



**Anaplan** Partner

# Harnessing AI for Financial Resilience in Universities: From Insight to Impact



UNIVERSITY OF  
**South Carolina**

Presenters:

Kelly Epting, Associate Vice President for Finance and Budget  
at University of South Carolina

Neal Goffman, Vice President, Anaplan Public Sector at  
Anaplan

Russ Owen, Director of Client Services at Tru Consulting



# Introductions



**Kelly Epting**

Associate Vice President for  
Finance and Budget at  
University of South Carolina



**Neal Goffman**

Vice President of Anaplan  
Public Sector at  
Anaplan



**Russ Owen**

Director of Client Services at  
Tru Consulting



# The *proven* Anaplan partner in public markets.

## **Proven FOCUS**

100% Anaplan  
100% State, Local, and Education  
250+ years industry experience

## **Proven METHODS**

Pre-built templates for nearly every use case  
Pre-built data integrations  
Industry best-practices

## **Proven SUCCESS**

50+ diverse clients of all sizes and complexity  
Hundreds of successfully completed projects

## Common Use Cases

- ✓ Budgeting Development
- ✓ Position Planning
- ✓ Enrollment and Tuition Planning
- ✓ Strategic / Long Range Planning
- ✓ Liquidity Planning
- ✓ Clinical Budgeting
- ✓ Gifts and Grants
- ✓ Auxiliary Planning
- ✓ Budget Transfers
- ✓ Capital Planning
- ✓ Grants Management

## State Systems and Academic Medical Centers



## Public State Universities



## Private Research Universities



## Community Colleges and Colleges



# About Anaplan

# Amazon is bringing a whole lot of AI to Thursday Night Football this season



Amazon's still showing a football game... but it has some ideas about what else it can do. Image: Amazon

FORTUNE  
/ The compai  
its machine l  
understand h  
it can help vi

FORTUNE  
**KPMG is committing \$2 billion-plus to A.I.—and estimates that could generate \$12 billion in revenue**

experience covering consumer tech. Previously, at Protocol, The Wall Street Journal, and Wired.  
Aug 24, 2023 at 11:09 AM EDT | 10 Comments / 10 New



# A boy saw 17 doctors over 3 years for chronic pain. ChatGPT found the diagnosis

t a bounce house for her two young  
i experiencing pain.

FORTUNE  
**A.I. could automate 30% of STEM workers' hours by 2030, new McKinsey research warns**

FORTUNE  
**Elon Musk once said 'with artificial intelligence, we are summoning the demon.' Now he's starting an AI company**

FORTUNE  
**VC billionaire Marc Andreessen says A.I. could eliminate the need for labor in the best-case scenario—or lead to Chinese world domination**

5 Rachel Shin  
Tue, July 11, 2023 at 9:00 AM CDT · 4 min read

f  
Business · Business Insider

**Google is testing a new AI tool that can write news articles and reportedly pitching it to The New York Times and News Corp**

FORTUNE  
**CEO slammed for replacing 90% of his company's support staff with an A.I. chatbot— then bragging about it on Twitter**

engadget

**Google is testing its medical AI chatbot at the Mayo Clinic**

Med-PaLM 2 can respond to medical questions, summarize documents and more.

# AI is Disrupting Higher Education — Will Traditional Colleges Survive?

AI is booming, and students are using it to navigate assignments. Will colleges survive?

ght have what it takes to replace the C-suite — But  
s say the top jobs are safe for cultural reasons

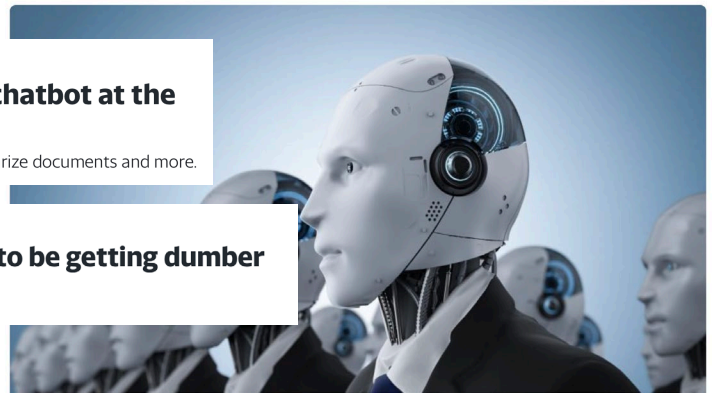
# From admissions to teaching to grading AI is infiltrating higher education

As colleges' use of the technology grows, so do questions about bias and accuracy

BUSINESS INSIDER

**The AI behind ChatGPT really does seem to be getting dumber — but no one can quite figure out why**

**Google's Bard chatbot finally launches in the EU, now supports more than 40 languages**

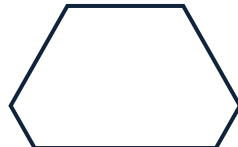


# You Are Falling Behind!





## Top 10 AI Terms







## AI

Artificial intelligence, which is the simulation of human intelligence processes by machines or computer systems. AI can mimic human capabilities such as communication, learning, and decision-making. Aka Cognitive Computing

## Machine Learning (ML)

A branch of artificial intelligence (AI) and computer science which focuses on the use of data and algorithms to imitate the way that humans learn, gradually improving its accuracy

## Natural Language Processing (NLP)

The capacity of computers to comprehend or extract meaning from natural human languages. NLP generally entails computer interpretation of text or speech recognition.



## Chatbot

A chatbot is a software application that is designed to imitate human conversation through text or voice commands.

## Generative AI

Artificial intelligence capable of generating text, images, or other media, using generative models. Generative AI models learn the patterns and structure of their input training data and then generate new data that has similar characteristics.

## Artificial General Intelligence (AGI)

AGI is a computational system that may execute any intellectual function that a human can. Also known as “Strong AI.” At the moment, AGI is just a concept.



## Deep Learning

A function of AI that imitates the human brain by learning from how it structures and processes information to make decisions. Instead of relying on an algorithm that can only perform one specific task, this subset of machine learning can learn from unstructured data without supervision.

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## Predictive Analytics

Predictive analytics is a type of analytics that uses technology to predict what will happen in a specific time frame based on historical data and patterns.

## Prescriptive Analytics

Prescriptive analytics is a type of analytics that uses technology to analyze data for factors such as possible situations and scenarios, past and present performance, and other resources to help organizations make better strategic decisions.

## Pattern Recognition

Pattern recognition is the method of using computer algorithms to analyze, detect, and label regularities in data. This informs how the data gets classified into different categories.



## Turing Test

The Turing test was created by computer scientist Alan Turing to evaluate a machine's ability to exhibit intelligence equal to humans, especially in language and behavior. When facilitating the test, a human evaluator judges conversations between a human and machine. If the evaluator cannot distinguish between responses, then the machine passes the Turing test.



# State of AI

# Higher Ed applications of AI



**Personalized full  
funnel enrollment  
assistant**

Applicant



**Automated student  
application clustering  
and review**

Admission/recruitment  
team



**Program offering  
demand analysis,  
curriculum R & D**

Campus marketing  
leadership



**Forecasting,  
predictive modeling  
for enrollment goals**

Deans/department chairs



**Digital marketing  
reimagined with  
generative AI**

Digital marketing strategy  
team

## Higher Ed budget applications of AI

### LRP

- Summarize Long Range Plan
- Identify Key Drivers

### Annual Budget

- Initial Baseline
- Recommendations

### Forecast

- Real time changes in trend
- Recommendations for course correction



## Higher Ed capital planning applications of AI

### Policies & Procedures

Search & Summarize Long Range Plan Quantitative and Qualitative Measures for Project Viability

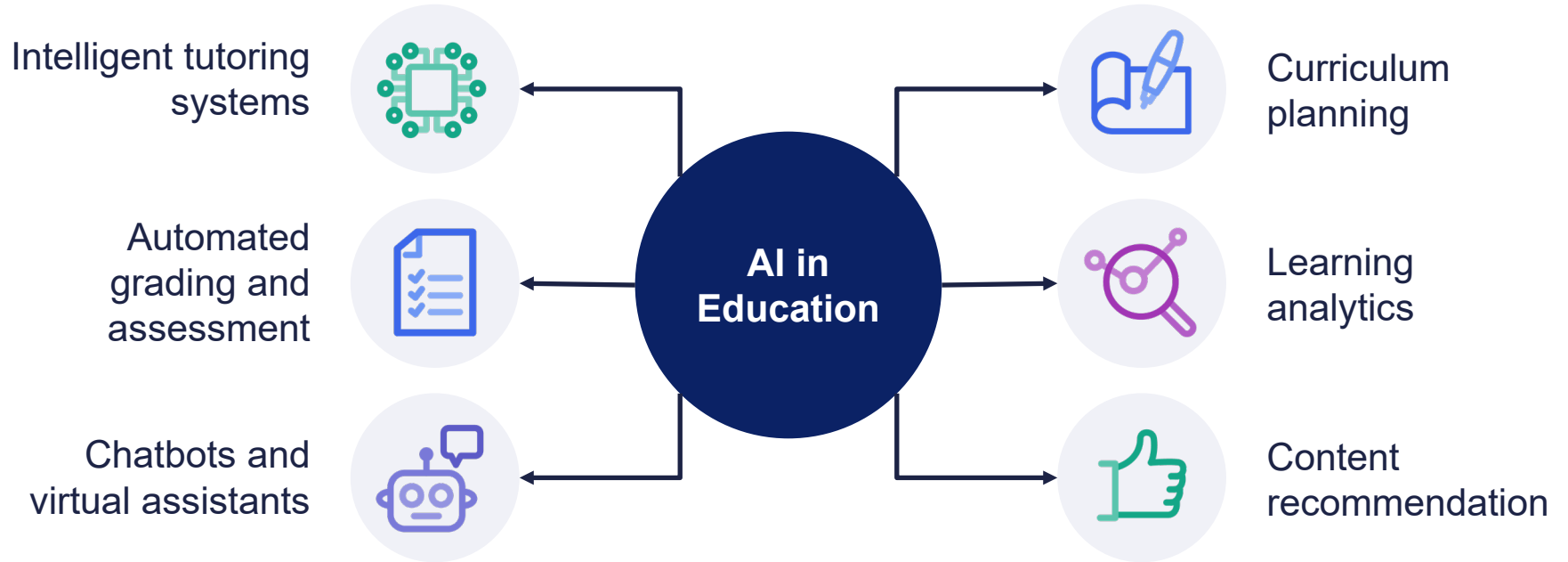
### Business Case

Populate Business Case Template for Project Review

### Project Analysis

Real time costs vs budget, timeline analysis and projections

# AI in the classroom



# Let's Connect

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**Russ Owen**

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Meeting Link:



# Upcoming Events

- November 8<sup>th</sup>: Webinar partnering with CCBO at 2pm ET- More Details soon!
- February 2024: Webinar featuring University of Miami

