



The IT leader's guide to unlocking AI productivity

Table of contents

01. The challenges support teams face today	4
Common support challenges faced by support organizations	6
Inefficient practices lead to a decline in productivity	9
The opportunity cost of ignoring AI	10
Benefits of leveraging AI	11
Risks of ignoring AI	12
The path forward: An introduction to AI	13
02. Make your AI a future-proof investment	14
The three main ways companies are implementing AI	15
What is an AI copilot?	16
The need for an enterprise AI copilot	16
How AI copilots work	17
Benefits of AI copilots	19
Business value of AI copilots	20
Determining the right AI solution: A tiered approach	21
Common AI copilots in the market	23
Common AI copilot use cases for enterprise systems	24
Deliver real business outcomes with an AI copilot	27
Operational efficiency	27
Employee experience	28
Accelerate business transformation	29
It's time to invest in an AI copilot	30

03. Making the business case	31
How to address AI business and technical alignment	32
How to estimate the costs, benefits, and ROI of AI copilots	34
Customer case studies: Demonstrating AI copilot value	38
Understanding copilot security and privacy	41
Conversational AI trustworthiness	41
The foundations of trustworthy conversational AI	42
How to conduct your copilot vendor selection and solution evaluation	45
Next steps: Designing your implementation plan	46
04. From idea to implementation	47
Stage I: Pre-implementation	48
Stage II: Implementation and go-live	54
Stage III: Post-implementation user adoption and optimization	59
True IT productivity begins with AI	63



01: The challenges support teams face today

Do you ever feel like delivering exceptional global support is an uphill battle? As tech landscapes rapidly shift, managing your service desk can feel increasingly chaotic. If the daily deluge of requests is overwhelming your team, then providing consistent, top-notch support can feel like a distant goal.

In a bid to unlock productivity in these challenging times, you can turn to artificial intelligence, which encompasses a range of various intelligent systems, including machine learning. However, a specific type of AI called [generative AI \(genAI\)](#) is particularly interesting for IT professionals. GenAI focuses on creating new content and extracting key points from existing data and condensing them into summaries.

Within the realm of IT support, AI assistants, genAI, and particularly [Large Language Models \(LLMs\)](#), play a vital role. LLMs, trained on massive datasets of text and code, can power AI assistants to understand user queries, automate tasks, and provide exceptional support experiences. By automating tedious tasks and augmenting our capabilities, this technology empowers support teams to focus on what truly matters — driving innovation, enhancing collaboration, and accelerating growth.

When it comes to enabling productivity, AI is no longer a luxury; it's considered a necessity. But as an IT leader, navigating the AI landscape is full of twists, turns, and uncertainty. You'll face skeptical stakeholders across your organization from cautious C-suite executives to doubting frontline employees. That's why we've assembled this guide to help you through every step of your journey.

Chapter 1: The challenges support teams face today dives into the everyday challenges your support team faces and how outdated processes are holding you back. We'll uncover the hidden costs of sticking to the status quo and show you how AI can be your secret weapon to turn things around.

Chapter 2: Make your AI a future-proof investment lays the groundwork for long-term AI success. We'll help you shift from one-off projects to a strategic, company-wide AI approach. You'll learn to identify high-impact use cases, understand the different types of AI copilots, and discover how they can drive tangible business value.

Chapter 3: Making the business case is where the rubber meets the road. We'll show you how to quantify the potential benefits of an AI copilot and build a compelling case for investment. You'll learn to identify potential pain points, estimate cost savings, select a vendor, and create a solid business case to impress even a skeptical CFO.

Chapter 4: From Idea to implementation is your roadmap to successful implementation. We'll help you overcome common hurdles, from gaining alignment to integrating AI into your existing tech stack. You'll also learn how to begin to measure success, optimize your copilot, gain employee adoption, and ensure it delivers ongoing value.

Yes, you'll encounter numerous technical, strategic, and personnel challenges, but on the other side is efficiency, service excellence, and clear business alignment. Imagine a future where issues are resolved quickly, first-contact resolution rates soar, and users are delighted with the support experience. With AI by your side, you can picture a world where your team is empowered to drive operational excellence, deliver exceptional experiences, and enable productive business growth.

Common support challenges faced by support organizations

Information Week outlines [common challenges that IT teams face today](#) — all of which require critical thinking. From adversarial AI use and increased regulation to cloud migration and a bloated tech stack, leaders must unpack these trends to understand their overarching impact on their IT teams and businesses.

An article by Amazon Web Services delves deeper into these complex [challenges and opportunities for IT leadership](#), stating, “The average employee jumps between 6-8 different software-as-a-service (SaaS) applications each day... However, as the adoption of SaaS applications proliferates, IT and security teams find themselves grappling with a new set of challenges that threaten to undermine the very benefits these tools are meant to provide.”

In the section below, we will explore the **top support pitfalls** teams are grappling with:

1. Technology debt

Digital clutter and fragmented technology stacks are hurting organizations, worldwide. [63% of IT executives](#) regret not being more judicious in their technology choices, recognizing the need for a more streamlined and effective technology stack. Many organizations fail to spend their IT budget effectively, leading to suboptimal technology.

2. Legacy systems

Maintaining, updating, operating, and managing legacy systems can be both expensive and burdensome. Furthermore, these systems are more vulnerable to cyber threats and security breaches. Improperly planned technology can greatly hinder productivity and efficiency while making integrations harder and more complex.

In fact, the absence of updated, capable infrastructure is [one of the biggest hurdles companies implementing AI are experiencing](#), as per Forbes. Outdated systems, tools and applications and insufficient computing power are making AI integration more difficult. The lack of proper storage or processing capabilities that can handle large amounts of data are limiting businesses from adopting AI at scale. We will revisit this later in this chapter under the hurdles section.

3. Lack of automation

A lack of automation coupled with legacy systems can lead to suboptimal outputs. This blog on [workplace productivity](#) elaborates the ‘productivity tax of manual processes.’ Inefficiencies stemming from lack of automation directly impede employee output, sapping valuable time and brainpower from more strategic initiatives. Businesses end up paying a steep price in increased error rates, inefficient utilization of resources, delayed response times, limited scalability, and lower employee morale.

4. Failed IT governance

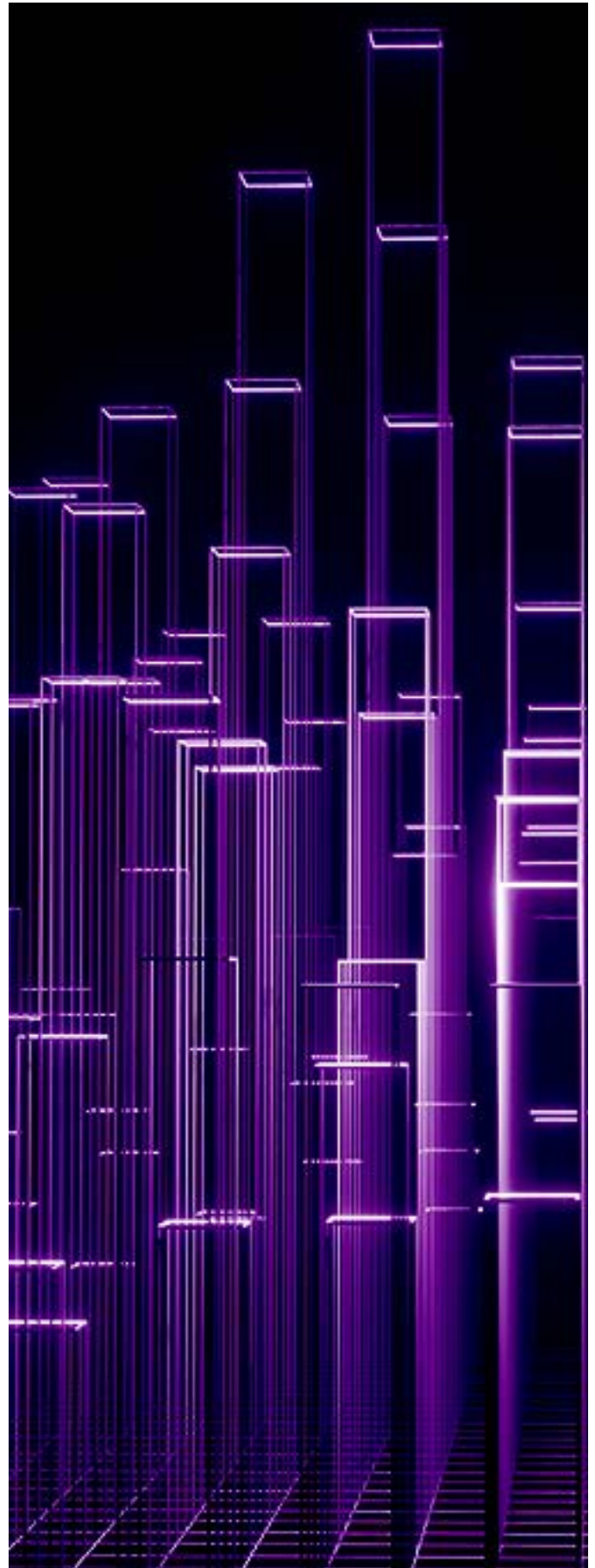
With the ever evolving technology landscape, IT organizations need to move and they need to move fast. Navigating through a slew of international, federal, and industry-specific regulations requires dedicated resources, functional knowledge, and deep expertise. However, ensuring compliance, managing audits, and accurate reporting can be time consuming and challenging.

The absence or failure of IT governance and risk management programs can result in security breaches and financial losses, in the short term. It might even lead to loss of customer trust, exorbitant fines, or legal complications, in the long run.

5. Flawed digital transformation initiatives

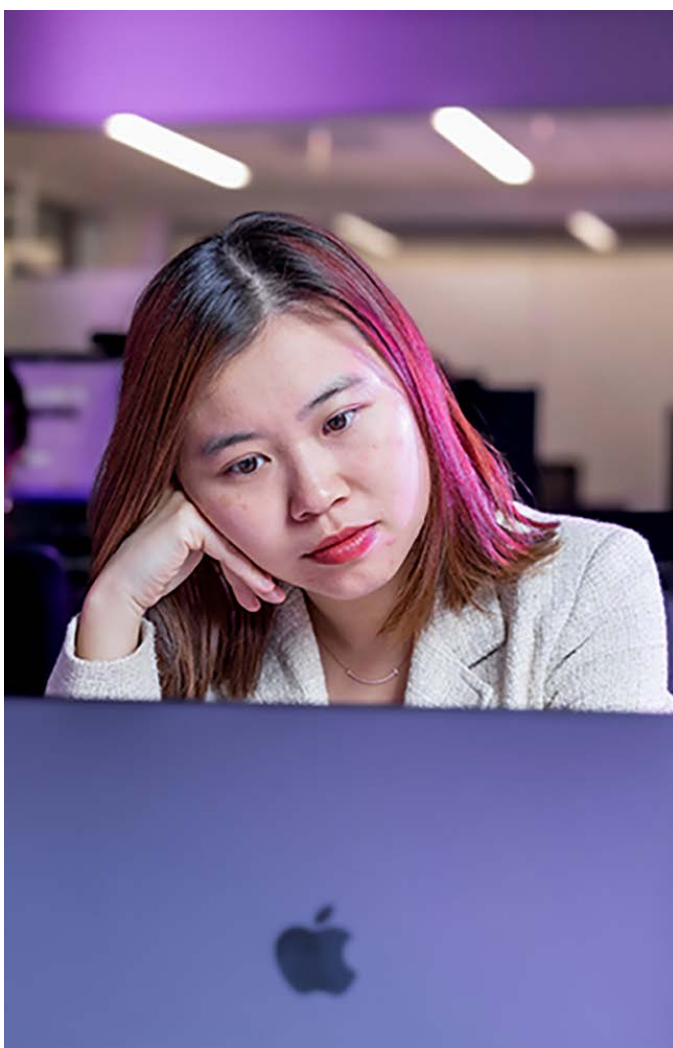
At a fundamental level, digital transformation relates to the process of using digital technologies to alter how businesses operate and deliver value. It can involve improving existing processes, creating new ones, rethinking traditional roles, and changing customer experiences. Digital transformation spend is expected to reach [\\$3.9 trillion by the year 2027](#), according to the International Data Corporation.

However, despite these significant investments, Tech Target outlines [eleven reasons why digital transformations fail](#). These include the lack of executive sponsorship, lack of clear goals, lack of culture and talent, lack of broader



organizational alignment, lack of right OKRs, and lack of the right technology stack.

When organizations struggle to demonstrate the value of new technologies to stakeholders, this slows down adoption. As a result, digital transformation initiatives often fall short of organizational targets due to poor employee engagement, lack of management support, inadequate collaboration, and accountability. All successful transformations begin with the leadership team having a clear understanding and vision of what the business is transforming into.



6. Inefficient support and low employee morale

Inefficient processes, tedious workflows, lack of skilled resources, poor incident management, and the absence of automation can lead to lower productivity and morale among teams. System downtime, unresolved technical issues, and piling support tickets can cause frustration, stress, and wasted time.

Understaffed and under-equipped departments feel inundated by the volume of support requests. These result in long wait times and rushed solutions. Plus, reliance on outdated or legacy support tools and software can limit the ability to diagnose and fix issues effectively. The lack of access to necessary software, applications, training or resources can disrupt workflows and negatively impact efficiency.

The employee morale takes a hit as frontline workers are bombarded with routine queries, forcing them to prioritize low-level issues over more strategic support. Manual and repetitive tasks limit them from pursuing high impact projects, solving complex problems, and doing more meaningful work.

Addressing support issues requires a strategic approach with careful investments in robust employee training, sophisticated ticketing systems, a collaborative organizational culture, and most importantly, next generation AI technologies that can retrieve information and automate tasks at speed and scale.

Inefficient practices lead to a decline in productivity

Inefficient systems, practices, and processes are having an adverse effect on productivity. Be it legacy systems, lack of automation or failed digital transformation efforts — they all have a multiplier effect on reducing overall efficiency. As a result, they contribute to [limited productivity](#) in the five ways, stated below:

- 1. Uptick in downtime:** If the IT support staff is not able to use their tools and systems as needed, it can lead to undue delays in response times, issue resolution, and completion of tasks. There are times that IT support has to unnecessarily wait on systems in order to handle employee requests and tickets.
- 2. Delayed response times:** An overreliance on manual processes inevitably leads to delays in completing critical workstreams, hampering the organization's ability to operate in a nimble and responsive manner.
- 3. Slow employee onboarding:** Increased downtime and longer resolution times could result in delayed onboarding of employees. This, in turn, has them waiting on setting up their systems, installing the necessary software, and gaining access to important work related

applications. Overall, the company loses due to the unnecessary time spent waiting on getting systems setup or provisioning software.

- 4. Increased security risks:** Limited expertise, tedious workflows, and lack of access to state-of-art technology might expose an organization to cyber threats. This could cause major disruptions, data loss, and closures. They might even require additional investments, diversion of resources, and funds to address new vulnerabilities introduced in the system.
- 5. Diminished focus and creative bandwidth:** The support staff becomes unproductive and frustrated because of outdated technology, piling issues, and having to work on repetitive, mundane tasks. Plus, poor or non-existent self-service support manifests itself as lost productivity “on both sides of the ticket” — on one hand, the help desk agents get bogged down in shallow work like password resets while on the other, the end users end up endlessly waiting for their turn.

All of these factors result in lost productivity and ROI for the organization. The help desk is more than just a knowledge base and it must include the ability to self serve, automate tasks and workflows, and take action across enterprise systems, among others — all of which can be powered by generative AI.

The opportunity cost of ignoring AI

AI is the future of work and ignoring artificial intelligence could prove costly to organizations.

Generative AI promises to be a force multiplier for skilled IT professionals, amplifying their productivity and unlocking new frontiers of innovation. By using genAI powered machine learning algorithms, support professionals are empowered to achieve more with less, streamline processes, and drive greater output.

In fact, a McKinsey study estimates that generative [AI could boost global corporate profits by as much as \\$4.4 trillion annually](#). That would translate to

increasing the value of productivity from artificial intelligence and analytics by 15% to 40% compared to previous generations of the technology.

Further, this amount could roughly double as generative AI spreads more diffusely across the global workplace. They state that, “This latest advance in artificial intelligence is speedily transforming business and work, leaving companies, governments, and individuals scrambling to assess its impact in real time.”

In the section below, we will explore the benefits of leveraging AI vis-a-vis the risks of ignoring it.

AI benefit	Risk
Unlocks new levels of productivity	Lost productivity
Fosters creativity and innovation	Lack of creativity and innovation
Optimizes workflows, streamlines processes, and reduces operational costs	Complex workflows, dated processes, and higher costs
Facilitates efficient collaboration and communication	Silos and sloppy communication
Enhances decision making and gives businesses a competitive edge	Delayed decision making and stagnation

Benefits of leveraging AI

The economic contributions of AI have become so vast that PwC forecasts that AI will contribute [\\$15.7 trillion](#) to the global economy along with a 26% boost in GDP for local economies by the year 2030.

According to PwC's 'Global Artificial Intelligence Study: Exploiting the AI Revolution,' labor productivity improvements will drive initial GDP gains as firms seek to "augment" the productivity of their labor force with AI technologies to automate some tasks and roles. It is expected that "45% of total economic gains by 2030 will come from product enhancements, stimulating consumer demand. This is because AI will drive greater product variety, with increased personalisation, attractiveness and affordability over time."

The key benefits of AI are captured below:

- 1. Unlocks new levels of productivity:** The productivity gains enabled by generative AI have the potential to revitalize entire organizations, fostering a culture of efficiency and agility. This drives business transformation allowing digital technologies to deliver value at scale. AI frees employees of manual low value tasks who can now channelize their efforts to maximize impact.
- 2. Fosters creativity and innovation:** By automating repetitive tasks and augmenting human capabilities, businesses can optimize resource allocation, focus on high ticket items, and maximize output. The employee morale

goes up and they begin to enjoy their work.

This spurs creativity and innovation, ultimately leading to profitability.

- 3. Optimizes workflows, streamlines processes, and reduces operational costs:** With AI, organizations can unify their enterprise systems and applications in a single source of truth. They can connect employees to every business system, simplifying interactions and optimizing workflows through natural language processing. This also results in streamlining operations and substantial cost savings.
- 4. Facilitates efficient collaboration and communication:** With ready access to enterprise data, automated support, and the ability to action, IT support is able to collaborate and communicate, faster than ever. AI also provides unparalleled global support to users in their native language. This multilingual functionality enables businesses to cater to diverse employee demographics more effectively.
- 5. Enhances decision making and gives businesses a competitive edge:** Businesses that incorporate AI at their very core are at a significant advantage. Advanced AI capabilities have the potential to understand and interpret complex and nuanced context and goals, allowing for more sophisticated interactions and robust decision-making.

Risks of ignoring AI

Now that we've outlined the merits of AI, it is obvious that the inverse makes up the potential risks of ignoring generative artificial intelligence. The risks below have been mapped one is to one to the benefits stated above:

1. Lost productivity: The cost of manual processes and technology debt is simply too high in today's competitive landscape. Manual support is usually slow and error prone, thereby, restricting employees to dedicating themselves to more complex tasks.

2. Lack of creativity and innovation:

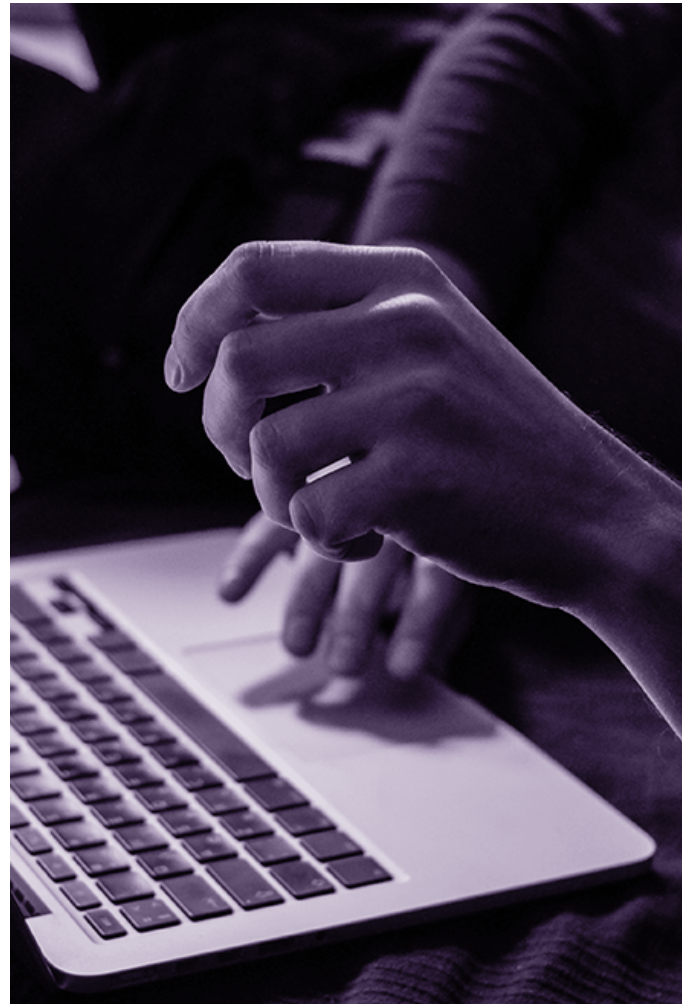
Overburdened IT teams have limited time and energy left for creative problem-solving, strategic thinking, and working on innovative products that can propel the business forward. Employees are exhausted, dissatisfied and overwhelmed leaving little or no room to pursue creative pursuits. The inability to contribute in a meaningful way leads to dissatisfaction, churn, and attrition.

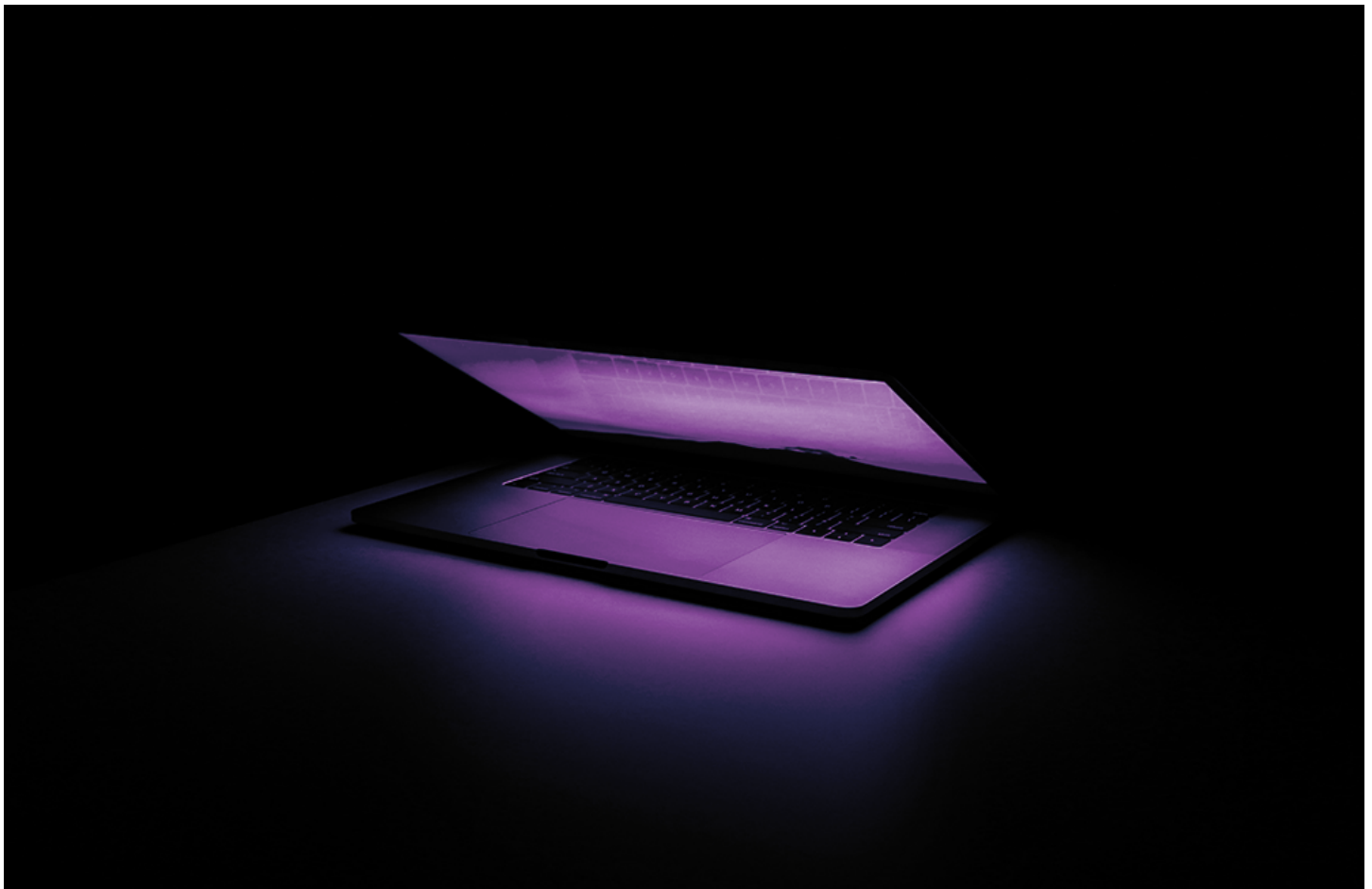
3. Complex workflows, dated processes, and higher costs: An overreliance on fragmented technology stacks and complex workflows inevitably leads to delays in completing critical workstreams, hampering the organization's ability to operate nimbly and responsively. Maintaining and managing legacy systems can be both expensive.

4. Silos and sloppy communication: IT personnel often get trapped in silos owing to inefficient systems and processes. Communication and collaboration take a hit. Multilingual support becomes a distant reality as teams struggle to keep up with the demand.

5. Delayed decision making and stagnation:

Under-equipped support functions feel inundated by the volume of support requests thereby, hindering growth and profitability. Over time, this inhibits an enterprise from delivering value, scaling operations, and making informed decisions.





The path forward: An introduction to AI

It's clear that companies that integrate AI in their workflows will thrive and witness new levels of productivity while those who resist change risk falling behind. AI is no longer just nice to have for today's IT departments. It's an important building block for you to stay competitive and drive value to your stakeholders.

While the benefits can't be ignored, there are challenges and concerns that arise when implementing AI. From a lack of in-house expertise to data privacy and security concerns to choosing between sheer number of options, you may not

know where to start. There can also be issues when integrating AI with existing workflows or facing potential cultural resistance. That's why comprehensive adoption strategies involving training, communication, and employee support are critical for successful change management.

Now, let's bridge the gap between understanding these challenges and learning how to address them. In the next chapter, we will explore AI and introduce [AI copilots](#) in detail. We will dive into the enterprise copilot, explore its importance and benefits, along with practical use cases and examples. Now let's learn more about AI, how to help your AI investment to deliver lasting value, optimize productivity, and accelerate your business transformation journey.



02: Make your AI a future-proof investment

As an IT decision-maker, you're under immense pressure to deliver more across a rapidly expanding tech stack with less. The average enterprise uses over [1,000 different applications](#) and systems.

You're faced with challenges like technology debt, supporting global teams, and a lack of automation which leads to inefficient practices that significantly hinder productivity. This inefficiency translates to longer resolution times, decreased employee morale, and ultimately, a higher support burden.

The opportunity cost of ignoring AI becomes even greater in this ever-evolving tech landscape. By failing to embrace AI-powered solutions, you may miss out on the potential to streamline resources and workflows, automate tasks, and empower IT teams to focus on higher-value activities.

To remain competitive and ensure optimal service delivery, you should actively seek ways to boost your productivity. This is where exploring different AI implementation approaches comes into play.

The three main ways companies are implementing AI

There are three main approaches leaders can take when deploying AI: using individual AI tools, building a custom AI chatbot, and deploying AI copilots.

While each has its merits, some offer advantages over others.

1. Individual AI tools: This involves [integrating various AI-powered tools across your existing tech stack](#), such as for ticketing automation or knowledge base search. The pro lies in its ease of implementation – you can pick and choose tools that address specific needs. However, the cons can be significant. Managing a hodgepodge of tools can lead to data silos, bloated tech stacks, and integration headaches. Additionally, individual tools are challenged by the level of coordination and automation needed for complex tasks and enterprise-wide support.

2. Building a custom AI chatbot: Developing a chatbot tailored to your company's specific needs sounds appealing – it can answer questions, support different interactions, and perhaps even propose potential solutions. However, building and maintaining a custom chatbot requires substantial investment in resources and hard to find technical expertise.

Our [Build vs. Buy Guide](#) explores how training the AI model on your data takes significant time, often requiring resources and hiring expensive AI/ML experts. Keeping your own AI updated and

fully secure can also be an ongoing challenge. Additionally, custom chatbots struggle with complex questions, [taking subsequent actions](#), or with situations outside of their training data, making their functionality limited.

3. Deploying AI copilots: AI copilots are pre-built AI platforms that use large language models (LLMs) to integrate seamlessly with your existing systems and tech stack. This approach offers several advantages.

Copilots come with pre-trained models and functionalities that can be readily applied to various tasks across your organization. They also offer greater automation capabilities and can handle complex workflows. Additionally, ongoing maintenance and updates are handled by the copilot provider, freeing your IT team to focus on other priorities.

While there are some implementation considerations for using a new platform, copilots offer fast time to value and simple conversational interfaces giving users one central place to search and take action. We will discuss all these benefits and functionalities in detail in this chapter, where we will cover:

- What is an AI copilot?
- How do AI copilots work and their benefits
- Common AI copilots, use cases, and examples
- How to deliver real business outcomes with an AI copilot

Let's learn more about AI copilots and why investing in an AI copilot can be the answer enterprise tech leaders are looking for to future-proof productivity.

What is an AI copilot?

To understand an AI copilot, imagine an AI assistant you can talk to who can help you with different tasks and decisions at work. These AI assistants can use powerful large language models (LLM) to understand your needs and access select information across your company.

An AI copilot is a conversational interface that uses LLMs to support users in completing various tasks and decision-making processes within an enterprise environment. By leveraging LLMs, AI copilots possess the capability to understand, analyze, and process vast amounts of data.

AI copilots play a crucial role in enhancing productivity and efficiency by:

- **Providing context-aware assistance:** AI copilots can proactively respond to user needs based on contextual information, ensuring relevant and timely support during decision-making processes.
- **Automating mundane tasks:** By taking charge of repetitive time-consuming tasks, AI copilots allow users to focus on strategic and creative work, significantly boosting overall productivity.
- **Analyzing data:** AI copilots can quickly process large amounts of information, identify

patterns and trends, and present actionable insights to drive effective decision-making.

- **Enabling seamless communication:**

AI copilots facilitate effective stakeholder interactions, including between employees, customers, and vendors, streamlining communication processes to reduce delays and misunderstandings.

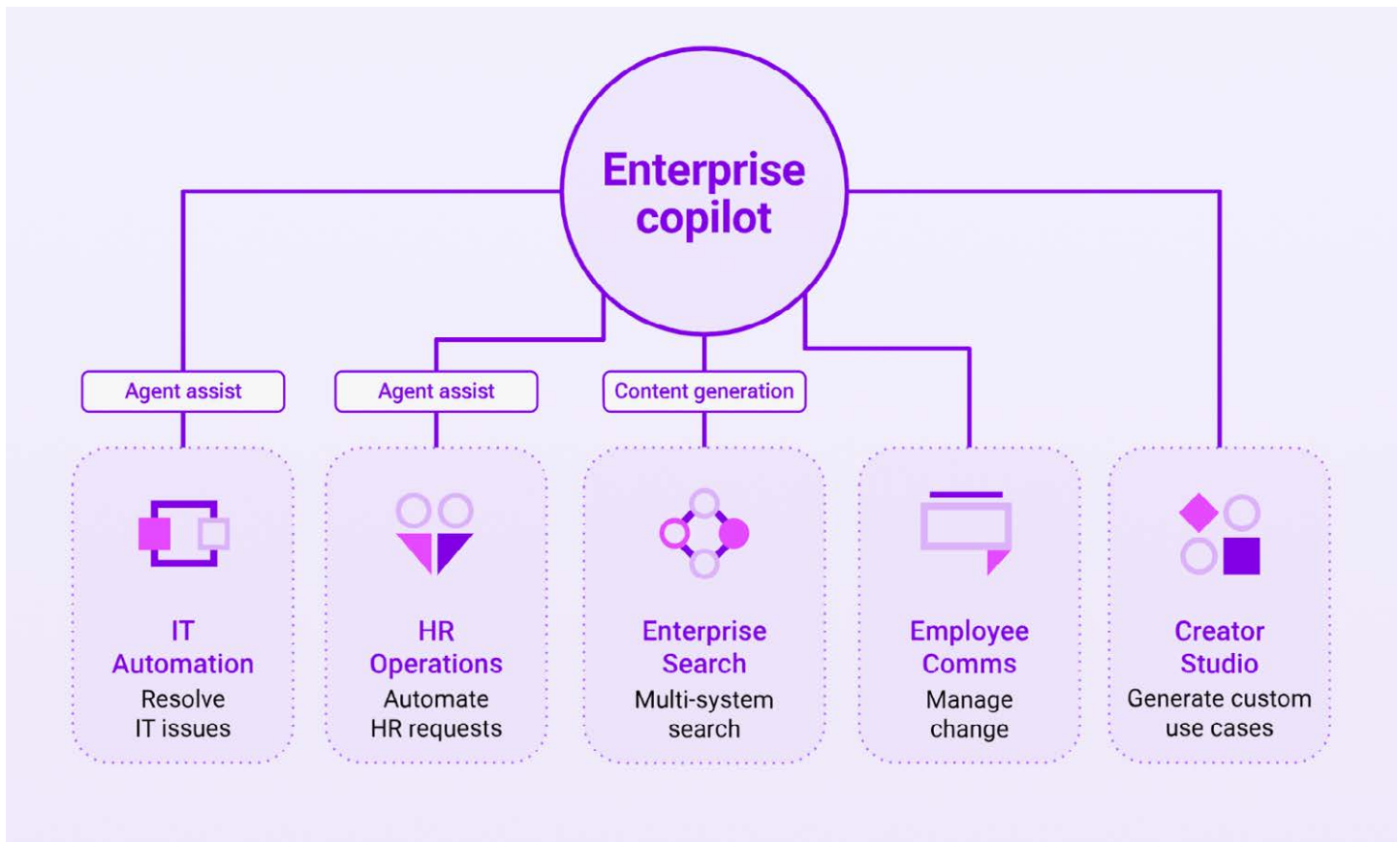
- **Unifying disparate systems:** AI copilots can be the cohesive force connecting multiple platforms, tools, and software applications under one umbrella, ensuring data integrity, accessibility, and compatibility across your enterprise.

At a more fundamental level, an AI copilot acts to simplify complex tasks and provide valuable guidance and support ultimately elevating the user experience to drive your business toward your goals effectively and efficiently.

The need for an enterprise AI copilot

As businesses become increasingly complex and rely on a myriad of systems, applications, and processes, your IT team often faces the challenge of navigating and managing these diverse systems.

Traditional, isolated solutions often fall short of resolving cross-system communication which leads to system inefficiencies and diminished productivity. [An enterprise AI copilot](#) — like Moveworks — can be the answer to overcoming these challenges.



By integrating all enterprise systems under a single conversational interface, employees can access information and complete tasks more efficiently. The AI copilot simplifies collaboration, making it easier for employees to excel in their functions and significantly boosting overall productivity. Employees can simply describe their issue or request in natural language, and the enterprise copilot can serve up an answer or an automation instantly, automatically, and securely.

How AI copilots work

Gone are the days of relying on traditional AI chatbots with rigid dialogue flows and pre-mapped

scenario planning: this approach simply doesn't scale as you can't predict the infinite number of ways someone might ask a question.

That's why advanced AI copilots are designed to understand context and user intent by integrating state-of-the-art AI techniques. They often combine a reasoning engine with an action engine and together they parse requests, communicate with employees and systems, and deliver value as speed and scale.

A copilot can deliver a seamless, frictionless experience because of the [crucial building blocks](#) of reasoning, planning, plugins, clarifications, summaries, and citations.

Reasoning

Planning

Plugins

Clarifications

Summaries

Citations

Reasoning is the brain powering a copilot's advanced capabilities. It mimics human cognition to tackle complex challenges with an ability to strategize solutions and plot the best course of action, just like an ITSM or support agent might do.

Planning is the set of steps that the brain devises to complete the task at hand. It's the project plan that takes the conversation through to resolution. Once reasoning has worked out the optimal approach to the employee's request, planning maps out each specific step required to get there.

Plugins refer to specialized components that actually carry out the planned actions. Each plugin is custom-built to handle specific use cases and integrate with certain systems. For example, plugins may reset passwords in Okta, provision users in Google Workspace, onboard staff in BambooHR, manage access in AccessHub, deploy servers, update Salesforce, pull reports from analytics platforms, or sync product data between ERP systems.

Clarifications, as the name suggests, seeks clarification to enrich vague requests that lack the necessary context to determine a solution. It can have natural language conversations with employees to ask thoughtful follow-up questions, or it can search integrated systems to uncover additional helpful information. Rather than make assumptions or ignore gaps, it leverages two-way dialogue and system data to fill in the blanks.

Summaries are the final responses that an AI copilot delivers by summarizing the most important details in simple language. They empower a copilot to synthesize dynamic answers after analyzing all the information gathered, including clarifications, system data, and actions taken.

Citations complement summaries and they list where the summarized information is coming from, be it knowledge base articles, system data, or other sources. They serve the vital purpose of establishing trust and credibility, so employees can instantly see that the responses are grounded in reality.



Benefits of AI copilots

AI copilots offer many benefits that mitigate the most pressing challenges of productivity and efficiency faced by most organizations. [Early benchmarks confirm that people using copilots are more productive](#), as stated in CIO. [GitHub reported on its copilot's impact](#), with 88% of surveyed developers stating improved productivity, while [Microsoft's benchmarks](#) show that 70% of copilot users said they were more productive. We'll look at these in more detail in the next chapter.

- **By streamlining navigation and consolidating resources**, users can quickly access required information, considerably reducing the time spent on tedious searches. Furthermore, these intelligent assistants can help handle routine queries, freeing up agents and middle managers to focus on more critical tasks and expedite user support.
- Ensuring that the full **potential of your existing tech stack is realized**. By promoting

seamless interaction with powerful backend tools, employees can perform their jobs with greater precision and accuracy. These advanced AI systems extend beyond traditional chatbots or virtual assistants, providing a differentiated value through continuous learning, adaptation, and prediction.

- Moreover, AI copilots **integrate perfectly with various industry-specific tools** like Salesforce or Notion, empowering users to access their platforms' complete range of features more proficiently. As a result, IT departments and entire organizations are able to unlock higher levels of productivity.

By incorporating AI copilots into their operations, businesses can enhance efficiency, foster a smoother flow of information, and open up new opportunities for growth. As these intelligent systems continue to evolve, their impact on the corporate landscape is becoming even more evident.

Business value of AI copilots

AI copilots have changed the way businesses interact with various enterprise systems, offering several advantages that lead to improved operational efficiency and satisfaction levels. Five key value drivers are captured below:

- 1. Unified enterprise systems:** AI copilots connect employees to every business system, simplifying interactions through natural language processing. Leveraging machine learning models, these intelligent assistants facilitate swift access to enterprise data. By integrating with a wide range of business systems, AI copilots can assist with various use cases across different departments. For instance, the IT department can log huge efficiency gains by providing speedy resolutions.
- 2. Omnichannel support:** Unlocking an account or updating benefits should be intuitive, not complicated. AI copilots adapt to the preferred channels of users, providing a [seamless conversational interface across platforms](#) like Slack, Microsoft Teams, email, or web portals. This ubiquity ensures consistent, uninterrupted support for employees, regardless of their workspace.
- 3. Multilingual support:** AI copilots provide unparalleled global support to users in their native tongue, regardless of their location.

The challenges of supporting multilingual IT are quickly dissipating with the capability to communicate in many different languages. This multilingual functionality enables businesses to cater to diverse employee demographics more effectively.

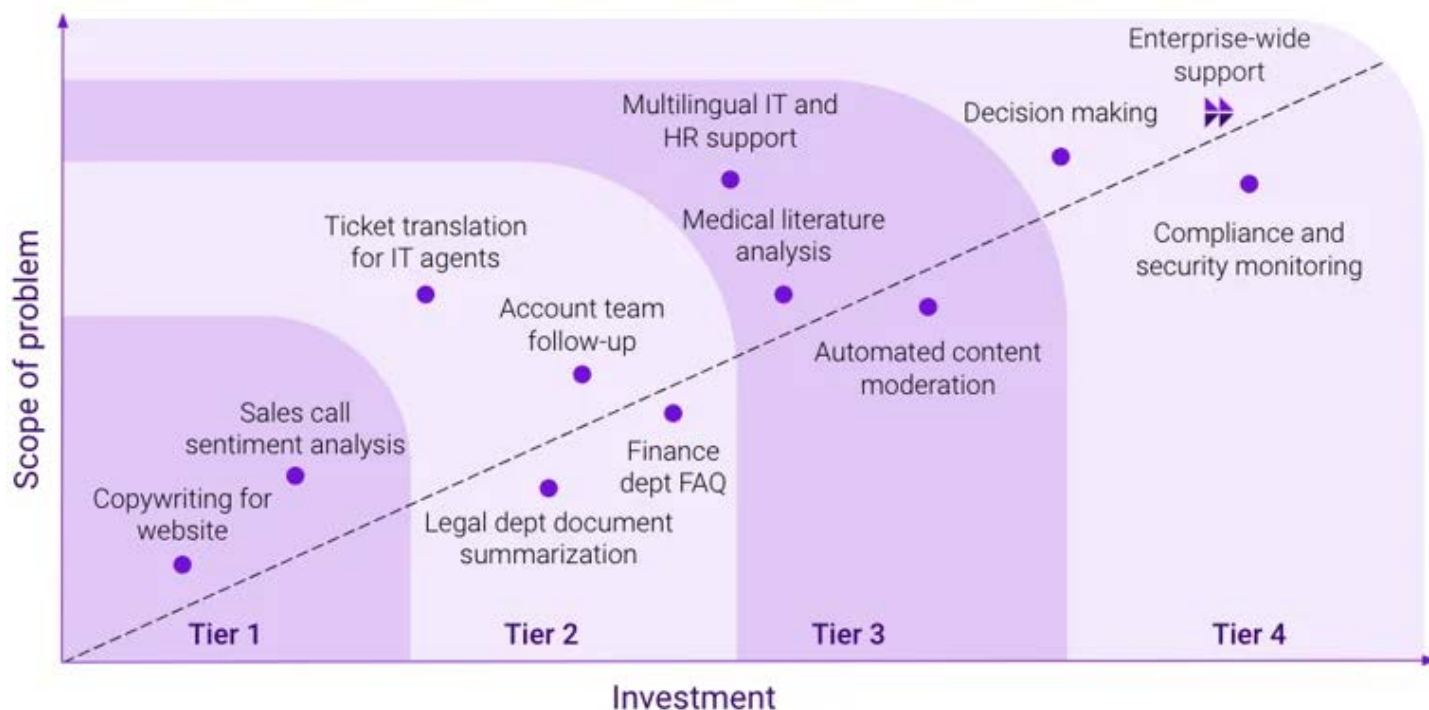
- 4. Enhanced creativity and productivity:** By automating mundane tasks and providing quick access to information, AI copilots allow employees to focus on higher-value tasks, fostering creativity and boosting overall productivity. Employees are able to continually sharpen their skills thus driving career development and contributing to a more skilled and happier workforce.
- 5. Cost savings:** AI copilots can [substantially cut the IT spend](#) by automating routine tasks, minimizing the time spent on searching for information, proactively preventing support issues, and identifying and closing the service gaps. Furthermore, by connecting backend systems, AI is able to speed up personalized assistance.

By harnessing the immense potential of AI copilots, businesses can streamline operations, offer seamless support across platforms in many languages, and enhance workforce efficiency and creativity while keeping costs down. As a result, users benefit from rapid, tailored support that address their needs effectively.

Determining the right AI solution: A tiered approach

When it comes to deploying an AI copilot, determining the right copilot based on your business needs, goals, and outcomes becomes imperative. There's no one solution that fits all. Identifying the right [copilot use cases](#) for your organization is key to unlocking the true potential of this technology. We will elaborate this in the next section.

From powering enterprise search to sophisticated automation and everything in between, the investment is directly proportional to the scope. The scope of the problem you're trying to solve will require varying degrees of investment. For instance, using AI to provide enterprise-wide support will need a greater investment as opposed to leveraging it for simple tasks like writing emails.

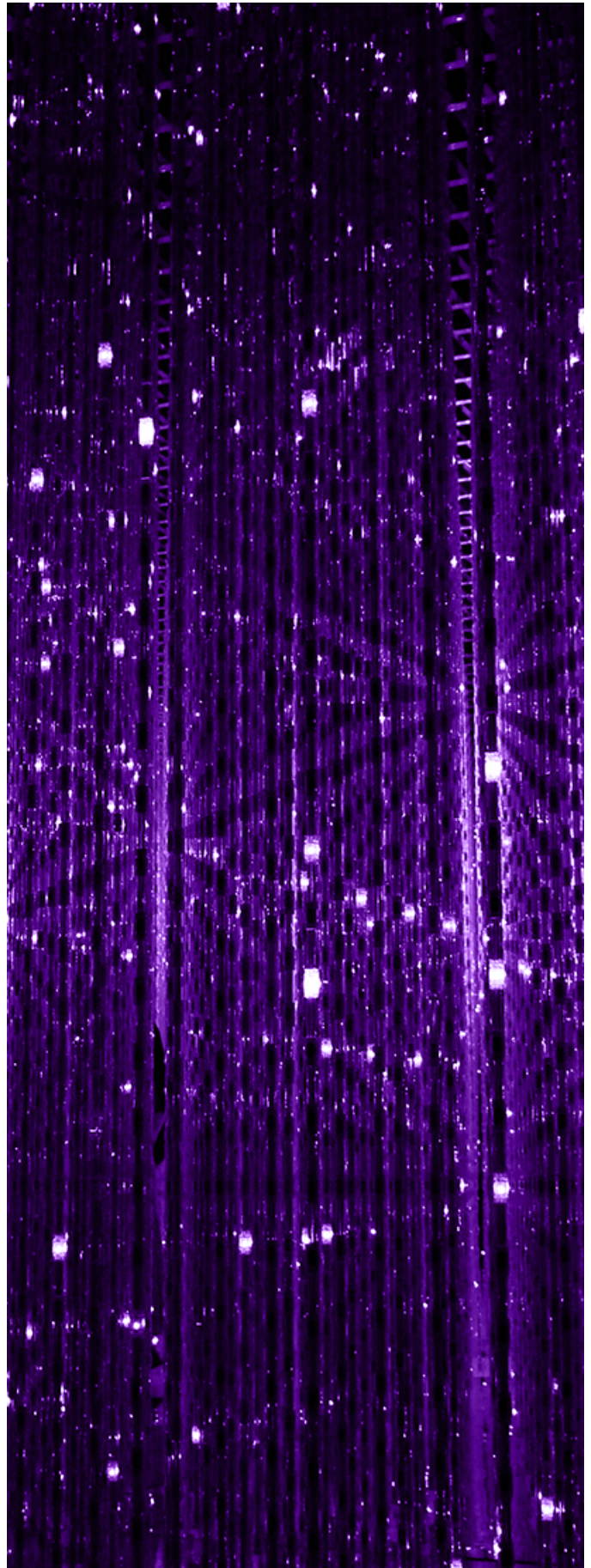


Tier-four copilot mapped by scope

At Moveworks, we've developed a [four-tiered framework](#) to help business leaders determine which copilot will be best suited for their requirements.

- **Tier-one copilot:** Basic AI assistant using large language models for simple tasks like social media suggestions or email auto-completion.
- **Tier-two copilot:** Customized AI tailored to your company's specific data, used for tasks like translating IT tickets or summarizing documents.
- **Tier-three copilot:** Combines multiple AI models to handle complex tasks like automating workflows or analyzing data for trends.
- **Tier-four copilot:** Advanced AI system for large enterprises, offering features like reasoning and analytics to support various departments. As a sophisticated LLM system specifically designed for enterprise-wide deployment, these tier-four copilots encompass advanced features like a reasoning engine, analytics, security, and privacy, as well as out-of-the-box connectors catering to the demanding requirements of large organizations.

By grasping the nuances of the various tiers of AI copilots and their unique capabilities and limitations, you will be better equipped to create a tailored strategy for your organization. Let's explore some of the most well known copilots currently available.



Common AI copilots in the market

ChatGPT unleashed an era of innovation, and today the industry is flooded with AI copilots. Some of the [most popular AI copilots](#) are included below:

1. [ChatGPT](#): OpenAI's signature AI model, ChatGPT is a large-scale [conversational AI](#) system capable of answering questions, providing recommendations, and drafting content naturally. ChatGPT can help streamline various high-level tasks and workflows, making it an invaluable partner for navigating everyday challenges.
2. [Moveworks' Enterprise Copilot](#): The enterprise copilot from Moveworks is the generative AI copilot that automates employee assistance and empowering your workforce to surface information and take action across enterprise systems, all through a single conversational interface. It ensures seamless support for all employees, regardless of their language or preferred communication channel.
3. [Jasper](#): Jasper is an enterprise grade copywriting assistant that helps marketing teams in producing content and campaigns. By understanding the user's input and providing relevant suggestions, content creators and marketers can save time, increase productivity, and build campaigns.
4. [Copilot for Microsoft 365](#): Microsoft's copilot is designed to help users with a range of tasks across the Microsoft ecosystem, including in applications such as Teams, Word, Outlook, PowerPoint, Excel, and others. It can automate text and layout suggestions, create email summaries, and provide real-time assistance. It comes with enterprise grade security, privacy and compliance.
5. [Einstein GPT](#): This copilot from Salesforce generates personalized content across the Salesforce platform, enhancing employee productivity. Open and extensible, it supports public and private AI models so that Salesforce customers can elevate CRM efficiency with out-of-the-box [generative AI](#).
6. [Github's Copilot](#): An AI-driven code completion copilot which helps developers write code more efficiently by suggesting entire lines or blocks of code. By learning from the context and past code in a repository, Github Copilot offers tailored recommendations, reducing development time and making the coding process more intuitive.

[Microsoft and Moveworks have entered into a strategic partnership](#) to power the future of generative AI and deliver secure, scalable, and robust AI experiences to the global workforce. This collaboration has extended the power of Microsoft Teams, unlocking new levels of productivity across industry verticals.

Moveworks is now available on the Microsoft Commercial Marketplace. Plus, Microsoft customers can also [apply their existing](#)

[Microsoft Azure Consumption Commitments \(MACC\) towards the purchase of the Moveworks copilot.](#)

This flexible purchasing model empowers organizations to extend the value of their existing Azure investments to easily take advantage of Moveworks' advanced AI capabilities for automating employee support. Discover how these [two copilots complement each other.](#)

Common AI copilot use cases for enterprise systems

After getting a sense of the four-tiered approach and the common AI copilots in the market, let's elaborate on some common use cases for enterprises. From driving productivity to unlocking efficiency, the advance in AI copilots is taking companies by storm.

Copilots boost productivity across IT teams and company-wide by seamlessly integrating into workflows. They allow teams to accomplish more with less by automating tasks. Furthermore, they are improving efficiency by optimizing processes and ensuring every action has a purpose. Extending from

IT and support teams to HR and finance, AI copilots give increased capacity across departments to handle complex issues with finesse.

Moveworks has [mapped the top 140 use cases](#) across common enterprise systems such as application management system (AMS), collaboration system, customer relationship management (CRM) system, financial management system (FMS), identity and access management (IDAM) system, IT operations system, human resource information systems (HRIS), marketing system, procurement system, and project management system. The top use cases under each of these ten widely used systems are captured below:

System	Common use cases
IT Operations	* Notifying employees about maintenance * System outage alerts * Announcing IT service launches * Retrieving system configuration information * Checking server status * Diagnosing and fixing API errors * Configuring environment variables * Guiding through infrastructure provisioning
Identity and Access Management (IDAM)	* Multi-factor authentication requests * Security incident alerts * Password resets * Access request status updates * Compliance training reminders
Application Management System (AMS)	* Sending application maintenance reminders * Upcoming outage notifications * Submission reminders * Checking application status * Viewing logs * Searching users * Configuring settings * Viewing usage * Requesting access * Reporting issues
Project Management System (PMS)	* Project milestone updates * Task assignments * Managing timelines * Reporting progress * Workflow optimization
Collaboration System	* Sending meeting reminders * Task notifications * Document updates * Welcoming new employees * Finding meeting rooms * Scheduling meetings
Customer Relationship Management (CRM)	* Sending key milestone updates * Requesting customer feedback * Notifying of product updates * Alerting sales reps on leads * Looking up customer information * Checking order status * Resolving customer issues
Financial Management System (FMS)	* Managing budgets * Submitting and tracking expenses * Approving purchase requests * Adjusting payroll deductions * Resolving payment disputes
Human Resource Information Systems (HRIS)	* Onboarding new hires * Managing benefits * Payroll information * 401k balance lookups * Benefits enrollment * Health information access * Performance review reminders * Compliance training reminders

System	Common use cases
Marketing System	* Creating content * Launching campaigns * Analyzing performance * Competitive analysis * Social media posts * Website analytics
Procurement System	* Purchase order lookups and approvals * Policy guidance * Delivery updates * Contract expiration alerts * Requisition status updates * Inventory and vendor information lookups

Moveworks, the industry’s leading enterprise copilot, is at the forefront of delivering these use cases to the [world’s leading companies](#). AI copilots can seem very powerful with all the things they can do. However,

your organization should take a measured and thoughtful approach as you invest in this technology. In the next section, let’s dive into the importance of aligning AI investments to business outcomes.

Deliver real business outcomes with an AI copilot

We've all heard the saying, what's measured is what matters. Numerous research studies highlight the importance of tying technology investments to measurable business outcomes. We take that same approach at Moveworks and our AI value framework is grounded in three business outcome categories: **improved operational efficiencies, enhanced experiences, and accelerated business transformation.**

Are you seeking to enhance operational efficiencies, improve employee experiences, or speed up your business transformation – or perhaps do all three?

Once these business outcome categories have been defined, it becomes easier to establish impact areas and associated KPIs to baseline, target, and measure against over time. This approach helps companies inform their initial investment, gauge

your investment's success over time, and re-inform additional investment as needed.

When working with customers, our team collaboratively defines KPIs that map to eight common business impact areas that Moveworks' conversational AI platform delivers against.

Operational efficiency

1. Increased tech stack ROI

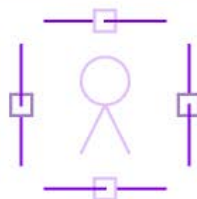
Getting the most value out of technology investments – from your knowledge bases to ITSM to CRMs to ERPs – contributes to core KPIs. By improving the performance and efficiency of the technology stack, your organization may be able to reduce change management costs and potentially increase the long term productivity, which can result in increased competitiveness, revenue, and profitability.

Improve Operational Efficiencies



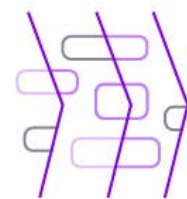
Effectively and efficiently utilize enterprise resources (time, people, capital) to achieve goals

Enhance Experiences



Deliver delightful, optimal experiences across your employees, partners, and customers

Accelerate Business Transformation



Fundamentally change how your organization operates to improve its performance and competitiveness

2. Improved employee productivity

To increase the amount of work or output produced by employees within a given period, you must try to quickly provide employees with the resources and support needed for their roles. These provisions include automating or streamlining tasks, and improving communication and collaboration to increase profitability per employee.

3. Improved support scalability

To stay competitive, it's critical for a support team to effectively handle an increasing number of users without a corresponding increase in resources. Automating routine tasks, implementing self-service options, and using data and analytics to identify and prioritize high-impact initiatives and projects all contribute to a support organization's ability to grow. By improving scalability, organizations can provide better service management to their users, even as the number of people they serve increases.

Employee experience

4. Improved service desk efficiencies

Perhaps you'd like to make the service desk more effective while reducing costs. Implementing new technologies such as AI, automating processes, and optimizing existing technology infrastructure (hardware and software) lowers the burden on staff, can potentially reduce escalations to L2 and L3 staff,

and give support resources more time to focus on higher-value projects. This, in turn, improves the quality of service provided to end users, and increases employee satisfaction, leading to cost savings for the organization and a more productive environment for the workforce.

5. Reduced manual processes

Replacing manual, time-consuming tasks with automated or digital solutions becomes a key business impact area. By automating certain processes, organizations may be able to eliminate the need for manual intervention altogether. Organizations capable of reducing the time and budget required to complete basic tasks free up staff to focus on more valuable, strategic work. In addition, automated processes are often more reliable and consistent than manual ones, leading to improved quality and employee and customer satisfaction.

6. Improved employee onboarding

Employee onboarding is an important KPI. How new employees are introduced to a company and its policies, procedures, and culture is deeply connected to you — and your company's — success. The right tools provide new employees with the necessary knowledge, skills, and support they need to succeed from day one. By helping new employees feel comfortable, confident, and engaged in their work, overall job satisfaction and performance improve, ultimately benefiting not just your department but the entire organization.

7. Reduced employee churn

Employee churn, also known as turnover or attrition, can be costly for businesses, leading to a loss of institutional knowledge, reduced productivity, increased hiring and training expenses, and ultimately reduced profitability. Organizations who enable high employee productivity and support excellence often show signs of improved retention, reduced turnover costs, and help to create a more stable and engaged workforce.

Accelerate business transformation

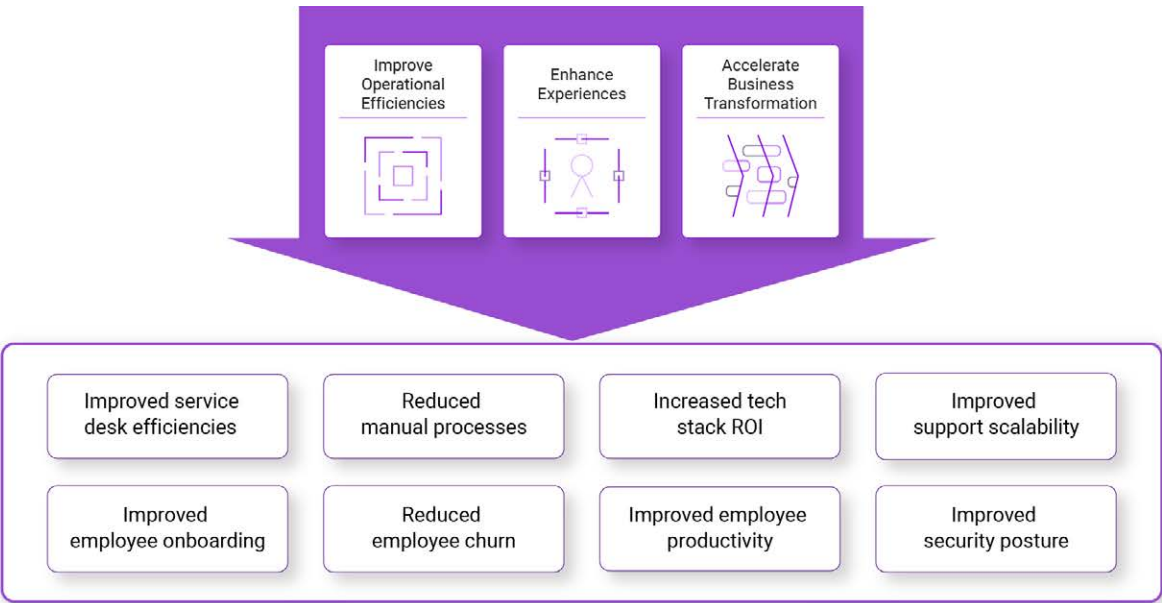
8. Improved security posture

A strong security posture is essential for businesses, as it helps prevent systems and software vulnerabilities that may have serious consequences. To improve security posture, organizations can implement various measures, such as having robust password policies,

updating software and security protocols, and providing regular training to employees on security best practices. Improving security posture has many benefits, including reducing costs, reducing reputational risk, and protecting revenue.

9. AI aligned with business goals

Taking a goal-oriented approach lets organizations confidently invest in the right type of AI copilots knowing that the time, effort and cost will pay dividends. Organizations can begin by identifying their business objectives when evaluating the AI in collaboration between the technology and business teams. Then they should define the specific use cases to implement and the success criteria and KPIs that will be used to measure outcomes. This framework helps to assess the opportunity and measure the value to inform businesses investments.





It's time to invest in an AI copilot

There's no time to waste – generative AI offers a powerful opportunity to multiply your team's impact. The days of dabbling with AI experimentation are part of the past, now you should strategically align AI with core business goals.

Move beyond one-off tech bets and select use cases that directly contribute to company-wide objectives and **align with overall strategy**. This chapter should have equipped you to more confidently invest in an AI copilot by outlining how copilots work, the key differences between tiers, common enterprise applications, and the eight measurable impact areas.

Wondering about the true value of AI for your IT team? It lies in driving positive business outcomes

across departments and your entire company. Building on this chapter's discussion of AI copilots' transformational potential, the next chapter dives deeper into quantifying productivity gains and [demonstrating ROI](#) so you can **ensure business and technical alignment**.

Our next chapter, making the business case for an AI copilot, will guide you through quantifying productivity and building a compelling business case for AI. This includes identifying current service and support bottlenecks, estimating potential improvements, and constructing a robust cost-benefit analysis. Now let's discuss how to make a compelling case for an AI solution, address potential concerns, and how to highlight its many powerful benefits.

03: Making the business case

Whether you've realized that you need an AI copilot or are still skeptical, this chapter explores common questions about copilot solutions.

Our goal is to help you quantify productivity gains and build a compelling business case for this transformational technology.

We understand the importance of addressing the essential questions and clearly articulating both the benefits and challenges of implementing a copilot.

We share:

- How to address business and technical alignment
- How to estimate the costs, benefits, and ROI of AI copilots
- Customer case studies demonstrating AI copilots value
- How to mitigate security and privacy considerations
- What are your next steps for copilot implementation

Convincing stakeholders across your organization — whether doubting frontline employees or cautious C-suite executives — is crucial to integrate AI technology effectively into your workflows.



How to address AI business and technical alignment

Aligning on your AI copilot can feel like venturing into uncharted territory. [Asana's State of AI at Work](#) report revealed that less than one-third of companies (31%) have a formal AI strategy in place, while an [IBM survey](#) revealed that 40% of IT professionals at large organizations are still exploring using this technology.

It's natural to have questions and concerns, especially when adapting AI to meet needs across business and technology functions. These challenges often arise due to project complexity, unrealistic expectations, and evolving business environments. This section equips you better to navigate these challenges for smoother, more successful company alignment.

Select repetitive processes impacting both IT – and your overall business

86% of IT executives believe that [generative AI will have a major impact](#) on their companies, according to new research from Slack on new trends in AI use at work. The fact that the vast majority of IT leaders are optimistic about AI shouldn't be surprising. Its capacities are well-suited for addressing the high volume of repetitive tasks bottlenecking many support teams.

Understanding how AI copilots can impact company productivity starts with conducting a thorough analysis of your current IT and support processes. This analysis involves **pinpointing areas with high volumes of repetitive tasks**, such as password resets or basic troubleshooting. Some common examples include:

- **Access requests:** The constant influx of new software and roles creates a backlog of access requests, delaying employee onboarding and productivity.
- **Hardware troubleshooting:** Frequent hardware malfunctions, with printers and other devices, lead to wasted time spent on diagnostics and troubleshooting. These issues can vary greatly depending on specific equipment and configurations.
- **Infrastructure management:** Identifying and resolving infrastructure issues often requires specialized knowledge and experience, leading to delays in addressing root causes that impact end users.
- **New employee onboarding:** Intelligent assistants guide new hires through hardware/software setup, access requests, and knowledge absorption.
- **Knowledge management:** Copilots serve up answers to common questions and IT issues by tapping knowledge bases.
- **Incident management:** AI initiates automated diagnosis, triage, and remediation steps based on user-reported incidents.

However, even if your chosen AI assistant has features that impress your IT team, it still might fail to address other core business challenges identified by stakeholders. This kind of misalignment may lead to frustration, wasted resources, and ultimately, AI falls short of expectations. That's why once repetitive processes are identified, you should then get feedback from different teams and departments to facilitate consensus.

Solicit cross-functional team input from the get-go

Creating a cross-functional team with members from different departments promotes collaboration and should ensure comprehensive coverage when evaluating any potential AI project and defining success metrics. It's advisable to include experts in IT operations, data science, and data governance. Data governance specialists, in particular, can provide valuable insights into data quality management, essential for preparing data for the AI tool's use.

Have your cross-functional team identify priority [metrics](#) and KPIs with a company-wide impact, like average resolution times, first touch resolution, and ticket volume. These can reveal areas where processes are slow and impede overall efficiency, and help you to focus your AI investments on areas with the greatest potential for productivity gains through automation and streamlined workflows.

Strategic AI = successful AI

By addressing business and technical alignment and tackling these strategic concerns proactively, you can ensure a more successful [AI adoption](#) journey. Our next chapter will help equip you in much greater detail on how to navigate your implementation journey, from initial launch and optimizing your copilot for ongoing success so you are able to unlock the transformative power of AI for your team. However, before diving into implementing, your stakeholders will want to see concrete evidence of the value AI copilot brings to the table. That's why we've spent the next section of this chapter considering the ins and outs of quantifying your copilot success.



How to estimate the costs, benefits, and ROI of AI copilots

Understanding the true cost-benefit picture of AI copilots is essential for IT leaders making investment decisions. Let's focus on hard metrics like usage volumes, time savings, productivity gains, discuss potential indirect benefits, and finally share how to quantify the costs, benefits, and ROI of an AI copilot.

Costs of a copilot

Like most SaaS solutions, the cost of AI copilot platforms varies based on several factors:

- **Vendor:** Different vendors offer varied pricing structures, such as per-user subscriptions, feature-based pricing, or user-based licensing.
- **Features:** Platforms with [advanced capabilities like natural language processing](#) or self-service options tend to be more expensive than basic AI assistants.
- **Deployment model:** Cloud-based solutions are easier to scale but involve ongoing subscription fees, while on-premise solutions require upfront investments in hardware and software.
- **Organization size:** Larger enterprises with a higher volume of use may pay more than smaller businesses.
- **Ease of implementation:** Initial setup may require additional resources for knowledge curation and customization, depending on adoption and use cases.

Direct benefits of a copilot

We know that empowering your teams with AI is especially critical for IT teams where your human resources are limited, costly, and can't easily scale. However, the benefits of a copilot go beyond just cost savings and productivity gains. The hard returns of AI may directly connect to profitability as well. These include [metrics](#) such as potential increases in revenue, reductions in cost, and savings in time.

- **Reduced labor costs:** Automating routine tasks like password resets and basic queries frees up IT staff for strategic initiatives, reducing labor costs.
- **Increased efficiency:** AI simplifies the management of common support requests across departments, reducing the need for service desk interactions. This translates to a decrease in support volume and associated costs.
- **Empowered employees:** By handling routine tasks, AI copilots [free up valuable time for employees](#), allowing them to focus on core activities, leading to increased overall productivity.

Looking for an estimate of your copilot savings?

[Request a personalized Moveworks demo](#) Connect with our team and discuss your goals and current challenges, assess your technical environment, receive an overview of the Moveworks Copilot, and get answers to your questions.

Productivity benefits

Benefit	Observable results	Impact	Metrics
Productivity savings	• Faster resolution times • Improved employee satisfaction (i.e., reduced frustration with IT support, support in native language)	• Increased employee focus time on core activities • Improved employee morale and engagement • 24/7 availability of AI-powered support • Multi-lingual support • Personalized recommendations and knowledge base suggestions	• End user time saving: For improved IT resolution rates, including but not limited to the following: • Access restoration time: How long it takes to reset passwords or unlock accounts • Time to answer troubleshooting questions: Duration to provide answers to how-to inquiries • Approval wait time: The time needed to obtain manager approvals for requests
Cost savings	• Reduced labor costs (i.e., time saved on tickets, password resets) • Reduced training costs	• Lower IT operational expenses • Increased budget allocation for strategic initiatives	• Annual salary cost associated with saved time • Reduced training hours cost
IT team efficiency gains	• Reduced ticket volume (i.e., through self-service capabilities, improving first-contact resolution rates) • Faster resolution times (i.e., AI-powered knowledge management)	• Increased capacity for strategic IT projects • Identify service hotspots: AI pinpoints challenge areas • Improved IT service delivery capabilities	• Mean time to resolution (MTTR): Average resolution time before and after AI copilot • High-touch issue resolution time: The time to resolve complex issues needing subject matter expert (SME) or L2/L3 input. • Number of tickets: Compare the number handled by IT team before and after AI copilot

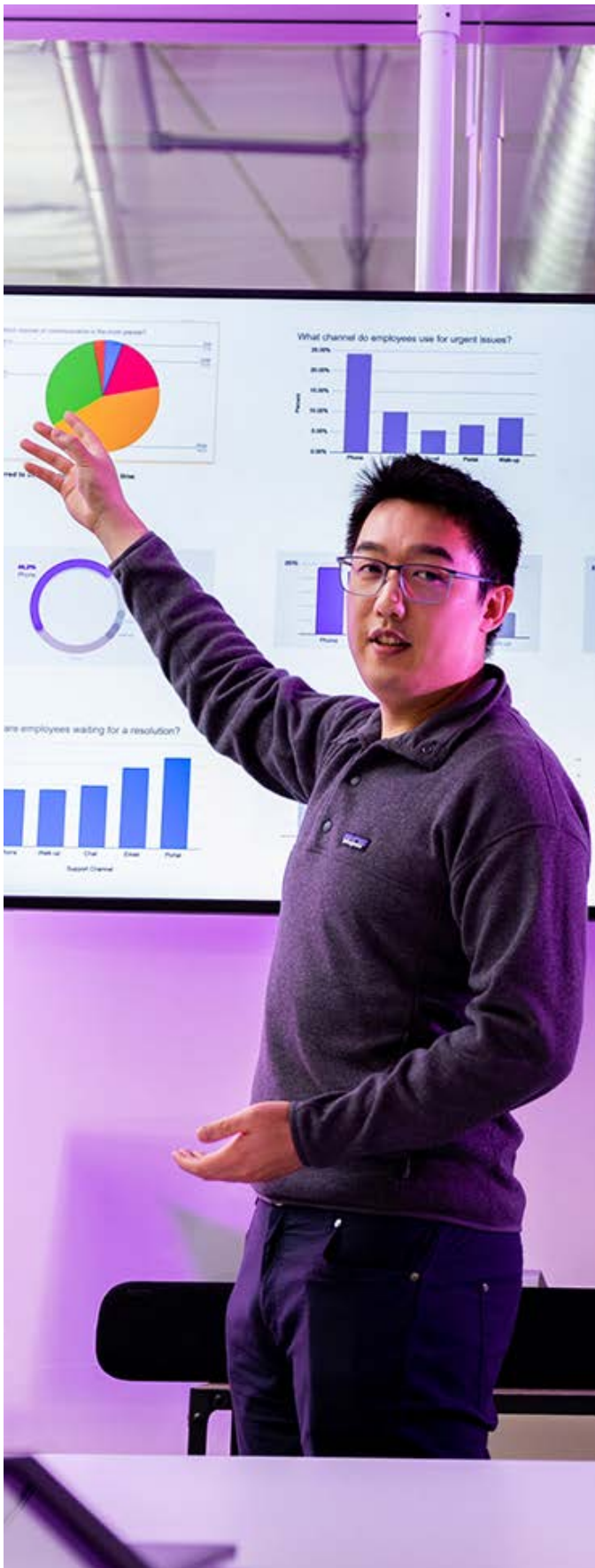
Indirect benefits

Benefit	Observable results	Impact
Improved support scalability / IT staff empowerment	• Reduced ticket volume due to self-service and AI-powered resolution • Increased capacity for handling future support needs	• Reduced need for additional IT support staff as workload increases • Increased self-serve support • IT staff allowed to focus on complex issues and strategic initiatives
Enhanced user experience	• 24/7 availability of AI-powered support • Multi-lingual support • Personalized recommendations and knowledge base suggestions	• Increased user satisfaction with IT services • Improved localized support • Improved user adoption of technology within the organization
Improved knowledge sharing & retention	• AI-powered knowledge base continuously updated with successful resolutions	• Easier, more visible access to relevant knowledge for IT staff and end-users • Reduced time spent on problem-solving tasks • Increased usage of knowledge bases and other information platforms (ITSM, CRMs, ERPs, etc)

Indirect benefits of a Copilot

Productivity benefits and cost savings are certainly a major advantage of AI copilots in IT. Copilots can also indirectly influence productivity through improving support scalability, enhancing user experiences, and improving knowledge sharing and retention. [GitHub released data](#) on its copilot's impact, showing that 74% surveyed developers could focus on more satisfying work.

However, the potential for indirect benefits – and revenue growth – generally happens through two key areas: increased employee effectiveness and enhanced information visibility. The ease of information access with [24/7 support, automation and self-service capabilities](#) typically means much faster service, satisfaction, and empowered employees to focus on core revenue-generating work.



Calculating your copilot return on investment (ROI)

ROI measures the profitability of an investment and is expressed as a percentage. The standard formula to calculate ROI is: $ROI = (\text{Net Profit} / \text{Cost of Investment}) \times 100$.

However, a comprehensive ROI estimate should factor in all anticipated benefits and costs to better demonstrate the financial viability of copilot adoption. It should account for **improved operational efficiencies, enhanced experiences, and accelerated business transformation.**

Discover how Moveworks delivers business benefits, cost savings, and 256% ROI with conversational AI built for the enterprise in the commissioned Forrester Consulting study [The Total Economic Impact™ of Moveworks report](#). This report explores the standard costs, estimated benefits, and the ROI of Moveworks.

One important distinction about AI is that unlike traditional investments, where gains are evaluated against costs for immediate financial returns, the [return on AI investments](#) may not be as financially impactful in the short term. Instead, the advantages of AI — such as self-service, task automation, and predictive analytics — can greatly enhance employee productivity and informed decision-making, are **benefits that gain significant momentum over time**, contributing to the long-term success of the business.



Customer case studies: Demonstrating AI copilot value

Building on the previous section's explanation of costs, benefits, and ROI, let's leverage the power of customer case studies. These real-world success stories don't just tell you that AI copilots are valuable, they show you how copilots created substantial value for actual customers.

By delving into how other companies achieved concrete results, these case studies can help to quantify the potential impact for your organization.

Discover how Broadcom and Palo Alto Networks witnessed results like:

- Increased productivity metrics
- Cost reductions through streamlined workflows
- Improved employee satisfaction

The examples below can strengthen your business case for AI copilots and empower your team with a data-driven metrics approach to envision similar results.

How [Broadcom](#) integrates knowledge bases to autonomously fix IT issues

Broadcom is a multi-billion dollar global infrastructure technology company with a long history of innovation. It designs, develops, and manufactures a wide range of semiconductor and infrastructure software products.

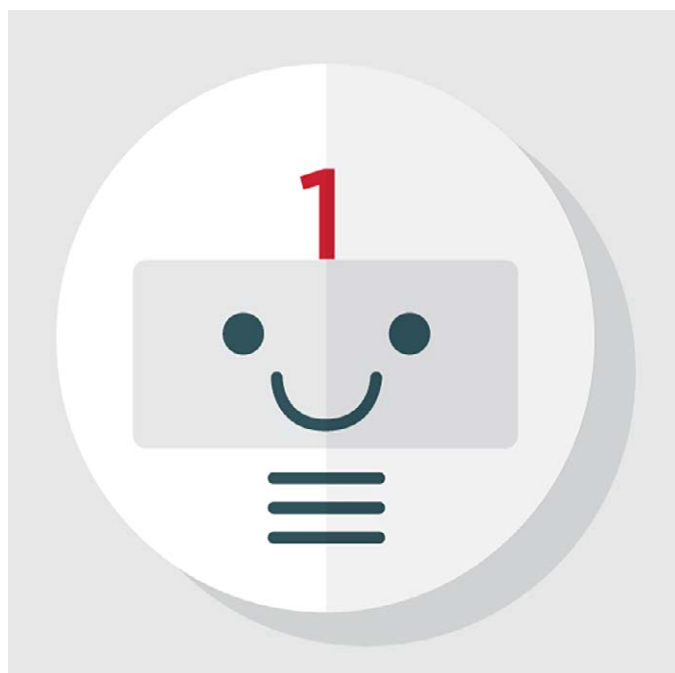
The company underwent rapid growth and transformation over the years. However, the acquisitions that it made over the last decade presented significant integration challenges. Information was spread across 10 different knowledge bases, making it difficult for employees to access the right information. As employees relied on an ever-growing pool of SaaS applications, scattered knowledge bases, and outdated search systems, keeping pace with the fast-moving business was becoming a challenge and hindering the overall productivity.

They turned to Moveworks and launched the Broadcom Copilot, called 1.Bot. As a result, the employees were instantly able to use Google Chat to resolve a variety of issues like resetting passwords, unlocking accounts, creating tickets, checking ticket status, and finding answers from knowledge base articles.

As a result, Broadcom is able to resolve 57% of its IT issues in under a minute. The Copilot is able to pull information from different knowledge bases and surface it in a single interface. Additionally, with real time visibility into knowledge base gaps, Broadcom's

team can now create new articles, or update old ones, so employees can self-serve.

The Moveworks Reasoning Engine — a powerful combination of the company's proprietary large language model, [MoveLM™](#), and the world's most advanced LLM offerings — powers 1.Bot to resolve IT support issues conversationally, directly in chat.



“You don’t want your users going all over the place to search for information. The advantage of Moveworks is that there’s one familiar go-to place for employees to get their answers.”

— **Stanley Toh**, Head of End-User Services & Experience, Broadcom

How [Palo Alto Networks](#) unlocks global productivity

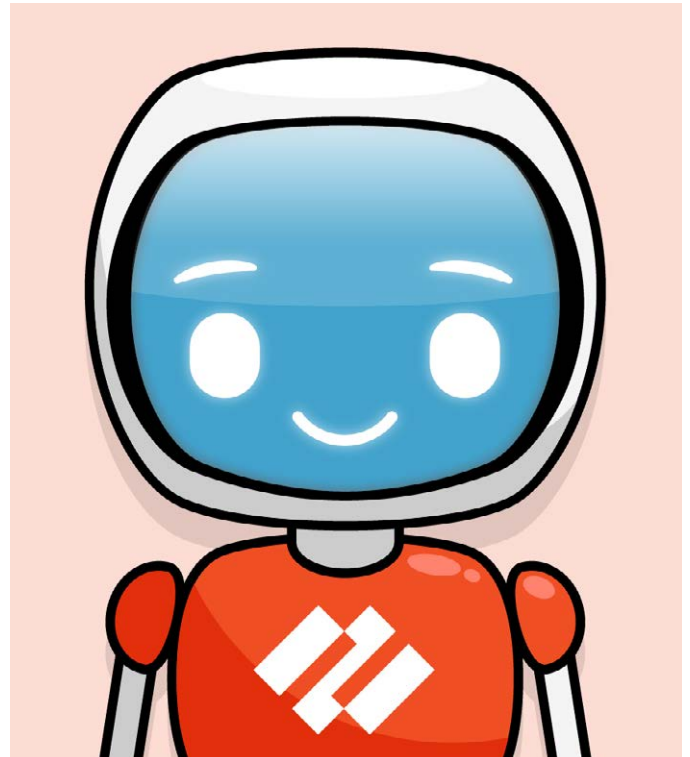
Palo Alto Networks is a global cybersecurity leader that is transforming the way people and organizations operate. The core product is a platform that includes advanced firewalls and cloud-based offerings. The company has recently experienced record growth to reach a market capitalization of more than \$100 billion.

The growth meant more hiring across the board and with a workforce of more than 15,000 employees, Palo Alto Networks' help desk had to deliver support on a much larger scale — without dramatically increasing headcount. It needed to do all this while also establishing FLEXWORK, a program to provide personalized support to each employee at work. It clearly needed a more efficient way to address IT issues, HR requests, and policy questions in a hybrid workplace.

To solve its growing pains, Palo Alto Networks deployed Sheldon, its Moveworks Copilot. Powered by Moveworks' Reasoning Engine, Sheldon helps employees through natural conversations, whether that's accessing software or answering questions across many different channels. Today, it is able to intercept employees' issues wherever they're submitted, be it via a direct message, in Slack, through email, and even inside its ServiceNow portal.

As a result, the cybersecurity giant was able to save its hybrid workforce 351,000 hours in productivity. It is now able to deliver immediate,

24/7 support to a hybrid workforce while freeing up the help desk agents to concentrate on high-impact initiatives. Further, the company is able to achieve its vision for FLEXWORK by backing up the right policies with the right technologies.



“In terms of the experience for employees, there’s nothing even close to Moveworks. It’s the best, period.”

— **Steve Januario**, Former VP of Digital Employee Experience, Palo Alto Networks

Understanding copilot security and privacy

Introducing an AI copilot into any organization is a significant decision, one that requires careful consideration and strategic planning. While the potential benefits of AI for enhancing efficiency, automating processes, and driving innovation are widely acknowledged, numerous security and privacy concerns can come up prior to implementation.

We understand that building trust in conversational AI technology requires a comprehensive approach to security. To ensure the trustworthiness of our solutions, we implement rigorous security measures throughout the entire product development lifecycle. This includes application security reviews, scanning capabilities (integrated in our CI/CD pipeline), penetration testing, red team exercises, bug bounty program, and as well as security operations capabilities.

Conversational AI trustworthiness

As conversational AI becomes increasingly recognized as a tool to improve the customer and employee experience, the trustworthiness of conversational AI — specifically, ensuring that customer data is properly safeguarded — is crucial.

Since its inception, Moveworks has taken security and privacy seriously by following industry best practices and innovating in this space.



The foundations of trustworthy conversational AI

Customer trust

A company earns customer trust by delivering on its commitments and promises. Building and maintaining trust requires well-established information security and privacy processes, mechanisms, and teams. Furthermore, there is a commitment from the executive leadership team and designated resources to promptly work on these important initiatives.

Moveworks' approach: Moveworks has a dedicated team of security and privacy professionals led by a Chief Information Security Officer (CISO). Moveworks has established security mechanisms & privacy processes, which are regularly updated with best-in-class practices. Moveworks also has security and privacy features built into the product to properly safeguard customer data.

Identity and input validation

The information exchanged between the conversational AI and the customer needs to be properly validated and the identity properly safeguarded.

Moveworks' approach: Moveworks validates users' identity by integrating with enterprise collaboration platforms and identity management systems and by leveraging existing enterprise identity management systems to authenticate the user.

Access control

Customer data should have proper access controls in place and be stored separately. The conversational AI service should only have access to the services and data needed.

Moveworks' approach: Access to customer data is restricted on a need-to-know basis and controlled via the least privilege mechanism. Moveworks recognizes the sensitive nature of your data, and to mitigate risk, each Moveworks customer has a logically isolated instance of our cloud services suite that is deployed and secured on AWS US West (Oregon), AWS US East (Ohio), and AWS GovCloud (US-East).

Hardened infrastructure

Conversational AI must operate on a properly configured and secured infrastructure with secure default configurations.

Moveworks' approach: The Moveworks service runs as a set of containers in the Amazon Web Services (AWS) cloud with all Moveworks runtime services and runtime customer data resident in the Moveworks virtual private cloud (VPC). Moveworks maintains controls and enforces infrastructure hardening standards to ensure the confidentiality, integrity, and availability of your data. The security of the infrastructure is scanned, monitored, and audited on a regular basis.

Data handling

Conversational AI must access and process data to service requests and generate user-specific responses. It should also have the capability to delete and mask sensitive data. A proper conversational AI relies on machine learning (ML) to improve over time, so proper privacy-enhancing technologies should be implemented. Lastly, it is important for conversational AI to ensure the data from one customer is not intertwined with another customer.

Moveworks' approach: Customer data is stored in a dedicated and encrypted AWS S3 bucket via AWS KMS. Data is encrypted at rest (AES-GCM 256) and in transit (TLS 1.2). All keys and credentials are encrypted and managed by AWS KMS (Rotated at least annually).

Our collective learning system is designed to anonymize and irreversibly transform customer data, including personally identifiable information (PII), before ingesting it into our models for training.

Moveworks deletes data upon request or if your organization stops using the product (following NIST 800-88).

Data masking

Data masking ensures that sensitive customer data is concealed from people who might need to review or access data as part of their job (such as a data annotator). A trustworthy conversational AI has this functionality to ensure that sensitive data is not exposed.

Moveworks' approach: Moveworks utilizes a data masking library to mask sensitive personal information such as names, emails, phone numbers, credit card numbers, etc.

Moveworks maintains strict levels of privacy by complying with industry-leading standards such as GDPR, CCPA, and ISO 27001. Customers subject to additional data privacy compliance requirements, can enter into Data Processing Addendums and Business Associate Agreements (BAA) with Moveworks, where applicable.

Industry certification

Several industry standards and certifications highlight security and privacy. They ensure that security and privacy controls are properly implemented, including processes and mechanisms to protect its customers and their data.

Moveworks' approach: Moveworks' security and privacy program has achieved the following industry certifications: SOC2 (Security, Confidentiality, Availability, and Privacy TSCs), ISO 27001, ISO 27017, ISO 27018, CSA Star Level 2 Gold, and Privacy Shield.

Responsible AI

Unbiased machine learning (ML) models require actively minimizing or eliminating potential sources of bias with respect to protected classes, including race, age, disability, religion, color, national origin, sexual orientation, gender identification, and genetic information.

Moveworks' approach: Moveworks' ML models are trained primarily on data sampled from production usage. Using a technique known as Collective Learning, many of our models are trained on anonymized data drawn from multiple customers, allowing them to learn the universal structure of requests from employees with different backgrounds and characteristics.

Moveworks annotates this data without exposing any user characteristics to the annotator: no names, photos, or other category-identifying features are included in the annotation interface. When annotating the intention of a request, for example, the annotator only sees the text of the message and the organization's name.

During training and processing, Moveworks does not include protected attributes, such as gender or race, in the inputs from which the models learn to derive signals.

Handling our customers' data

We understand the importance of data protection and privacy, and we are committed to safeguarding our users' data. We encrypt the data both at rest and in-transit as well as maintain strict access control mechanisms to ensure that user data is processed and stored securely. We also adhere to applicable data protection regulations (see Compliance section below), and our policies and practices ensure that we collect only necessary data for our machine learning systems to function.

Security culture and standards compliance

As an organization that handles customer data directly, sound security practices lie at the heart of Moveworks culture. To protect the confidentiality,

integrity, availability, and privacy of information under our control, Moveworks has achieved the following security and privacy certifications.

What are the security certifications?

- ISO 27001: Global standard for information security management systems
- ISO 27017: Code of practice for information security controls for cloud services
- ISO 27018: Code of practice for protecting personally identifiable information (PII)
- SOC 2 Type 2: Certified for security, confidentiality, availability as well as privacy TSCs
- CSA STAR Certification Level 2: Enhanced Security Controls for Cloud Service Providers

What are the privacy certifications?

- ISO 27701: Privacy information management standard supporting compliance with global privacy laws
- SOC 2 Type 2: Certified for security, confidentiality, availability as well as privacy TSCs
- GDPR Compliant: Protecting Data Privacy Rights
- CCPA Compliant: Safeguarding Consumer Privacy Rights

Learn more about security at Moveworks

[For more information about security at Moveworks](#), please reach out to your customer support team to get access to our Whistic profile, where you can find more of our Security documentation and certification reports.



How to conduct your copilot vendor selection and solution evaluation

Defining your organization's unique needs involves uncovering your business pain points and conducting a comprehensive needs assessment with key stakeholders. Only then, once your team's requirements are crystal clear, can you begin exploring the available AI copilot and vendors within the market. Survey the landscape to identify suitable solutions that align with your needs.

Analyze features, functionalities, and pricing models

During your AI copilot selection process, you'll want to conduct a meticulous analysis of features, functionalities, and pricing models. The key is to meticulously match the features offered by each tool to your pre-defined needs to pinpoint the solution to address your specific challenges.

At a high-level, you may want to consider the following when selecting your vendor:

- **Vendor reputation:** Prioritize reputation, customer support, and reliability.
- **Own data demos:** [Request interactive demos](#) with your own data. Demos can provide valuable insights into the tool's functionality and its compatibility with your existing infrastructure.
- **LLM expertise:** Ask about the vendor's expertise in large language models and conversational AI, as these capabilities are essential for effective AI copilot performance.

Next, embark on a comparative analysis of these tools, by carefully weighing both the features and the associated costs. You should also account for critical factors like scalability and security; ensuring the tool can grow with your needs and safeguard your data is essential. Consider assessing the potential [return on investment \(ROI\)](#) for each option to solidify your decision. By deliberately considering these factors, you'll be well-equipped to choose the AI copilot that can deliver the most efficiency and value for your organization.

Understand the differences between tiers of copilots

Before developing an AI copilot strategy, you need to understand there is a vast difference between a ChatGPT and other [single use-case AI tools](#) and an enterprise copilot platform that is fully integrated within an organization.

For a copilot to [own more enterprise-focused tasks](#), you need a less general, more tailored tier-four copilot that can manage your domain-specific requirements, relevant data inputs, system integrations, offers custom AI models, strong analytics and data science team, consistent, intuitive user experience and a robust security infrastructure.

While some use cases might be lighter lifts, others may require heavy, long-term maintenance. The scope of the problem you're trying to solve can require varying degrees of investment. For example, using AI to write web copy is different from using AI to provide enterprise-wide support and is much more complex.

Use best practices for selecting AI copilots

When selecting an AI copilot, you should evaluate the platform based on specific factors that contribute to a smooth implementation and overall performance. Below are some key aspects to consider:

- **Enterprise context:** Your AI copilot should be capable of understanding and leveraging your company-specific data to provide contextually accurate and relevant interactions.
- **Data security and compliance:** Select a copilot designed with strict security,

compliance, and privacy standards, ensuring data protection for individual, group, and tenant levels.

- **Scalability and integrations:** Opt for an AI copilot that can integrate with multiple applications and scale as your business grows, providing a robust and adaptable solution.
- **Learning capability:** Select an AI copilot that can continually learn and adapt its skillset to meet evolving organizational and industry requirements.

Next steps: Designing your implementation plan

We know that there are reasonable doubts about the challenges of AI implementation. **That's why we've discussed common strategic and security concerns so you can mindfully approach your vendor selection for a more private, secure and smoother copilot implementation.**

We have also illustrated the transformational potential gains from AI copilots – as well as the associated costs and potential [return on investment \(ROI\)](#). Now you can face your entire team with more confidence and a better understanding of the measurable benefits of an AI copilot.

Let's expand our exploration in our next Chapter 4, building the foundation for successful copilot implementation, which guides you through designing your implementation plan, and provides a practical roadmap for successfully launching an AI copilot.



04: From idea to implementation

In our previous chapter, we explored how to pinpoint areas for enhanced IT productivity, highlighted the promising potential gains from deploying AI copilots, and discussed how to calculate the return on investment (ROI) of these solutions.

While copilots can offer significant productivity and favorable ROI, there is an understandable skepticism surrounding the implementation process and how to select the right copilot for your organization.

Perhaps you or one of your stakeholders have already wondered:

- How do I assess my organizational readiness?
- How do I choose the right pilot use case(s) to deliver value quickly?

- How do I ensure the copilot can seamlessly integrate with my existing systems?
- How can I prepare for change management so employees will adopt these new capabilities?
- How can I make sure the copilot is successfully launched and continually optimized?

To help to address these implementation concerns, we explore all these questions in detail. Together this overview offers a practical potential roadmap for incorporating an AI copilot that drives productivity into your IT environment.



Stage I: Pre-implementation

Gearing up for an AI copilot implementation isn't a one-size-fits-all process. It starts with thoroughly evaluating your organization's readiness, exploring how to overcome skill and resource gaps, and finally checking that your copilot solution aligns with business value. These steps should set you on the path toward using a generative AI copilot that can unlock the most productivity for your organization.

How do I assess my organizational readiness?

- Conduct a skill and resource inventory
- Identify how to overcome gaps in skills and resources
- Align AI with business value

Step 1: Pre-implementation preparation

Conduct a skill and resource inventory

Begin by identifying potential gaps in skills and resources. According to IBM, [one in five organizations lack employees with the necessary skill set for AI](#) and automation tools.

Readiness assessment begins with a detailed examination of your current IT infrastructure and team's capabilities. Surveys, interviews, and data analysis uncover departmental bottlenecks and pinpoint opportunities where AI can significantly enhance processes. This evaluation can also reveal the strengths and weaknesses of your existing tech stack, aiding in the decision-making process.

This assessment can also reveal areas where training, hiring, or a platform investment might be necessary to fill skill gaps. A typical enterprise AI copilot is best supported by the diverse personas outlined in the graphic below.

Program team personas & responsibilities

Persona	Responsibility	Effort
Executive sponsor	Tasked with overall strategy for AI copilot, definition of value and expected business outcomes, and support organizational change management.	Low
Product owner	Tasked with sponsoring AI copilot product within the organization, prioritizing and coordinating initiatives/workstreams, and navigating/owning value conversations both upward and downward. This stakeholder is a key decision maker for new features/configurations and other internal changes required to enhance AI copilot functionality.	Medium - High
Project manager	Tasked with team/meeting coordination, initiative tracking, and ownership assignment. This stakeholder is a day to day contact of your vendor's customer success team and is oftentimes a service desk manager/delivery lead.	High
Enterprise architect	Tasked with architecture design reviews/scoping, providing technical implementation guidance and support to developers, performing supervisory review of code releases, and liaising between your AI copilot vendor and your technical teams.	Low - Medium
Developer	Tasked with deploying and maintaining AI copilot products. These stakeholders are technically proficient but need enablement on extending the functionality of the AI copilot. For large enterprises, this is typically a lead developer and their direct reports.	Low - Medium
Creator	Tasked with creating/updating knowledge, forms, or other core resources of the platform which the AI copilot relies on to answer support requests. This stakeholder has familiarity with internal comms and is capable of building campaigns to promote the copilot.	Low - Medium

Identify how to overcome gaps in skills and resources

After you've conducted a thorough skill and resource inventory, you'll have proactively identified any gaps that might hinder successful adoption. Your plan might include upskilling programs to address knowledge deficiencies or bringing in talent support, while exploring managed service options or cloud solutions to supplement resource limitations. This strategic approach sets the stage for a smooth implementation and maximizes the return on your AI investment.

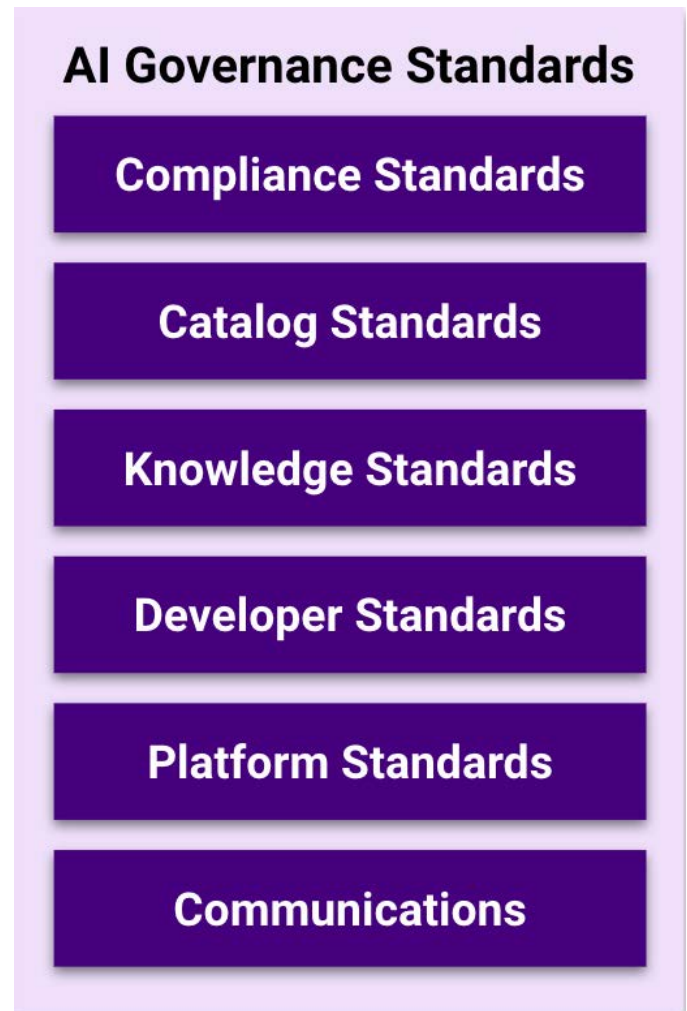
Align AI with business value

As an IT leader, you recognize the importance of establishing clear goals and measurable success metrics before deploying an AI assistant to guarantee your initiative yields tangible business value. Align your copilot objectives with your organization's broader strategic goals, such as cost reduction or employee retention, for maximum impact. We'll explore this more in Step 2: Define your pilot program vision and goals.

Establish an AI governance framework

[AI governance](#) serves as the set of rules, policies, and procedures designed to oversee the development, deployment, and use of artificial intelligence within your organization. Rules will typically include compliance standards, catalog standards, knowledge standards, developer

standards, platform standards and communications. Establishing such frameworks and clear framework owners helps to ensure that AI systems are developed and used ethically, responsibly, and in alignment with company's values and objectives.



Step 2: Define your pilot program vision and goals

Don't launch into your implementation headfirst without a clear vision – this can be a recipe for frustration. Instead, take a more structured approach by launching a pilot program and clearly defining your vision, goals, and success metrics prior to implementation.

How can I define my pilot program vision and goals?

- Identify needs and pain points
- Prioritize quick-win use cases for initial testing
- Define your success metrics and vision
- Continuously measure and refine

Identify needs and pain points

Grasping the impact of AI copilots on company productivity begins an in-depth analysis of current IT and support processes. This involves identifying areas that handle a high volume of repetitive tasks, such as password resets or basic troubleshooting.

More broadly, common examples include, but are not limited to: access requests, hardware troubleshooting, infrastructure management, employee onboarding, knowledge management,

and incident management. Identifying these bottlenecks allows you to concentrate your AI investments where you can achieve the most significant productivity gains through automation and streamlined workflows.

By examining metrics like average resolution times, first-touch resolution, and ticket volume, you can uncover barriers to efficiency and more effectively measure AI copilot impact.

Prioritize quick-win use cases for initial testing

Not all use cases are created equal. Focus on high-impact, feasible use cases for the most significant return on investment. Perhaps this is an area where current solutions are only partially addressing your support challenges, like repetitive service desk tickets.

Start with small, manageable wins and gradually expand. We typically recommend users pick just three to six use cases to start with and engage a small user base before scaling use cases more broadly. Using a service desk example, you might consider a pilot program where your AI copilot can automate initial support triage or streamline employee onboarding.

Evaluate potential use cases based on factors like potential impact, ease of implementation, and data availability. Be sure to choose use cases that align with the overall business goals and offer a clear value proposition.

Strategic Vision

Supporting Drivers



Establish clear vision statements and success metrics

Clearly define your copilot objectives by aligning them with your organization's broader strategic goals, such as cost reduction or employee retention. This will help ensure your AI initiative delivers tangible business value.

- **Set a clear vision:** Translate your goals into a vision statement and then create specific, actionable targets, such as "provide an exceptional employee experience while increasing operational efficiencies."
- **Determine supporting drivers:** With this vision in place, you'll want to get more specific.

Align with your stakeholders to determine the supporting drivers for your chosen use case. Quantifying these supporting drivers can serve as your evaluation yardstick, measuring the effectiveness of the AI copilot in improving your IT productivity.

For instance, instead of aiming for "improved customer satisfaction," aim for a specific metric, like a, "15% increase in CSAT scores within 6 months after copilot implementation." You should also establish baselines for your chosen KPIs before implementing your AI assistant to measure improvement and track your progress towards your goals.

Strategic vision & success metrics

Provide an exceptional employee experience while increasing operational efficiencies			
Pillar of Impact	Resolution <i>What issues are my bot autonomously resolving on behalf of the service desk?</i>	Acceleration <i>How does my bot autonomously route tickets and accelerate business processes by making ticket interactions and approvals frictionless?</i>	Adoption <i>How are my employees engaging with my bot and how can I expand impact of my bot?</i>
Supporting Drivers	★ Ticket Reduction ★ Increased autonomous resolution ★ Reduced time to resolution ★ Exceptional employee experience	★ Reduced time to resolution ★ Increased employee productivity ★ Exceptional employee experience ★ Increased employee satisfaction	★ Increased employee satisfaction ★ Exceptional employee experience
Top Impact Makers (Capabilities)	★ Account Access ★ Answers ★ Software Access ★ Forms ★ Groups Access ★ Concierge (Ticket Interception)	★ Approvals ★ Concierge (Ticket interactions such as ticket status, comments, close tickets) ★ Triage	★ Employee Communications ★ Moveworks for Web ★ CSAT ★ Channel Resolver (Slack)

Continuously measure and refine

Even the best pilot programs need adjustments. Throughout the pilot program, gather data and see how your AI copilot is faring relative to your established KPIs. This intel should help you identify areas for improvement, like fine-tuning the AI model or tweaking user training.

By following these steps, you help to launch a successful pilot program, paving the way for a smoother, smarter implementation that can contribute to overall business objectives. This data-driven approach fosters more informed decision-making and helps to maximize the ROI of your AI investment.



Stage II: Implementation and go-live

Step 3: Setting up a successful implementation

Successfully implementing a generative AI copilot is no joke, especially when juggling a strong technical set-up, positive user experience, and business goal alignment.

Your implementation journey begins with configuring the copilot for your infrastructure and conducting a pilot program to explore capabilities in a controlled environment. Here are several key steps to consider as you begin your implementation.

How can I set up a successful implementation and go-live?

- Establish a joint planning framework with your vendor
- Have a cross-functional support strategy
- Kick off customer feedback mechanisms
- Schedule quarterly impact reviews

Establish a joint planning framework with your vendor

To ensure a smooth rollout and maximize the benefits of your new AI assistant, craft a joint success plan with your copilot vendor. These plans can leverage their machine learning capabilities, [incorporate knowledge writing best practices](#), and draw upon proven adoption strategies to drive user engagement and successful implementation.

Have a cross-functional support strategy

Fostering effective cross-functional support requires ongoing collaboration. Consider establishing quarterly impact reviews alongside your copilot provider's product and data science teams. This collaborative approach allows you to assess the tool's performance, identify areas for improvement, and ensure it aligns with your evolving needs.

Kick off internal feedback mechanisms

To gather valuable user insights and optimize your AI assistant's effectiveness, establish a multi-pronged internal feedback approach. Build a strong relationship with your vendor's customer success managers and engineering support, who can provide expert guidance. Regular executive check-ins can ensure alignment with leadership goals. Additionally, implement dedicated feedback loops through surveys and actively solicit questions from your vendor's customer support team. This comprehensive approach should yield a clear understanding of user needs.

Set up a quarterly impact review

To ensure your AI assistant reaches its full potential, establish a regular rhythm of evaluation through quarterly impact reviews. These reviews should begin with aligning on goals and objectives, confirming everyone is working towards the same targets. Delve into the copilot's impact during the past quarter and highlight its achievements. Then you can collaboratively develop a data-driven success plan that outlines next steps for continued improvement and maximized impact. This ongoing cycle ensures your AI assistant remains aligned with your evolving needs.

Establish a joint success plan with your vendor

Collaborate with your copilot provider on a comprehensive joint success plan. This plan should include detailed headroom analysis, conducted quarterly. The analysis might delve into unresolved tickets, pinpointing areas for improvement. Furthermore, some providers can leverage machine learning and AI to generate intelligent recommendations, including suggestions for knowledge base optimization, forms, and software provisioning. These recommendations should be grounded in best practices, to help you implement industry-proven strategies that have demonstrably increased value for other customers. By working together, you can maximize the impact of your AI assistant and realize its full potential.

Step 4: Align your environment

Without proper internal alignment, your IT infrastructure could struggle to handle the copilot's demands or your copilot could face user resistance. By taking the time to align your environment and users beforehand, you help to ensure a smoother rollout and to maximize the potential benefits of your AI copilot.

How can you align your environment?

- Align IT infrastructure to support the copilot
- Streamline processes for optimal copilot integration
- Ensure cross-functional departmental alignment
- Prepare data for AI utilization
- Conduct rigorous testing to ensure smooth launch

Align your IT infrastructure for impact

Consider beginning by assessing potential impacts on current integrations and tailoring your chosen copilot platform to more easily integrate with your existing tech stack. This enables you to create a better foundation for a stable launch before considering additional features.

IT infrastructure can sometimes need an upgrade to support deploying genAI, since these models often require significant computational processing power and storage. To address these challenges, your team can consider investing in scalable and secure cloud infrastructure to gain the computing resources to handle the greater demands of generative AI, without the need to buy or maintain expensive new hardware.

Streamline processes for optimal copilot integration

For maximum impact, your conversational copilot needs to integrate seamlessly with your existing workflows. Consider the many steps and parties involved in your current incident management, service requests, knowledge management, and change management processes. Be sure to identify bottlenecks, areas of ambiguity, and take steps to streamline processes before automation kicks in. Trying to automate a broken process is likely to only create more frustration.

Cross-functional departmental alignment

Establishing a cross-functional team with representatives from various departments fosters collaboration and ensures all aspects of the pilot are addressed. While these can vary depending on company and structure, common team personas include an executive sponsor, product owner, project manager, enterprise architect, developer and creator.

Including individuals with expertise in IT operations, data science, and potentially data governance is highly recommended. Data governance specialists can be especially useful, as their expertise in data quality management can be invaluable in preparing the data for the AI tool's use.

Data preparation for AI utilization

You've heard the adage that when it comes to data quality, you get what you put in. While data preparation is no walk in the park, it is the foundation for better accuracy and more reliable AI models.

This process involves several key steps:

- **Data discovery and inventory:** This entails identifying all the relevant data sources across your tech stack. These sources may include ticketing systems, knowledge bases, network logs, and user activity data. Cataloging and understanding the format and content of this data is crucial, however it's equally important to determine where the core datasets are and to focus copilot on those that have meaningful information.

- **Data formatting and standardization:**

Inevitably, your data may contain inconsistencies, missing values, and duplicates. However, properly formatted data is vital for AI assistants pulling from knowledge bases and other internal sources. [AI-ready formatting](#) allows your copilot to find information quickly and deliver accurate responses. Consistency in formatting helps to

ensure AI understands the data and provides a seamless user experience, while structured formats simplify updates and optimize the data for the AI algorithms, ultimately enhancing response speed and overall effectiveness.

- **Enhance data security and governance:**

When dealing with enterprise data, ensure data preparation processes comply with relevant data privacy regulations and internal security protocols. This compliance also helps to safeguard sensitive user information from unauthorized access or misuse, while also mitigating the risk of biased or inaccurate responses due to poorly managed data. A secure and well-governed data environment fosters increased copilot user confidence.

- **Solidify your AI policy early:** Establishing clear ownership and access controls for the data used by your AI assistant is crucial. As you review existing controls, you should be aware of data classifications, sharing policies, and access management. Work with internal stakeholders to craft usage policies that cater to employee use cases. Remember, copilot is just one genAI tool your employees are using.

By investing time and effort into data preparation, you lay the groundwork for a successful copilot deployment. Clean, well-structured data empowers the AI tool to learn effectively, identify patterns, and ultimately deliver valuable insights and automated solutions that benefit your entire organization.

Monitor compliance

Monitoring compliance involves regular checks of whether your AI system is operating within the boundaries set by established governance guidelines and adheres to ethical, legal, and regulatory standards. Upholding these standards involves a number of steps, including: regular system audits, monitoring performance metrics, identifying and addressing deviations, and documenting any issues, corrective actions, and lessons learned.

Conduct rigorous testing to ensure smooth launch

Once the groundwork is laid through platform integration and meticulous data preparation, **rigorous testing** becomes the final hurdle before unleashing a generative AI copilot within your IT operations. This testing phase serves a dual purpose: ensuring the technical robustness of the genAI tool within your tech stack and gauging user acceptance among staff.

- **Technical testing** involves a multi-pronged approach. Integration testing verifies seamless communication between the copilot platform and your existing systems. Performance testing assesses your copilot's ability to handle real-world workloads without compromising speed or stability. Security testing is paramount, helping to ensure the AI assistant adheres to the organization's security protocols and safeguards sensitive data.

- **User acceptance testing (UAT)** is equally crucial and involves providing representative IT staff with access to the copilot tool and evaluating their experience. UAT gathers valuable feedback on copilot usability, effectiveness, and overall value proposition for IT operations. By incorporating this feedback into the final stages of pilot program development, you can ensure a smooth transition and maximize user adoption across your IT department.





Stage III: Post-implementation user adoption and optimization

Step 5: Developing a winning user adoption strategy

Convincing users to switch from old habits to new tech can feel like an uphill battle. So thoughtfully [consider your user adoption](#) and communication strategy for your copilot to truly deliver on its potential. Let's explore how to set clear expectations and get buy-in by making sure users know what your copilot can do — and how it can help them.

How to develop a winning user adoption strategy?

- Standardize communication strategy through the copilot
- Have persona-specific marketing and outreach campaigns
- Create and train owner champions

Standardize communication strategy through the copilot

Utilizing a variety of channels, from internal announcements to town hall meetings, ensures everyone is informed and can understand the positive impact and countless use cases that copilot can support with their daily work.

Use data-driven messaging to highlight potential increases in efficiency, improved accuracy, and reduced workload through pilot program data or industry trends generates excitement and demonstrates the tangible benefits the copilot offers. Determine appropriate timing for adoption campaigns, making sure not to overwhelm end users with notifications.

Have persona-specific marketing and outreach campaigns

Focus on showcasing the quantifiable benefits your AI assistant delivers for specific personas. Be prepared to work through the team-specific challenges and doubts. Regularly share metrics that demonstrate increased efficiency, improved accuracy, or reduced workload for different user groups. Consider featuring success stories from

employees who have successfully leveraged the tool to overcome specific challenges. Persistently emphasizing the value proposition, helps to encourage users to explore the AI assistant's capabilities further.

Create and train owner champions

Your tool and process owners can promote grass roots adoption. They should be a great early source for new, high adoption use cases. These people can also be the ones benefiting most from scaling out support.

Tool owners can then build momentum and become trusted advisors to address initial challenges and easing the transition for their colleagues.

Developing copilot training materials and user guides tailored to the specific roles and responsibilities your IT staff is essential. You need to understand your user population to determine how best to engage. Hold interactive workshops and hands-on sessions to cater to diverse learners, ensuring everyone feels comfortable navigating your AI assistant.

Step 6: Successfully launch and optimize your copilot

Your copilot journey doesn't end with launch day, it begins. Now comes the critical step: successfully integrating an AI assistant across your company's tech stack and into user workflows. Think of your journey as a marathon, not a sprint.

This process involves a well-defined process, clear metrics and performance monitoring, and a commitment to continuous improvement, ongoing user engagement, and expansion. This milestone represents a significant step towards streamlining IT operations and reaping AI's benefits.

How can I successfully launch and optimize my copilot?

- Define your launch process
- Track performance
- Employ strategies for ongoing user engagement and expansion

Define your launch process

Start your AI journey with simple use cases and quick wins. Identify a project manager to keep your copilot initiatives front and center within other departments and projects. Begin by focusing on identifiable pain points where AI can demonstrably improve efficiency. For instance, if you're

overwhelmed with repetitive service desk tickets, an AI copilot can automate initial troubleshooting, freeing your team for more complex issues.

Implementing the AI assistant in phases allows for controlled testing and identification of potential integration challenges.

Starting with a designated environment and a smaller subset of users enables you to refine configurations and address any initial hurdles before scaling up to full deployment. Establish clear go-live procedures, including comprehensive user training and accessible support resources, to ensure users can effectively navigate the system.

Track your performance

Once your copilot is operational, ongoing performance monitoring becomes paramount. Consider leveraging the tool's built-in analytics or establish custom monitoring metrics to track key performance indicators (KPIs)..

Continuously collecting and analyzing this data empowers you to identify areas for optimization, refine the copilot's configuration, and measure its true impact on your IT operations.

Establish processes for ongoing maintenance, monitoring, and model refinement to ensure applications continue meeting business needs. Choose a vendor that provides the tools and support needed for prompt issue identification and resolution to minimize downtime and disruptions, while maintaining the accuracy and effectiveness of your AI assistant.

Employ strategies for ongoing user engagement and expansion

The initial rollout of your AI assistant tool may have been a success, but the true test lies in fostering long-term user engagement and encouraging continuous expansion of its use cases.

- **Address questions and concerns head-on:**

Acknowledge that some staff may be hesitant to embrace new technologies and address this resistance proactively.

- **Highlight value and impact:**

Regularly share metrics that demonstrate increased efficiency, improved accuracy, or reduced workload.

Feature success stories from employees who have successfully leveraged the tool to overcome specific challenges. Highlight career development opportunities associated with working with AI assistants to alleviate anxieties and encourage engagement.

- **Continuous learning and updates:**

Implement a program for gathering user feedback through surveys, focus groups, interviews, and other channels. Use this data to refine functionalities and introduce new features that address emerging user pain points.

- **Promote advanced use cases:**

Develop targeted training programs and tutorials that showcase advanced functionalities of the AI assistant. Consider creating “power user” guides that highlight lesser-known features.

- **Build a community of champions:** Identify enthusiastic users who have successfully integrated the AI assistant into their work routine. These individuals can become “champions” who share best practices, troubleshoot challenges, and provide peer-to-peer support.

By implementing these strategies, you can move beyond basic user engagement and to foster a culture of reliance on your AI assistant. Promote continuous learning and innovation to unlock the transformative potential of AI technology within your organization’s IT operations.





True IT productivity begins with AI

The days of constantly battling legacy systems, managing teams stretched thin by manual tasks, and struggling to keep pace with digital transformation can cripple your IT functions.

But there's hope. The future of IT support is here, and it's powered by AI.

The result? Increased efficiency, happier staff, and a support organization that can finally breathe. With an AI copilot by your side, you can transform your support team function from reactive to proactive and as a driver of business growth.

In this guide, we've explored how investing in an AI copilot can turn your challenges of

enhanced operational efficiency, improved employee experience, and accelerated business transformation — into opportunities. We discussed how to build a compelling business case for an AI copilot and addressed key strategic concerns, and talked through the buying and implementation processes. By following these steps and balancing technical and human aspects, you can help to ensure a smooth transition on your AI copilot journey.

Embrace the power of AI to transform not only your IT function, but your entire organization. By implementing an AI copilot, you can create a future-proof support organization that delivers exceptional service and productivity, empowers your team, and fuels business growth.