THE CUSTOMER STORY

Answers, where people already work.

An anonymized customer story about AI applied to employee information.

The need

Employees may need employment information when the HR team is unavailable. The customer identified a need to make that information easier to access.

The approach

A technology partner helped design and implement an AI assistant within Microsoft Teams, using a defined scope and selected sources, including employment agreements and working calendars. The public case describes availability around the clock.

EMPLOYEE QUESTION > TEAMS > SELECTED SOURCES

A useful first question: where does your team repeatedly search for answers that are already documented?

What to take from this story

Start with a specific need, familiar tools and information people can trust. Validate what the assistant should answer and which exceptions need human support.

Adapted from a public customer testimonial. Company and customer identities are omitted. This independent marketing prototype does not report measured savings or campaign results.

FIND YOUR OWN STARTING POINT

Which questions keep coming back?

Different teams, the same starting point: recurring questions with answers in reliable sources.

HR	Leave, holiday dates and working calendars.	Possible sources: Approved policies and employment agreements.
IT	Access to tools and standard support procedures.	Possible sources: Reviewed access guides and support documentation.
Finance	Expenses, receipts and approval rules.	Possible sources: Current expense policy and reimbursement procedures.
Operations	How to complete a recurring internal task.	Possible sources: Validated manuals and operating protocols.
Sales	Product questions and approved commercial information.	Possible sources: Current product documentation and approved sales materials.

These are prompts for investigation, not recommendations to automate every process. Check the frequency, effort and risks with the people who handle the questions.

FOUR FOUNDATIONS

Before the pilot, check the basics.

Work through these questions with the people who own the process and its information.

01 / Documented answers

Locate the sources that answer real questions. Identify gaps, conflicting versions and answers that still depend on individual knowledge.

02 / Current information and owners

Confirm that the information is current, who approves changes and how previous versions are retired.

03 / Access permissions

Define who can consult each source. Check what must remain restricted and how those limits can be applied.

04 / Human escalation

Agree which questions, exceptions and decisions require a person, who receives them and how the handoff works.

TRY THE INTERACTIVE DIAGNOSTIC

Add your department, answers and evidence. Get a useful next step.

A discussion aid, not a technical certification or an estimate of business impact.

YOUR CONVERSATION WORKSHEET

Define one need.
Choose one next step.

Use this page with your team. Keep personal and confidential information out of the prototype.

Which recurring question would we address?

Who asks it, and how is it answered today?

Where are the sources, and who maintains them?

What access limits and human exceptions apply?

What evidence would justify a small pilot?

Next step: validate a small set of real questions, the quality of the sources and the effort involved. Agree what success would mean before proposing a pilot.

Open the interactive tool

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