



AFIT Summer Institute Resource Bundle

Jul 31, 2024

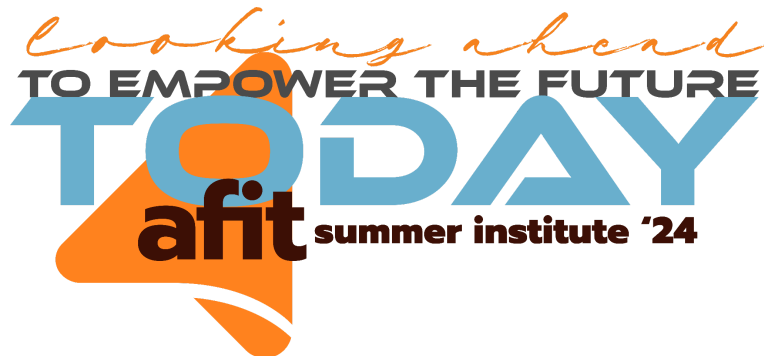


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Revolutionize Your Student Services



Real AI Powers Real Conversations

Experience genuine, intuitive interactions powered by state-of-the-art **Generative AI**. Engage naturally and effectively.



Single Source of Truth

Built from your existing **Knowledge Sources**, ensuring consistent and accurate information dissemination.



Low Lift, Rapid Implementation

Advanced **Web Crawler** technology for bot building ensures a swift and effortless deployment with no additional work for your team.



Hands-Free Updates

Enjoy the convenience of our **Daily Auto-Refresh** feature to ensure your bot's knowledge is always up-to-date.



Personalized Engagement

With robust system **Integrations**, tailor your bot interactions to connect students with account specific information to support every part of their journey.



Data-Driven Decision Making

Leverage the power of **Analytics**. Understand, refine, and perfect your communication strategies based on real-time insights.



Secure, Compliant, Accessible

Trust in our commitment to the highest **Security and Compliance** standards: WCAG, FERPA, HIPAA, and GDPR compliant.



Unified Student Experience

Deliver a consistent and enriched student experience across all touchpoints with our **Omnichannel** approach.

Adoption Considerations

Best Practices for Evaluating AI Chatbot Integration for Organizational Efficiency

Embarking on the journey of adopting an AI chatbot for your organization? It's crucial to ask the right questions to ensure seamless integration and maximum impact. This guide outlines the essential inquiries to make, paving the way for a successful AI-driven transformation.



What is the overall desired outcome?

- What are the goals and objectives of each functional area?

Why is this important? Without well-defined goals, your implementation process can become unfocused, wasting resources and time. With a clear understanding of desired outcomes, you can regularly review and refine the chatbot's functionalities, ensuring it remains aligned with evolving organizational goals and user needs.



What baseline data do you have to evaluate the success of your AI chatbot implementation?

- At an organizational level?
- At the functional area level?

Why is this important? It is critical to have a benchmark against which the chatbot's performance can be measured. It becomes the yardstick for success, helping assess if the chatbot is meeting, exceeding, or falling short of expectations, allowing you to adjust your deployment to maintain alignment with your desired outcome.



Who are the stakeholders, and do they understand the tool(s) available and the potential impact of implementing the solution?

- Decision makers?
- Budget holders?
- Project lead(s)?
- Day-to-day chatbot admins?

Why is this important? Identifying your stakeholders allows you to ensure they have a tangible grasp of the value the chatbot is expected to bring.

Adoption Considerations

Best Practices for Evaluating AI Chatbot Integration for Organizational Efficiency (cont.)



What are the preferred communication channels for your customers/students?

- What tool offers those channels the flexibility to align the channels with the unique needs of each functional area?

Why is this important? Your vendor needs to build your chatbot for a user experience tailored to drive end-users toward your goal: support, sales, or information dissemination.



What resources will be required to implement and maintain the chatbot successfully?

- What kind of ongoing maintenance is required? How frequently does the platform behind the chatbot receive updates and how do these impact its operation?

Why is this important? Proper resource planning ensures you don't over-invest in unnecessary features or under-invest in critical functionalities. You need to understand the time, money, and manpower required for short- and long-term success.



What other systems, software, and databases are utilized across the enterprise (i.e. CRM, SIS, ITSM)?

- Does the chatbot integrate with those systems?
- What is the desired use case for that integration?

Why is this important? For business operations, you want a smooth flow of data and processes to avoid bottlenecks or disruptions caused by disjointed systems. Additionally, the integration will result in efficiencies for your teams by reducing manual work like data entry across multiple platforms or cross-checking data sources. For your end-users, integrations deliver a streamlined user experience; users can navigate seamlessly between systems without toggling between different platforms.

Adoption Inhibitors

Best Practices for Anticipating Roadblocks to Accelerate Time to Value

Successfully navigating the path to value requires foresight and preparation. Organizations can streamline their adoption process by employing best practices to anticipate potential roadblocks, ensuring a swift and efficient realization of benefits.



Security & Data Privacy

- What compliance certifications (e.g. GDPR, FERPA, HIPAA) matter to your business?
- Do you have a standard security and technical review? At what point is that shared in the consideration process?
- What kind of data would your bot potentially handle (e.g. SSN, credit card info, student information)?

Why is this important? Ensuring the chatbot handles customer data securely and in compliance with regulations should be a significant concern to guarantee customer privacy.



Accessibility

- What is your accessibility review process and who oversees it? At what point do you perform the accessibility review?
- What documentation do you require from vendors for accessibility (e.g. VPAT)?
- Why does this matter to your end users AND your administrators?

Why is this important? Many regions have laws and regulations (like the Americans with Disabilities Act in the U.S.) that mandate digital accessibility. Non-compliance can lead to legal actions and financial penalties. Accessibility features, while designed for those with specific needs, often improve the user experience for everyone.



Quality of the AI

- Does real AI power the solution?
- What LLM do they use, and how do they use it?
- Do they tune their model? If so, how?

Why is this important? If the chatbot does not understand the query and cannot deliver a response effectively, it can lead to user frustration and decreased adoption. The algorithm being used to power the solution directly impacts the project's success and the overall desired outcome.

Adoption Inhibitors

Best Practices for Anticipating Roadblocks to Accelerate Time to Value (cont.)



Budget

- Have you identified or allocated a budget for this project?
- Is your budget centralized or decentralized?
- What pricing model works best for your organization? Consumption-based or annual subscription fee?

Why is this important? To capture the full power of your investment, planning for a longer-term engagement is necessary. There is an organizational and end-user learning curve to adopting AI; abandoning a solution because the budget is no longer available is a flawed approach to a rapidly evolving technology.



Change Management

- Are your stakeholders still engaged?
- Have you implemented a communication plan to highlight the benefits of the chatbot for employees?
- Have you implemented regular training sessions to equip employees with the skills and confidence to use the new tool?
- Have you established a system for continuous feedback to ensure employees have a vehicle for voicing concerns?

Why is this important? Employee resistance to change can inhibit adoption, especially if the chatbot is perceived as threatening their role. Creating an environment where all employees feel invested in the chatbot's ongoing success and improvement will facilitate smooth adoption.



PennState

Elevating Efficiency:

Call Center Operations Innovation at Penn State

During the COVID-19 pandemic, Penn State University, like many other institutions and organizations, found itself facing unprecedented challenges. To prioritize the safety and well-being of its students, faculty, and staff, Penn State sought innovative solutions to effectively manage the surge in inquiries and support needs stemming from the crisis.

Glenna Emel, Penn State's IT service desk manager, recently recalled the daunting task of managing the institution's call center amidst the evolving and uncertain landscape of COVID-19. With the sudden influx of queries ranging from health and safety concerns to academic adjustments, Penn State quickly recognized the need for a responsive and scalable support system to meet the diverse needs of its community members. The Ivy.ai AI-powered platform streamlined Penn State's call center operations — and helped navigate the complexities of the pandemic with agility and efficiency.

Challenges

The onset of the pandemic prompted Penn State to establish a specialized COVID Call Center, open during business hours and dedicated to addressing inquiries related to the crisis. However, as the situation rapidly evolved and information changed frequently, the team faced challenges in maintaining an efficient response system, compounded by the turnover and training needs of temporary staff hired for the call center. The need for a dynamic and adaptable solution became increasingly apparent as the institution sought to provide accurate and timely assistance to its Penn State community.

Solution

In response to the challenges posed by the evolving landscape of COVID-19, Penn State sought a dynamic solution to streamline its call center operations and effectively manage the surge in inquiries. Leveraging its existing relationship with Ivy.ai, used on campus as a chatbot, the institution recognized the potential of Ivy's advanced capabilities to address the unique demands of the COVID Call Center. Penn State swiftly deployed a customized bot tailored specifically to meet the needs of the COVID Call Center. Unlike traditional chatbots, this bot was installed in a way that received questions and provided answers directly over the phone. This innovative solution empowered Penn State to automate responses to frequently asked questions, provide timely updates to callers, and ensure consistency in information delivery, all while minimizing the need for human intervention.

Self-Service	81%
Agent Transfer	19%
Total Conversations	1012

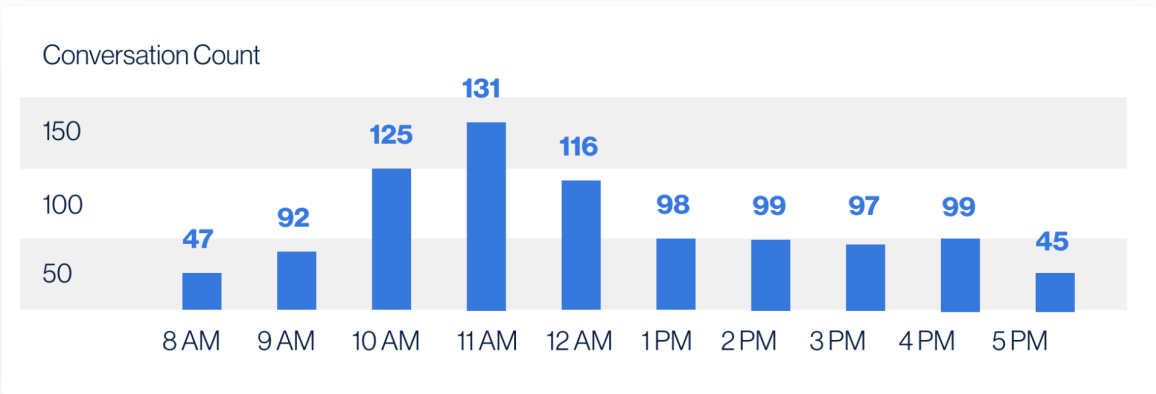
The IvyQuantum IVR bot had a total of 1,012 conversations, 81% being handled entirely by the bot without needing escalation to a live agent. By leveraging Ivy's expertise and technology, Penn State successfully navigated the complexities of the pandemic, demonstrating its commitment to innovation and resilience in times of crisis.



Benefits

The implementation of Ivy's generative conversational voice bot, or Interactive Voice Response (IVR), proved to be a transformative solution for Penn State, yielding many benefits:

- **Enhanced Operational Efficiency:** Automating responses to frequently asked questions reduced the workload on human agents, allowing them to focus on addressing more complex inquiries and tasks. ***During business hours, the bot handled a total of 949 calls, enabling staff to concentrate on more complex issues and other important tasks.** This resulted in improved productivity and efficiency within the call center and the institution as a whole.
- **Improved Responsiveness:** The Ivy IVR bot provided accurate and up-to-date information to callers in real time. This ensured consistency and reliability in communication, enhancing the overall caller experience.
- **Time and Resource Savings:** As temporary staff contracts concluded, Ivy's technology allowed Penn State to sustain support coverage and the customer experience by deploying a voice bot, eliminating the need for rehiring and training new staff as the pandemic waned.
- **Agility and Adaptability:** Ivy's flexible platform enabled Penn State to rapidly deploy and customize the IVR bot to meet the evolving needs of the COVID Call Center. This allowed the institution to adapt quickly in response to changing circumstances, ensuring continued support for its community members.



***Data on conversation count during business hours**

The ability to innovate and adapt is paramount to ensuring the continuity of essential services and support systems, especially in times of uncertainty. Penn State's collaboration with Ivy exemplified the power of AI in addressing real-world challenges and driving positive outcomes. By leveraging Ivy's advanced capabilities, Penn State not only navigated the complexities of the COVID-19 pandemic with resilience and agility but also laid the foundation for future advancements in operations and customer service.

As Penn State continues its journey of innovation and excellence, its partnership with Ivy serves as a testament to the transformative impact of AI in higher education and beyond, paving the way for a brighter and more resilient future.





Ivy Becomes a “Go-To” Resource for

Medical College of Wisconsin

Human Resources Department

“

[The Ivy chatbot] has definitely cut down the amount of time that we spend having to respond to emails or answer calls when it’s a question that we have out there on our site. It’s been very beneficial, and it really has allowed us to get done what we need to get done.

Susan McIntyre, Benefits Sr. Representative, Medical College of Wisconsin

Like students, staff, and faculty at an institution lead busy lives, necessitating a thoughtful approach to streamlining their access to information and support. Institutions need to provide innovative and efficient tools to put staff and faculty in a position to be self-reliant. At the Medical College of Wisconsin, Susan McIntyre has partnered with Ivy.ai since 2018, where she serves as the Benefits Sr. Representative in the Human Resources Department.

Identifying the Need

In 2018, the Benefits Office noticed a persistent increase in the volume of calls and emails coming from staff and faculty in various other departments. These inquiries spanned a number of subjects, ranging from benefits and employment to matters beyond the Benefits' scope of work. Consequently, staff found themselves dedicating a significant portion of their workday addressing routine inquiries readily available on their website and redirecting employees to appropriate departments.

Recognizing the need to empower employees to handle more complex questions and streamline their daily responsibilities, the Medical College of Wisconsin (MCW) aimed to find a tool that enhanced employees' overall operational efficiency. Simultaneously, they sought to ensure that employees from other departments still received the information they needed promptly and seamlessly.

Implementation

With the introduction of Ivy to MCW's benefits office, McIntyre anticipated a period of growth, learning, and adjustment as she and her colleagues got familiar with the platform. While embracing new technology can be challenging, the team at MCW demonstrated their commitment to innovation through the change. MCW doubled down on its commitment when major changes were announced to the Ivy platform. Those changes, which included a new name - IvyQuantum™ - were a catalyst for continued investment and training, all supported by the team at Ivy.ai.

Despite any concerns about getting acclimated to the new system, Ivy's implementation process and training went much smoother than expected. "I think the way that the platform is now, it's definitely user-friendly and easy. You can literally just say, 'Here's our page,' and boom, you're done." McIntyre also found comfort in knowing that a dedicated Ivy team member was readily and promptly available to assist her and her team with any questions. Regular pointers and instructional videos from the Ivy team further ensured a seamless transition and training experience. Now with confidence in the support available and having seen the impact Ivy has made at MCW, the staff in the Benefits Office look forward to embracing new technological advancements and implementations institution-wide.



Every time I reach out saying, 'Hey, I can't get this to work, or something's not right', our [Partner Success Manager] is quick to respond and quick to fix. Everyone along the way from the time we rolled it out and let it go live up until now has been phenomenal.

Results

While the transition to using a new system wasn't immediate, MCW's Benefits Office experienced a gradual yet substantial improvement through the utilization of the Ivy bot. Customizing the bot to their unique requirements, incorporating features like single sign-on for staff, and tailoring it to seamlessly integrate with the Benefit's needs, allowed the team to establish a consistently supportive bot.

As the bot becomes a go-to resource for staff and faculty seeking information, the Benefits Office gains valuable insights into common questions and topics, pinpointing areas where the website can be enriched. For example, when enrollment dates shift, staff can easily explore their bot analytics and adjust accordingly. "If something changes on that webpage, the bot answer is still going to [reference the website content]. The [correct] answer could change, but that's less work on my end," said McIntyre, noting that the analytics provided by her Ivy bot make it easy to find outdated website content.

The implementation of Ivy fostered a sense of empowerment among MCW staff, encouraging them to become more self-reliant and proficient in navigating the website to

find answers on their own. This transformation has empowered employees to embrace technology and be more proactive in finding solutions, ultimately enhancing the organization's efficiency and adaptability. "The bot definitely helped with the goal to get people more in tune with our site and find answers on their own," and as a result, the Benefits Office staff could shift their focus towards addressing more complex inquiries and attending to other daily responsibilities. The Ivy bot has not only led to a notable reduction in calls and emails but has also led to a reshaping of the Benefits Office's operational structure.

Looking Ahead

As staff continues to learn and utilize the Ivy platform, and with new talent joining the team, McIntyre envisions a future where the Ivy platform gains traction enterprise-wide. Recognizing the need for MCW to stay competitive, she emphasized the importance of embracing and understanding innovative solutions like the Ivy chatbot.

With vast amounts of information spread across various departments, implementing a solution like this enterprise-wide presents great opportunities. Not only will it make information readily available to all departments, but it holds the potential to give comparable outcomes in reduced calls and emails, as seen within her own department.



I think it would help all the departments. Because there's so much information on the intranet and all the different departments, I think it would be very beneficial for all of the other areas to have it, just so their information can get out there more readily.

As chatbots become increasingly popular across websites in various industries, students are growing to be more accustomed to and even expect communication tools like the Ivy chatbot, thus allowing MCW the opportunity to integrate a bot on the student-facing side as well. "As we start to get more and more of the younger generation in, they're more apt to use that than pick up a phone or to email." By continuing to stay proactive and integrating unique tools, MCW will continue to see growth and success across the entire institution.



Florida Public Research University

Streamlines Financial Aid Process with AI

Identifying the Need

A public research university in Florida was on a mission to meet the needs of students in a 24/7 customer service environment. Prior to finding Ivy.ai, the administration spoke with the IT department to find ways to support more students more efficiently. 80 percent of all student questions were generic and could easily be found on the website. This left students and parents frustrated with long wait times for questions that were easy to answer. With the onset of the pandemic, the need for connecting with students remotely only grew, as the financial aid department sought to research different chatbot options for their institution. Despite having videos and answers readily available, students still asked questions about their financial aid status or when the FAFSA opened. As Ana Gagula, Associate Director of Financial Aid at Florida Atlantic University put it, “Students don’t want to spend time looking for answers. They just want it right in front of them.”

The finance office had a similar initiative, seeking to reduce incoming calls, especially because wait times were long. After visiting another peer’s website, Associate Controller Shane Siewbally learned that they were using Ivy.ai as their preferred vendor. In addition, many of the other options were only suitable for the financial aid department, and couldn’t be deployed across other departments. This led the institution to select Ivy.ai over other available chatbots, aligning with their vision to support more students, more efficiently.

Implementation

Ana and Shane both received feedback from their IT liaison that the implementation was much less strenuous than they had imagined. With just a few lines of code, the institution was on its way to delivering a far superior customer experience than before. When Ana and Shane had questions, they noted how Ivy.ai’s customer success team was responsive and easy to work with.

Results

The institution instantly noticed a reduction in how often students made appointments to get answers to their questions.

After implementation, appointments dropped 96 percent compared to the previous year, a strong indication that students prefer to interact with their bot. While inbound phone calls once took as long as 20 minutes, the average chatbot conversation took just six minutes. As Ana explains, “They come to see us in-person when they have to, but we find that students aren’t looking to visit an office in-person. They’d rather have the answers on their phone, wherever they are.”

The bot also reduced the number of inbound calls and emails by a combined 11 percent. The improved efficiency allows the financial aid and finance departments to handle more complex questions when the situation called for it. Now, 80 percent of all questions are answered by their bot. As Shane said, “I like that the bot is helping us bring 24/7 availability and not having 700 emails waiting for us like we had before.”

With over 50 percent of all questions coming after-hours, the financial aid department can provide a personalized touch during the day without accumulating a backlog of questions the morning after. Ana is a heavy user of Ivy.ai’s heat map to understand which topics rise to the top for students over time, and where on the website they tend to ask certain questions. They also monitor trends in topics and popular times to help update content on their website as needed or scale support during peak hours.

Finally, Ivy.ai’s Live Chat functionality allows the financial aid department to work more efficiently with other departments whenever there’s a need to verify information. This was especially important in a remote work environment where employees aren’t centrally located on campus.

Looking Ahead

The institution is planning to implement Ivy.ai into the admissions and student orientation departments. Since there is a shared brain, Ivy.ai’s chatbot can answer questions for a variety of departments without siloing student inquiries and sending them in different directions.



Broward Achieves \$500,000+

Cost Savings with Ivy.ai

Identifying the Need

Broward College is a large institution that supports more than **65,000 students**. The college serves students from all walks of life and while the average student age is 24, a considerable portion of the student population is between 18-24 years old. Within the student population, **80 percent of students are part-time**, and **41 percent are first-generation students**.

First-generation students present unique challenges to institutions of higher ed, requiring additional support as they navigate the student journey. They want to take full advantage of the college experience, but may not always know how to integrate themselves. In Broward's case, this resulted in thousands of students calling to ask simple questions, and many becoming frustrated by long hold times.

In 2018, Broward sought a strategy to improve their contact center through better intelligence while reducing expenses for outsourced staff. The institution wanted to collect insights on what students were asking so they could provide better customer service.

Prior to discovering Ivy.ai, Broward worked with an outsourced contact center to help drive away incidence costs. This contact center offered a live chat option but often charged overage fees due to the volume of students utilizing this feature. Broward felt a need to mitigate incidence costs while also helping students get immediate answers.

Implementation

Throughout Broward's implementation, the institution had specific, solutions-oriented goals they wanted to achieve towards their current challenges. Broward wanted to reduce overall expenses and maximize efficiencies. The institution prides itself on being a lean operation, so any way they could reduce outsourced expenses is considered an added bonus.

They also wanted the ability to improve their marketing with data-driven decision-making. Uncovering rich data insights would allow them to improve outreach towards current and prospective students while breaking down current enrollment barriers.

From a student perspective, Broward sought the ability to address tier one questions. The institution wanted to help students get immediate answers without having to spend much effort searching for them. To accomplish this objective, they added Ivy.ai's chatbot and live chat to the admissions counseling and financial aid departments.

Results

Broward implemented Ivy.ai's chatbot in October of 2020 and has achieved astonishing results since that time. The platform enabled the institution to provide better Tier-1 support while reducing the administrative burden.

Broward dramatically reduced the number of inbound calls that came through due to the implementation of SMS-guided flows. These flows helped students become more aware of upcoming deadlines and offered appropriate follow-up when requested. Most notably, tuition payment reminders led to a 17.05% response rate with students feeling like they're talking to a real person.

The chatbot helped deflect live agent call volume by 9.6% of all incidents - **a whopping 30,041 calls**. Broward estimates that **this led to a cost savings of \$210,287** as the bot successfully deflected live agent call incidents.

Broward's bot also deflected live agent chat conversations by handling **60,842 inquiries** during the college's first fiscal year. **This led to Broward saving \$304,210** in outsourced live chat incidence costs.

Faculty and staff alike have given an overall positive impression. They enjoy the fact that all students can get equal access to information and that Ivy.ai's multi-language capabilities allow non-native English speakers to converse with the bot in the language of their choice.

By using Ivy.ai's platform, Broward can pick up gaps in their communication and help figure out when and where students need to be reminded. In addition to substantial cost savings, the college can allocate resources for high-priority inquiries while students get a 24/7/365 resource for all populations. With the help of chatbot ratings and reviews, the college can better improve the bot's brain and ensure it has the most up-to-date information possible while escalating high-priority issues. This ensures that Broward is always working within a student-first mindset.

Looking Ahead

As a forward-thinking institution, Broward always looks for ways to improve. One of the biggest goals Broward hopes to achieve moving forward is to get the AI to the point where it anticipates future student needs while improving its messaging consistency. The college looks forward to increased adoption so the bot continues getting smarter as Broward streamlines its student-facing communication.



The UNIVERSITY *of* OKLAHOMA

OU Institutes Winning Culture Through Innovation

At the University of Oklahoma, Bryce Kunkel has leveraged AI technology since 2017 where he serves as Assistant Director of Enrollment Management Communications.

Identifying the Need

Kunkel's staff found that prospective graduate students navigated to the wrong pages in search of their programs. For instance, rather than finding the correct graduate admissions page, they landed on the site for undergraduate admission. This data paved the way for OU to provide an enhanced user experience (something that Ivy.ai's chatbot would later uncover). In addition, the University of Oklahoma is proactively strategizing ways to address the enrollment cliff. Despite directives from the President's office to grow enrollment over the next five years, the potential student population is expected to decline for all colleges and universities in the US.

Implementation

The University of Oklahoma was one of Ivy.ai's earliest adopters in 2017. Kunkel worked with co-founders Mark McNasby and Michal Oglodek to customize the project to meet OU's needs with features like Inbox Zero - a tool his team uses to review questions that stumped the bot and add knowledge for future questions. They uncovered one of OU's biggest pain points when they found that students were seeking information in the wrong places, such as students who sought graduate nursing program information from undergraduate admissions. The chatbot has helped to redirect those inquiries and connect more students with the information they seek.

In addition to the chatbot, OU leverages Ivy.ai's Live Chat platform to connect students with consultative support at the click of a button. This is especially helpful in situations where the chatbot is unable to answer a question, ensuring that students, parents, and alumni all receive exceptional customer service.

OU also uses Ivy.ai's SMS texting feature to deliver reminders and reassurance that help is available if it's needed. "We feed an API over from our CRM, and we're able to send out messages from Ivy.ai to our prospective students for enrollment and for new student orientation," said Kunkel.

Results

After Ivy.ai was implemented, OU saw its inbound calls to the admissions department plummet and noticed a change in the types of questions they received. Additionally, Kunkel notes that anonymity helps students to feel more comfortable asking questions they might not ask an advisor. Before Ivy.ai, students would call or send emails to ask “what’s my application status” or “what scholarships are available”, but now, OU is able to use Ivy.ai to answer those questions autonomously or point users to direct resources without requiring them to dig through their website or contact anyone else.

The department uses the time saved to better connect with students to create more intentional, deeper relationships. This shift was especially important because in 2018, OU had its largest freshman class in history and welcomed its third largest freshman class amidst the pandemic. One of Kunkel’s favorite features is the ability to code the bot in humorous ways in order to make it more personable.

Ivy.ai also provided OU with insight into what kinds of questions students ask and when. “We pretty much have it narrowed down to know what topics students are going to ask about at certain times of year,” Kunkel said. He noted that at some points during the year they’re focused on scholarships, enrollment, and setting up appointments, for example. He also noted that they can uncover trends about high school juniors who are starting to look at how to apply, and that such information helps make decisions about where to focus recruiting efforts.

When asked about the experience provided to students, Kunkel says the chatbot makes it really simple. “I don’t have to read a whole web page about how to apply - I get three methods and links for how to do it.”

Looking Ahead

The University of Oklahoma has a sincere commitment to providing a great service experience, and has implemented Ivy.ai’s communication tools to support students in real time. OU plans to leverage such tools, along with others, to enhance their communication with current students, as well as with their parents. Ultimately, their goal is to provide an exceptional experience that helps the entire family feel connected to the university.