

# Exploring Your Organization's Use of AI? Get Expert Advice.

## Artificial intelligence (AI) is a powerful tool for your organization — if you know where and how to use it.

Interest in AI has accelerated since the relatively recent introduction of generative AI (Gen AI) tools. It's understandable — software like OpenAI's ChatGPT, Anthropic's Claude, Google's Gemini and Microsoft's Copilot, which are based on large language models (LLMs), create impressive content quickly. Additionally, business software vendors are also offering additions to their software that embed AI solutions to assist users with completing "in-application" activities.

There are compelling reasons to consider adding AI, particularly Gen AI, to your organization's processes, tasks and workflows. The software has the potential to:

			
Increase productivity and quality	Improve service	Reduce costs	Help develop new services or products

To achieve those goals, selecting and implementing GenAI appropriately is key.

But identifying relevant use cases and then navigating the choices available for implementing the appropriate mode (chatbot or even now, agent) can be overwhelming, given the range of options and the pace with which new features, functionality and toolsets, let alone vendors, are entering the marketplace. That's why thoughtful advice on AI is invaluable, especially if your team doesn't have time to follow every technological advance.

## Get insightful guidance from Segal's Administration and Technology Consulting (ATC) Practice

Our ATC consultants are immersed in AI and closely follow the latest developments. They're ready to help your organization identify how to use AI appropriately based on your strategic goals and tactical day-to-day needs, whether you're just beginning to explore the options or have already started to implement the technology.

## Segal AI Advisor

Segal AI Advisor offers a suite of three services that you can take advantage of together or separately depending on your goals, capabilities, staff and budget:



### AI Strategy

- Assessment of your organization's AI readiness
- Prioritization of general and specific business uses of AI for your organization
- Creation of an overview of your organization's AI strategy within the context of your mission, vision and values
- Establishment of a clearly defined vision for AI use that describes the potential benefits to your organization
- Identification of data privacy and security concerns
- Development of a high-level roadmap for organizational change management that includes training and communication recommendations
- Creation of standard governing policies and procedures for the implementation and use, privacy and security of AI



### AI Blueprint

- Details for specific projects based on previously identified use cases from your AI strategy, slotted within a roadmap, including project purpose, timeline, milestones and expected outcomes
- Recommendations for AI use and utilization as well as suggested implementations (e.g., chatbot or agent) that aligns with the organization's requirements
- Identification of specific measurable outcomes and success metrics for each project, such as key performance indicators
- Identification of other general areas for expected improvement
- Best-practice recommendations for AI maintenance to ensure ongoing benefits



### AI Workshop

- One-day introduction to AI, including a brief overview of AI's strengths and weaknesses, both generally and specifically in your organization's context
- Hands-on practical training on the LLM(s) you choose
- Skills practice and testing with chatbots or agent tools (e.g., using prompt engineering to ask AI for the information you seek)
- Guidance on evaluating the AI's output (i.e., critical-thinking evaluation)
- Provision of a reference library of articles and white papers as well as tips for effective prompt engineering

We've helped clients with their technology needs for more than 30 years. Our subject matter experts have decades of experience in every aspect of benefits administration and applications of the latest technology.

Get in touch to learn more about how our AI advisory services can help your organization use AI effectively, responsibly and ethically.

### Contact



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