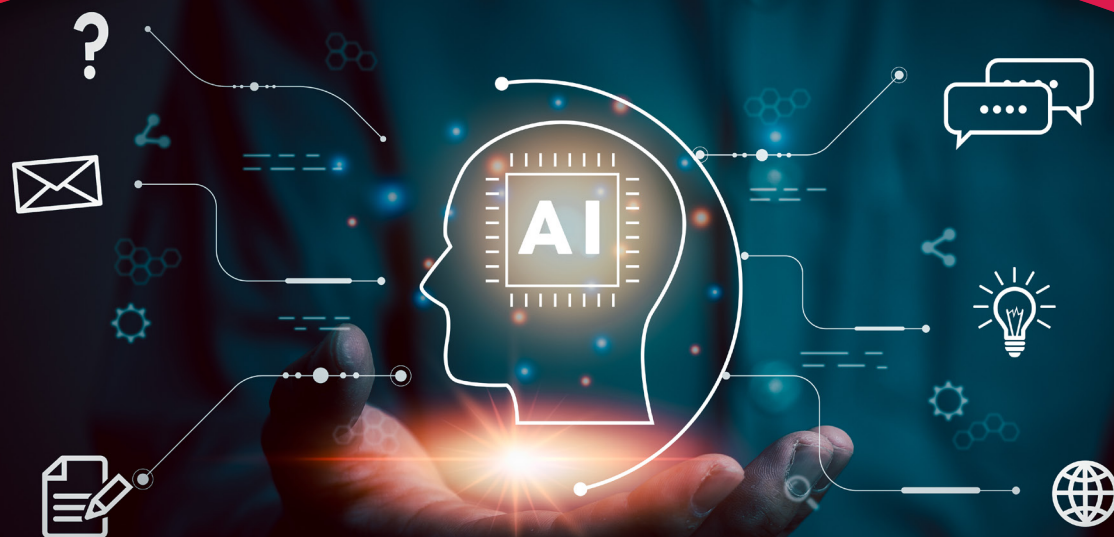


How to transform day-to-day business tasks with GenAI: A practical guide

WHITEPAPER



INTRODUCTION

Why modern businesses can't afford to ignore GenAI

Generative AI (GenAI) is revolutionizing business practices across industries by streamlining knowledge-intensive tasks that have traditionally required human cognition. As it transforms how organizations process and leverage content, GenAI has the potential to completely change strategic activities and routine day-to-day tasks – driving next-level operational efficiency gains as well as new market advantages. For companies aiming to stay at the forefront of innovation, adopting GenAI is not just a strategic necessity but a competitive imperative.

The key to fully exploiting GenAI lies in its integration into the business infrastructure, though. A primary challenge is how to adapt GenAI to reliably automate and optimize specific business tasks, while ensuring that the technology is aligned with the organization's core operations and strategic objectives.

This also relies on enabling teams to confidently use GenAI in their everyday work; making technology accessible, intuitive, and indispensable to a wide pool of users without requiring them to possess in-depth technical knowledge.

To help focus GenAI success, companies will additionally need some formal structure around the technology's deployment. In the paper we explore the value of following the STEP framework (Segmentation, Transition, Education, Performance)¹. This is strongly recommended for integrating GenAI best into daily operations and ensuring that the technology plays a positive and productive role in an organization, with employees' full buy-in and cooperation.

Ultimately, marrying GenAI-enabled efficiencies with identified business needs allows companies to release valuable time and resources; assets that can now be focused on more complex and strategic projects, sharpening the organization's competitive advantage as the pace of business change continues to accelerate.

Next we'll unpack the transformation opportunity for everyday business tasks with GenAI and the critical success factors for exploiting the technology to optimal effect.

Opportunity identifiers: GenAI's greatest scope

In today's dynamic business ecosystem, staying competitive requires not just keeping pace with technological advancements but leveraging them to do things differently. GenAI offers enormous potential here, as it not only permits smarter process automation but also *reinvents* the way that entire organizations generate content, make decisions, and interact with customers.

With the amount of available information soaring, all companies are challenged to harness these assets and insights more smartly and swiftly, yet without detracting from the skilled work that employees are most valued for. GenAI bridges that gap, empowering teams to deliver more of what matters, by supporting them with the knowledge and content they need on demand.

Imagine an end to routine tasks such as responding to emails, drafting content, or searching for information or instructions. While these tasks may appear trivial when viewed individually, they collectively form the backbone that sustains business operations. However, many of these activities fall outside the capabilities of major applications such as enterprise content management (ECM), enterprise resource planning (ERP), and customer relationship management (CRM) systems. This is where GenAI can shine.

ENHANCED CONTENT CREATION

GenAI can help automate responses to common customer enquiries, generate personalized quotes based on customer history, or craft compelling advertising copy tailored to targeted demographics. It ensures messaging consistency and coherence, while significantly reducing manual effort. By analyzing individual customer preferences and behaviors, GenAI tailors experiences, recommendations, and services to meet the unique needs of each customer, enhancing loyalty and boosting sales.

¹Helping Employees Succeed with Generative AI: How to manage performance when new technology brings constant and unpredictable change, Harvard Business Review, December 2023: <https://hbr.org/2023/11/helping-employees-succeed-with-generative-ai>

CUSTOMER SUPPORT

In a customer support context, GenAI-driven chatbots and virtual assistants are capable of understanding and responding to customer queries more sensitively and intelligently than early-generation chat facilities, enabling efficient, convenient 24/7 customer service, improving satisfaction and engagement.

OPTIMIZED INFORMATION RETRIEVAL, STREAMLINING DECISION-MAKING

GenAI technology can also swiftly analyze large volumes of data and extract relevant information; conduct complex searches across multiple sources; and summarize lengthy documents into actionable insights - prompted by a simple question phrased in everyday language.

This supports timelier decision-making, with the confidence that teams can trace, access, and follow up the fuller source materials at any time.

QUALIFYING THE POTENTIAL: PARAMETERS FOR GENAI SUCCESS

Technology's true power lies in its effective utilization, of course. Here, this begins with understanding the use cases to which GenAI is best suited and where it adds the most value (this is true for all applications of AI²). The ability to craft effective prompts is important too, though it can be complex in practice.




For GenAI to support business operations in a targeted manner, its output must align with the organization's data, field of business, and specific industry. A generic approach, employing a standard chatbot for instance, does not provide the necessary granularity. This oversight – associated with purchasing off-the-shelf AI tools and providing only rudimentary training - is a primary reason why GenAI initiatives fail.

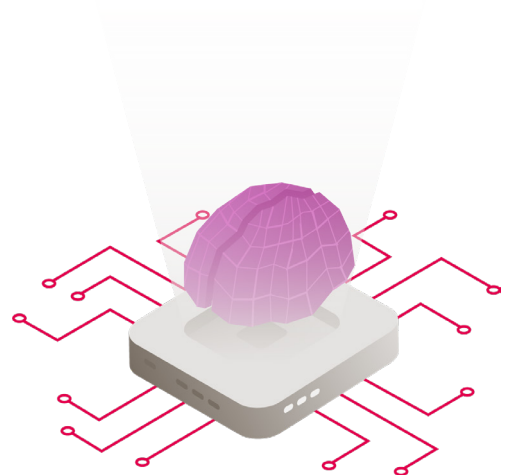
Effective exploitation of GenAI requires strategic utilization of the technology within specific contexts and workflows. Without this targeted approach, along with an understanding of the underlying technology and a guiding principle, organizations may not achieve the desired return on their AI investments.

We'll discuss all of this below. But first, a bit more about what GenAI is and how it works.

GenAI's best business use cases:

Generating human-like output

-  Improved content creation
 - Ensure messaging consistency with automated responses
 - Significantly reduce manual effort
-  Smarter search at speed
 - Conduct complex searches across multiple sources faster
 - Extract relevant information for timelier decision-making
-  Convenient customer service
 - Respond more sensitively to customer queries
 - Improve customer satisfaction & engagement



²AI Productivity: Looking for AI use cases, Benedict Evans, April 2024: <https://www.ben-evans.com/benedictevans/2024/4/19/looking-for-ai-use-cases>

GenAI: The technology

GenAI refers to a subset of artificial intelligence (AI) technologies capable of creating content, in the form of new text, images, or even code, that resembles human-generated output.

GenAI systems learn from vast datasets (large language models - LLMs) to generate easy-to-understand conclusions, summaries, or digests based on the patterns and information they have absorbed. Unlike traditional AI technology, which typically responds to queries with predetermined answers, GenAI can create its own narrative, suggest solutions, and even predict future trends based on the extensive and diverse data it has been exposed to.

Harnessed appropriately, the technology promises to reshape how businesses operate, innovate, and compete in an era of advanced machine intelligence.

What's under the hood? GenAI's 3 main technological enablers

At GenAI's core technologies are three main technologies: Natural Language Processing, Machine Learning (including Neural Networks), and Content Embedding.

| NATURAL LANGUAGE PROCESSING (NLP)

Natural Language Processing (NLP) is a form of cognitive computing that involves teaching computers to understand, interpret, and generate human language. Applications include text classification, sentiment analysis, and language translation. Algorithms process text data, breaking it down into smaller components like words and phrases, and then analyze their relationships and meanings. Techniques such as tokenization, named entity recognition, and syntactic parsing (automatic analysis of the syntactic structure of natural language) are used to extract valuable information from text.

| MACHINE LEARNING (ML)/NEURAL NETWORKS

Machine learning (ML) algorithms allow computers to infer patterns from data and make decisions or predictions without being explicitly programmed. Neural Networks, a subset of ML, are computational models inspired by the structure and function of the human brain. They consist of interconnected nodes (neurons) organized in layers.

Deep learning, a type of ML that uses neural networks with multiple layers, has proven particularly effective for NLP tasks such as sentiment analysis or intent detection. Models like recurrent neural networks (RNNs) and transformers process sequences of words and learn complex linguistic patterns, enabling tasks such as language translation, text summarization, and question answering.

| CONTENT EMBEDDING

Content embedding techniques, like word and document embeddings (used to enrich AI generation), are pivotal for semantic search, enabling algorithms to grasp the meaning of text. By converting textual data into numerical representations, these techniques enable GenAI systems to understand the context and meaning of content more effectively.

In recommendation systems, for instance, content embeddings help identify similar items or articles based on their semantic similarities, enhancing the accuracy of recommendations. Additionally, semantic search powered by content embeddings ensures that users receive relevant and contextually appropriate results.

By leveraging these technologies, GenAI systems can perform advanced text analysis and generation tasks with impressive accuracy and efficiency. Together, these technologies equip businesses to effectively automate content creation, enhance customer interactions, and derive insights from data.

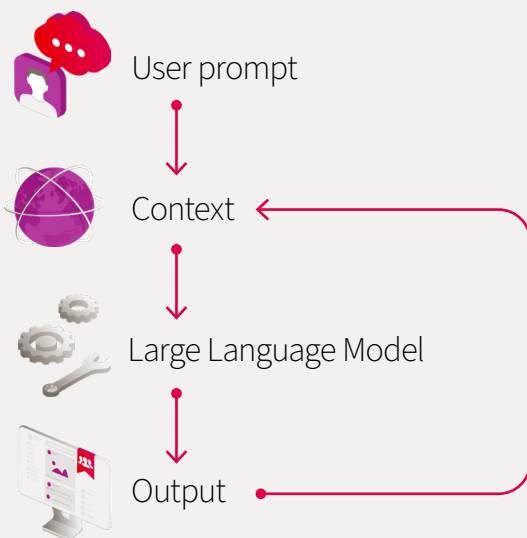
Prompting & training: Extracting more of what you need

Prompting GenAI involves interacting with an AI model through inputs known as 'prompts' to generate specific outputs. The aim is to instruct the AI by supplying it with a starting point or a cue; a guideline or specification for what the user wants the AI to generate. The prompt could be as simple as a text query, or as complex as a detailed instruction set specifying various parameters like style, tone, content guidelines, and more.

On receiving the prompt, the AI uses its pre-trained models to interpret the input and generate an appropriate response. The model draws on patterns, data, and learned associations from its training to produce outputs that align with the input prompt.

Depending on the AI's capabilities and the nature of the prompt, the output could range from a few lines of text to more elaborate compositions including full articles, graphic designs, or technical solutions. The sophistication and effectiveness of the GenAI output depends largely on how well the prompt is constructed and how well trained the AI model is.

Basic prompt cycle



AVOIDING ROGUE RESPONSES

Prompting can be thought of as programming in natural language, where the possibilities are nearly limitless.

The challenge here is for organizations to ensure that their employees can exploit GenAI to its full potential given that not all business users are experts in effective prompt crafting or have an affinity for new technologies. One solution is to deploy tools or platforms that protect non-technical users from this complexity, making it possible for anyone to reliably harness the full potential of GenAI.

In this context, ChatGPT has emerged as a mainstream GenAI platform. ChatGPT's accessibility is one of its stand-out features, yet it comes with a caveat: there is no inherent quality control mechanism to ensure the consistency and reliability of outputs. This can give rise to varied results - particularly when users with diverse degrees of expertise and understanding of the technology employ it. Unlike other solutions, ChatGPT does not shield users from the need to be able to prompt effectively to drive optimal results.

TAILORING GENAI FOR SPECIFIC BUSINESS NEEDS: CORPORATE CONTENT EMBEDDING

Corporate content embedding in the context of GenAI means incorporating specific business-related data, information, and contextual knowledge into AI systems. This integration enables the AI to produce outputs that are highly tailored and relevant to the company's specific operational, strategic, and communication needs. This data can cover a broad spectrum, including:

- ✓ **Internal documents**
Reports, policies, standard operating procedures, working instructions, and guidelines that provide insight into the company's established practices and communication styles.
- ✓ **Financial data**
Sales figures, expense reports, and market analysis data that help the AI understand business performance and economic conditions to generate forecasts and financial reports.

- ✔ **Customer data**
Records of customer interactions, feedback, and buying behavior that eases the creation and delivery of personalized, relevant AI outputs for enhanced customer engagement.
- ✔ **Product information & documentation**
Comprehensive details about products or services offered, including specifications, benefits, usage guidelines, and support information. This helps the AI to accurately represent and promote products in customer interactions, as well as automate support enquiries.
- ✔ **Sales & marketing information**
Data related to sales strategies, marketing campaigns, market research, and competitive analysis. Embedding this content allows the AI to optimize sales pitches, generate targeted marketing content, and adapt strategies based on competitive dynamics.
- ✔ **Strategic objectives**
The goals and objectives that guide the company's strategic direction to help align the AI's outputs with long-term business priorities and initiatives.

A customized GenAI application that has been embedded with corporate content will significantly outperform generalized applications. This is because the AI's outputs directly support ongoing business activities, providing more precise and actionable insights – in contrast with the generic responses of standard chatbots that lack deep industry or company-specific knowledge.

Such customization not only enhances efficiency, by automating and data-driving routine tasks as well as by streamlining complex search enquiries. It also permits the creation of personalized communications and targeted content, leading to improved customer engagement.

Optimizing wide-scale GenAI adoption - the STEP framework

Adopting GenAI in enterprises is fraught with challenges, from that of how to integrate innovative technology into existing systems, to how to ensure it enhances rather than disrupts everyday workflows.

To exploit the full potential of GenAI across multiple departments and functions, businesses need to follow a structured approach, such as the STEP (Segmentation, Transition, Education, Performance) Framework developed by Paul Leonardi, Professor of Technology Management at the University of California³. This offers a systematic method for integrating GenAI into daily operations and holds particular value for mid to large organizations.

The STEP Framework guides ensures that companies do not skip over critical success factors in their rush to embrace the technology. These are:

Segmentation: Identifying AI-ready tasks

The first framework step is about determining which business tasks lend themselves best to AI automation or augmentation, via detailed analysis and categorization of current processes based on their reliance on data processing, customer interaction, and content creation, for instance. Tasks that are high-volume and repetitive, and which require consistency, can make ideal candidates for smart automation.

Transition: Redefining roles & processes

This phase involves redefining job descriptions and workflow processes to incorporate AI capabilities seamlessly and derive the best results. Any changes should fit with the company's strategic objectives and ensure that GenAI complements human skills to enhance overall productivity rather than displace workers. Clear communication and change management strategies will help promote positive cooperation and productive collaboration.

Education: Equipping employees with appropriate skills

Ongoing education and training will empower employees to get the most from GenAI technologies. This is about developing AI literacy across the organization and providing training on how to interact with AI tools; how to interpret outputs; and how to integrate these insights into daily decision-making. Tailored training, hands-on workshops, e-learning modules, and continuous learning opportunities will help teams keep pace with what's possible.

Performance: Measuring impact & sustaining growth

Understanding the evolving impact of GenAI on the business will help inform continuous improvement and additional use cases. This means establishing relevant metrics and key performance indicators (KPIs), to track the direct impact of AI applications on productivity, efficiency, and innovation. Metrics should be aligned with specific business goals. Ongoing monitoring, meanwhile, will help to identify areas for refinement and ensure that AI tools continue to meet evolving business needs, inspiring next targets for process or service innovation.



³Helping Employees Succeed with Generative AI: How to manage performance when new technology brings constant and unpredictable change, Harvard Business Review, December 2023: <https://hbr.org/2023/11/helping-employees-succeed-with-generative-ai>

SEIZING THE DAY

5 steps to GenAI-Based transformation of day-to-day business tasks

The scope to transform productivity and foster innovation makes fit-for-purpose GenAI an increasingly valuable asset in the modern business toolkit.

With a better understanding of the basic principles of GenAI, managers can move forward more confidently with the technology's integration into identified daily business processes, reaping its full benefits while mitigating associated risks. So, how can your organization maximize success with GenAI?

1. Acknowledge technical challenges & harness business-ready GenAI

Rather than expect business users to become experts in GenAI technology, *shield* them from the technical complexity and *show* them how to harness the capabilities to simplify and streamline routine tasks - making their lives easier, and their actions more impactful.

To leverage GenAI's comparative advantage in a timely manner, emerging best practice is to deploy out-of-the-box, business-oriented solutions that proactively address the main challenges associated with GenAI. This will be more economical than attempting to develop individual solutions for specific business purposes.

2. Bed in GenAI solutions at the business core

To drive strategic advantage from GenAI investments, capabilities must be aligned with their specific operational needs and seamlessly incorporated into identified business processes. Strategic integration of the technology will ensure that GenAI not only automates tasks, but also substantially improves productivity and efficiency where it matters most. Pre-built solutions that can be adapted to specific business environments offer a reliable route to GenAI-powered process transformation, without the need for extensive and costly customization.

3. Apply appropriate controls: Ethical AI use & managing biases

As GenAI becomes an integral part of routine workflow, managing the ethical dimensions of technology deployment will be paramount so that there can be full trust in the output. As an integral part of these provisions, companies will need to establish protocols or processes that prevent biases in AI outputs – drawing on appropriate external expertise, as needed. Human oversight will remain crucial wherever GenAI is deployed, both as a quality check and to ensure that GenAI solutions adhere to ethical standards and align with the company's values and relevant regulatory obligations.

4. Empower employees to use the technology to best effect

Empowering employees to feel confident to use GenAI appropriately, through optimized training, and providing the right GenAI applications to fit the particular demands of each team or department will help drive the desired results from smart process automation initiatives. In addition to familiarizing people with the strategic potential of GenAI, it will be important that employees are taught how to effectively operate and manage AI tools within their roles.

5. Maintain alignment: Guide GenAI adoption in a structured way

Finally, taking a structured approach to GenAI adoption, ideally using the proven STEP Framework, will ensure that its integration into the business is aligned with strategic business goals and enhances operational efficiencies. As well as ensuring smoother adoption and optimal use of GenAI technologies, this should help maximize the scope to incorporate future technological advancements as these become available.

Conclusion: The call to act

GenAI technology offers exciting potential to transform the way all kinds of organizations access, interpret, and harness information and insights, across a wealth of everyday activities not catered for by current core business applications such as ERP, CRM, and ECM systems.

Although the fast pace of AI advancement, and the apparent complexity of the constituent technologies, can make GenAI seem daunting in a business context, optimized technology platforms exist that can be easily adapted to different applications.

Along with recognized frameworks for optimizing GenAI's take-up and impact, such developments go a long way in allaying previous concerns so that companies can reap the full benefits of GenAI within some of their most information-intensive processes today.

Drawing on the guidance set out above, organizations of all kinds can capitalize on a great opportunity to automate, optimize, and thereby transform their day-to-day business operations with GenAI, boosting operational efficiency and overall business performance.

Learn more about Geniehub, fme's new platform for leveraging GenAI to support organizations' everyday routine tasks.

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We invite you to take a look at our second whitepaper **"Effective GenAI adoption: Streamline everyday business tasks with GenieHub from fme"**

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