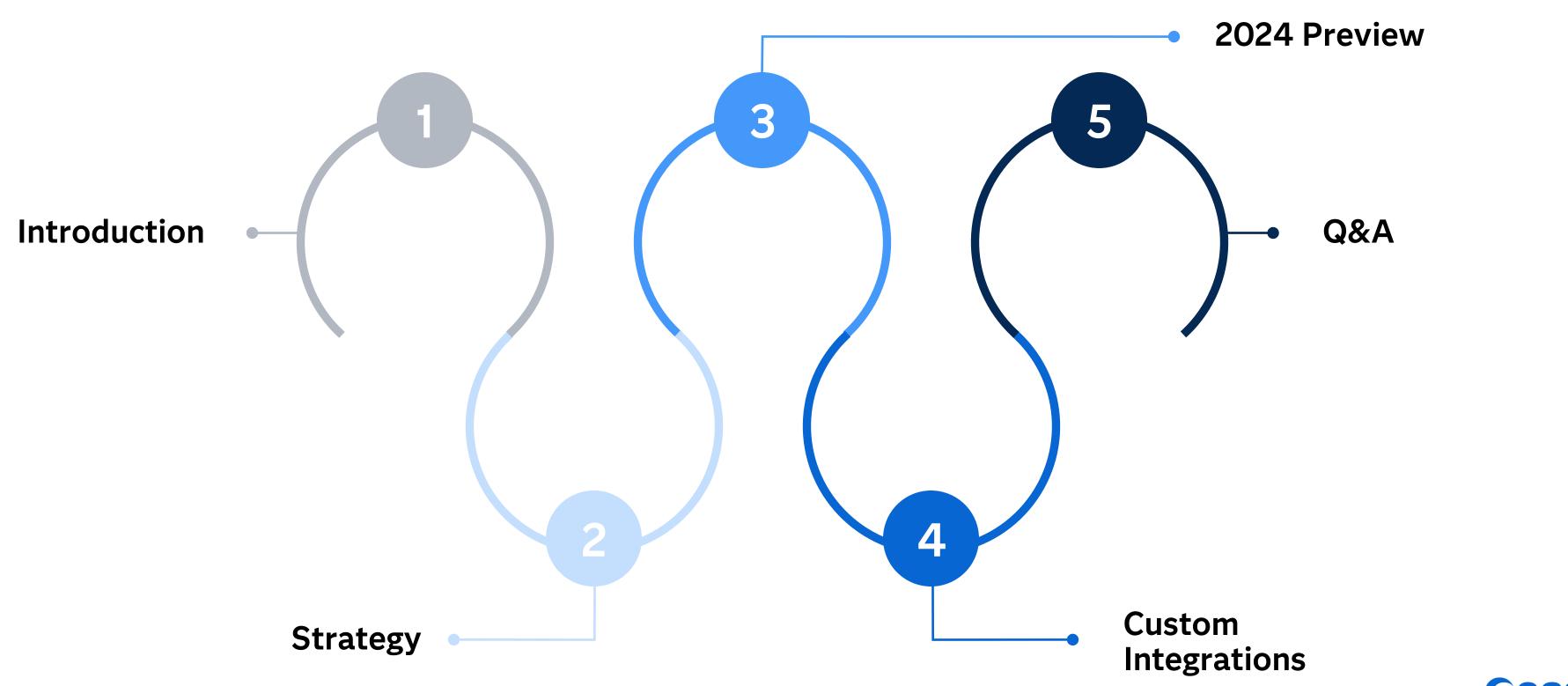
CI360 and Generative AI

Mac Carlton, Global Customer Intelligence Practice











How do we effectively integrate Generative AI into solutions?



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

inputs

Super Powerful GenAl Model!

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Example – autonomous vehicles

GPS, Cameras, LIDAR, Sensors,

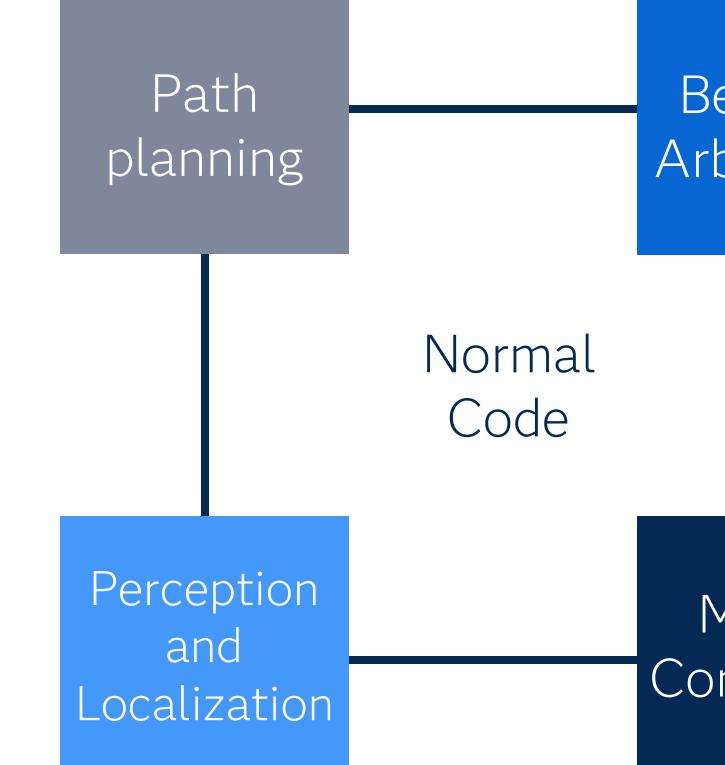
• • •

Autonomous Vehicle Model





Reality – many models + lots of code!



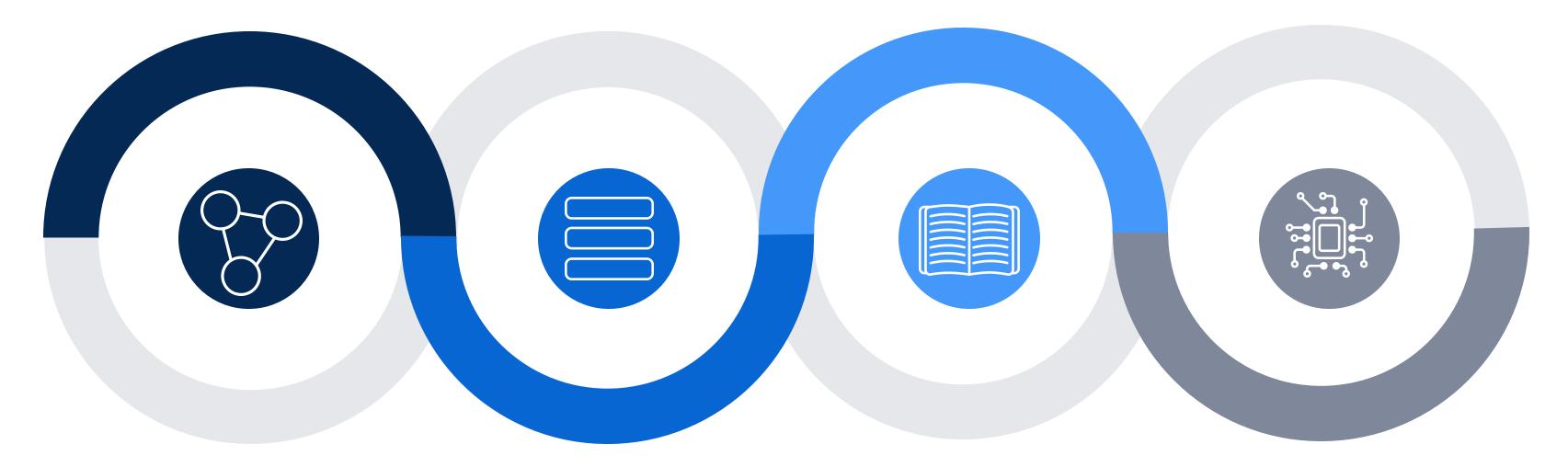


Behavior Arbitration

Motion Controllers



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



Analytical Models

Orchestration Layers

Knowledge access

access Intuitive Integrations

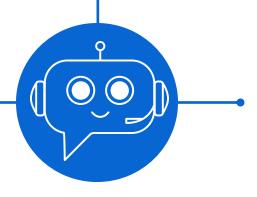


Differentiating (and providing value) with GenAI

GenAl did a bit of the work We want to build here!

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GenAI did all of the work







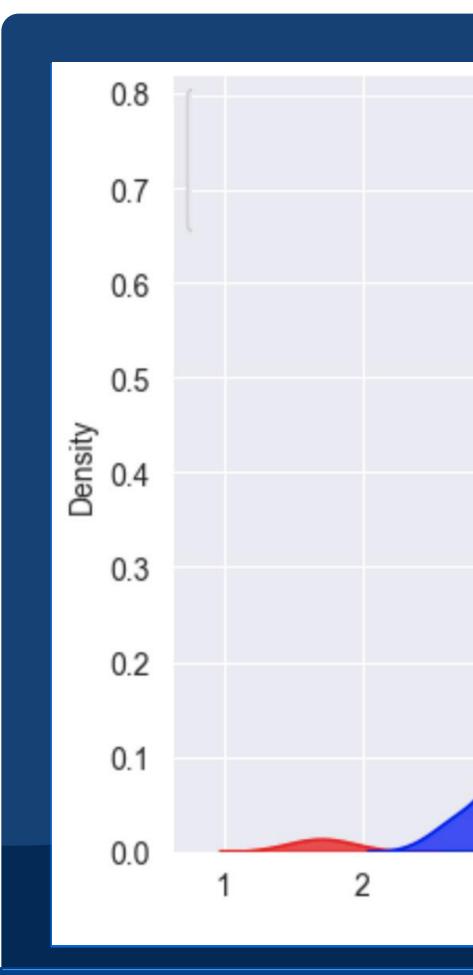
How do we know that integrating Generative AI is useful?



Can GenAl increase Human Productivity?

Over 18 tasks GenAl users:

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



SOURCE:

HBS + Wharton + MIT professors' study with 758 BCG consultants Field Experimental Evidence of the Effects of AI on Knowledge Worker Productivity and Quality

3

Quality improvement by using GenAI across 18 different tasks

5

Quality

Did not use GenAl

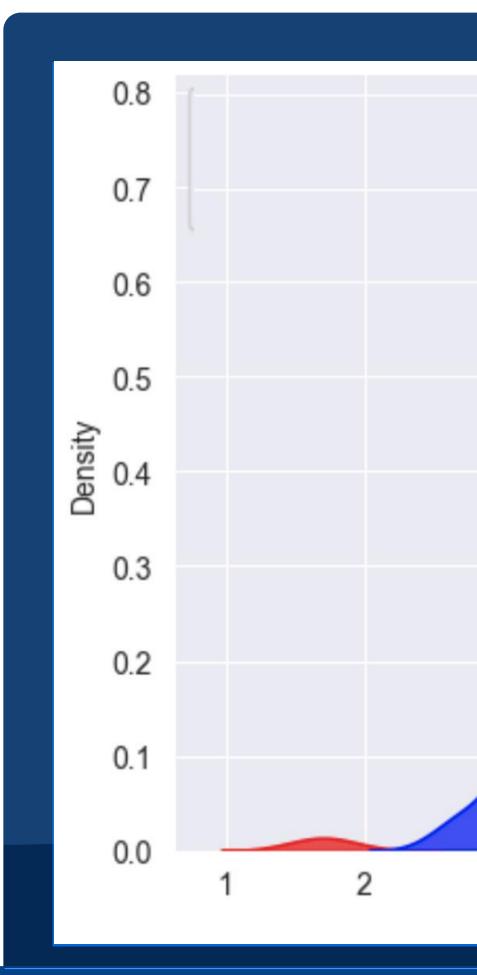
Used GenAl

6

7

Can GenAl increase Human Productivity?

When AI wasn't suited for the task, users where <u>19% less likely</u> to produce correct solutions!



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HBS + Wharton + MIT professors' study with 758 BCG consultants Field Experimental Evidence of the Effects of AI on Knowledge Worker Productivity and Quality

3

Quality improvement by using GenAI across 18 different tasks

5

Quality

Did not use GenAl

Used GenAl

6

7



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



Generative Al Strategy For 2024 and beyond



Cl360's GenAl 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.

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.

Orchestration

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

Custom Integrations

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



Strategic Principles for building with GenAI

Incremental Development

Purpose-built, tailored capabilities

Hype

Leverage GenAl where it aligns with strategic goals.

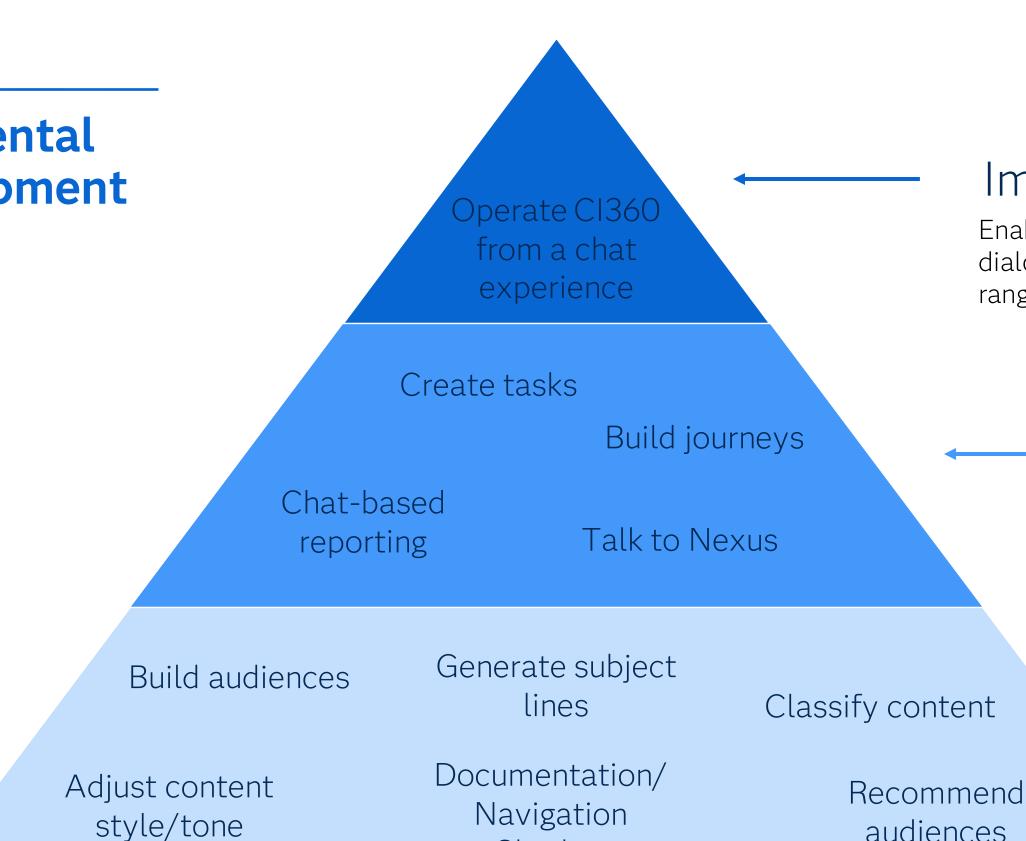
Purpose over

Reduce Time to Value

Let users be more productive on our solutions.



Incremental **Development**



Chatbot

Immersive

Enable dynamic, context-aware dialogues for a comprehensive range of scenarios

Enhanced

Builds off existing foundational elements, requires more substantial changes to solution

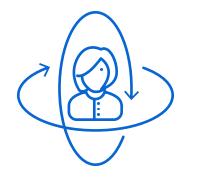
audiences

Foundational

Enhance core features with minimal adjustments to existing solution



Purpose over Hype



Solution Driven Development

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

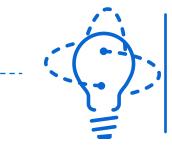
Seeking applications for a particular technology, often driven by the excitement and potential.

Technology Driven Development









Enhance decision making

> Recommend actions

Modulate content



2024 Generative Al Preview





A/B Subject Line Generation

B Enter a Subject Line Generate subject lines	Specify the header information for the email. Hypothesis: The personalized subject line will result in more Opens than the non-personalized subject line. Subject: A Holiday Promotion: Get 10% Off! B Enter a Subject Line Generate subject lines To: Sefect a sender address: Reply-to:	Specify the header information for the email. Hypothesis: The personalized subject line will result in more Opens than the non-personalized subject line. Subject: A Holiday Promotion: Get 10% Off! B Enter a Subject Line Generate subject line To: Sefect a sender address: Reply-to:	i≡ New Task 1 – Bulk Email A/B	rest (Cloud)			
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Hypothesis: The personalized subject line will result in more Opens than the non-personalized subject line. Subject: A Holiday Promotion: Get 10% Off! B Enter a Subject Line Generate subject lines To: ① %%email_contact%% From: ② Select a sender address: Reply-to: ①	Hypothesis: The personalized subject line will result in more Opens than the non-personalized subject line. Subject: A Holiday Promotion: Get 10% Off1 B Enter a Subject Line Generate subject lines To: To: Select a sender address: Reply-to:	Hypothesis: The personalized subject line will result in more Opens than the non-personalized subject line. Subject: A Holiday Promotion: Get 10% Off! B Enter a Subject Line Cenerate subject lines To: 0 %%email_contact%% From: 0 Select a sender address: Reply-to: 0	Specify the header information for the em	nail. @			
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To: [®] %%email_contact%% From: [®] Select a sender address: Reply-to: [®]	To: ⁽¹⁾ %%email_contact%% From: ⁽¹⁾ Select a sender address: Reply-to: ⁽²⁾	To: [®] %%email_contact%% From: [®] Select a sender address: Reply-to: [®]	B Enter a Subject Line				<
To: %%email_contact%% From: Select a sender address: Reply-to:	To: %%email_contact%% From: Select a sender address: Reply-to:	To: ⑦ %%email_contact%% From: ⑦ Select a sender address: ▼ Reply-to: ⑦	Generate subject lines				
%%email_contact%% From: ① Select a sender address: •	%%email_contact%% From: ① Select a sender address: •	%%email_contact%% From: ① Select a sender address: Reply-to: ①	A				
From: ⁽¹⁾ Select a sender address: Reply-to: ⁽²⁾	From: ① Select a sender address: Reply-to: ①	From: ⑦ Select a sender address: ▼ Reply-to: ⑦					
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Reply-to: O	Reply-to: 🔊	Reply-to: 🔊					
			Select a sender address:		•		
Select a reply-to address:	Select a reply-to address:	Select a reply-to address:					
			Select a reply-to address:		•		

Recommend actions

		374 S	
Subject line A Distribution A Variant A: 50% B Variant B: 50%	6		
Duration 24 • hours Criteria for A/B Test Primary Matrici			
Primary Metric: Select Baseline conversion: 30 % Test settings	Ø		I



A/B Subject Line Generation

© Customer Intelligence 360 - raven	
i≡ New Task 1 – Bulk Email A/B Test	(Cloud)
■ Content ⋮≡ Header Review Ta	argeting 🗉 Properties 🌡 Permissions 📩 Orchestration 👪 Insights
Specify the header information for the email. ®	
Hypothesis:	Generate Subject Lines
The personalized subject line will result in more	
	A Variant A: Holiday Promotion: Get 10% Off!
Subject:	B Variant B:
A Holiday Promotion: Get 10% Off!	California di Santa
B Enter a Subject Line	Subject lines: Festive Savings Alert: Enjoy 10% Off This Holiday Season!
Generate subject lines	 Holiday Cheer: Get 10% Off Your Favorite Items!
Selerate subject lines	
To: 0	 Season's Greetings with 10% Off! Shop Now.
%%email_contact%%	Celebrate with Savings: Exclusive 10% Off Holiday Promo!
From: [®]	O Deck Your Discounts: Enjoy 10% Off This Festive Season!
Select a sender address:	Apply for Variant B
Reply-to: ⑦ Select a reply-to address:	Refresh subject line options OK Cancel

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Recommend actions

			374 5	
	a (5	: 1		
			8	
Cubiest line A/D	and a			
Subject line A/E Distribution	test o			
A Variant A: 50%				
B Variant B: 50%				
Duration @				
24 V hours				
Criteria for A/B Test				
Primary Metric:				
Baseline conversion: @)			
30 %				
Test settings				
				1



A/B Subject Line Generation

Spec Hypo The Subjo A B	ify the header info othesis: personalized subje ect: Holiday Promotion Celebrate with Sav	ormation for the en		Properties an the non-person	Permissions	Insights	
Hypo The Subje A B	othesis: personalized subje ect: Holiday Promotion	ect line will result i		an the non-person	alized subject line.		
The Subje	personalized subje ect: Holiday Promotion		n more Opens tha	an the non-person	alized subject line.		
Subju A B	ect: Holiday Promotion		n more Opens tha	an the non-person	alized subject line.		
AB	Holiday Promotion	: Get 10% Off!				 	J
AB	Holiday Promotion	: Get 10% Off!					
В		: Get 10% Off!					
_	Celebrate with Sav					\Diamond]
Gen		rings: Exclusive 10%	6 Off Holiday Promo	o!		\bigcirc	Ç" Ger
	erate subject lines	k					
To: (0	
70%	email_contact%%)				 \Diamond	
From							
Sel	ect a sender addre	ess:			v		
Repl	y-to: ወ						
_	ect a reply-to addr	ress:			•		

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Recommend actions

			E	3 74 S	
		Ø	: 1	Close	
		~			
Subject line A/E Distribution	o test	0			
A Variant A: 50%					
B Variant B: 50%					
Duration ®					
24 ▼ hours					
Criteria for A/B Test					
Primary Metric:					
Select •					
Baseline conversion: @	Ð				
30 %					
Test settings					
		-			



Audience Generation

	Customer Intelligence 360		Q Q ? 8
æ	E Customers with Policies	Expiring	E 🕼 : 5 Close
歐	E Properties 🖓 Audience	to Orchestration 🖷 Insights	R 🖪
	Audience Data	Estimated audience size:	Update Count Preview Data
E	₽ Filter	St Generate an Audience	~
Ð	 Account Creation Date Account Number 	Describe your new audience: ③	
ojo	Account Status	Build me an audience of customers who	
12	⊕ Age		
	Billing City	Suggestions: 🗞 Customers who live in Brussels 🔕 Attributes include Name, Address, and Age	
铝	Billing Country	Autoutes include Name, Address, and Age	
	▲ Billing State⊕ Billing Zip Code		Generate Clear Results
683	Children		
0	lemail	V Customer Data	>
B	Employment		
	ℰ First Name	R Attributes	>
		ID	
9	 		
¢	& Last Name		
	Hast Payment Amount		
	苗 Last Payment Date ∓		
>>	A Marital Status		

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Enhance decision making



Audience Generation

≅ Customers with Policies Ex	xpiring
Properties Audience	to Orchestration 🖷 Insights
Audience Data	Estimated audience size: Update Count Preview Data
Ø Filter	☆ Generate an Audience
 Account Creation Date Account Number 	Describe your new audience: ③
Account Number	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
⊕ Age	their customer attributes of name, address, policy date and email address.
Billing City	Suggestions: 🗞 Customers who live in Brussels 🐟 Attributes include Name, Address, and Age
 Billing Country Billing State 	
Billing Zip Code	Generate Clear Results
Children	
left Email	Customer Data
Employment	Audience source: Customer Visit Data - Snowflake 🖿
First Name	Include the following:
▲ Gender⊕ Harmony Points	
⊕ ID	Policy End Date Is in the next 60 Days
last Name	AND Region Equals Syddanmark
Last Payment Amount	
📩 Last Payment Date ∓	(+)
A Marital Status	

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Enhance decision making

Chat Assistant

		SAS® Customer Intelliger	nce 360		<i>⇔</i> ? M
Home Insights PLANNING III Plans	Craft the Customer Experience Plan, design, activate and measure customer touchpoints and journeys	r.			
 Commitments Invoices My Workflows My Workflow Tasks CONTENT DELIVERY Activities Tasks Segments Audiences Data Views 	 RESOURCE CENTER What's new Help Center Connect with communities Tutorials Contact technical support Tour the home page 	Create an audience	Create a segment	Create an email Create a mobile in-app message	Create a direct marketing list
 CONTENT Messages Creatives Assets SETUP Events Spots OPTIMIZATION Optimization Input Data Optimization Scenarios 	MY RECENTLY MODIFIED ITEMS Test Loan Internal Search © Ready • Oct 30, 2023 4:14 PM	SCHEDULED ITEMS	e ⊡ Segm	ent Map Feb 5, 2024 4:00 AM EST 4	↑ Published By C Rob.Sneath@sas.com
CONFIGURATION Connections Dashboard General Settings Data Processing «			yo	ello, I'm a CI360 Assistant powered by ou? an	y generative Al. How can I help Send



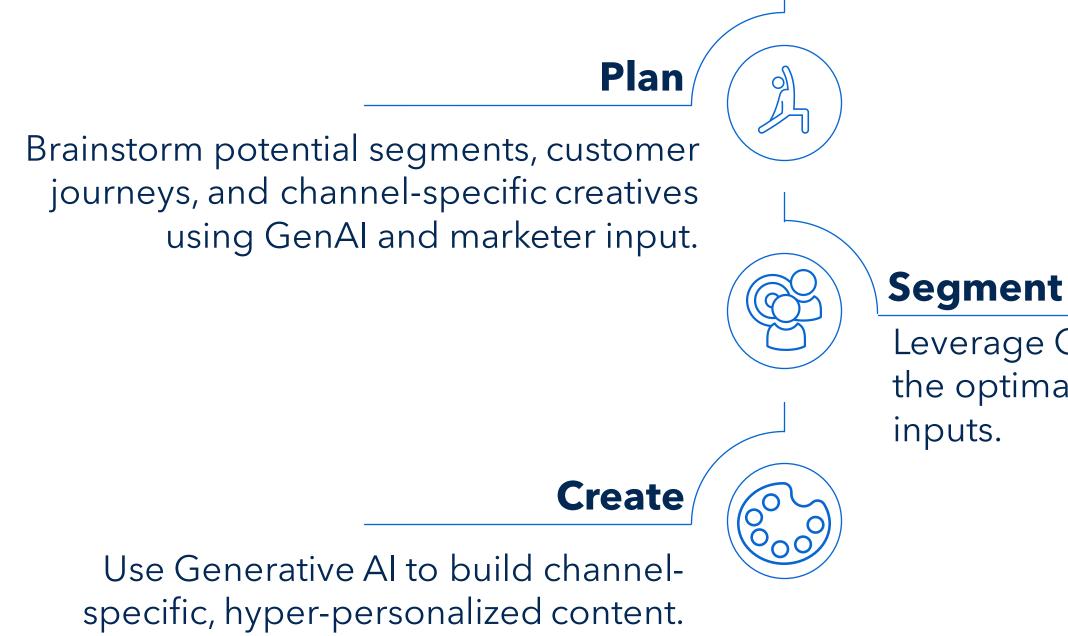
Accelerate onboarding



Custom Integrations



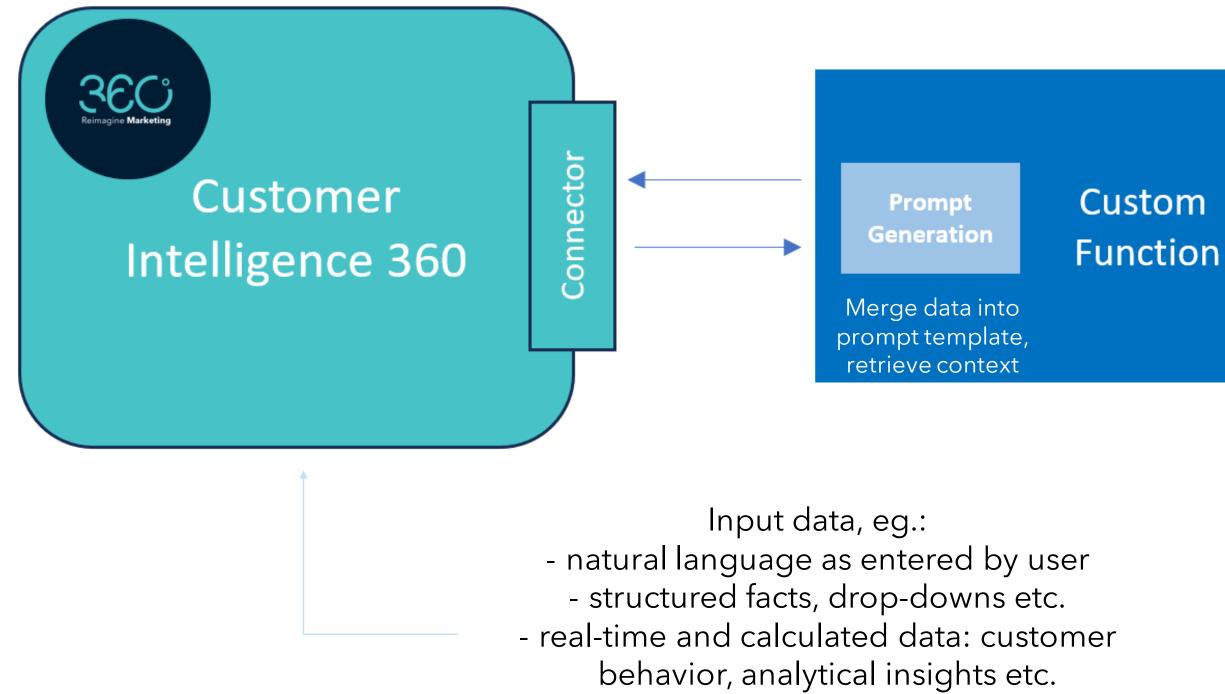
Generative Al in Action



Leverage Generative AI to recommend the optimal segments based off your



Integration Formula

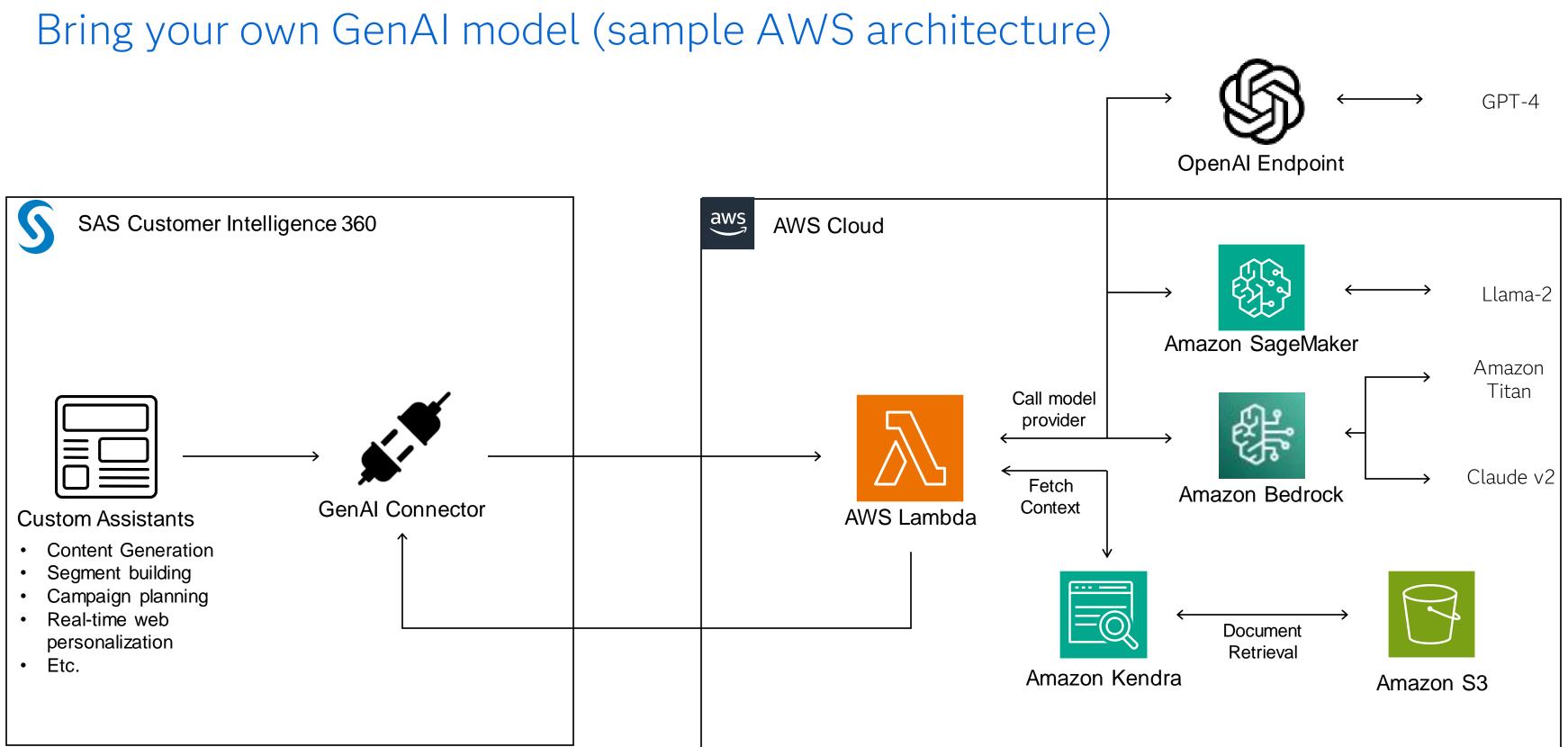


- Previous Al responses

Fetch relevant information (product descriptions, sample emails, etc.) Knowledge Base Response Validation Pattern checking, response formatting 5 error handling LLM API



Custom Integrations





Custom Integration: Email Assistant

~	i≡ New Task 1 – Triggered Email		E 5 1 Close
Home	🗉 Content 🗄 Header 💽 Review 🖸	🔉 Targeting 🗉 Properties 🌡 Permissions 🛱 Orchestration 🖷 Insights	
引 Insights — PLANNING			
Plans	Standard @ Name:		
	Description:		
My Workflows			
My Workflow Tasks	Folder: Tasks		
- CONTENT DELIVERY	Code: 10 TSK_1970		
Activities			
2 Tasks	Generate contact events based on the er	mail send event 💿	
3 Segments	Custom ®		□ + □
Audiences	AI Email Assistant	AI Email Assistant	Reset
Data Views	MultiLLM Email Gen		
– CONTENT		Product Select an item ▼ ♀ Category	
Messages		Product Select an item • Q	
Creatives			
Assets		Product Features	
– SETUP			
Events		Generate Segment	
2 Spots		Segment	
- OPTIMIZATION		This segment will be used in email generation	
Optimization Input Data			
> Optimization Scenarios		Email Guidelines	
- CONFIGURATION		Additional information for email generation.	
		Generate Content	
~ ~			

Custom Assistant for SAS Marketing

Advanced Segmentation

2. Job level	□ Board	□ Division/Department Head	🛛 Manager	Segment	Co
	Chairman/Member	□ VP/VP - Associate	⊠ Staff	Description	
	C-level	🛛 Manager - Senior			
	□ Director			Generate Segment	
Job function	Education – Students	General - Administration	🗆 General – Human	Job Levels	C-
	□ Education – Professors	🛛 General - Analytics/Data	Resources	JOD Levels	0-1
	🗆 Finance	Science/Business Intelligence	🗆 General - Legal		
	🗆 Fraud	🖾 General – Consulting	General - Operations	Job Functions	Ge
	🗆 Risk	🗌 General – Executive	🗆 General - Purchasing &		De
	☐ Information Technology	Management	Procurement		
	□ Marketing	🗆 General - Government	🖾 General - Research &	Job Title or	Da
		Professionals	Development	Keywords	Re
	□ Sales	🗆 General - Health/Medical			
		Professions		Interest Areas	An
Job title or	Business Intelligence	⊠ Customer	Digital		
keywords	🛛 Analyst	🖾 Architect	Operations	SAS User Profile	SA
	🛛 Analytics	🛛 Systems	🛛 Other: Data Scientists,		
	🛛 Data	🗆 Actuary	Machine Learning Engineers,		
	🛛 Insights	🛛 Statistician	Business Analysts	Other Recommendations	- Ye
	⊠ Reporting	🗆 Risk		Recommendations	- E
	🗆 Brand	🗆 Fraud			- In
Interest Area	⊠ Analytics	🛛 Business Intelligence	🛛 Fraud		- C
	🛛 Artificial Intelligence	🗆 Customer Intelligence	🛛 Platform		- Le
	🛛 Data Management	🖾 Risk	· · · · · · · · · · · · · · · · · · ·		- M
SAS user	□ SAS user only	SAE only			- P
profile					- R
Language					- L
					- P - E



<u>Reset</u> tact Profile - Data Science Flow el, Director, Division/Department Head, VP/VP - Associate, Manager - Senior, Manager eral - Analytics/Data Science/Business Intelligence, Information Technology, General - Research & elopment , Analytics, Data Scientists, Machine Learning Engineers, Analyst, Business Intelligence, Insights, orting, Statistician ytics, Artificial Intelligence, Data Management, Business Intelligence, Customer Intelligence user only ars of Experience ucation Level ecific skill set ustry of Work mpany Size el of SAS usage (casual, moderate, intensive) mbership in Professional Organizations ferred Learning Method (online courses, webinars, etc.) cial Media Presence / Engagement gion or Location nguages Spoken ferred time for communication. agement level with previous communications.

