenAI increase Human Productivity?

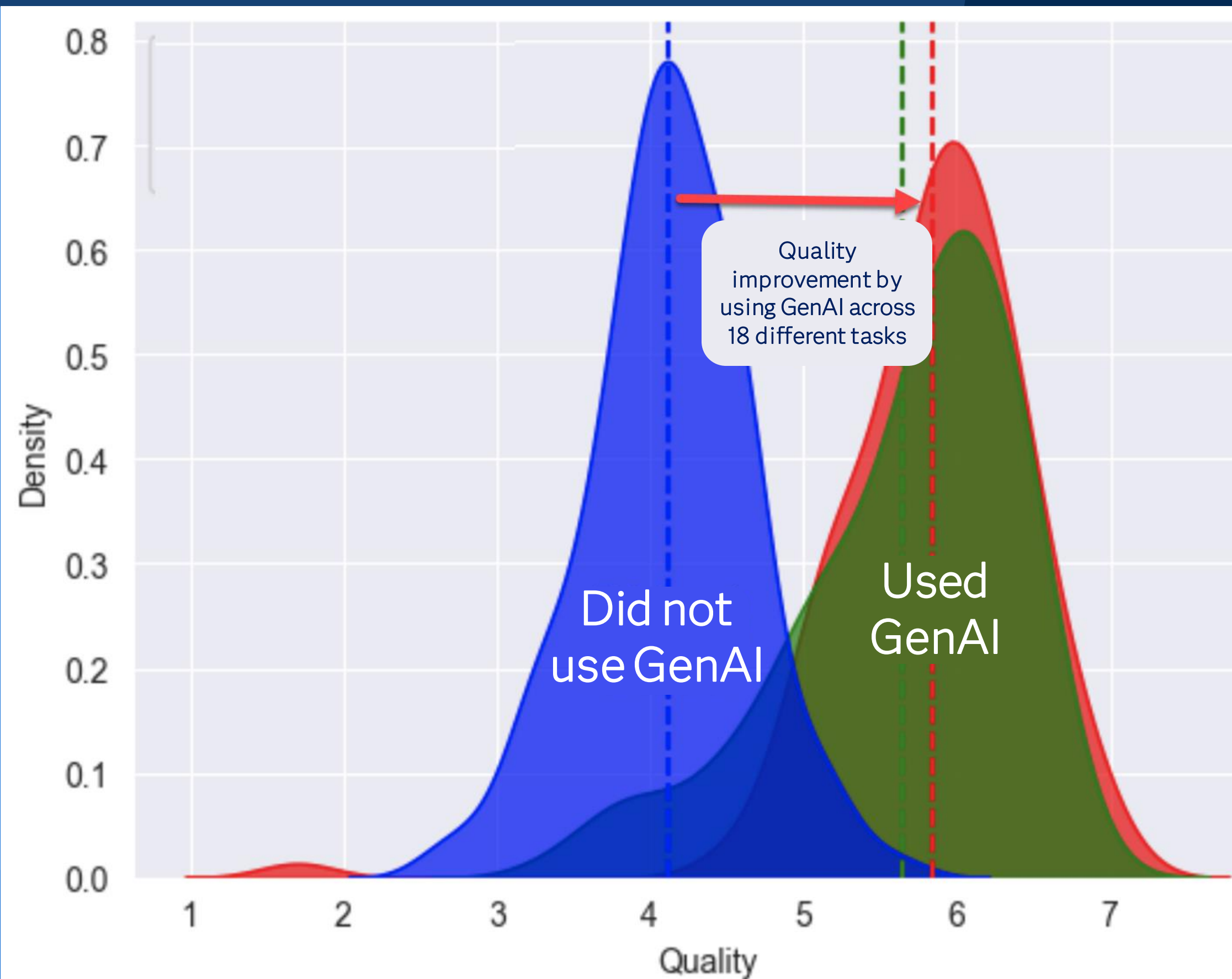
Over 18 tasks GenAI users:

- completed 12% more tasks
- 25.1% quicker
- 40% higher quality



Can GenAI increase Human Productivity?

When AI wasn't suited for the task, users were [19% less likely](#) to produce correct solutions!





How do we do we build with Generative AI in CI?

Generative AI Strategy

For 2024 and beyond

CI360's GenAI Focus Areas

Content Generation

Recommend subject lines, adjust tone/style of content, email generation with RAG.

Segmentation

Build audiences from marketer descriptions, chat with an assistant to better understand your audience.

Orchestration

Create customer journeys from text descriptions, configure objects (tasks, segments) through GenAI assistants.

User Experience

Chat assistant for navigation, enablement, and providing instructions on how to accomplish tasks in CI360.

Metadata Generation

Classify content in our system, apply analytics, surface insights to users.

Custom Integrations

Allow customers to define their own integrations with LLMs for niche use cases.

Strategic Principles for building with GenAI

1

Incremental Development

Purpose-built, tailored capabilities

2

Purpose over Hype

Leverage GenAI where it aligns with strategic goals.

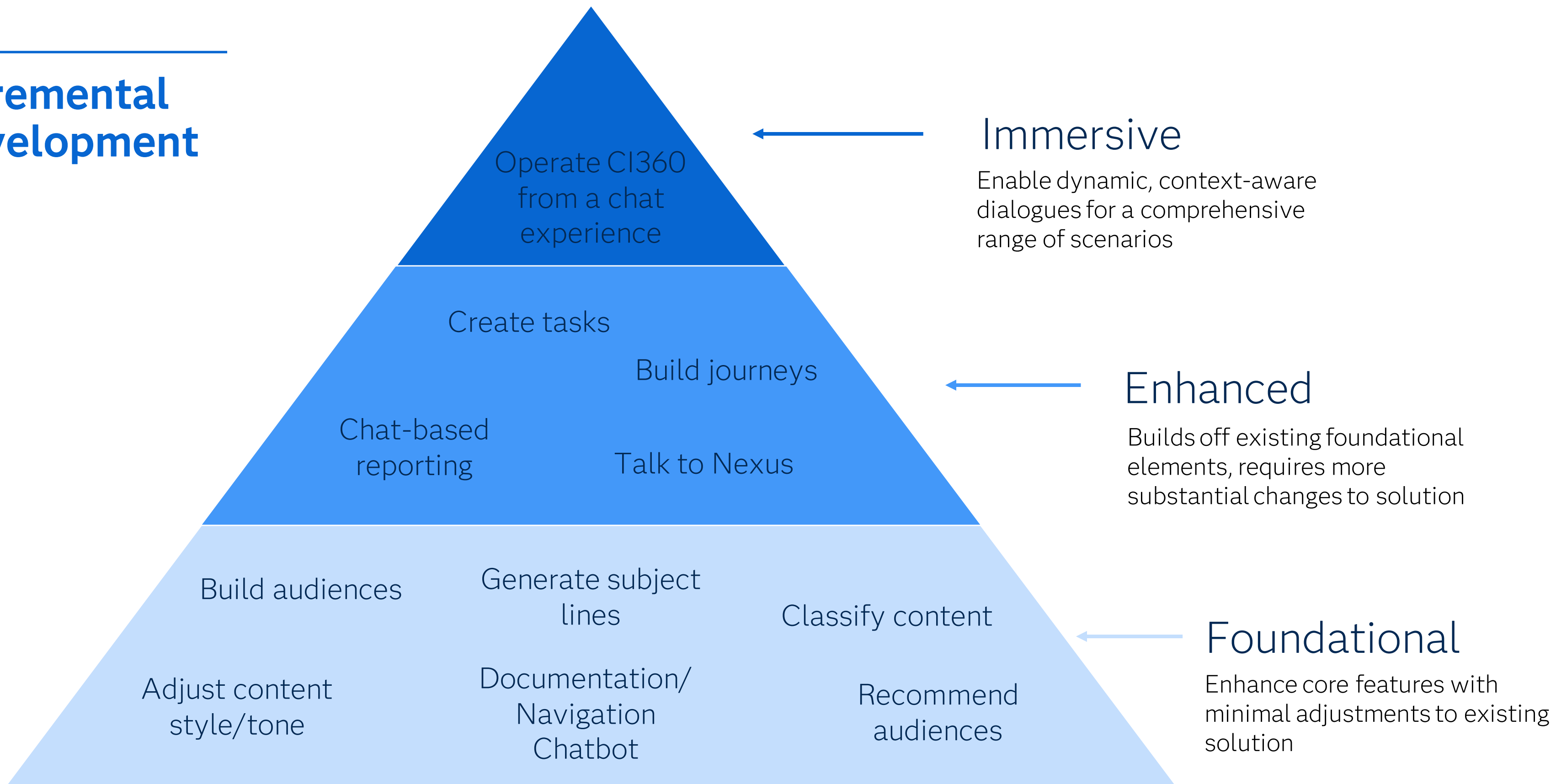
3

Reduce Time to Value

Let users be more productive on our solutions.

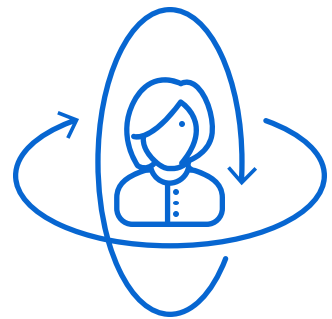
3

Incremental Development



2

Purpose over Hype



Solution Driven Development

Identify problems or needs and seek the appropriate technology to address it.

Technology Driven Development

Seeking applications for a particular technology, often driven by the excitement and potential.



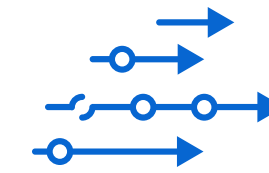
1

Reduce Time to Value

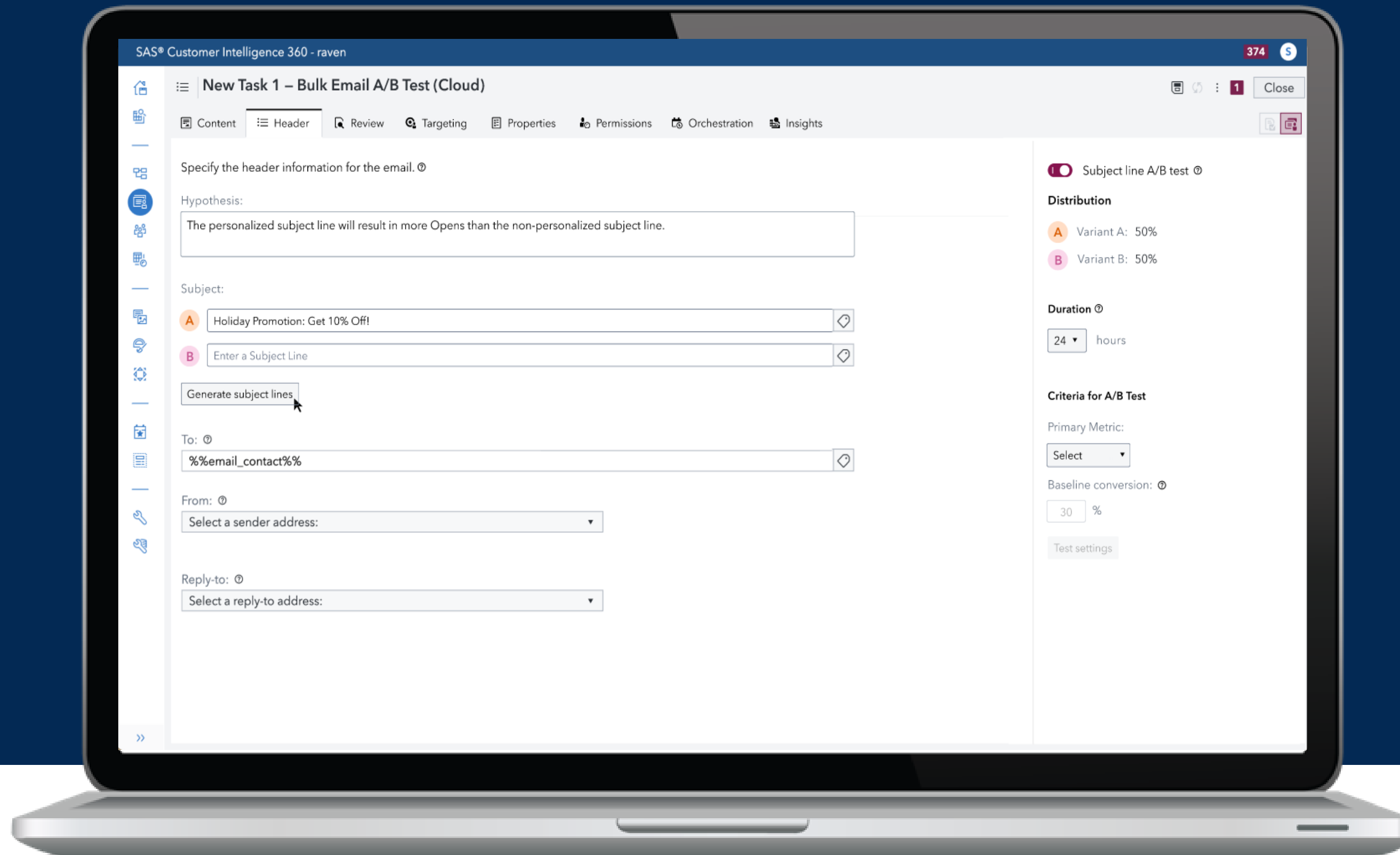


2024 Generative AI Preview

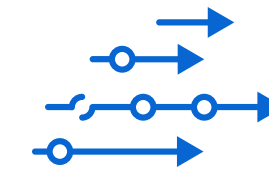
A/B Subject Line Generation



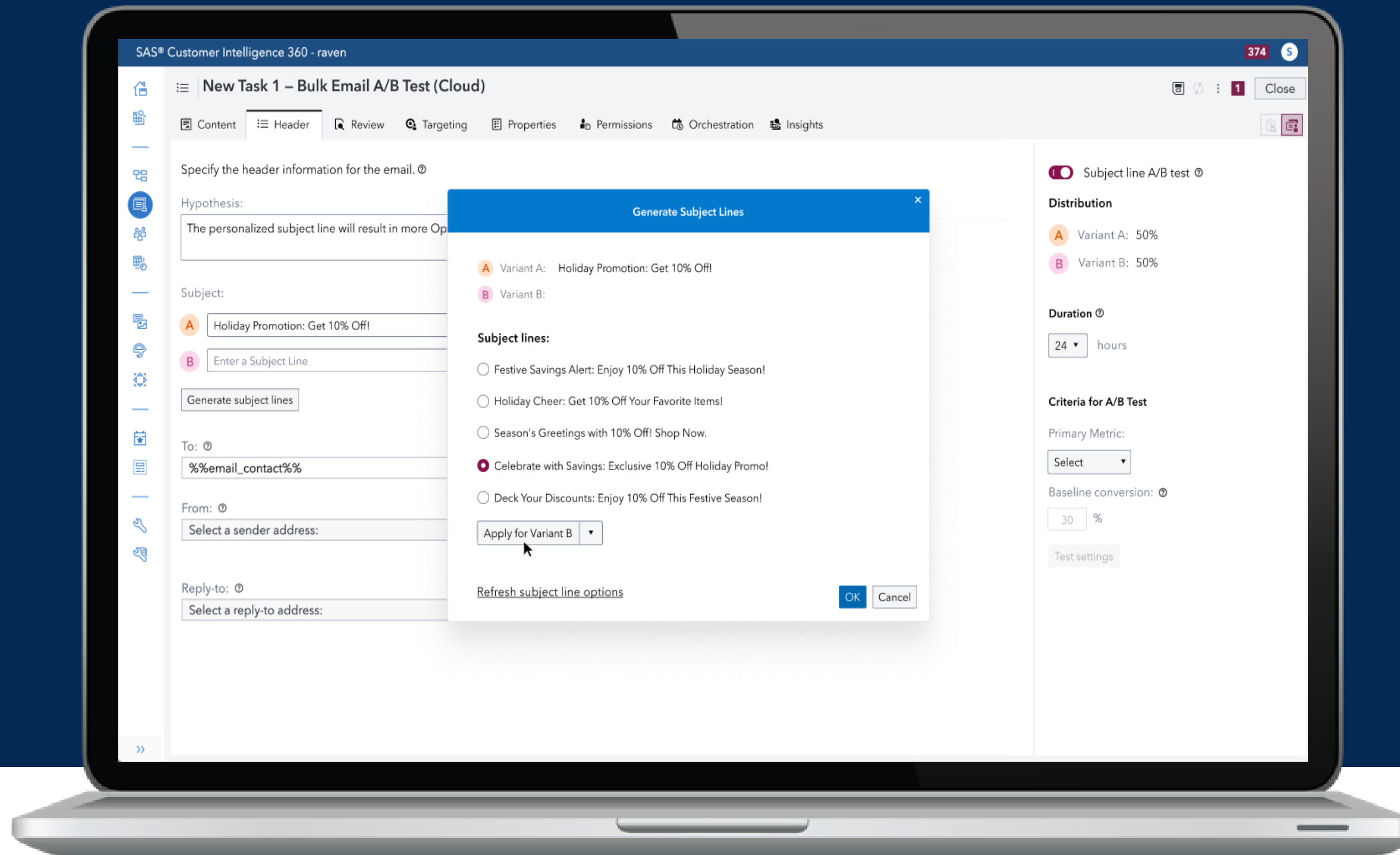
Recommendations



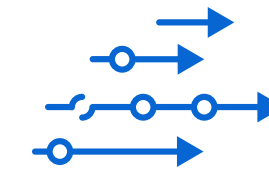
A/B Subject Line Generation



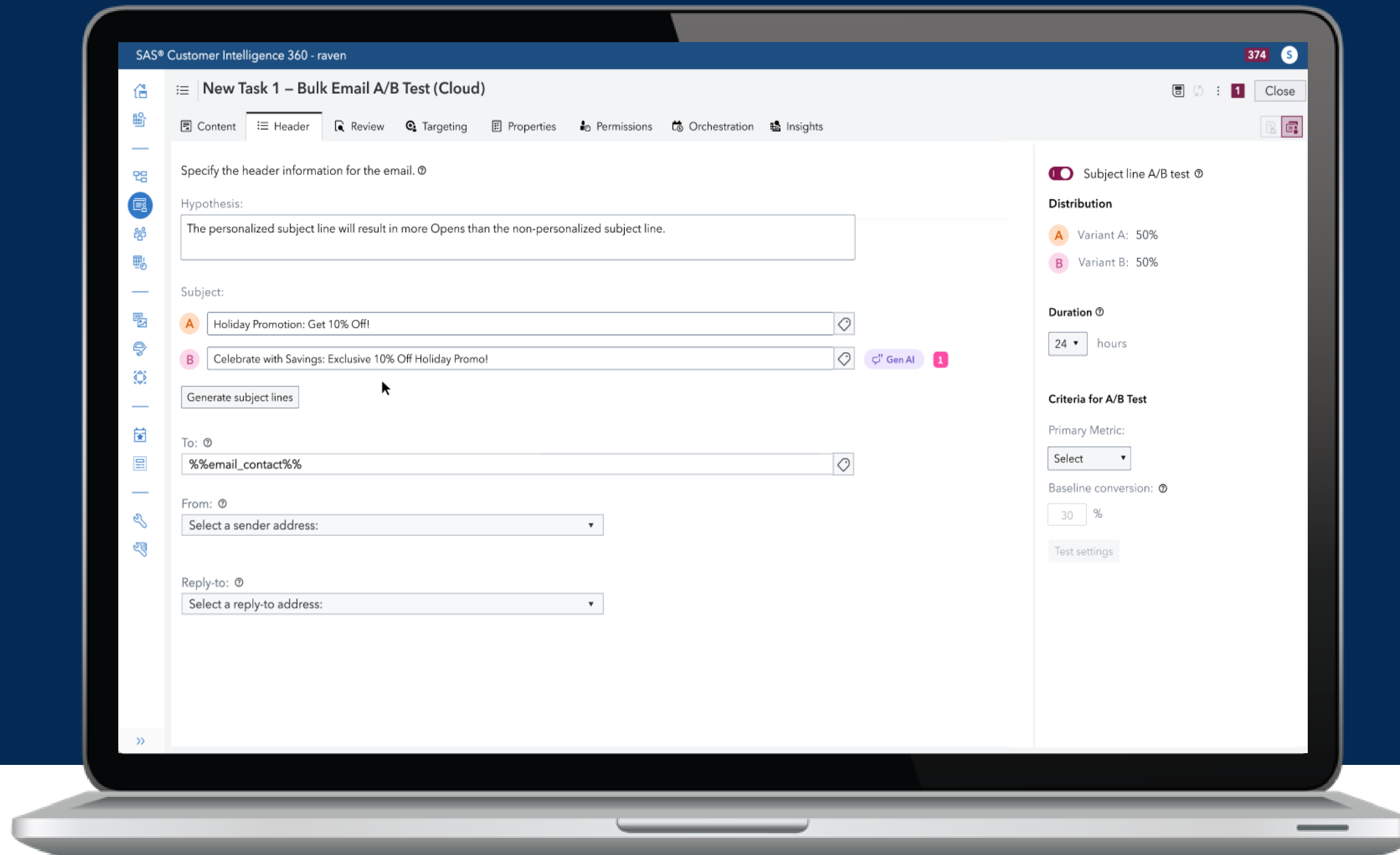
Recommendations



A/B Subject Line Generation



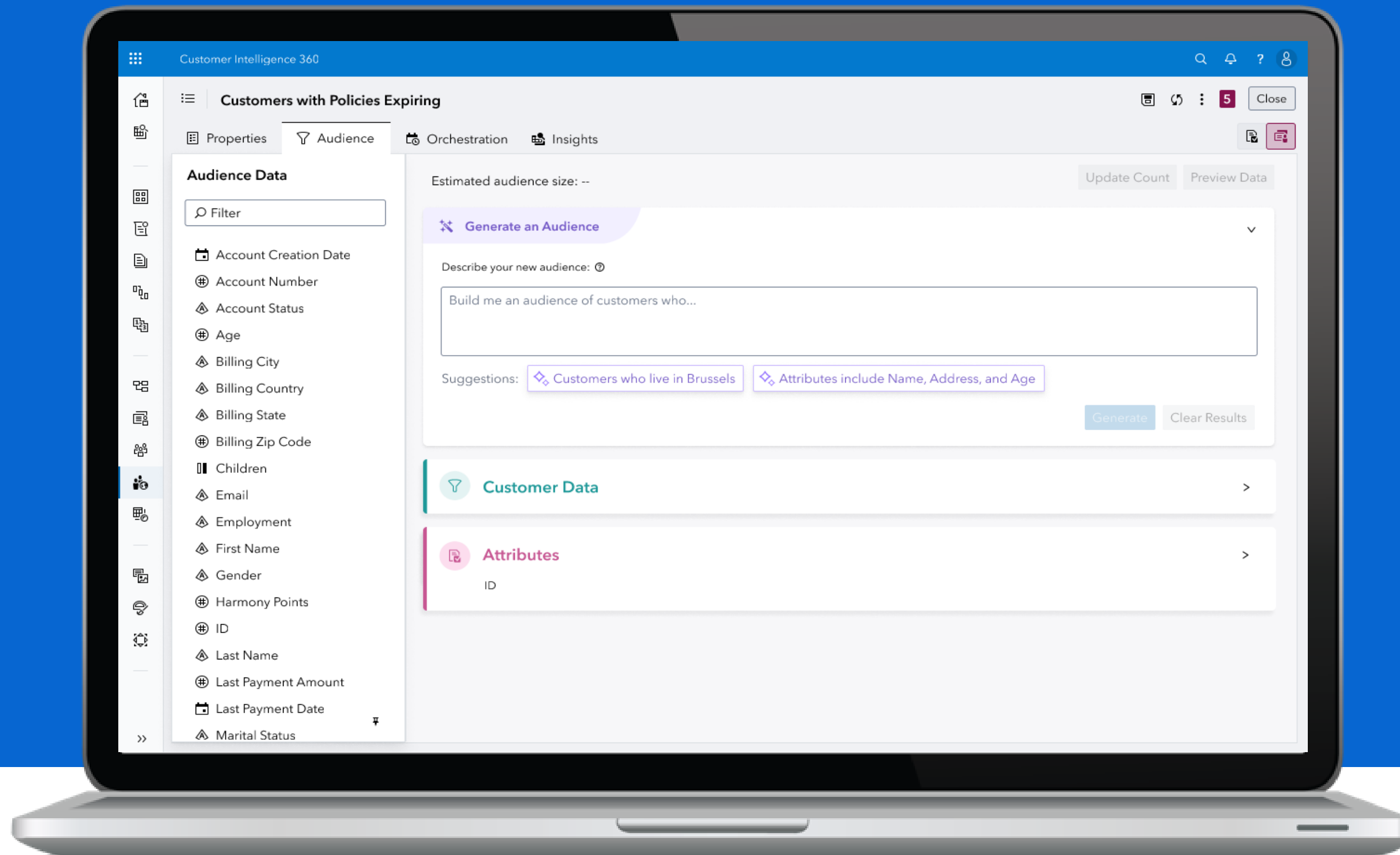
Recommendations



Audience Generation



Enhance decision making



Audience Generation



Enhance decision making

The screenshot displays the SAS Customer Intelligence 360 interface for a dashboard titled "Customers with Policies Expiring". The interface is divided into several sections:

- Left Panel (Audience Data):** A list of attributes for filtering, including Account Creation Date, Account Number, Account Status, Age, Billing City, Billing Country, Billing State, Billing Zip Code, Children, Email, Employment, First Name, Gender, Harmony Points, ID, Last Name, Last Payment Amount, Last Payment Date, and Marital Status.
- Top Right:** Search, notification, and user profile icons, along with a "Close" button.
- Central Panel (Audience Generation):**
 - Estimated audience size: --
 - Buttons: "Update Count", "Preview Data"
 - Section: "Generate an Audience"
 - Text input: "Describe your new audience: @"
 - Text area: "Build me an audience of customers that have a policy set to expire in 60 days who live in the Syddanmark region. I'd like to also have their customer attributes of name, address, policy date and email address."
 - Suggestions: "Customers who live in Brussels", "Attributes include Name, Address, and Age"
 - Buttons: "Generate", "Clear Results"
- Bottom Panel (Customer Data):**
 - Audience source: "Customer Visit Data - Snowflake"
 - Section: "Include the following:"
 - Filter 1: "Policy End Date" is in the next 60 Days
 - Filter 2: "AND" Region Equals Syddanmark
 - Buttons: "+", "↑", "↓", "🗑️", "🔍"

Chat Assistant



Accelerate onboarding

SAS* Customer Intelligence 360

Craft the Customer Experience

Plan, design, activate and measure customer touchpoints and journeys.

RESOURCE CENTER

- [What's new](#)
- [Help Center](#)
- [Connect with communities](#)
- [Tutorials](#)
- [Contact technical support](#)
- [Tour the home page](#)

I WANT TO

- Create an audience
- Create a segment
- Create an email
- Create a direct marketing list
- Set up a mobile app spot
- Personalize a mobile app
- Create a mobile in-app message
- Create a mobile push notification

MY RECENTLY MODIFIED ITEMS

- [Test Loan Internal Search](#) (Ready • Oct 30, 2023 4:14 PM)

SCHEDULED ITEMS

Name	Type	Scheduled Date	Published By
Facebook Custom Audience	Segment Map	Feb 5, 2024 4:00 AM EST	Rob.Sneath@sas.com

MY RECENT RESULTS

Tenant: Demo - Vertical - Finance (prdfin1)

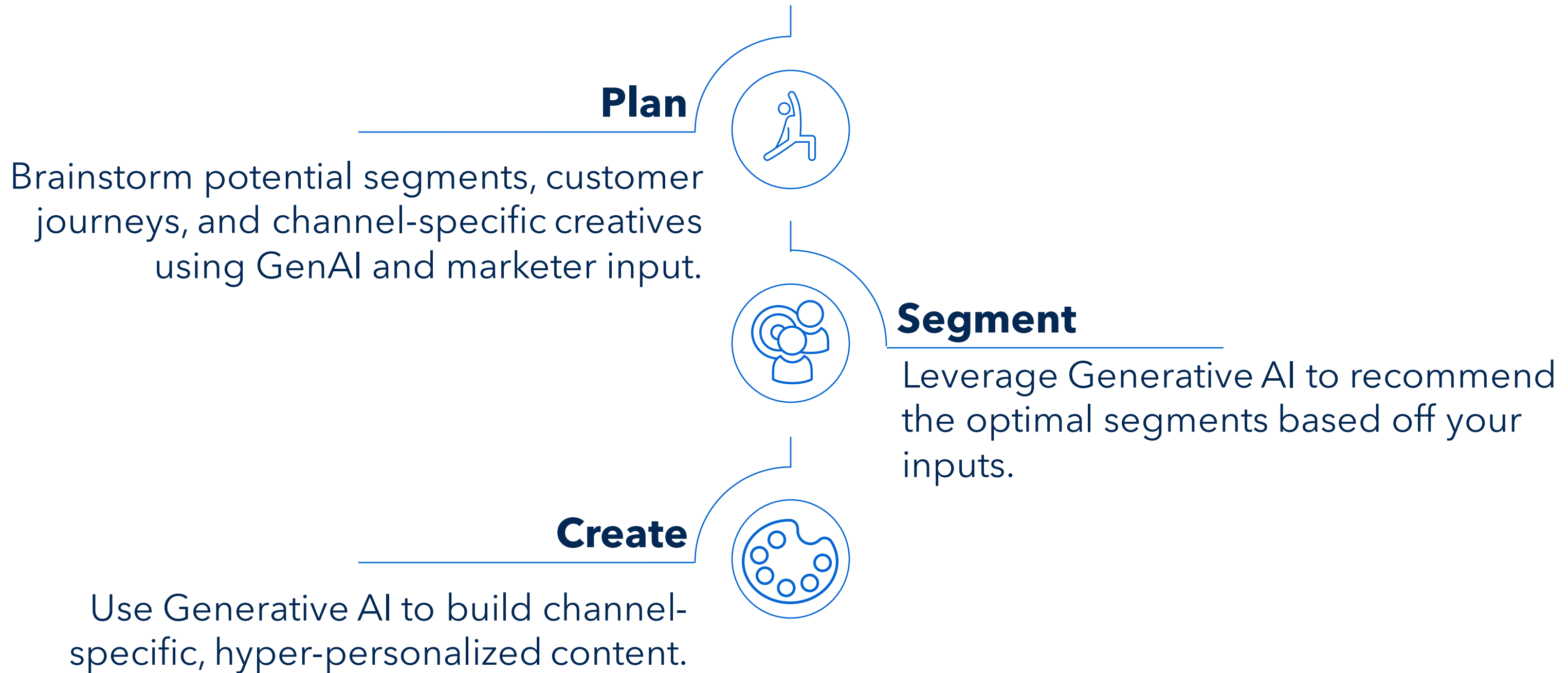
Chat

Hello, I'm a CI360 Assistant powered by generative AI. How can I help you?

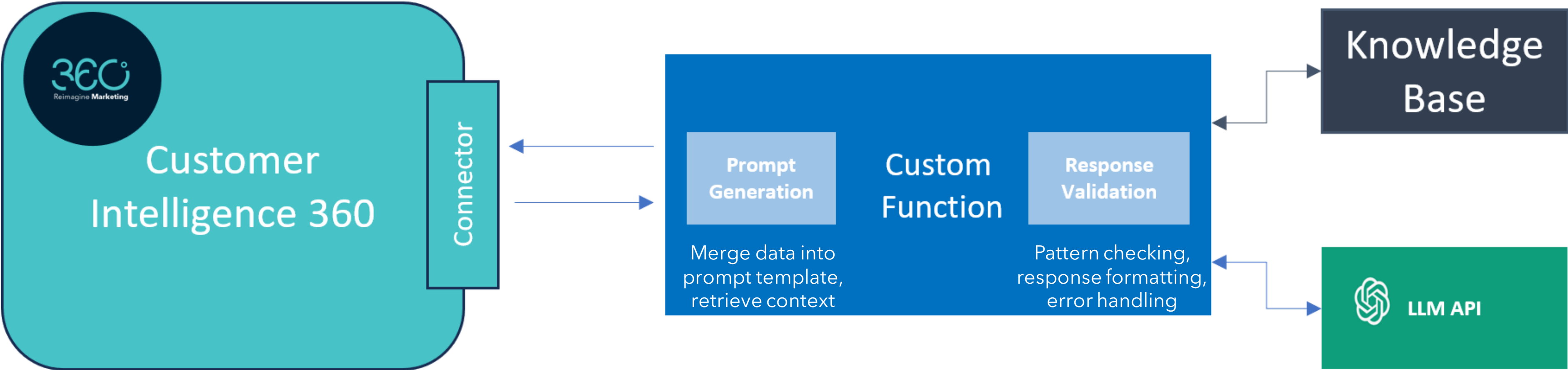
Can | Send

Custom Integrations

Generative AI in Action



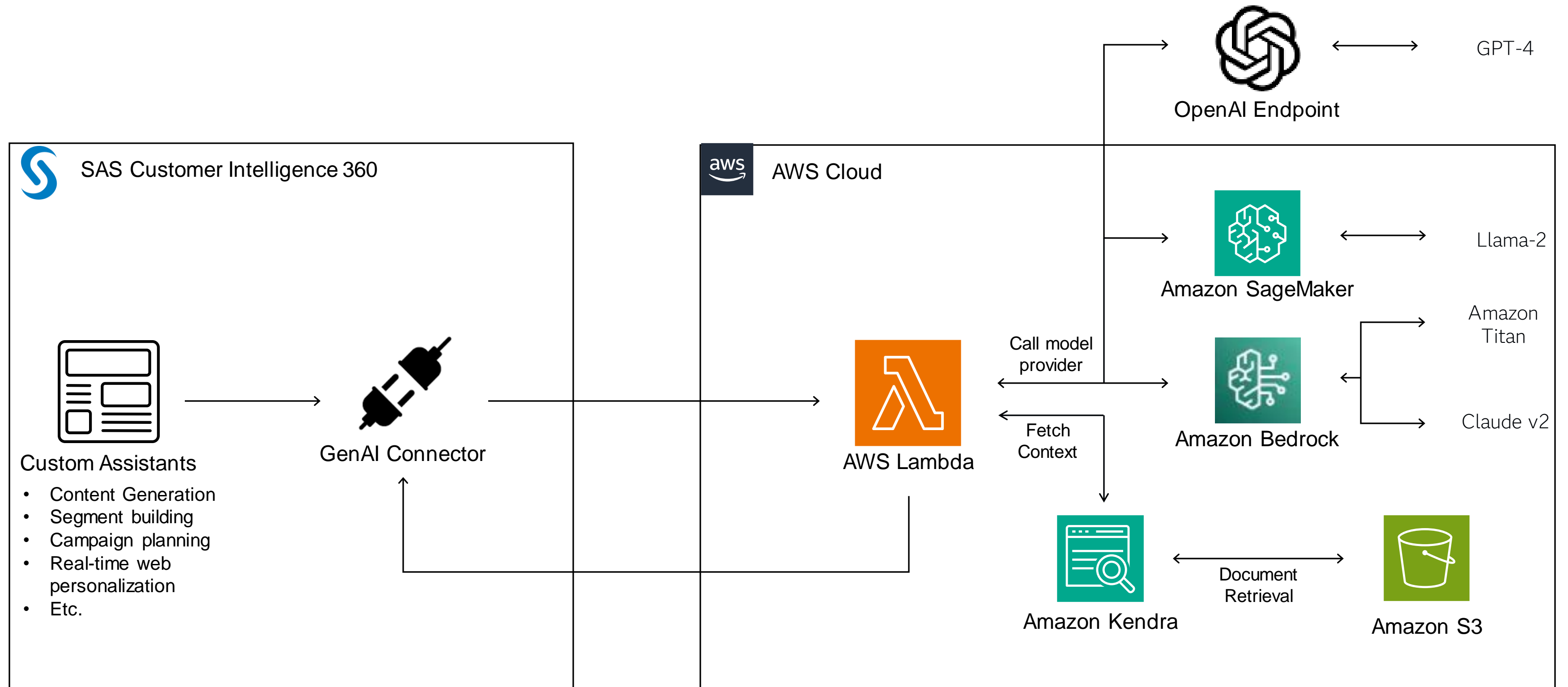
Integration Formula



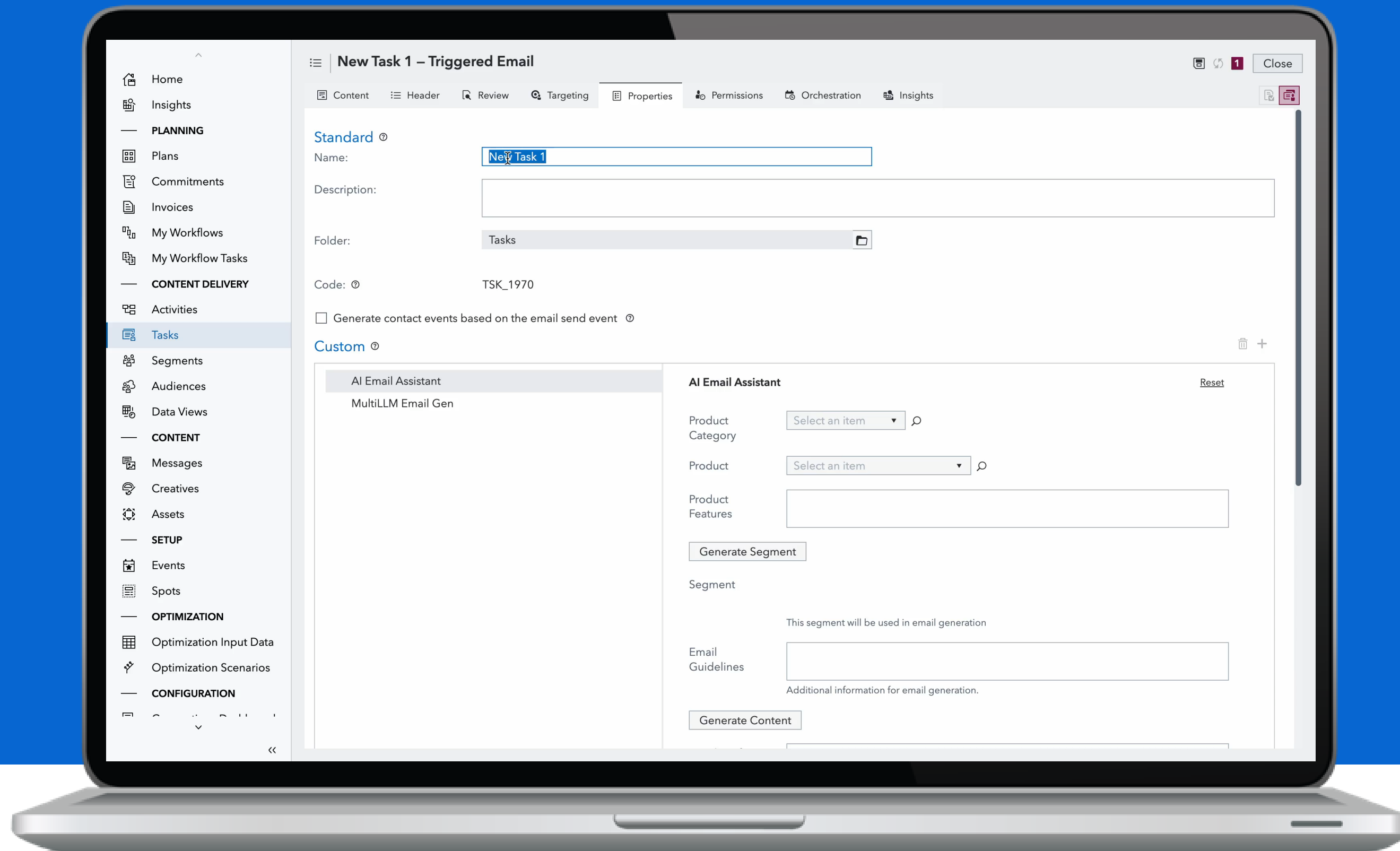
- Input data, eg.:
- natural language as entered by user
 - structured facts, drop-downs etc.
 - real-time and calculated data: customer behavior, analytical insights etc.
 - **Previous AI responses**

Custom Integrations

Bring your own GenAI model (sample AWS architecture)



Custom Integration: Email Assistant



Custom Assistant for SAS Marketing

Advanced Segmentation

1. Contact profile – Data Science Flow			
2.			
Job level	<input type="checkbox"/> Board <input type="checkbox"/> Chairman/Member <input type="checkbox"/> C-level <input type="checkbox"/> Director	<input type="checkbox"/> Division/Department Head <input type="checkbox"/> VP/VP - Associate <input checked="" type="checkbox"/> Manager - Senior	<input checked="" type="checkbox"/> Manager <input checked="" type="checkbox"/> Staff
Job function	<input type="checkbox"/> Education – Students <input type="checkbox"/> Education – Professors <input type="checkbox"/> Finance <input type="checkbox"/> Fraud <input type="checkbox"/> Risk <input checked="" type="checkbox"/> Information Technology <input type="checkbox"/> Marketing <input type="checkbox"/> Production <input type="checkbox"/> Sales	<input type="checkbox"/> General - Administration <input checked="" type="checkbox"/> General - Analytics/Data Science/Business Intelligence <input checked="" type="checkbox"/> General – Consulting <input type="checkbox"/> General – Executive Management <input type="checkbox"/> General - Government Professionals <input type="checkbox"/> General - Health/Medical Professions	<input type="checkbox"/> General – Human Resources <input type="checkbox"/> General - Legal <input type="checkbox"/> General - Operations <input type="checkbox"/> General - Purchasing & Procurement <input checked="" type="checkbox"/> General - Research & Development
Job title or keywords	<input checked="" type="checkbox"/> Business Intelligence <input checked="" type="checkbox"/> Analyst <input checked="" type="checkbox"/> Analytics <input checked="" type="checkbox"/> Data <input checked="" type="checkbox"/> Insights <input checked="" type="checkbox"/> Reporting <input type="checkbox"/> Brand	<input checked="" type="checkbox"/> Customer <input checked="" type="checkbox"/> Architect <input checked="" type="checkbox"/> Systems <input type="checkbox"/> Actuary <input checked="" type="checkbox"/> Statistician <input type="checkbox"/> Risk <input type="checkbox"/> Fraud	<input type="checkbox"/> Digital <input type="checkbox"/> Operations <input checked="" type="checkbox"/> Other: Data Scientists, Machine Learning Engineers, Business Analysts
Interest Area	<input checked="" type="checkbox"/> Analytics <input checked="" type="checkbox"/> Artificial Intelligence <input checked="" type="checkbox"/> Data Management	<input checked="" type="checkbox"/> Business Intelligence <input type="checkbox"/> Customer Intelligence <input checked="" type="checkbox"/> Risk	<input checked="" type="checkbox"/> Fraud <input checked="" type="checkbox"/> Platform
SAS user profile	<input type="checkbox"/> SAS user only <input type="checkbox"/> SAE only		
Language			

Segment Profiler [Reset](#)

Segment Description:

Job Levels:

Job Functions:

Job Title or Keywords:

Interest Areas:

SAS User Profile:

Other Recommendations:

- Years of Experience
- Education Level
- Specific skill set
- Industry of Work
- Company Size
- Level of SAS usage (casual, moderate, intensive)
- Membership in Professional Organizations
- Preferred Learning Method (online courses, webinars, etc.)
- Social Media Presence / Engagement
- Region or Location
- Languages Spoken
- Preferred time for communication.
- Engagement level with previous communications.