

# Watsonx in Action for Higher Education

M. Josh Ruiz, Technical Seller – Americas Build Top Team, IBM

# RNL's Partnership with IBM

## Why is This Important for Our Campus Partners

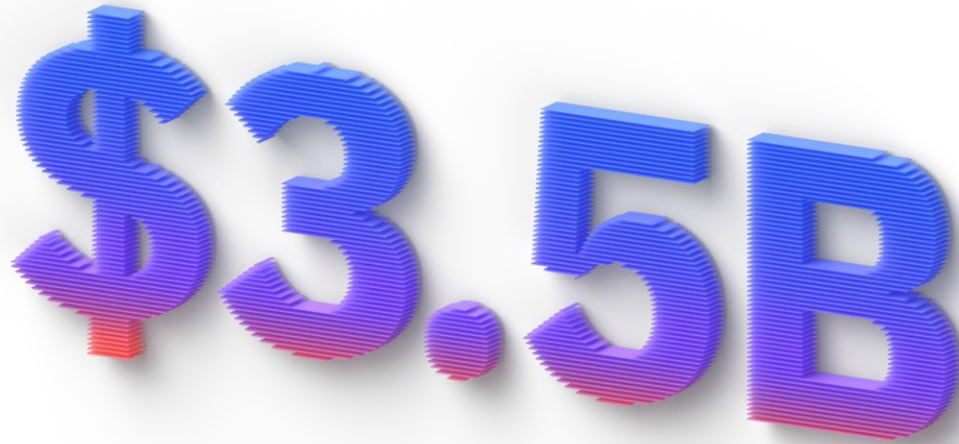
- RNL has partnered with IBM to develop innovative AI solutions for universities.
- These tools will transform institutional operations by:
  - Simplifying data management
  - Personalizing engagement
  - Driving better decisions
  - Saving significant time.

# RNL's Partnership with IBM

## The AI-Driven Tools Will Enable Campus Partners to:

- Merge their own data with RNL's, creating a comprehensive understanding of their unique student and donor landscapes
- Develop personalized strategies for recruitment and fundraising
- Automate manual processes, empowering staff to focus on high-touch interactions with students
- Leverage AI-powered self-service solutions to streamline workflows and achieve results independently

Rethink  Reshape



\$3.5B

in productivity gains



# Setting the strategy

# Guiding principles



Eliminate operational complexity



Simplify end-to-end workflows



Automate manual tasks



Embed AI everywhere

# Guiding principles



Eliminate operational complexity



Simplify end-to-end workflows



Automate manual tasks



Embed AI everywhere



# Strategic Execution



Transformation steering committee



Transformation project office



Productivity discovery team



Engaged workforce



# Use cases and results

# How IBM is using AI and automation

Enterprise insights

95%

increase in supply chain  
productivity

Automation  
watsonx Orchestrate  
watsonx.ai

Customer support

\$191M

annualized  
operational savings

Automation  
watsonx Orchestrate  
watsonx.ai

Digital labor

80%

of top IT issues addressed  
by AskIT

watsonx Orchestrate  
watsonx discovery  
watsonx Orchestrate

IT modernization

\$600M+

optimization

Turbonomic  
Hybrid Cloud  
Ansible Automation and  
watsonx Code Assistant

# The path to \$3.5B (and counting)

## IT Operations

62% reduction in Ansible  
Playbook creation time

watsonx.ai

## Support case summarization

\$86M annual  
operational savings

watsonx

## AI sales assistant

50-70% of repetitive tasks  
automated

watsonx Orchestrate

## Governance

5.7M in cost savings by  
consolidating operational IT  
data

watsonx.data

## Supply Chain

\$150M reduction in  
supply chain costs

watsonx

## Marketing

67% content creation  
efficiency gain for  
supported asset types

watsonx.ai

## HR

94% of inquiries  
resolved by AskHR

watsonx assistant

## Finance

97% (above benchmark)  
accuracy of touchless  
forecasting

watsonx

## Procurement

From 40+ systems to one  
data view

watsonx.ai  
Watsonx Orchestrate

# AI use cases in action

Enterprise insights

20%

boost in AI  
response accuracy

**LOCKHEED MARTIN** 

watsonx

Customer experience

10%

improvement in  
customer retention

 **Sicredi**

watsonx Orchestrate

Digital Labor

25%

reduction in time to  
onboard new customers

**Avid**   
**Solutions**

watsonx Orchestrate

IT operations

62%

reduction in Ansible  
Playbook creation time



watsonx Code Assistant



# Bringing intelligence to Higher Education Content

Murtaza Masood – Global Managing Director, Public Sector

# Trusted by Higher Education Institutions worldwide

1,500+

Education  
Customers

4.5M

Seats Deployed

Yale



# We're entering an AI-first era of education

AI agents are joining the classroom



 Any workflow can be automated

Instant intelligence from your data



 Students & Faculty expect better experiences

Data governance becomes essential



# Introducing Box AI with IBM watsonx



Boost individual and team productivity by gleaning instant insights from content

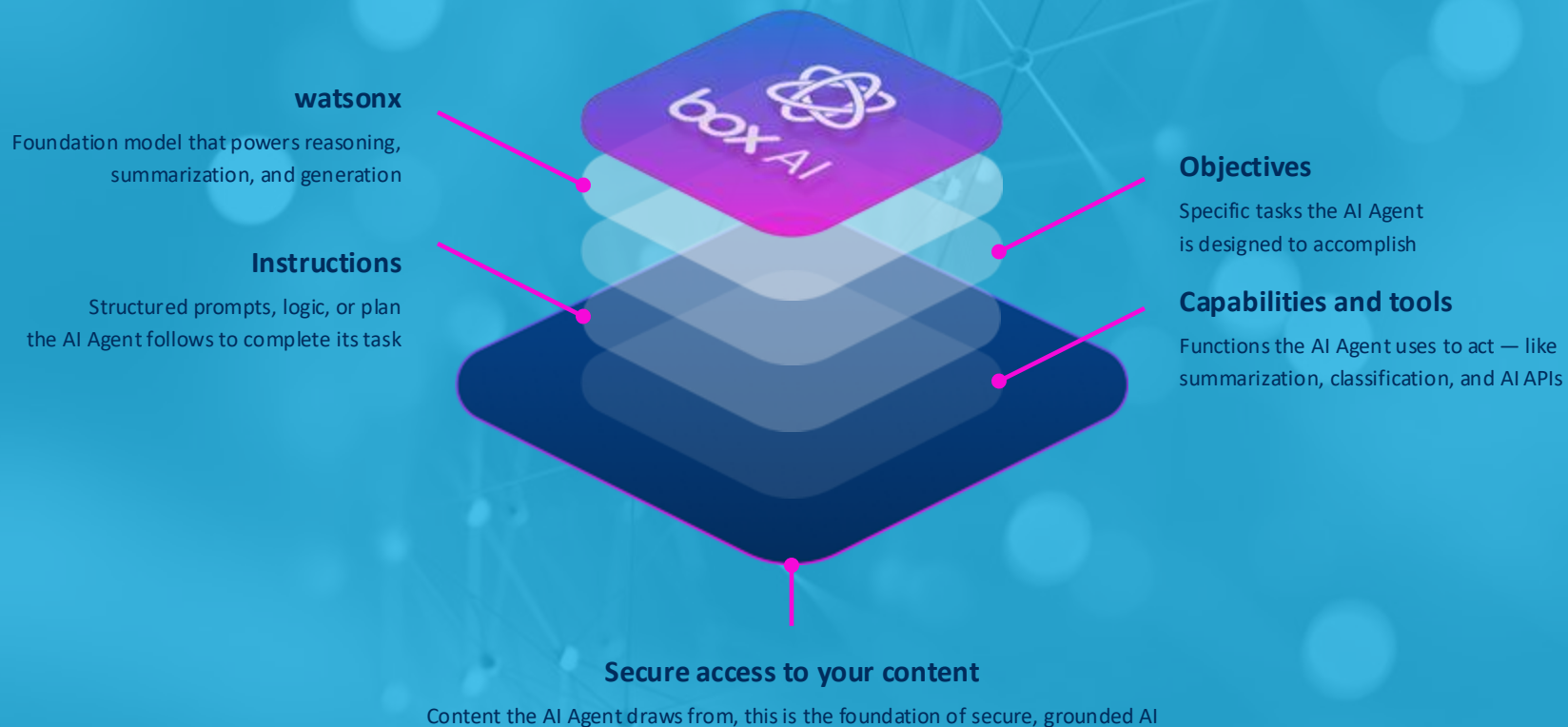


Accelerate mission-critical processes with secure, intelligent workflows

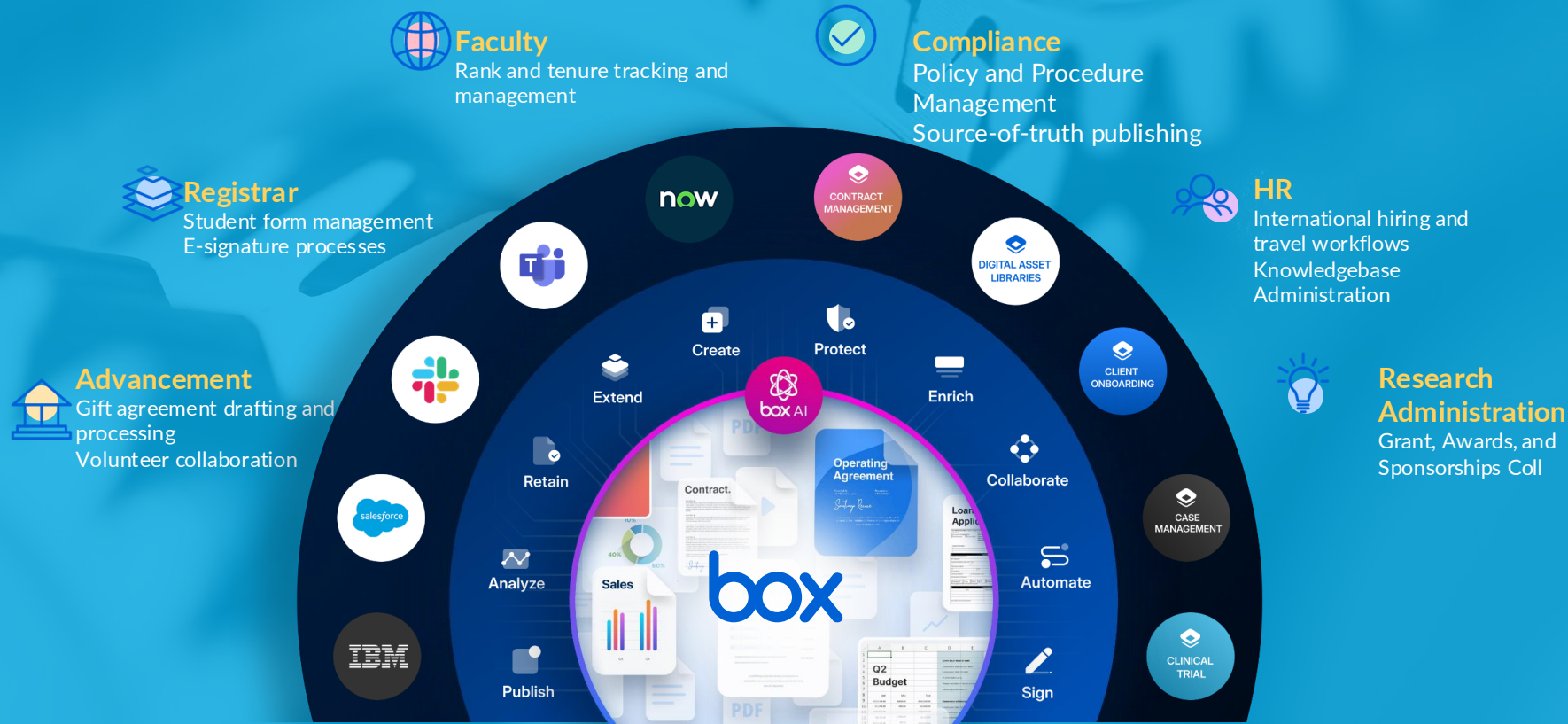


Optimize human-in-the-loop workflows at scale with custom, agentic AI

# Bringing agentic technology to the Box platform



# Transforming How Colleges and Universities work with Content



# AI transforms how we work with our content

## Generate instant insights



How can we speed up our product roadmap?

There are several delays in the product roadmap that I will highlight:

1. Your roadmap schedule includes a sequential QA and legal review process. Consider running these two processes concurrently to save review time.
2. Your product strategy includes customer focus groups for multiple features. Consider running one larger focus group rather than multiple shorter to speed up

1 2



## Get intelligence from your data

172 Contracts

17 Above \$5,000

90 Due in 90 Days

12 Risky clauses

23 Out for signature

53 Contain PII

## Automate any workflow



Loan Approved

DUE IN 7 DAYS

APPROVED

✓ Signature required

New client onboarded

JOHN SMITH | JSMITH@ACME.COM



Insurance claim processed

PENDING

✓ Documents required



Compliance audit submitted

CONFIDENTIAL



## Generate instant insights



How can we speed up our product roadmap?

### PRODUCT ANALYST

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Ask Box AI anything about your content and get answers right away in documents or images

View citations so you can trace the answer directly back to the source

Summarize lengthy documents,  
find specific information, uncover key  
findings, and more

[illegible]

The screenshot displays the Box AI interface. On the left, a document titled "Style Central NDA.pdf" is open, showing a "NON-DISCLOSURE & CONFIDENTIALITY AGREEMENT". The document text includes "AGREEMENT and acknowledgment between principles at Capitalizing NDA Inc. (the 'Discloser') and Joseph Klingon (name of Style Central) composed with principles at Style Central S. (The Underagent)". Below this, it states "WHEREAS, the Discloser agrees to furnish the undersigned certain confidential and highly proprietary information for the purpose of..." and "The NDA expires on April 2, 2024, unless terminated earlier by either party upon written notice." The document is signed by "Style Central S." and "Joseph Klingon".

On the right, the Box AI chat window is open. The chat history shows a welcome message: "Welcome to Box AI! I can answer any questions about 'Style Central NDA.pdf'. This chat will be cleared when you close this document." Below this, there are two buttons: "Explain this document" and "Summarize this document". The chat also shows a question: "When does the NDA expire?" with an answer: "The NDA expires on April 2, 2024, unless terminated earlier by either party upon written notice." Below this, there is a text input field with the placeholder "Ask anything about this document" and a blue "Ask" button.

At the bottom of the chat window, there is a message input field with the placeholder "Message Box AI" and a blue "Ask" button.

# Create content in seconds with Box AI + watsonx in

Generate AI-powered content directly within your Box Note by simply entering a prompt

Create content from scratch or refine existing content

Fix spelling & grammar, editing voice & tone, making content shorter & longer, and more

The screenshot displays the Box AI interface within a note-taking application. The top toolbar includes a 'New' button, a 'Body' dropdown, and various text formatting icons (bold, italic, underline). A 'Notes' title is visible in the background. The main content area shows a note titled 'Features to highlight for the marketing launch of BeatsBeanie for Cap-tivating Hat's key demographic:' followed by a bulleted list of features. A 'Box AI' window is open, displaying generated text for a blog post announcement. The generated text includes an introductory paragraph, a list of features, and a concluding paragraph. At the bottom of the Box AI window, there is a text input field with the prompt 'Draft a blog post announcement for the launch of BeatsBeanie' and a blue button with a vertical bar icon.

Notes

Features to highlight for the marketing launch of BeatsBeanie for Cap-tivating Hat's key demographic:

- Fashionable beanie hat with built-in Bluetooth speakers
- Allows users to enjoy music or take calls on the go without additional headphones or earbuds
- Targeted at fashion-conscious men who appreciate wearable technology and high-quality audio accessories
- Bluetooth Connectivity for wireless connection to devices
- High-Quality Audio for an immersive listening experience
- Comfortable and Stylish Design suitable for various fashion styles and occasions
- User-Friendly Controls for easy adjustments and hands-free calls
- Long Battery Life for extended playtime and convenience

**Box AI**

We are excited to announce the launch of BeatsBeanie, the perfect combination of fashion and technology for the fashion-conscious man. BeatsBeanie is a beanie hat with built-in Bluetooth speakers, allowing users to enjoy music or take calls on the go without additional headphones or earbuds.

What makes BeatsBeanie stand out from the crowd? Here are some of its exciting features:

**Premium Sound Quality:** Don't compromise on sound quality with BeatsBeanie. Our Bluetooth speakers deliver rich, clear, and immersive sound, so you can enjoy your music, podcasts, or phone calls with crystal-clear audio.

**Easy Connectivity:** Connecting your BeatsBeanie to your Bluetooth-enabled devices is a breeze. Just pair it with your smartphone, tablet, or other devices, and you're ready to go. Plus, the Bluetooth technology provides a stable and reliable connection, allowing you to move freely without losing sound quality.

**P** Draft a blog post announcement for the launch of BeatsBeanie

# Hubs + AI



Query curated content



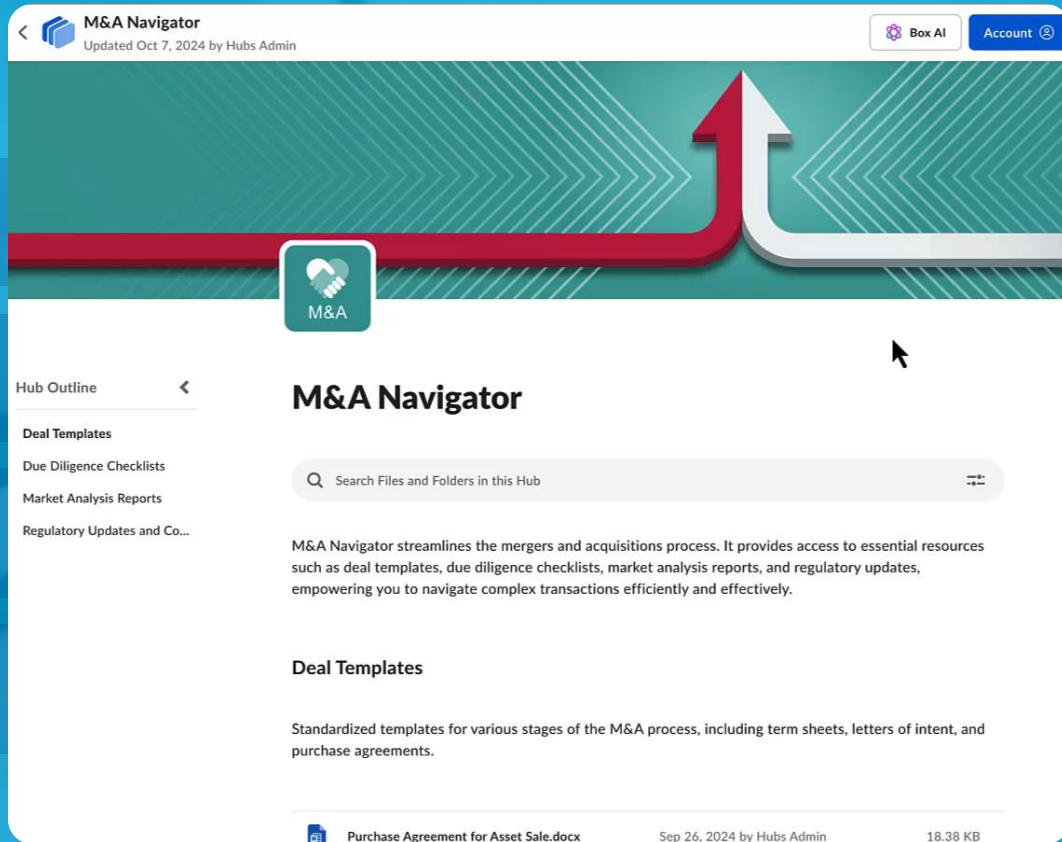
Instant summarization and insights

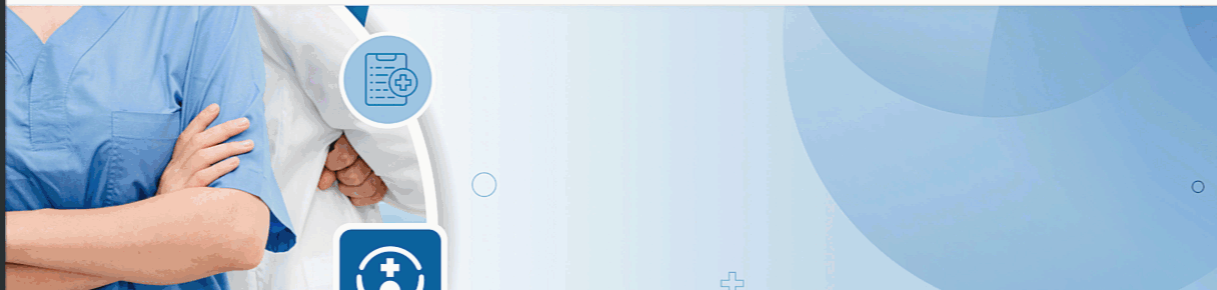


Citation transparency



Switch AI Agents in Hubs





## Hub Outline



Good Clinical Practices

Study Site Management

Data Management

Patient Engagement

# Clinical Operations Hub



Ask Box AI or search items in this Hub



This Hub is your single point of truth to review and interact with the approved Clinical operations Policies, SOPs and work instructions through the course of the clinical program. Here you will find everything you need to startup and operate new clinical sites and manage protocol amendments and deviations.

## Good Clinical Practices

Here you will find the latest GCP quality documentation required for maintaining good clinical practices with the intent to maintain high ethical and scientific standards.



Corrective Action SOP.docx

Sep 26, 2024 by Hubs Admin

17.42 KB

# Multidoc querying

Ask questions of a set of files selected, and get accurate answers instantly based on that context

Quickly make decisions based on information spread across multiple files

The screenshot displays the Box AI interface within the Box file management system. On the left, a sidebar shows navigation options like 'All Files', 'Recents', 'Synced', 'Canvas', 'Notes', 'Sign', 'Relay', 'Apps', 'Trash', 'My Collections', 'Favorites', 'Project Files', and 'Screenshots'. At the bottom of the sidebar are 'Developer Console' and 'Admin Console'. The main area features a search bar and a 'Share' button. A central modal window, titled 'Box AI AGENT Box', displays the results of a query. The modal has a settings gear icon, a close button, and a download icon. The query results are organized into three numbered sections: 1. Data Protection and Privacy, 2. Vendor and Third-Party Risk Management, and 3. Continuous Monitoring and Incident Response. Each section contains a paragraph of text summarizing the findings from the selected files. To the right of the text, a 'Files included:' section lists the documents used for the query: 'Q1 2024 IT Compliance Audit.pdf', 'IT Security Policies.pptx', 'Data Protection and Privacy...xlsx', 'Vendor Compliance Guideli...docx', and 'Annual Risk Assessment Re...docx'. Below the list is a link to 'Add file(s)'. At the bottom of the modal, there is a 'Based on:' section with five numbered tabs (1, 2, 3, 4, 5) and a row of icons for feedback. A text input field with a user icon 'J' and an 'Ask' button is located at the bottom of the modal. The background shows a list of files, including 'Annual Risk Assessment Report.docx' with a date of 'Feb 28, 2024 by Ethan Brown' and a size of '10.1 MB'.

box

Search

Share

Box AI AGENT Box

1. Data Protection and Privacy

Emphasis on strict adherence to GDPR and ISO 27001 standards for data encryption, access control, and data handling practices. Documents indicate a focus on minimizing data exposure risks, especially in client-facing systems, to comply with regulatory requirements.

2. Vendor and Third-Party Risk Management

Growing importance of vendor compliance protocols. The Vendor Compliance Guidelines and Annual Risk Assessment Report highlight the need for regular third-party audits and stringent security checks to ensure that all vendors meet internal IT security standards.

3. Continuous Monitoring and Incident Response

The IT Compliance Audit and IT Security Policies underscore the need for proactive threat monitoring and a robust incident response plan. Documents recommend real-time tracking of system vulnerabilities and regular employee training to maintain readiness and reduce response times to potential security threats.

Based on: 1 2 3 4 5

Files included:

- Q1 2024 IT Compliance Audit.pdf
- IT Security Policies.pptx
- Data Protection and Privacy...xlsx
- Vendor Compliance Guideli...docx
- Annual Risk Assessment Re...docx

Add file(s)

J

Ask

Annual Risk Assessment Report.docx

Feb 28, 2024 by Ethan Brown

10.1 MB

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PENDING




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Your unstructured data contains critical  
information that's untapped

# Box AI Extract Agents



Automatic data extraction  
from docs and images



Precise, accurate results



Flexible metadata templates



Highly scalable across  
enterprises

**Box AI** Consultant Project Closeout Report - Amy Jones.docx  
Closeout Reports · Updated Today by Julia Benivegna

1 PREO

**INCREO**

## Consultant Project Closeout Report

**Project Title:** HR Transformation: Empowering People and Driving Organizational Excellence

**Project ID:** 582037

**Total Hours Completed:** 100

**Consultant:** Amy Jones

**Project Overview:**

The HR Transformation project aimed to revamp Increo's human resources practices and processes to empower employees and drive organizational excellence. The project spanned over six months, starting on May 1, 2024, and concluding on October 31, 2024.

**Objectives:**

The primary objectives of the HR Transformation project were as follows:

- Streamline HR processes and systems to enhance efficiency.
- Develop a comprehensive talent management strategy.
- Implement employee engagement initiatives.
- Enhance communication channels between HR and employees.
- Foster a culture of continuous learning and development.

**Key Achievements:**

During the course of the project, several significant achievements were made:

a) **Process Streamlining:** The consultant successfully identified inefficiencies within our HR processes and implemented streamlined procedures that improved overall efficiency.

b) **Technology Integration:** By leveraging advanced HR technology solutions, the consultant facilitated the integration of advanced HR technology solutions that enhanced data management

**Metadata**

Increo - Closeout Report

This template has no values

See empty values

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# Box AI Studio



Create, manage, deploy custom AI agents



Choose your AI model



Test agents in AI playground



Select agent access to user



Choose from trusted AI agents

boxAdmin

Insights

Users & Groups

Content

Box AI

Reports

Classification

Shield

Governance

Relay

Platform

Apps

Account & Billing

Enterprise Settings

Back to My Account

Search

AI Studio

Box AI Settings

Box AIAGENTBox

Welcome to Box AI

Answer questions about "Revenue Growth FY23.pptx"

Explain this documentSummarize this document

Welcome to AI Studio

AI Studio is a no-code solution for the AI specialists in the organization. It allows you to control and customize how Box AI generates its responses.

Agents

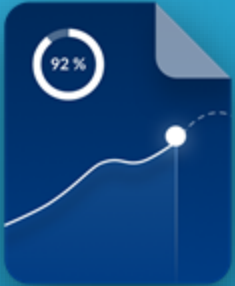
AI Studio

New Agent

AgentsModels

| NAME                             | CAPABILITIES | ACCESS ↑           | MONTHLY QUERIES 1 | LAST USED    |
|----------------------------------|--------------|--------------------|-------------------|--------------|
| <div><div>Box</div>DEFAULT</div> | <div></div>  | <div>Enabled</div> | 105.3 K           | Jul 24, 2024 |

# Box AI for Higher Education



## Fundraising

Extract key data from gift agreements, analyze it and use it to make key insights on donor activity. Generate personalized outreach emails to donors



## Admissions

Expedited application review  
  
Easily create messaging for prospective student campaigns



## Research

Find relevant successfully won grants and use them to write new content for new grant proposals  
  
Customize an agent that is designed to write grant proposals.



## Student Affairs

Give incoming new students an interactive chat bot (that has been customized to interact with them) that can be used to find answers to questions about campus life, move in day, and signing up for courses.



## HR

Draft job postings for any role based on internal documents or meeting notes  
  
Help employees find answers to any questions on company policy, instantly



## Administration

Extract key data from vendor contracts such as renewal date, contract amount, and vendor name. Ask questions across all your contracts and get fast answers.

# Thank you



**M. Josh Ruiz**

Technical Seller – Americas Build Top Team,  
IBM



**Murtaza Masood**

Global Managing Director,  
Public Sector | Box



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