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Shasta College

Ocelot AI Chatbot Proposal

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Submitted To:

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&

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Shasta College - Needs and Opportunity

Shasta College (SC) is looking for a solution to answer the ever growing number of student questions, without over-stretching valuable and limited staff resources. SC is very interested in a solution which can:

- Answer student questions efficiently, consistently, and accurately
- Answer student questions 24/7/365 - whenever they choose to engage
- Be easily implemented, maintained, and supported
- Help students self-service and guide them to existing resources
- Provide students with an extensive library of "How to Pay for College" videos

Our Solution

Overview. Our recommended solution is Ocelot's artificially intelligent chatbot powered by IBM's Watson. Ocelot's chatbot comes pre-loaded with a comprehensive knowledgebase of over 2,600 answers to the most common Tier 1 questions, including a large library of financial aid and student services content created for a diverse group of students and parents. Across all of our department libraries and client submitted content, Ocelot's knowledgebase has accumulated over 25,000 questions and answers. The knowledgebase also includes over 2,000 explainer videos - all maintained by Ocelot with the latest up-to-date information. Additionally, SC's staff can easily customize Ocelot content and create unlimited custom content to enhance the student experience.

Student Value. SC's students will have human-style, natural conversations with the chatbot in order to:

- Ask their most pressing questions, whenever they want or need, 24/7/365
- Get guidance in completing transactional processes
- Get instructions on how to find existing information in their student portal or on the school's website
- Find ways to better utilize existing online resources from whatever device they choose
- Avoid being on hold or delays in getting responses (or, worst case, giving up altogether)
- Get instantaneous responses to questions - especially critical during peak times, after office hours, and on weekends or holidays

Multilingual. SC can easily add multilingual capabilities into their chatbot. Ocelot's content team trains the chatbot's AI in each language we release. Please view the list below of languages that Ocelot is currently supporting or will be supporting in 2020.

- English
- Latin-American Spanish
- Simplified Chinese
- Vietnamese *(in 2020)*
- Arabic *(in 2020)*

Departments. The chatbot is designed to provide support across the entire campus. SC can seamlessly add department content into their chatbot. Please view the list of departments below that Ocelot is currently supporting or will be supporting for other clients in 2020.

- Academic Advising
- Admissions
- Career Services
- Counseling Services
- Disability Services
- Financial Aid
- Financial Literacy
- Guided Pathways *(in 2020)*
- Health Services
- Human Resources *(in 2020)*
- Housing
- Information Technology Helpdesk
- International Programs (Study Abroad)
- Orientation
- Parking and Transportation Services
- Parents *(in 2020)*
- Registrar
- Student Life
- Student Employment *(in 2020)*
- Title IX
- Veterans

Custom Branding. The chatbot is branded to the color scheme and mascot / avatar of your choosing - something that will resonate with your students.

Text / Nudge Campaigns. SC can nudge students via SMS and have the chatbot support student responses. SC can target different student demographics and nudge them towards achieving their goals; all the while having the chatbot support the process to minimize the level of effort needed from your staff. Powerful analytics and data will help SC continually improve messages and timing to better serve students.

API Suite for Integrations. Ocelot also provides an API suite which allows for integration with other data sources utilized on campus. These APIs can connect to data sources including calendars, directories, student information systems, CRMs. In addition, Ocelot provides an API option to set context regarding the student from 3rd party services (such as student information systems). This helps the chatbot to optimize / personalize answers for individual students, and saves the student time inputting information. We evaluate and support custom integrations on a client-by-client basis. We have professional service support for these as needed. Additional Ocelot APIs enable the bot to respond to inquiries from other channels including Facebook Messenger, Alexa skills, SMS, email, and other bots.

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Benefits

SC will experience three primary benefits.

1. **Fewer incoming questions** from students. Your phone call volume, wait lines and email count will go down, freeing up staff resources. Clients have seen an 18% decrease in phone calls, emails and walk-in traffic within their first year of launching.

2. **Better use of staff time.** Our chatbot has a 97% success rate in conversations with students. By answering repetitive questions in a consistent way, and guiding the students to self service, we help filter out the tier 1 questions. This in turn ensures that a higher level of Tier 2 and Tier 3 questions make it to your staff. SC's staff is then focused on the most critical, value-added conversations and interactions. Within 12 months of launching, clients have had their chatbot handling 20% of all student inquiries.

3. **Increased student engagement and satisfaction.** Around 40% of all chatbot interactions happen during off hours, when your staff is not available. Being able to provide immediate responses to students' questions, at the exact moment when they choose to seek out information, goes a long way towards increasing student satisfaction.

Why Us?

Eight things that set Ocelot apart from the pack.

1. **Our Financial Aid and Student Services Expertise.** With an average tenure of 15 years in higher education and over 300 staff years of financial aid and student services expertise, our chatbot was created to address your specific challenges and opportunities. We have walked in your shoes and know how to meet your students' needs.

2. **Our knowledgebase.** We make launching and maintaining our chatbot easy by preloading it with over 2,600 answers to the most common tier 1 questions. Between our department libraries and client submitted content, our knowledgebase has accumulated over 25,000 questions and answers. Our expertise in creating chatbot content "out-of-the-box" ensures we minimize the pull on your time and resources to get the chatbot launched. Additionally, our knowledgebase includes over 2,000 financial aid video answers, kept up-to-date by Ocelot's own Compliance and Regulations Committee, that can be watched directly in the chatbot. This is the largest library of its kind anywhere in the US.

3. **Launch Without IT Resources.** Our chatbot is a SaaS product that lives in the cloud and can be launched without any IT resources. One snippet of JavaScript code is all it takes to launch. Embed the code in your Content Management System on your own website and you are all set. There is no need to allocate precious IT resources to get this chatbot up and running. One school got their chatbot up and running in only two weeks.

4. **Unlimited Custom Content.** SC will benefit from unlimited custom content in the departments to which you subscribe. This ensures that you have the ability to create as much content as you desire in order to fully meet your student's needs and answer all of the unique questions that are specific to SC students.

5. **Our Community.** We have the largest active chatbot community in U.S. higher education, and over 375 clients in total. Our community sharing feature provides you access to all of the custom content created by other clients and allows you to utilize this content in your own chatbot. You can review and implement any custom questions and responses that other clients have felt were valuable for their students. This feature alone will save your team hundreds of hours, and add tremendous value to your own students.

6. **Analytics Dashboard**. You will have your own unique dashboard with data showing how students are using the chatbot. This enables you to enhance the AI and shape how the content improves. You also get an easy-to-use administrative interface for customizing content and tracking student usage. These features similarly help you to drive continuous improvement of both your chatbot and the student experience.

7. **Multilingual.** We take a unique approach to language by hand-training our chatbot to seamlessly translate all the complex jargon of higher education. We are the only company to have manually trained the chatbot in multiple languages against the Department of Education language standards. Our multilingual chatbot is able to interact in English, Spanish and Simplified Chinese. Our chatbot's translations are created in real-time by machine-learning AI technology and trained by our team specifically for the higher education domain. This allows your institution to create deeper access and equity for students and parents when it comes to important topics around paying for and attending college. Our Spanish chatbot has achieved a Bilingual Evaluation Understudy (BLEU) Score of over 50, which is considered "better than human". Additionally, we will be releasing Vietnamese and Arabic in 2020.

8. **Our Commitment to Accessibility.** All of our products adhere to the WCAG 2.3 AA accessibility standards. Our commitment to student accessibility is second to none.

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About Us

Ocelot is an education technology company headquartered in Boulder, CO. We have been educating students and supporting staff for over 16 years. Schools choose Ocelot to promote student self-service, reduce phone calls, improve customer service, increase student retention and provide information students need to be successful. We have over 375 higher education clients covering all types of institutions.

We have a client retention rate of over 96% year over year. We are passionate about exceeding our clients' expectations. Our growth comes from the strong endorsement of our raving fan clients. We are always delighted to connect prospective customers to clients who can share why they chose Ocelot's chatbot and the value they derive from the product.

Since 2018, Ocelot has launched over 190 chatbots for colleges, with 25 slated to launch in the next 6 weeks. This is the largest network of higher education chatbots anywhere in the US. Gartner estimates 85% of customer interactions will soon be handled by chatbot. We are at the forefront of this trend for higher education.

Annual Investment

Investment. SC has secured a highly competitive subscription pricing. The pricing below is good through 5/31/2020.

"Paying for College" Financial Aid Chatbot	One-Time Setup Fee	Annual Investment
Core Features - AI Chatbot delivering instant answers 24/7/365 - Preloaded with over 2,600 answers to common tier 1 questions - Access to FATV GetAnswers Video Library of over 2,000 videos - Human Supervised Machine Learning - Unlimited customization of content - Robust analytics dashboard - Dedicated Customer Success Manager - Training and promotional marketing support - Storage in secure cloud environment - Annual maintenance	$3,500 *(waived with a 3 year agreement)*	$17,500
Two-Way Conversant Multilingual Capability - Out-of-the-box with Spanish and Simplified Chinese - Vietnamese and Arabic to be released in 2020 - Includes all future released languages	N/A	$5,000
Additional Departments (priced per additional department) - AI Chatbot support for departments outside of Financial Aid	$1,500	$5,000

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- Multilingual capabilities can be added for each additional department for $1,000 annually	*(waived with a 3 year agreement)*	

Enrollment Management Chatbot	One-Time Setup Fee	Annual Investment
Core Features - AI Chatbot for **5 Departments of Choice** - Example Departments: Financial Aid, Admissions, Registrar, Academic Advising, & Student Accounts/Billing - *Full department list under "Our Solution" in proposal* **Includes all features listed under "Paying for College" Financial Aid Chatbot; applied to the five selected departments**	$7,000 *(waived with a 3 year agreement)*	$27,500
Two-Way Conversant Multilingual Capability - Out-of-the-box with Spanish and Simplified Chinese - Includes all future releases (Vietnamese and Arabic in 2020)	N/A	$10,000
Additional Departments outside of 5 Selected Departments - Priced per additional department - Multilingual capabilities can be added for each additional department for $1,000 annually	$1,500 *(waived with a 3 year agreement)*	$5,000

Additional Features	Annual Investment
Text / Nudge Functionality - Ability to nudge students via SMS. - Chatbot supports student responses. - Target campaigns by student demographics and nudge them towards their goals. - Chatbot supports all interaction, minimizing effort needed from staff. - Powerful analytics and data help improve messaging and timing to better serve students. - No limit on the number of texts / campaigns for enrolled students option - **$3000 discount and no volume cap on texts for using SC's own Twilio account**	$10,500 Unlimited Texting to Enrolled Students **OR** $15,500 Texting to Prospective & Enrolled Students (250,000 Text Limit)
API Suite for Integrations - Integrate Chabot with other Data Sources Utilized on Campus. - Integrate with Calendars, Directories, CRMs, LMS and more. - Allows for Personalized Student Experiences with the Chatbot. - In addition, Ocelot evaluates and supports custom SIS integrations on a client-by-client basis. - Custom integrations pricing and support available upon request	$2,500 with "Paying for College" Financial Aid Chatbot **OR** Included with Enrollment Management Chatbot

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Implementation

Ocelot will guide SC through the implementation and maintenance process via a dedicated account manager and a full implementation team. Implementation normally takes 6-8 weeks. Together these teams ensure a seamless launch process and provide ongoing support for the SC staff.

Next Steps

As I mentioned in my email, I would love to set up a meeting to review this proposal and go over any questions you may have, review pricing, and as needed set up any additional demos that may be needed. I am also able to provide references of other colleges that currently work with Ocelot's Chatbot for you to learn more about their experience directly if this is of interest.

Best Regards,

Nicholas Burrell
Director of School Partnerships