

2019 IACA Merit Award Application

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Meet Eureka!

On May 8, 2018, the California Secretary of State's office launched Eureka, a new artificial intelligence online self-service search assistant. This new online search assistant, known in the information technology world as a "chatbot," is designed to help users navigate the California Secretary of State's website to quickly and easily connect to the information needed. Powered by Microsoft's artificial intelligence, Eureka is a smart search assistant that uses an individual's search query to pull up the most relevant, useful information related to businesses and trademarks.



Microsoft's Eureka Promotional Video

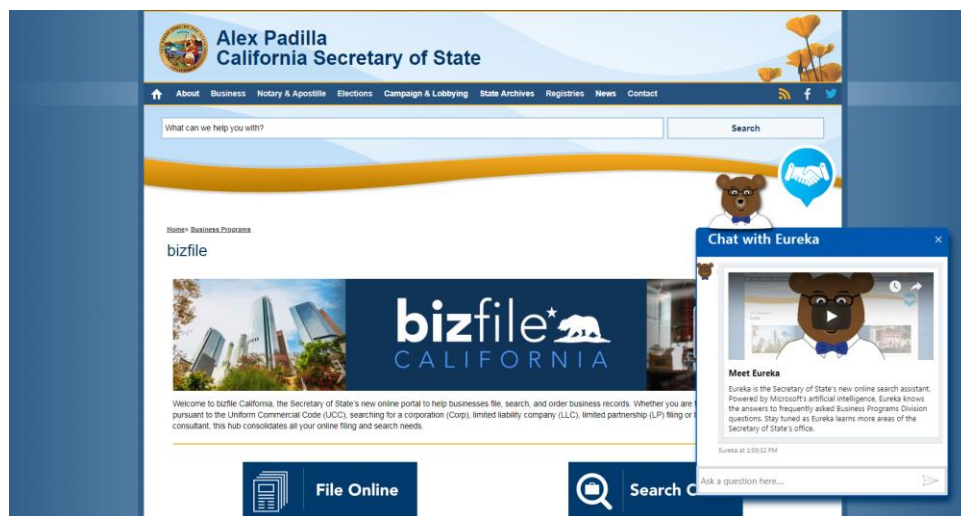
The California Secretary of State's office is committed to modernizing and creating efficiencies when providing services to customers. Eureka is part of California Secretary of State Alex Padilla's Digital Initiative to modernize and digitize the agency's divisions thus **making it easier to do business in California**. Eureka is helping to transform how Californian business owners engage with their state government, improving the delivery of information and freeing up staff to address the more complex challenges of current and prospective business owners. As a result, Eureka is enhancing the experiences of all users including business owners, entrepreneurs, professionals, and the public.

Available 24/7, Eureka affords greater accessibility for business owners and entrepreneurs to obtain information online - anywhere, anytime, and on any device. Eureka, conveniently located on our **bizfile** California Portal and all business and trademark California Secretary of State webpages, answers frequently asked questions and links customer to our online services. Customers can ask a question such as “How do I get a copy of a filed document?” and Eureka will link them to the California Business Search where they can look up a business record and access over 14.1 million corporation, limited liability company and limited partnership documents for free from the convenience of their home, office, or any other location. Customers can even enter a short phrase such as “register trademark” and Eureka will link them to our California Trademark Online registration system where users can register their trademark online. Users also can provide feedback about their Eureka experience and the quality of its responses, which the chatbot uses to continually improve.

The California Secretary of State is the first California state-level Department or Agency to use Microsoft’s artificial intelligence engine (chatbot) to modernize and create efficiencies when providing services to customers. The California Secretary of State’s office strongly desires to help other government agencies to similarly improve their level of service to the public and has already interacted with other California State agencies to share our experience, lessons learned, and continued benefits. To that end, the California Secretary of State seeks to use Eureka as a collaborative platform by sharing the resources used to build this chatbot. Our hope is that other agencies will learn from, implement and even improve upon the Eureka chatbot.

Modernizing Customer Service in California

In 2018, the State of California served more than 500,000 customers via phone calls in the areas of business and trademarks. Eureka is extending the ability for the business community to receive valuable information. Where once a business owner would have to call the California Secretary of State during office hours and wait on hold to get a question answered, business owners can now ask Eureka. Since Eureka’s launch, in eleven months’ time, Eureka has answered more than 59,000 queries which has provided instant information and assistance instead of business owners seeking information by phone, email or snail mail.



The primary beneficiaries of Eureka are millions of California businesses that are either registering or inquiring about registered businesses and trademarks with the California

Secretary of State. Eureka helps customers easily navigate business resources on the California Secretary of State's website, delivering the information they need, when they need it, in a user-friendly, efficient and effective manner. State employees benefit from having more meaningful, fulfilling work that better utilizes their knowledge, experience and expertise. Finally, California taxpayers benefit from the reduced costs of quickly and efficiently delivering information and services in a digital, connected way.

Customer/Public Benefits

- Faster time-to-information for public inquiries about business and trademark registrations and compliance requirements.
- Scales the California Secretary of State's ability to serve the most populous U.S. state by providing information to queries related to businesses and trademarks including starting new businesses, which are expected to generate more businesses and tax revenues.
- Fewer business registration and compliance errors, which avoids costs for businesses to correct.
- User-friendly interactive lookup of frequently asked questions.
- Access to an [instructional video](#) when starting a new Eureka session.
- The ability to improve process and quality of responses through an invitation to provide feedback about the user's experience and whether the answers were helpful.

Government Agency Benefits

- Improved throughput of customer service team by automating a routine portion of their workload.
- Enhanced productivity of customer service team, freeing them up to focus on more complex inquiries.
- Fewer business registration and compliance errors, which avoids costs for state enforcement.
- More meaningful, satisfying work for customer service team.
- The ability to improve process and quality of responses by utilizing the feedback provided by the user.
- Empowers program staff to be creative and develop an understanding of artificial intelligence to enhance the customer's experience in interacting with the SOS

Future of Eureka

The California Secretary of State continues to improve Eureka and plans to add the following features to further enhance Eureka and the customer experience over time:

- Additional languages to support more than English.
- LUIS (Language Understanding Intelligent Service) which identifies customer intent and tone.
- Radio buttons which will present customers with a variety of options and allow them to select the option that best suits their situation to provide the most specific information.
- Phone system integration which will allow a customer to begin a conversation with Eureka, but then seamlessly transition to a phone agent, if needed.
- Additional information to address other areas within the California Secretary of State's office.

Eureka was developed in partnership with Microsoft and required one internal resource from the California Secretary of State's Business Programs Division and one internal resource from the Information Technology Division. The development time was approximately four months and during that time valuable experience was gained and lessons were learned. Because of the ease of Microsoft's QnA Maker technology and the fact that Microsoft resources were available when needed, no major issues resulted over the duration of the project. The one challenge, which we have shared with other California State agencies, is related to time and resources. While the technology is easy to work with, the project itself was time consuming and requires a great deal of effort to feed initial information into the chatbot. We recommend to all other agencies that they designate multiple full-time resources to the project in order to give the chatbot a strong foundation.



Making it easier to do business in California.