

Human First. AI Forward.

How to Ignite Innovation
and Impact with AI

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Your Guides for This Session



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My favorite ways to use AI:

Personal: as a thinking partner and adversary
Work: as a production partner and QA assistant



My favorite ways to use AI:

Personal: as a travel planner and advisor
Work: as a research and content co-creator

Why We're Here Today

To give you **greater clarity, confidence and capability** in guiding AI innovation and impact in your organization.

You'll walk away with **practical, achievable actions you can take right now — wherever you are.**

In Our Time Together, We Will...



Discover why AI matters, to all of us (and what we mean by “AI”)



Reenvision your role and impact in the age of AI



Introduce a simple framework for navigating your AI evolution



Explore how Segal can support you at each stage—with case studies and demos



Share and discuss your questions, challenges, opportunities, and ideas [15 minutes at the end]

Segal's AI POV: Human First. AI Forward.

AI is not the hero — humans are.

We help our clients strategically apply AI and emerging technology to imagine, create, automate and govern AI-forward solutions and experiences that improve lives — with a priority on safety, ethics and human well-being.



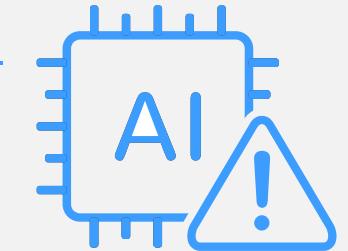
Why AI Matters to All of Us



800 million
people use ChatGPT
every week

TechCrunch, Oct 6, 2025 (quoting
Sam Altman at OpenAI Dev Day)

58% of employees use AI at work –
and **48%** have uploaded sensitive
company/customer data into public
GenAI tools.

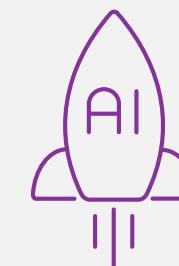


Global study of 32,352 workers in 47 countries
(TechXplore / The Conversation), Apr 29, 2025.

AI captured close to **50%** of
all global startup funding in
2025 – **\$202.3B** invested.



Crunchbase News, Dec 16, 2025



1,872 generative AI startups
tracked – **\$112.7B** raised
across 3,697 funding rounds.

Crunchbase “Generative AI Startups” hub profile.

What We Mean When We Say “AI”

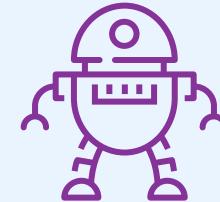


Conversational chatbots

Answer questions and respond to prompts in chat-like interface

Examples

OpenAI's ChatGPT
Anthropic's Claude
Meta's LLAMA
Google's Gemini

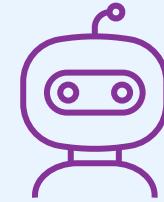


Productivity copilots & agents

Embedded productivity apps to help with writing, coding, analysis type tasks

Examples

Microsoft's Copilot
Google's Gemini
Salesforce's Einstein (Agentforce)



Semi-autonomous agents

Built to execute multi-step tasks independently, with pre-established prompts

Examples

OpenAI's
Microsoft's
Google's
Many others

How Our Clients Are Applying AI Today

All organizations

- Improve service quality and delivery and participant experience
- Reduce administrative burden
- Enhance decision-making
- Strengthen compliance and governance
- Boost engagement and education
- Scale expertise and consistency
- Augment cybersecurity

Public sector

- AI-powered chatbots for multilingual support
- Fraud detection algorithms
- Policy sentiment analysis tools
- AI assistants for HR and onboarding
- Workflow automation across departments

Multiemployer

- Summarize plan documents
- Draft member communications
- Draft reports (compliance, other)
- Operational risk dashboards
- Custom agents for fund-specific workflows (eligibility, reciprocity, etc.)

Corporate

- Personalized learning and benefits support
- HR and benefits AI assistants
- Engagement and behavior change optimization
- Sentiment and engagement analysis

Your Role in the Age of AI

You don't need to be a technologist to lead AI-forward change in your organization

You are the wise and capable human...

- Translator
- Guide
- Steward of trust
- Change agent
- Deep subject matter expert
- People-focused advocate

Our human “super-powers” of curiosity, empathy, imagination, intuition, and discretion are essential to how we evolve with AI



A Framework for Evolving with AI

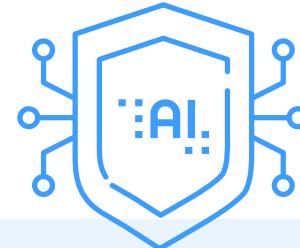
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Exploring



2

Strategizing



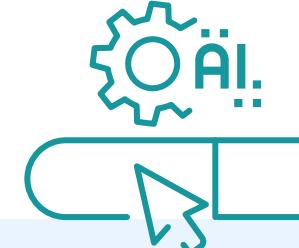
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Educating



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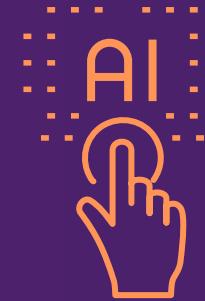
Exploring

“I don’t know where to start.”

“Should we invest in AI?”

“What problems can AI help me solve?”

“Is my organization (and data and content) ready for AI?”



How to make an impact:
AI discovery sessions
AI readiness assessments
Data and content strategy

Exploring Story

Multiemployer trust fund

AI discovery session leads to AI training and AI tool exploration

Opportunity: Fund trustees invited Segal to share and discuss what's possible with AI

Approach: Brief 30-minute presentation in a standing trustee meeting — a mix of discussion, reflection and sharing of AI trends and examples

Outcomes: Sparked interest and follow-ups, including an AI 101 training for business managers and an AI assistant demo for trustees

What's next: Upcoming meetings to further explore strategy and solutions for fund office and fund members

The possible: Better outcomes for the Fund

- The ability to draft quick responses to members about eligibility, using Gen AI to edit / summarize email or correspondence.
- The ability to compare to eligibility files or employer reports to find discrepancies.
- The ability to "research" eligibility and plan rules through a chat interface.
- The ability to summarize meeting or call transcripts for a single call or even for a collection of meetings.
- The ability to create a Podcast, that would discuss plan changes.

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Strategizing

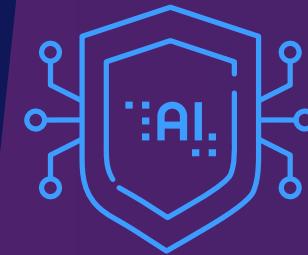
“We need a coherent AI strategy.”

“How do we choose the right tools or vendors?”

“What are the risks?”

“How do we govern AI?”

“Do we have insurance we need?”



How to make an impact:
AI strategy development
Governance frameworks
Vendor evaluation and AI audits
Risk and ethics consulting
Cyber liability insurance

Strategizing Story

Large higher education institution

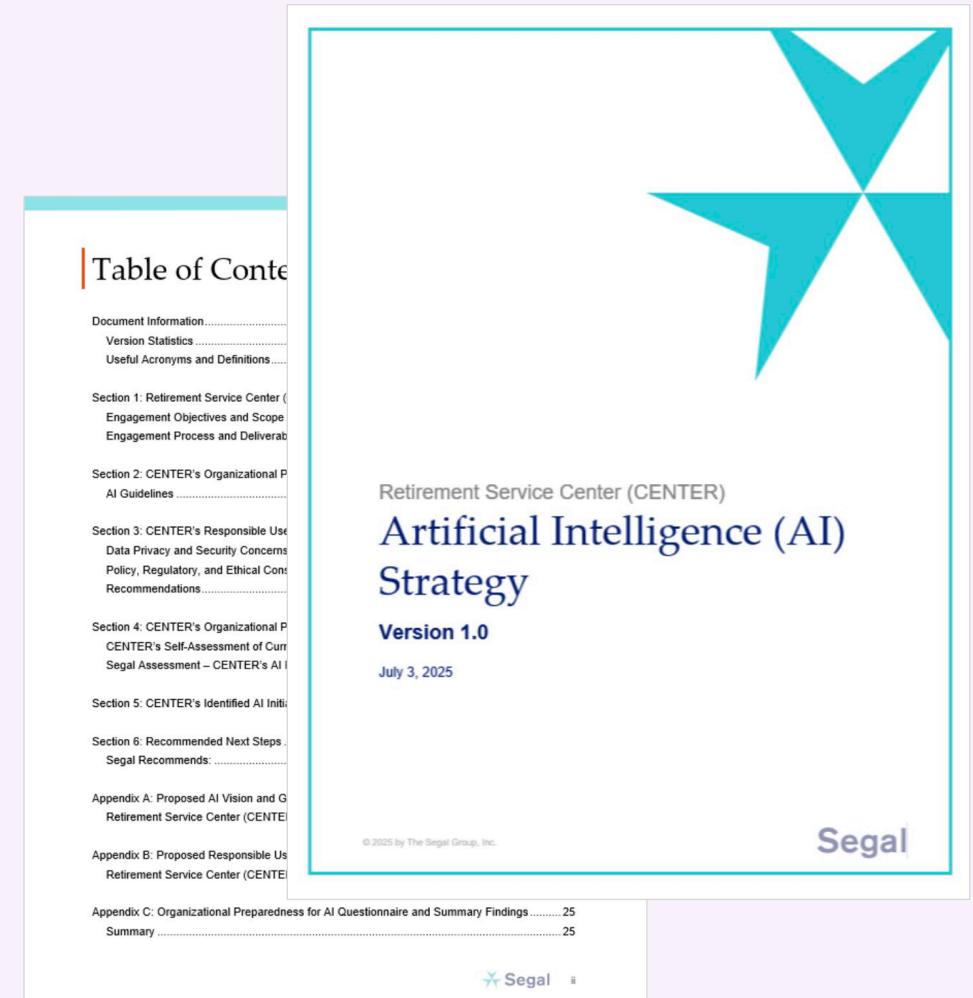
Organization enables secure, org-wide AI adoption to enhance staff capabilities

Opportunity: Ensure strategic, responsible AI provisioning aligned with institutional policies and governance, advancing organizational objectives.

Approach: Developed AI strategy and responsible use policy; aligned with institution and board-level governance. Addressed under-provisioning, clarified roles and embedded governance into operations.

Outcomes: Enabled secure, compliant AI use across staff, fostering innovation, continuous improvement and strategic alignment.

What's next: Expand custom Copilot agents for teams and user groups, governed by role-based permissions.



Retirement Service Center (CENTER)
**Artificial Intelligence (AI)
Strategy**
Version 1.0
July 3, 2025

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Segal

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Educating

“How do we get people to use these tools?”

“We don’t have the right talent.”

“Does our culture support success?”

“How do we communicate our AI strategy and need for change?”



How to make an impact:

AI literacy and prompt training

Workforce planning (org design, skills)

Role-specific training

Culture change and community building

AI-forward communication and change management strategy

Educating Story

Large higher education institution

Staff grows its AI skills and capabilities with tailored, deep-dive training

Opportunity: Build internal AI fluency and practical skills

Approach: Delivered one-day onsite training covering LLMs, GPTs, prompt engineering and relevant use cases

Outcomes: Empowered staff to use AI tools for analytics, communications and document generation

What's next: Training designated staff in the creation of declarative Copilot agents, working to deploy structured pilot projects (as part of a "tactical blueprint" engagement)

Exercise 1: Review a GPT-Generated Summary

Goal: Practice evaluating the quality and accuracy of AI-generated content.

Instructions:

1. Try this prompt: "Summarize the COLA rules for retirees in simple terms."
2. Evaluate the output using this checklist:
 - Is the explanation accurate?
 - Is it clear and easy to understand?
 - Does it include or miss important details?
 - Would you send this to a member?

Exercise 2: Spot the Hallucination

Goal: Identify confident but incorrect content from GPT.

Instructions:

3. Try this prompt: "List three pension systems that offer COLA based on CPI plus 1%."
4. Ask GPT for its sources or citations.
5. Verify the claims by searching online or checking your own system rules.

Expected Outcome:

- GPT may invent plausible-sounding but incorrect rules or systems—highlighting the need for fact-checking.

Exercise 3: Rewrite and Revise

Goal: Improve the clarity, tone, or structure of a GPT-generated message.

Instructions:

6. Ask GPT to write a short response to a member whose benefit calculation is delayed due to missing payroll records.
7. Evaluate the tone and wording. Is it too technical? Too robotic?
8. Revise your prompt to improve the tone: 'Make this more understanding and member-friendly.'
9. Compare both versions and discuss which one you would actually use.

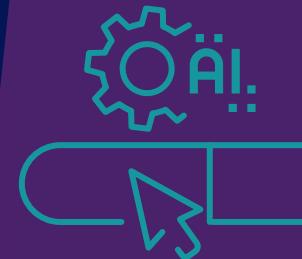
Implementing

“Which AI tools will best meet our needs, now and next?”

“What resources will it take to build and sustain them?”

“How do we ensure the input and output of our AI tools is accurate and unbiased?”

“How do we create the best AI-forward user experience?”



How to make an impact:

Implementation blueprint (tech, governance, policies, processes)

AI content readiness

AI assistant deployment

Autonomous agent deployment

AI-forward participant experience/ ecosystem design

Implementing Story

Healthcare company

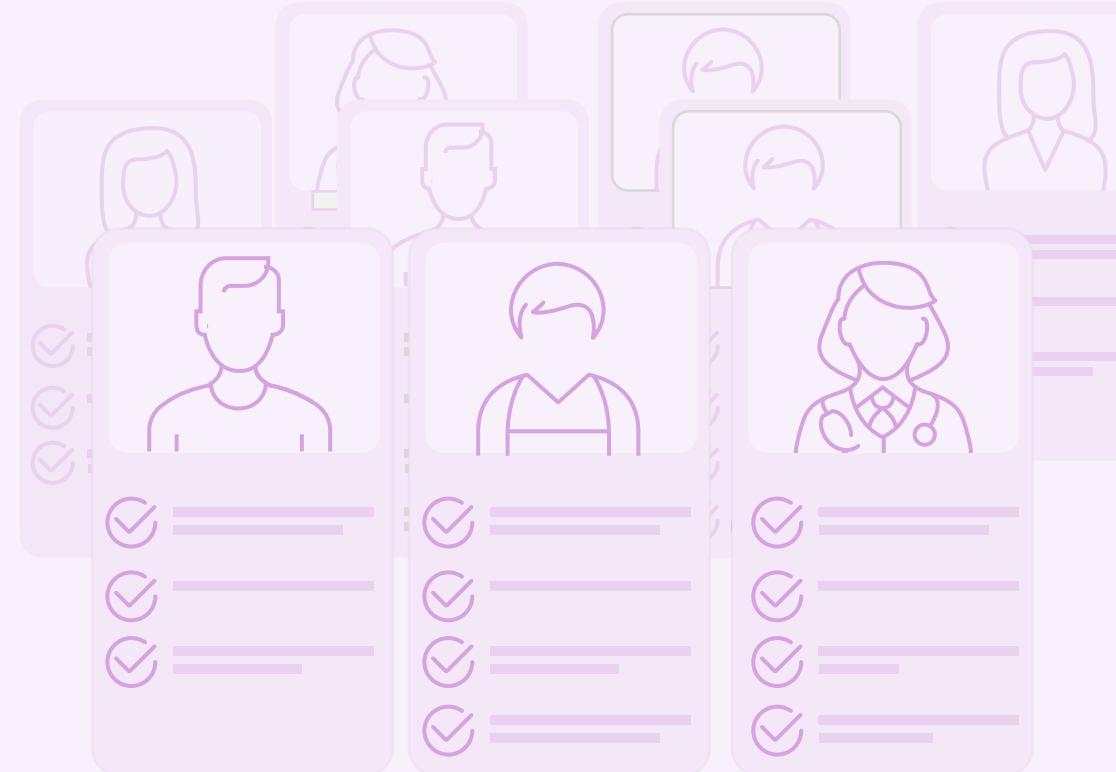
Accelerates job description consolidation with the help of Copilot AI

Opportunity: Standardize 8,000+ job descriptions for HRIS integration within 90 days

Approach: Used custom-built AI Copilot Agent and Power Automate to streamline high-volume processing

Outcomes: Saved 2,000+ hours of manual effort; reduced client costs by ~\$400K

What's next: Consolidated job descriptions were loaded into tracking tool (supported by Segal-ATC) so managers could review and make further updates. Once complete, the new job descriptions will be loaded to Workday.



Implementing Story

Tech company

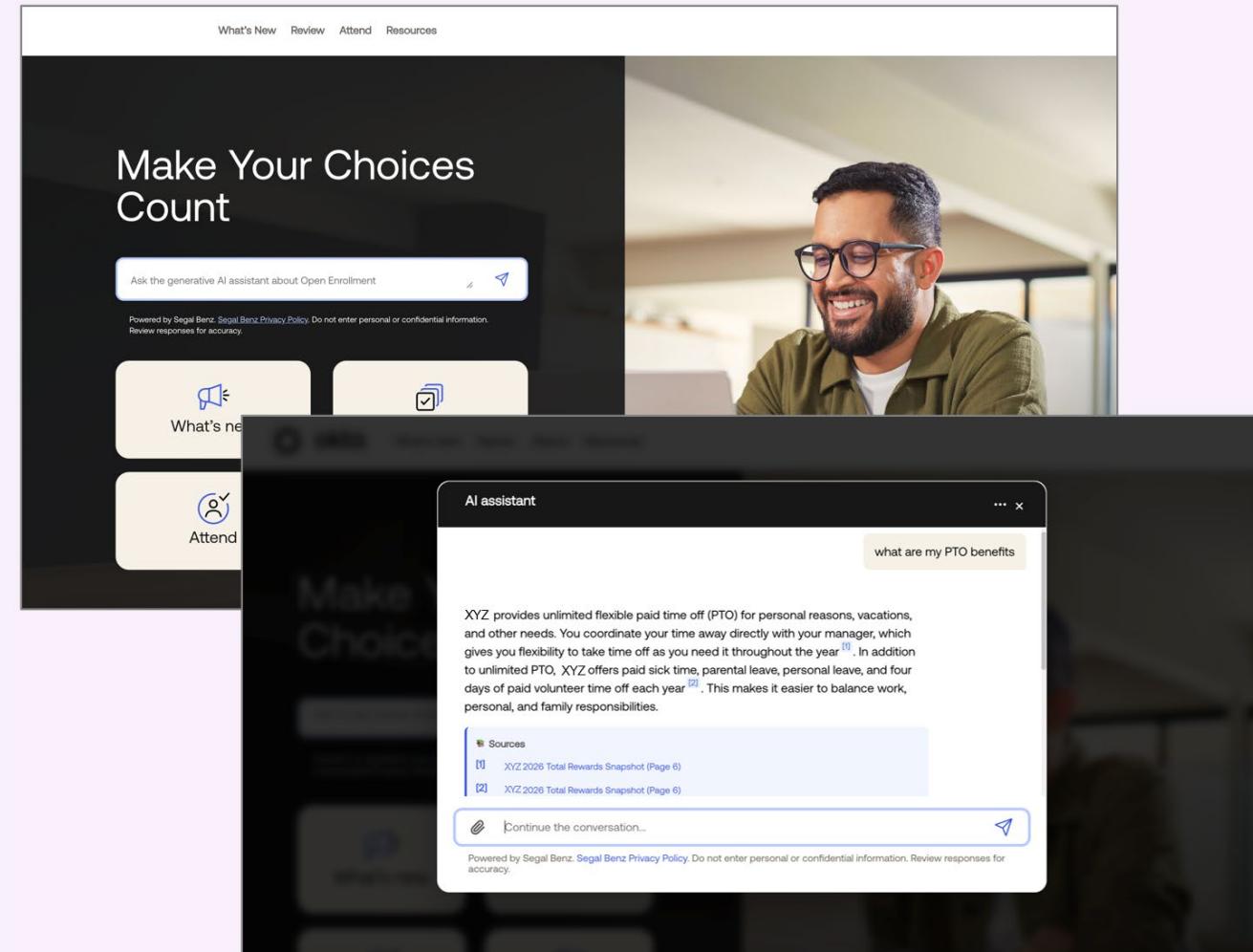
Elevates the open enrollment experience with a new AI assistant

Opportunity: Improve OE experience by reducing employee confusion and improving engagement and understanding

Approach: Embedded new AI assistant into OE microsite; personalized, secure and branded experience with 24/7 support and analytics

Outcomes: High employee engagement, reduced HR escalations by 70 percent, positioned org as a benefits tech innovator

What's next: Exploring expanded functionality for total rewards site



Evolving

“How do we know our AI efforts have been successful?”

“How do we get more value from our AI investments?”

“What’s next and why?”

“How do we keep up with change?”



How to make an impact:

ROI and performance reviews

Ongoing AI content management

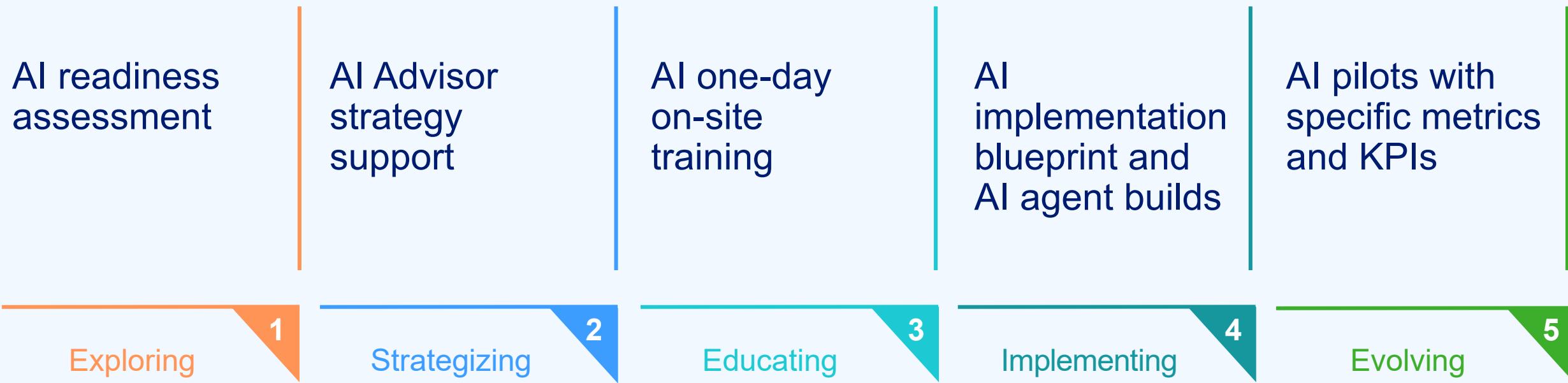
Continuous learning and governance

Continuous listening and community building

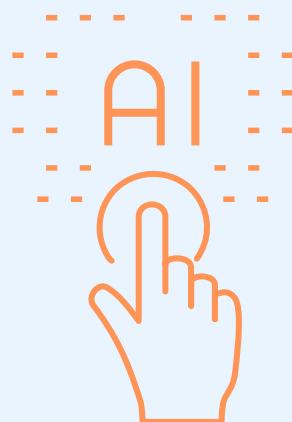
Evolving innovation strategy and roadmap

AI Evolution: Full Lifecycle Story

Large higher education institution



Key Takeaways from Today



AI has enormous power and potential
that humans like us can harness for good



Your call is to translate AI's power
into meaningful results, while mitigating risk



Your organization can light the way
for others



Start where you are
assess what you need and where you want to be



Grow and evolve, safely and securely
with expert help from Segal

What Now? Consider These Actions



Explore your AI opportunities and risks with an **AI discovery session** (free)



Get fresh participant experience ideas with an **AI assistant demo** (free)



Discover your org's AI-preparedness with **AI readiness assessment(s)**

Q&A and Discussion

What sparked your interest today?

What opportunities are a burning priority for you?

What's your next best step?

What challenges are you facing?

Anything else?

hvala
obrigado
mahalo
gracies

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chokran
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dankon
агуује
хвала
dankie

Дякую
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grazias **danke**
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