

Transforming Employee Efficiency with an AI Assistant

INDUSTRY
Manufacturing



Background

Forterra is a leading UK manufacturer of essential clay and concrete building products, with a unique combination of strong market positions in clay bricks, concrete blocks, and precast concrete flooring. Their purpose is to keep Britain building efficiently, sustainably, and economically.

In its portfolio, Forterra comprises of renowned brands such as London Brick and Butterley which date back to the 19th century as well as Ecostock and Thermalite which today feature nationwide in a variety of building types.

Making up the building blocks of the British landscape, Forterra is an expert in manufacturing bricks, blocks, and precast concrete, and also paves the way with it's sustainable paving solutions.



Challenges

Recognizing the potential of artificial intelligence, Forterra's IT team was tasked with researching AI solutions to streamline operations and improve employee efficiency.

Forterra needed to find the right type of AI solution that would align with their organizational needs and overcome the following challenges:

Limited Resources: With a small IT team, Forterra needed a scalable way to manage and deploy AI across departments without overburdening their IT resources and with minimal disruption to existing operations.

Fragmented Enterprise Systems: Employees relied on multiple disconnected systems, including CRM, HR, ITSM, and project management platforms, making information retrieval and task execution cumbersome. The AI solution would need to integrate with their existing enterprise systems and workflows. While some of their current tools offered AI capabilities at an extra cost, acquiring and overseeing multiple AI solutions from different vendors would pose significant complexities and expenses.

Support for Microsoft Teams: Forterra was undergoing digital transformation efforts to centralize work in Microsoft Teams and reduce reliance on emails when it comes to system notifications and corporate communications. Forterra was looking for a way to align employees work within Microsoft Teams, hoping for an AI solution that would integrate directly within the flow of Microsoft Teams.

Tailored Solution: While searching for solutions, the team determined they needed an option that was adaptable to implement across different employees and their individual needs, from frontline staff to desk workers and executives.



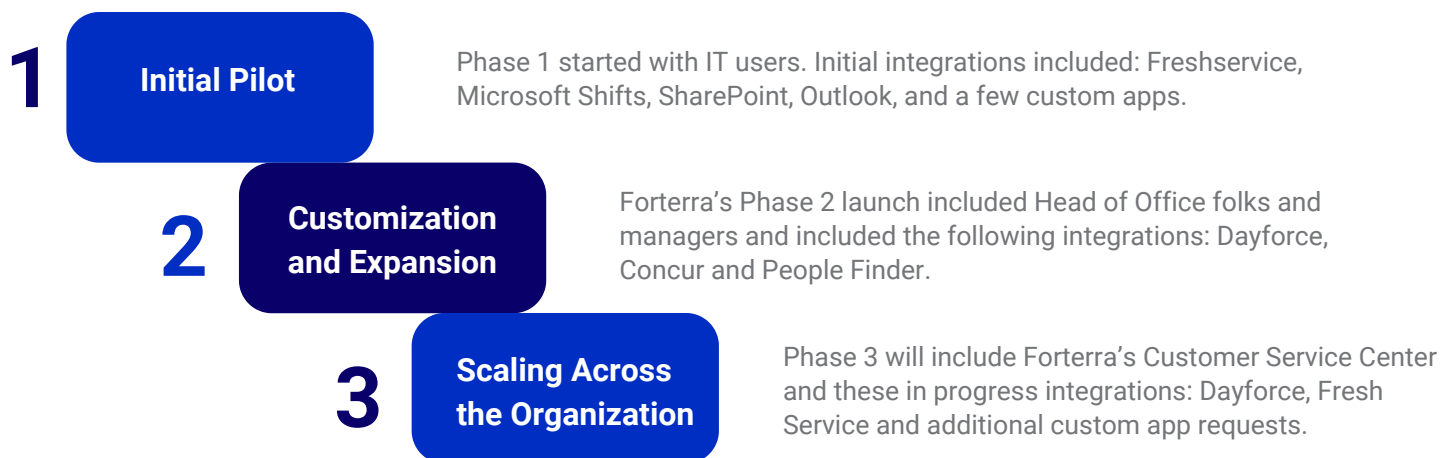
Solution

After evaluating different AI solutions, the team selected Workgrid's conversational AI platform for its capabilities, including:

- **Unified Enterprise Integration:** The Workgrid AI Assistant integrates seamlessly with many of Forterra's existing enterprise systems, providing employees a single AI Assistant to streamline knowledge discovery and perform tasks across multiple platforms.
- **Low-Code Builder:** With a low-code builder, Workgrid's platform allowed the Forterra IT team to quickly create and deploy new use cases tailored to their specific workflows with minimal technical expertise required.
- **Out-of-the-Box Use Cases:** The Workgrid AI Assistant includes a catalog of pre-configured templates that address common use cases. This allowed Forterra to immediately deploy use cases and deliver value to employees.
- **Tailored AI Experiences:** Workgrid enabled Forterra to implement various AI use cases tailored to different types of employees. This approach allowed for the customization of experiences based on individual roles and departments, ensuring employees receive personalized and relevant interactions.
- **Microsoft Teams Integration:** Centralizing everything where employees worked was a driver for Forterra to choose Workgrid opposed to deploying an AI Assistant as a separate application which would result in a disjointed experience for its employees. With Workgrid, employees can access the assistant in the flow of their work, creating a frictionless experience.

Implementation

When it came time for initial deployment, Forterra launched the AI Assistant in phases. They named their AI Assistant 'TOM' (acronym for Text Operated Machine) and deployed the assistant within Microsoft Teams.



Use Cases

Forterra is currently leveraging the AI Assistant for over 25 use cases to simplify employee's day, including:

Agenda Planning

Captures agenda items for upcoming meetings to help effectively prepare for meetings.

Anniversary Alerts

The AI Assistant sends an automated notification to an employee on the anniversary of their start date.

Celebrate Success

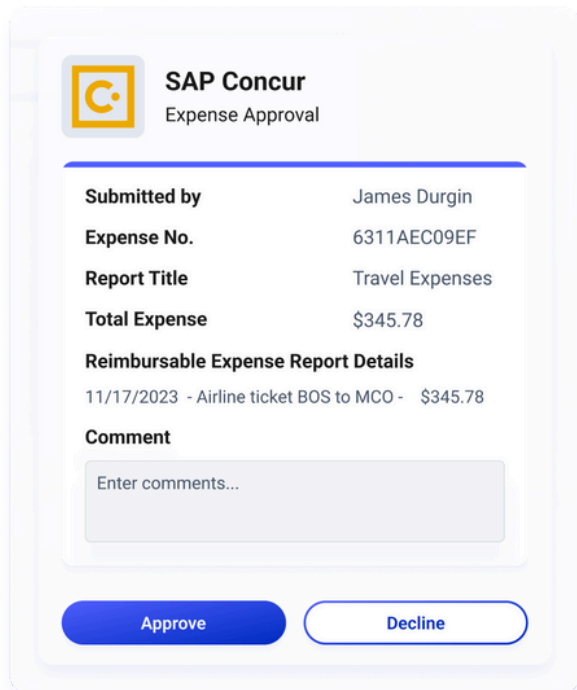
Every Friday, the Assistant encourages employees to share success stories from the week. Submissions are then automatically dispersed to the appropriate teams.

CRM Alerts

The AI Assistant notifies employees when new records are created, updated or closed.

Expense Management

The AI Assistant notifies managers when an expense approval needs their review. Managers can review details and approve or reject the expense right from the assistant.



SAP Concur
Expense Approval

Submitted by	James Durgin
Expense No.	6311AEC09EF
Report Title	Travel Expenses
Total Expense	\$345.78

Reimbursable Expense Report Details
11/17/2023 - Airline ticket BOS to MCO - \$345.78

Comment
Enter comments...

Approve **Decline**

Incident Management & Change Management

Use the assistant to create and edit incident or change management tickets. The assistant also notifies employees when the status has changed with any open tickets.

IT Hardware Request

Enables employees to submit service catalog requests from Freshservice directly from the AI Assistant.

Sales Quote Approvals

The AI Assistant notifies managers when sales quotes need their approval and enables managers to review and complete approval within the assistant interface within Microsoft Teams.

Scheduling

The Assistant notifies employees with a report on who is out of the office for the week and pulls employees' work location from Microsoft Shifts and sends it out to the IT team.

Search SharePoint Sites & Folders

The assistant integrates with SharePoint to enable employees to quickly search for information, such as policies across Forterra's SharePoint sites and folder directories where data and documents are stored.

Task Management

The Assistant provides employees with an easy to digest view of upcoming tasks by consolidating tasks from Microsoft Planner.

Time Management

Use the assistant to submit or cancel holiday requests and submit OOO messages.

Users simply use natural language to select the days they want to generate the OOO message and click submit. The OOO message is auto-generated based on the user's login and the dates selected.



Results and Impact

Implementation of the AI Assistant had a significant positive impact on Forterra's workforce, leading to:



Increased Efficiency:

As of the phase 3 launch, Forterra has centralized information and actions from 9 systems. In doing so, repetitive workflows and been automated time wasted from navigation, searching, and switching between systems has been reduced for a more productive and efficient workday.



Improved Employee Satisfaction:

The AI Assistant's intuitive interface and ability to simplify workflows enhanced employee satisfaction. Providing employees with a single pane of glass for accessing information and completing tasks across the organization, right within Microsoft Teams.



Enhanced Decision Making:

Real-time insights and easy access to consolidated data empowered managers and employees to make informed decisions and take action on tasks such as approvals faster.



Cost-Effective Scaling:

The IT teams' ability to deploy out-of-the-box use cases and build additional custom use cases minimized the need for external development resources, keeping cost under control.



Improved Communication & Culture:

The AI Assistant enabled Forterra to send recurring and one-time communications to employees so they could receive personalized and contextualized communications at the right time. Furthermore, Forterra built apps focused on enhancing employee morale, recognizing employees and key success stories which enhanced overall employee engagement.



Where can I find my expenses?



Based on what you asked, here are some possible answers:

How can I claim an expense?

Expense reports can be created and managed within the [Expenses Portal](#)

Suggested apps that may be of interest:

 **Expenses**

Conclusion

By implementing the Enterprise AI Assistant, Forterra successfully integrated AI into the employee experience, transformed workplace productivity, and enabled employees to work smarter, not harder. The combination of Workgrid's out-of-the-box capabilities and low-code builder platform provided a scalable, cost-effective solution that met the company's immediate and long-term needs.

**To learn more about how the
Workgrid Assistant can
support your digital workplace
request a demo!**



 workgrid.com

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