

# MAKING AI WORK FOR YOU WHEREVER YOU ARE ON YOUR JOURNEY

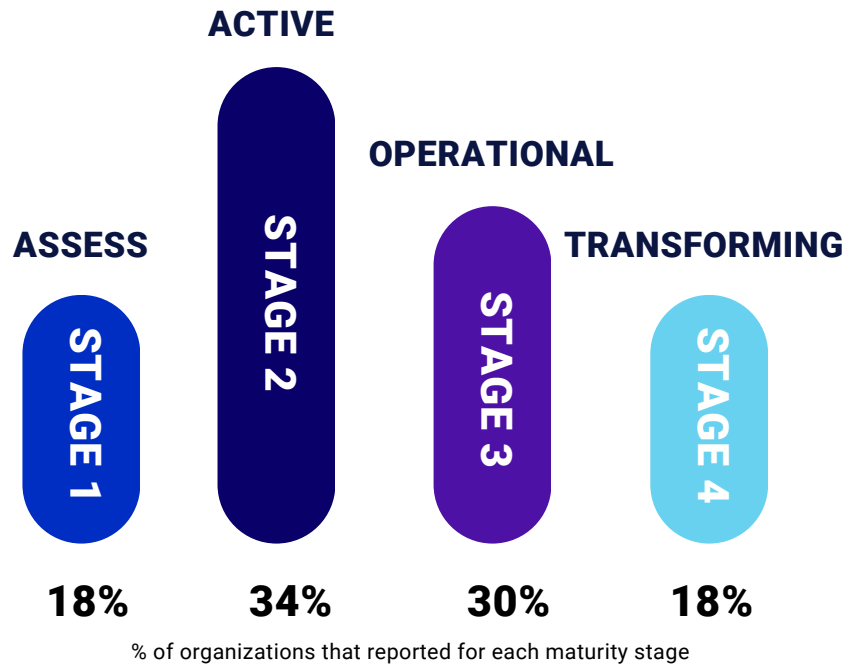
Transformative AI is the goal for many organizations. However, concerns around security, compliance, and access are key worries. Enter Workgrid: Conversational AI that is secure and composable - ready to meet you wherever you are on your AI journey.

## WHAT AI MATURITY STAGE ARE YOU IN?

There are many reports and maturity models attempting to understand the rapid changes in AI adoption inside organizations. More importantly, how it aids in enhancing the employee experience.

Proper AI adoption requires an understanding of where your organization is on its AI maturity and identifying the programs and resources that support a cohesive governance strategy.

## AI MATURITY STAGES



## AI GOVERNANCE STRATEGY

Organizations must establish a framework for use cases and a governance strategy that maximizes value and minimizes risk. When creating a business readiness model for implementing AI, it should align with the organization's AI maturity stage. Take into account the following elements:

- Program Strategy
- Org. Change Management
- Use Case Roadmap
- Roles & Responsibilities
- Measurement
- Access & Permissions
- Governance Framework
- Training & Enablement

# AI MATURITY MODEL

## GETTING STARTED

**Step 1:** Understand your AI maturity level to better deliver a governance and program strategy that propels the use of AI

**Step 2:** Define use cases that drive tangible business value

**Step 3:** Understand and grow governance levers in accordance with maturity and use cases

### ASSESS

Organizations in the **ASSESS** stage recognize the power and potential for AI, but have not formally invested in any services or programs. They are typically characterized by these common themes:

- Pilots are only plans
- AI strategy is still forming
- Formal business cases remain in flight
- Internal AI talent is completely organic and based on self-interest

### OPERATIONAL

The **OPERATIONAL** stage is typically reflected by programmatic AI use cases that are established within business lines and are producing direct, tangible ROI. Organizations in this stage are typically characterized by these common themes:

- Program strategy in place (AI lives as a program, not a “project”)
- Governance model is formalized and aiding in driving use case decisioning, program decisions, and risk mitigation
- AI dexterity is considered a talent & development priority

### ACTIVE

For the organizations in **ACTIVE** stage, they have begun experimenting in small, low-risk pilot projects to validate value and ROI of AI. They are typically characterized by these common themes:

- Pilots managed in silos by use case or user group
- AI projects may be linked to a central strategy
- Central strategy may remain in flux
- Use cases are being captured and vetted
- Governance model is forming and iterative - but is a key requirement to make AI real

### TRANSFORMING


When a company reaches the **TRANSFORMING** stage they have AI deeply embedded into the business, opportunities, and lives as a part of the corporate culture. They are typically characterized by these common themes:

- Robust program strategy and governance
- Data quality, integrity, and advanced analytics are helping to drive business outcomes on both EX and CX initiatives
- AI is aiding in delivering new unseen value, risk mitigation, and advancement

# AI USE CASES MATURITY STAGE: ASSESS

## Assess

- Approvals
- Target news, alerts, and announcements
- API-Only apps for notifications and actions
- Curated FAQs
- Quick Links



**Cornerstone**  
Training

**A new training course is available**  
Based on your development plan you may be interested in the new "Cybersecurity 101" training.

Launch Training

### Use Cases

Workgrid’s AI Assistant provides organizations in the Assess stage with easy-to-implement use cases that introduce benefits such as streamlined workflows and improved knowledge discovery.

### Approvals

Review and act on requests with system alerts delivered directly from the source system to your AI Assistant. Approvers can view details, decline, or approve the request right from the notification.

### FAQS

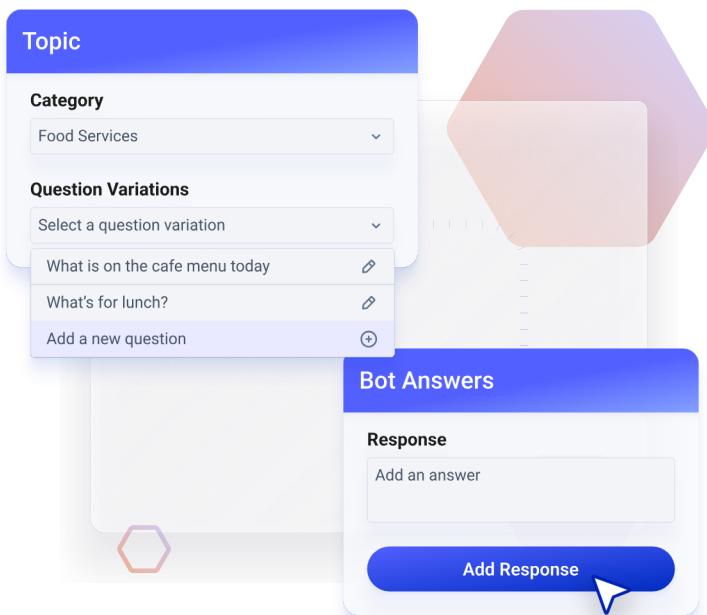
From policies to tech support, connecting the AI Assistant with frequently asked questions delivers employees quick access to information through an easy-to-use chat interface.

### Notifications

Whether you need to send a one-time alert or weekly reminders, an AI Assistant provides a single destination for announcements, system-based alerts, and notifications helping to ensure communications get seen.

### Quick Links

Streamline access to the information employees need with easily accessible links to commonly used web pages.



The screenshot shows a configuration interface for the AI Assistant. It features a 'Topic' section with a 'Category' dropdown set to 'Food Services' and a 'Question Variations' section with a dropdown set to 'Select a question variation'. Below this, there is a list of question variations: 'What is on the cafe menu today', 'What's for lunch?', and 'Add a new question'. The 'Bot Answers' section is also visible, with a 'Response' input field containing the text 'Add an answer' and an 'Add Response' button.

# AI USE CASES

## MATURITY STAGE: ACTIVE

### Active

- Highly controlled GenAI apps (managed for content, conversation, and risk mitigation)
  - Content Generation
  - Summarization
  - Insights
- Chat to documents through conversational AI

### Use Cases

Workgrid’s AI Assistant provides organizations in the Active stage easy-to-implement, highly controlled generative AI use cases that allow for the introduction of AI into an organization, limiting the risk of shadow AI and maximizing efficiency with workflows.

In the ACTIVE stage of AI maturity, organizations should have certain controls in place. With the Workgrid AI Assistant organizations will take advantage of the following features:

- Access roles and permissions
- Persona based pilot apps
- Governed BYO LLM
- Workgrid LLM

### Chat to Documents

Leverage conversational AI to save employees time by providing answers from company documents like handbooks and policies. The AI segments content into snippets for precise responses without reading full documents, which can be uploaded manually or linked through a hosted solution like SharePoint.

How do I refer someone for a job



Here’s what we found in the Employee Handbook:

**Please complete the Employee Referral Form located in the [ACME job portal](#) to refer a friend or former colleague for a position with ACME Co.**  
Chat to Document: [Employee Handbook](#).

### Generative AI Apps

Bring generative AI use cases to employees in a controlled manner. By leveraging built-in prompts, Workgrid’s Genie Apps provide constraints to keep output professional while helping employees understand what kinds of content can be created with powerful AI technology including writing content, summarizing, and providing insights.

#### Insight Genie

##### Content to analyze

How Generative AI is empowering the digital workplace

##### What insights do you wish for?

Select multiple options

Extract Key Points

Summary

Topic Classification

Sentiment

Trends

# AI USE CASES

## MATURITY STAGE: OPERATIONAL

### Operational

- Transactional AI Agents
- Bring your own LLM
- Chat to LLMs & Knowledge Sources
- AI Image Creation
- Democratized App Building

#### Use Cases

Workgrid's AI Assistant offers Operational stage organizations use cases that improve the employee experience by utilizing AI interactions based on iterative reasoning and information within the company's ecosystem like employee personas.

Organizations at the Operational level usually have established controls like zero training and tuning, audit logs, and builder prompt controls.

#### AI Agents

Agents employ iterative reasoning to determine the information to provide to the user, drawing from their knowledge within the AI ecosystem.

They can act proactively, either triggered by an event or notification, or prompted by the AI Assistant. For example, when the AI Work Assistant identifies an IT query, it alerts the IT Agent.

A key feature of Agents is that it gives the employee the ability to complete an action such as order a new device, submit an IT ticket, draft an email, and more.



Zoom keeps crashing on my computer

Let's create a help desk ticket for you:

#### Create IT Help Desk Ticket

##### Category

Select a ticket category

##### Name

Enter a ticket name

##### Comment

Add details that may be helpful

Submit

#### Bring Your Own LLM

For companies that want to move both fast and confident with their AI services, a flexible bring your own model allows for seamless integration of your LLM into workflows, with autonomy and control over data and inputs to make the most of your AI outcomes.

#### Chat to LLMs & Knowledge Sources

Connecting Workgrid to knowledge systems (ex. ServiceNow, Jira) allows the AI Assistant to extract and summarize information using LLM technology. This reduces time spent searching across data, providing relevant results and recommendations for employees.

#### Democratized App Building

Accelerate app development time from weeks to hours with the AI Assistant's low-code app builder. Reduce reliance on IT teams and empower citizen technologists to create apps that reduce digital friction, optimize legacy business process, and increase overall employee satisfaction.

# AI USE CASES MATURITY STAGE: TRANSFORMING

## Transforming

- Transforming AI Agents
- Knowledge Sensing and Reporting
- Democratized App Builders
- AI Orchestration

### Use Cases

Workgrid’s AI Assistant provides organizations in the Transforming stage the ability to improve workflow efficiencies with agentic style AI use cases.

Transforming level organizations typically have robust access controls, audit logs, and analytics in place.

### Democratized App Building

Unleash AI App development by allowing developers to connect multiple data sources, services, and applications to create novel AI use cases that transform the way you deliver insights and actions to employees.

© Add data source

**PAYCHEX**

© Triggered by chat

- Retrieve paycheck data
- Send check information to payee

**Paychex**  
1h ago

**My Pay**

<b>Net Pay</b>	\$2,007.95
8/26/23 - 9/8/23	80 hrs
<b>Gross Pay</b>	\$4,782.31
<b>Deductions</b>	
401 (k)	\$551.06
Child Support 1	\$500.00
Dental Plan	\$26.00
Dependent Care FSA	\$75.00
Health Care FSA	\$75.00

Request iPhone 15 Pro

Yes, I can help with that. Please chose from the following:

**Apple iPhone 15 Pro**  
Request for Apple iPhone 15 Pro

Is this is replacement for a lost or broken iPhone?  
 Yes  No

Choose a replacement color from the options below:  
 Alpine Green  
 Silver  
 Gold  
 Graphite

Order Now

### ServiceNow Service Catalog

Transform workflows and requests by leveraging agentic AI to improve processes. In the case of the ServiceNow Service Catalog app, users engage with the Assistant through conversational AI and can dynamically search the procurement system to complete an order.

### Office Productivity Agent

Connect the power of generative AI with your productivity suite (e.g. mail, calendar, conversations) to deliver agentic experiences. With an Office Agent, employees can connect AI generated email content directly with a draft in their inbox, request to block time on their calendar, or even generate a summary of unread emails right from the Assistant.