

## Meet Eureka



### *Government to Citizens*

**California Secretary of State**

Presented by

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## Executive Summary

The thriving economy and diverse business opportunities make California a great place to build a business. If California were an independent country, “its economy would rank as the fifth-largest in the world,” according to The New York Times. California’s businesses are diverse – it is home base to the technology industry, the entertainment capital of the world and a has robust agriculture industry. The variety of industry opportunities combined with over 40 million people, make the Golden State a perfect place to start a business with a good chance for success due to the improving economy. Moreover, from the scenic mountains to beaches and top Nationwide schools, California is a great place to live and launch a successful business. When starting a business in California, the first stop is with the Secretary of State’s (SOS) office. The SOS office provides citizen services for critical business functions including registering business entities and trademarks, enabling secured creditors to protect their financial interests, providing information to the public relating to business entities that include corporations, limited liability companies, limited partnerships, general partnerships, limited liability partnerships and other business filings. The California Secretary of State processes millions of business and trademark filings and information requests each year for constituents.

The SOS is committed to elevating the citizen experience which include modernizing and creating efficiencies when providing services to the public. As part of Secretary of State Alex Padilla’s Digital Initiative to modernize and digitize the Agency, the SOS launched the **Eureka** Chatbot in May of 2018. Eureka is a self-service online search assistant (Chatbot) with the goal of making it easier to do business in California. Eureka is helping to transform how Californian engage with their state government, improving the delivery of information and enhancing the experiences of all users including business owners, entrepreneurs, professionals, and the public.

Eureka’s objectives are:

- Is Available 24/7 on any device (Mobile and Desktop);
- Helps the public navigate the SOS website;
- Quickly connects the public to the information needed;
- Improves the delivery of information; and
- Directs a citizen to a live person, if the customer needs additional information.

The Digital Initiative also includes an online LLC and Corporation Statement of Information filing tool, an online LLC Formation filing option, an online trademark and service mark filing tool, 14.3 million searchable business records through California Business Search, and a Starting a New Business resource page, all of which can be easily found at [bizfile.sos.ca.gov](http://bizfile.sos.ca.gov). The implementation of Eureka has significantly increased the adoption rate of these SOS digital initiatives as it directs the citizen to these online tool options that are tailored to their inquiries.

## Concept

Eureka was developed in partnership with Microsoft. 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. Eureka was a collaborative effort between the Business Programs (1 resource) and Information Technology (1 resource) with the initial scope focused on the Frequently Asked Questions (FAQ's) for the Business Entities and Trademarks business lines. Eureka was implemented in four (4) months from development to deployment.

The small SOS team worked to bring Eureka to life by incorporating personality into the chatbot including assigning a birthday to coincide with the release date (see **Eureka Facts**). The Business Programs management released an image design contest and naming contest. The California State Bear was selected and "Eureka" was the winning name of the chatbot because it's part of California's state motto and was used during the historic gold rush to mean "*I have found it.*" Californians can achieve that same outcome by obtaining answers to their business-related questions instantly!

The SOS team incorporated organizational change management activities to ensure internal and external stakeholder needs would be met. These activities included a comprehensive communication plan, engaging the SOS phone staff to conduct Eureka testing and seeking customer feedback with a soft launch prior to the public release. A customer feedback option was incorporated into Eureka to improve Eureka's search engine and SOS continues to enhance functionality with planned functionality to include making Eureka multi-lingual, expanding to other SOS lines of business, introducing cognitive services. For more information on future enhancements, see **Future of Eureka**.

The SOS Press Office released several Press Releases to inform California constituents of this new service offering, including:

### **Secretary of State Alex Padilla Announces LLCs Can Now Be Formed Online, Launches New Business Chatbot**

<http://www.sos.ca.gov/administration/news-releases-and-advisories/2018-news-releases-and-advisories/secretary-state-alex-padilla-announces-llcs-can-now-be-formed-online-launches-new-business-chatbot/>

### **Secretary of State's Eureka Chatbot Awarded Best of California Award by the Center for Digital Media**

<https://www.sos.ca.gov/administration/news-releases-and-advisories/2018-news-releases-and-advisories/secretary-states-eureka-chatbot-awarded-best-california-award-center-digital-media/>

### **Meet Eureka:**

<https://www.youtube.com/watch?v=YxUPlu7PL14>

## Significance

Eureka is an example of transforming government by leveraging innovative technologies that change how Californian citizens engage with their state government, improving the delivery of information and enhancing the user experience. Available 24/7, Eureka also affords greater accessibility for business owners and entrepreneurs to obtain information online from the convenience of their desktop, laptop, tablet or smartphone – providing access to information 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 14.3 million corporation, limited liability company and limited partnership documents for free from the convenience of their home, office, or mobile device. Customers can even enter a short phrase such as “register trademark” and Eureka will link them to our California Trademark Online registration system where businesses 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 and get smarter.

Automating responses to routine queries about businesses and trademark registrations resolves three key primary problems and provides benefits for the citizens.

### **Issues:**

- Lengthy phone wait times.
- Difficulty in navigating website and finding key information.
- Need to provide services to global businesses outside of California office hours.

### **Benefits:**

- Faster time-to-information for the public seeking answers.
- Easily accessible and available to assist on a 24/7 basis.
- Ability to process a large volume of information requests.
- Raising adoption rate for online services.
- Fewer business registration and compliance errors, which avoid costs and valuable time for citizens.
- Improve public service through Eureka’s analytics and data collection.
- Increasing productivity of staff from manually answering routine business questions, allowing the customer service team to focus on helping the business community with more complex inquiries.

## Impact

Eureka provides businesses alternative options of engagement leading to improved citizen experience and organizational benefits. The impact of Eureka includes:

### 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, citizens can now ask Eureka. Since Eureka's launch, in eleven months' time, Eureka has answered more than 64,000 queries in its first year of implementation which has provided instant information and assistance instead of business owners seeking information by phone, email or traditional mail during office hours.



The primary beneficiaries of Eureka are millions of Californians and other businesses nationally and globally that are either registering or inquiring about registered businesses and trademarks with the California Secretary of State. Eureka helps customers easily navigate business and trademark 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.

On May 20, the California Secretary of State received the Merit Award for the implementation of Eureka at the International Association of Commercial Administrators (IACA) in New Orleans, Louisiana:

[https://twitter.com/IACAorg/status/1130570858701950976/photo/1?ref\\_src=twsrc%5Etfw%7Ctwcamp%5Eembeddedtimeline%7Ctwterm%5Eprofile%3AIACAorg&ref\\_url=https%3A%2F%2Fwww.iaca.org%2F](https://twitter.com/IACAorg/status/1130570858701950976/photo/1?ref_src=twsrc%5Etfw%7Ctwcamp%5Eembeddedtimeline%7Ctwterm%5Eprofile%3AIACAorg&ref_url=https%3A%2F%2Fwww.iaca.org%2F)

IACA is an organization for government, professionals at the state, federal and international levels administering business registries and secured transaction systems.

### **Government Agency Benefits**

The implementation of Eureka has also resulted in SOS organizational benefits, including:

- 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 Facts**

- Eureka's cost avoidance in the first year of implementation equates to \$224,278!
  - *Two analyst resources at the Associate Governmental Program Analyst classification*
- 281 Questions Asked Per Day on Average
- Most Popular Questions Asked:
  - Business Search
    - Citizens looking for detailed information regarding a specific business
      - As an example, Business Location or Officers
    - Citizens searching for copies of filed documents for a specific business.
  - Statement of Information
    - Citizens looking for when their Statement of Information Due
    - Citizens asking what is a Statement of Information
    - Citizens asking how to file a Statement of Information
  - Limited Liability Company (LLC)
    - Citizens asking how to start an LLC
    - Citizens asking how to cancel an LLC
  - Change of Address
  - Doing Business As (DBA)
    - Citizens asking if they can file their DBA or fictitious business names with the SOS, which they cannot.

- Most Helpful Responses:
  - How do I start a business?
  - Business Search
    - Provide answers and links to the Business Search online with 14.3 million searchable business records.
  - Statement of Information
    - Provide answers and links to Statement of Information online filing
  - SOS Suspended
    - Provide answers why their filing is suspended
  - Penalty Waiver
    - Provide answers to penalty waiver and a link to send request for waiver.
- Average Response Time – ½ Second
- Eureka’s Birthdate is May 8, 2018
- Eureka is a California Grizzly Bear
- Eureka’s Favorite Colors – Blue & Gold



***Making it easier to do business in California.***