

# Why Your AI Strategy Needs Better Operational Knowledge



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**This focuses on AI for  
Customer and Employee Support**



## What we have heard

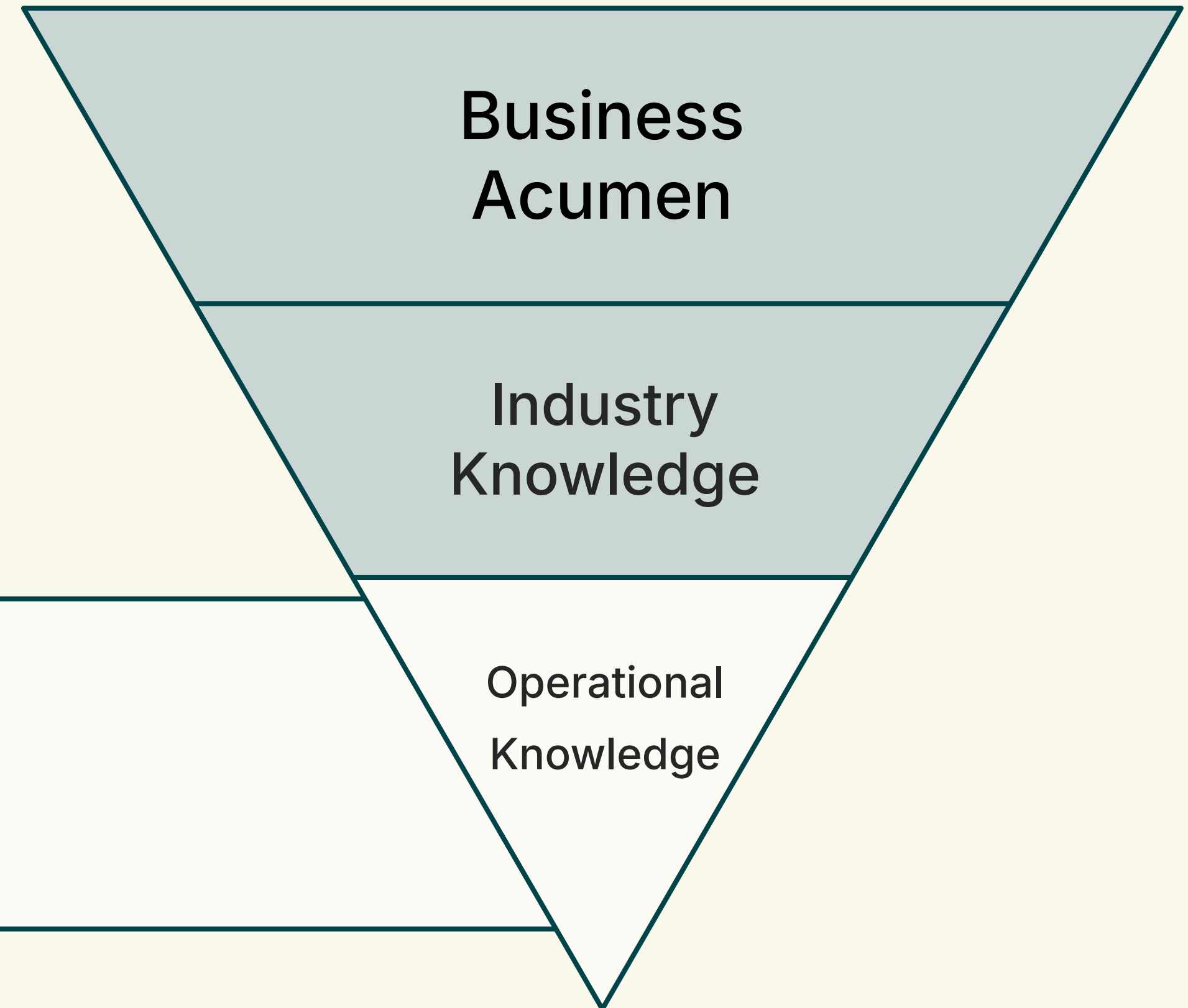
- AI platforms are selling a Tesla without a charging station
- We haven't heard of anyone who had their data ready

**The result:** AI initiatives that aren't delivering on their promise

# What we are going to cover today

- An overview of how AI for customer/employee support works
- Where organizations run into problems
- Examples of several AI platforms (some that do things well and some that don't)
- How Knowledge Operations can help

# Operational Knowledge



1. Open System X
2. Navigate to Account profile
3. Review transactions...

# Knowledge Management

Get everything neatly organized



# Knowledge Ops

Enable a performance



# Typical AI Implementation Plan (using RAG)



**Gather  
Documentation**



**Import it into a  
Data Lake**



**Train the Model or  
use RAG**



**Test and Refine**



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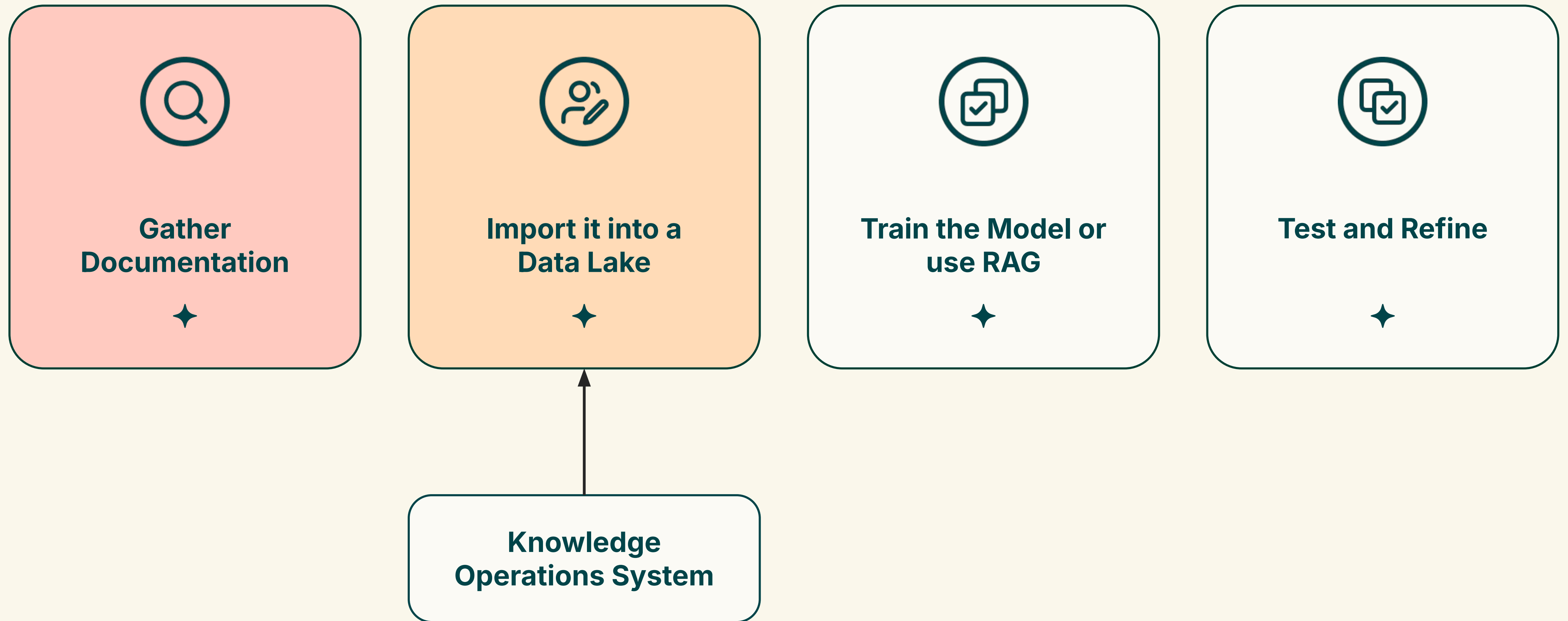
**Train the Model or  
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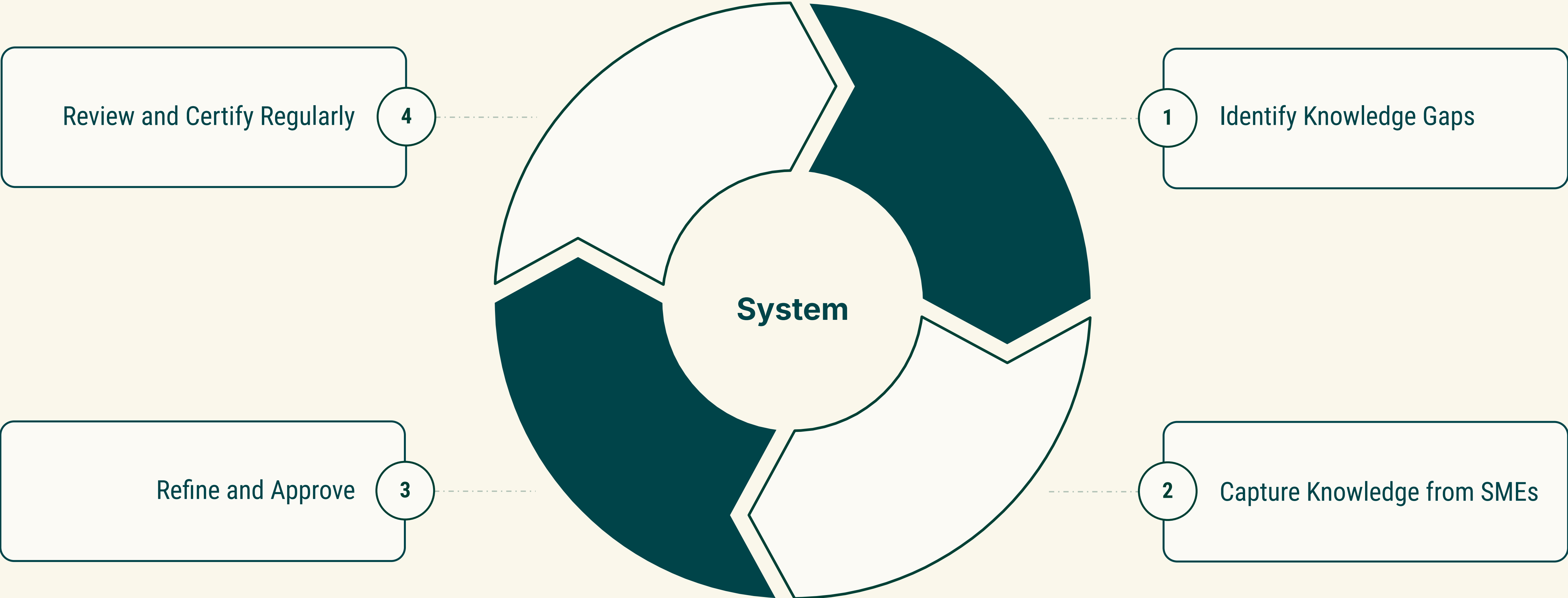
**Test and Refine**



# Typical AI Implementation Plan (using RAG)



# A Knowledge Operations System



# Examples of AI Platforms

# How Knowledge Ops Can Help

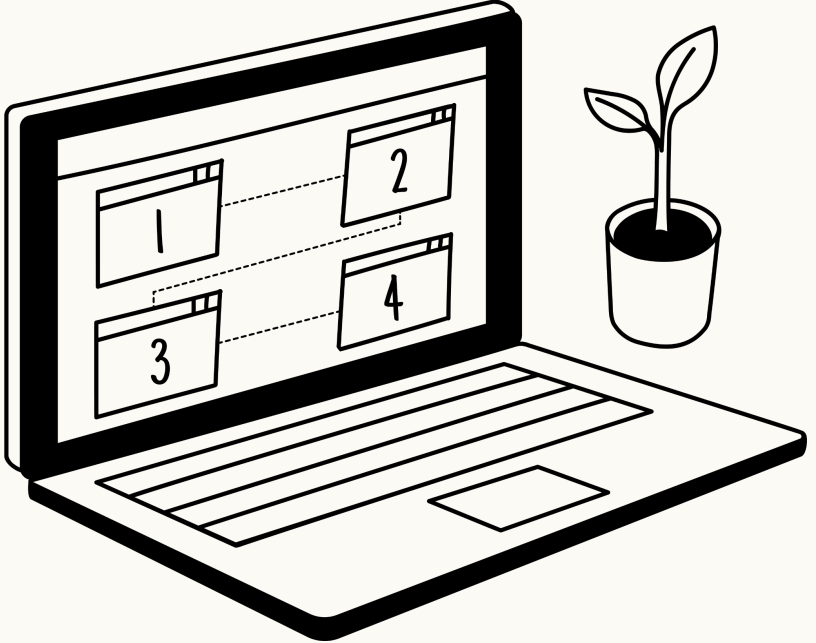
# Three Challenges



CAPTURE

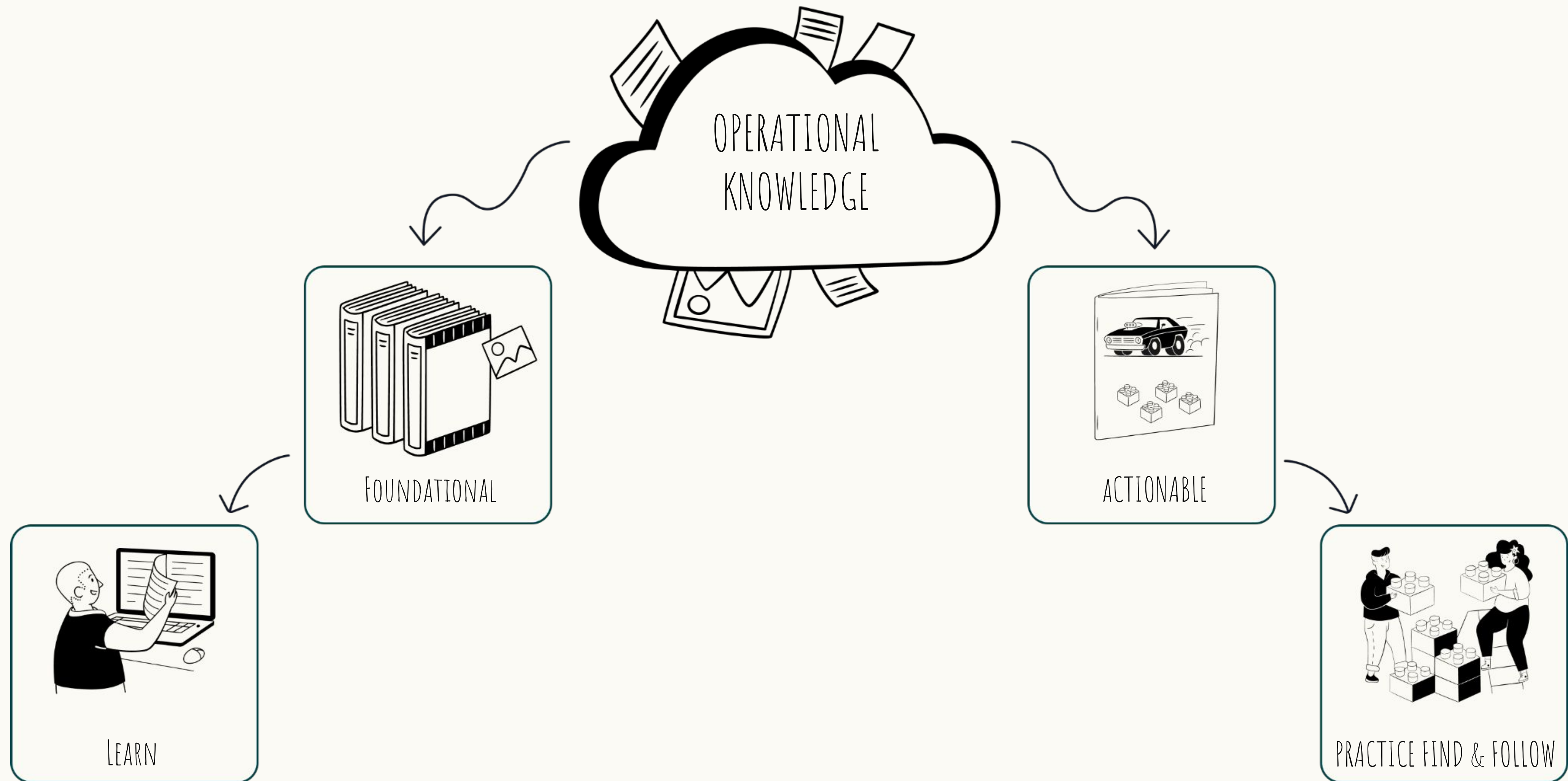


REVIEW



MAINTENANCE

# Separating Knowledge Makes it Easier to Review + Maintain



# Knowledge Ops Maturity Model





# AI Recording of Procedures

## Create a new article in site: My Company

Manual or Uncategorized Articles (required) ⓘ Chapter (required)



Sales Team Lead Management




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**– Create an article from an audio recording ✨**



Record yourself describing the process you want to document. Using the article title you entered above as a guide, ScreenSteps will convert the audio recording into a scannable, followable outline which you can then edit.

**Record voice** Upload audio file

00:05  

 Start recording  Stop recording  Delete

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## ❖ Clarify AI Assistant: Create a followable, scannable outline

What question should the outline answer?

Opening an Account

In the field below, enter the instructions you would like to analyze. Using the question you entered above as a guide, the Clarify AI Assistant will convert the text into a scannable, followable outline which you can then edit.

First, verify that the member meets the criteria for a new account. Ensure that they have a current driver's license with an address, that you have their social security number or TIN, taxpayer identification number. Make sure that they meet our eligibility requirements and that they have at least \$25 to open the account. If the member meets the criteria, if the member doesn't meet the criteria, then let them know that because they don't, for whatever reason, meet that criteria, we can't proceed with opening the account. If they do meet the criteria, then we need to complete the CIP. So, perform the following identity verification tasks: Run a credit report or a soft credit check. Check against databases to verify identity and detect potential fraud. Use third-party services to confirm the validity of identification documents.

If they don't pass the CIP, then you have to go check with a manager. If they do pass the CIP, then you can go and check the OFAC. So, navigate to OFAC in the system,

Create Outline

Followable, scannable outline

### Opening an Account

- Verify that the member meets the criteria for a new account:
  - Do they have a current driver's license with an address?
  - Do they have a social security number or TIN (taxpayer identification number)?
  - Do they meet our eligibility requirements?
  - Do they have at least \$25 to open the account?
- Does the member meet the criteria?
  - No: Inform them that they do not meet the criteria and cannot open an account.
  - Yes: Complete the CIP (Customer Identification Program):
    - Run a credit report or a soft credit check.
    - Check against databases to verify identity and detect potential fraud.
    - Use third-party services to confirm the validity of identification documents.
- Does the member pass the CIP?
  - No: Check with a manager.
  - Yes: Check the OFAC (Office of Foreign Assets Control):
    - Navigate to OFAC in the system.
    - Look up the member.

Cancel

Add Outline to Article

# Opening a New Account

Updated on Aug 01, 2024

## Verify Prospective Member Meets Criteria

- 1. Current Driver's License with Address ▼
- 2. SSN OR TIN ▼
- 3. Meet Eligibility Requirements ▼
- 4. \$25 to open account

## Does Prospective Member Meet the Above Criteria?

1. Select one Option Below

YES

NO

# Decision Trees and Checklists for Complex Procedures


# Questions



**Find & Follow 101**

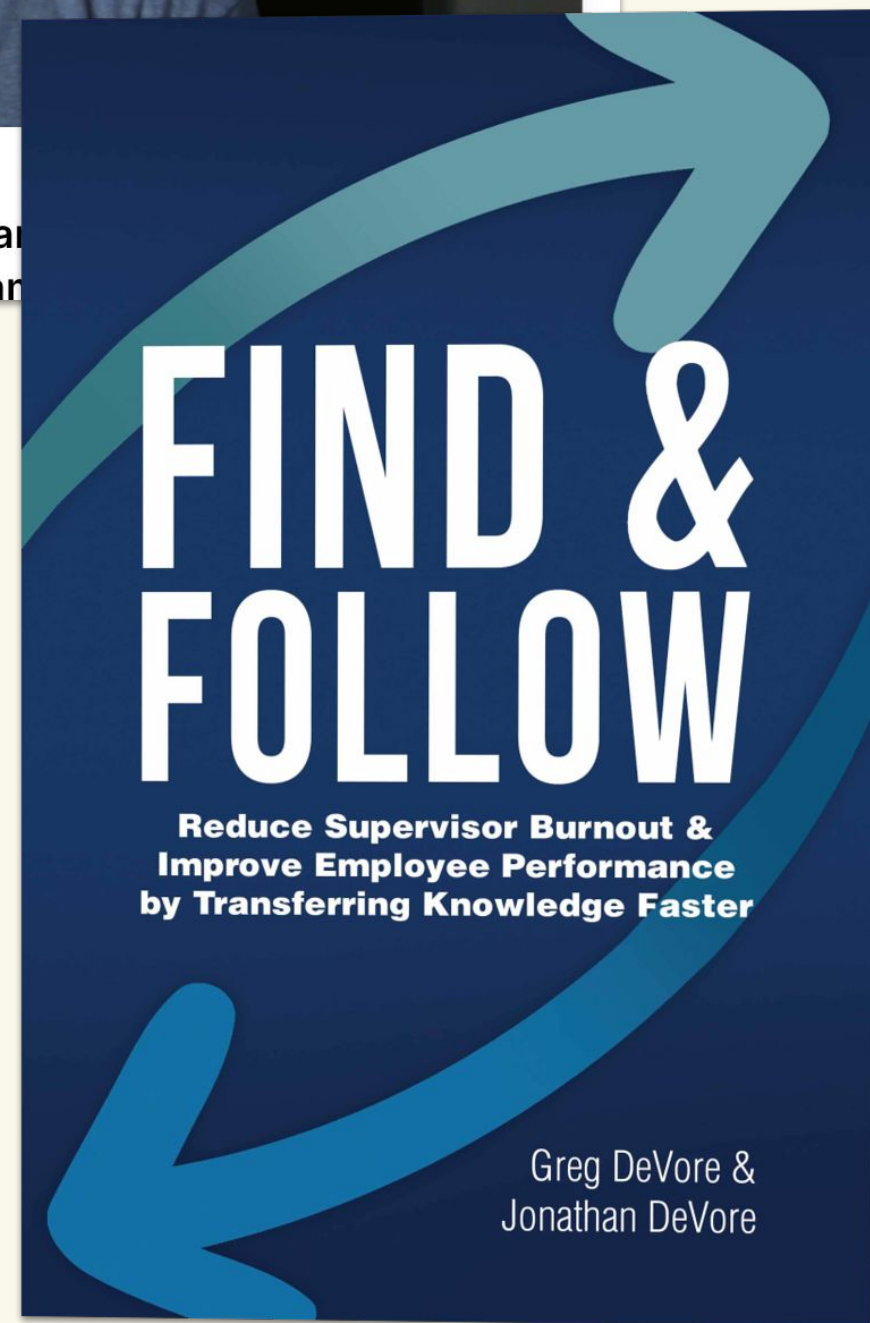
This free 30-minute course includes everything you need to know to get started with the Find & Follow Framework

[Enroll for Free Now](#)

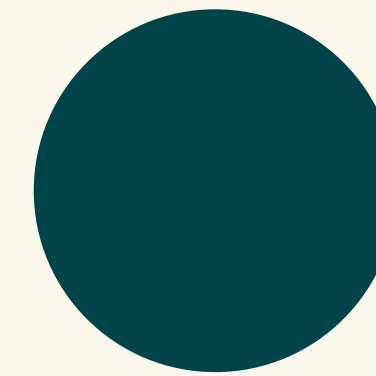


Watch the Course Trailer

Learn  
Frame

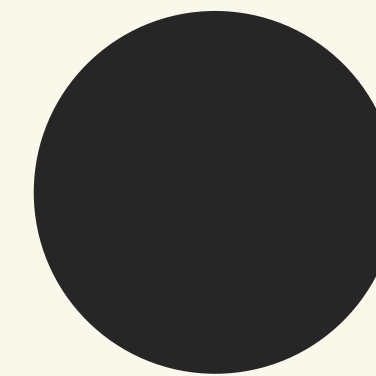


# Next Steps



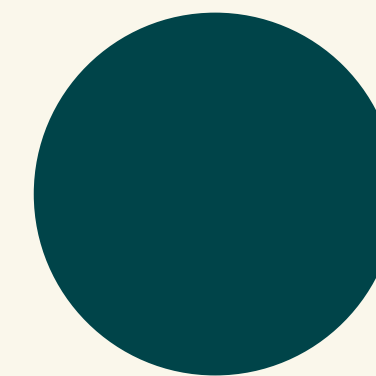
Sign up for a demo or trial

<https://www.screensteps.com/demo>



Intro to Knowledge Ops Course

<https://www.screensteps.com/knowledge-ops-course>



Pick up the book

<https://www.screensteps.com/find-follow-book>