



tovie ai

How to Use Generative AI for Your Data

An easy guide for workers
and businesses

Summer 2024

Table of Contents

3	About Tovie AI
4	What is generative AI?
5	Where do we use generative AI?
6	What do we love GenAI for?
7	Exploring the use cases
	Text generation
	Text summarisation
	Data structuring and analysis
	Information retrieving and Q&A
17	Data security challenges and avoiding hallucinations
19	Data Agent for easy data search
21	AI consulting
22	AI readiness checklist for companies
24	Contacts



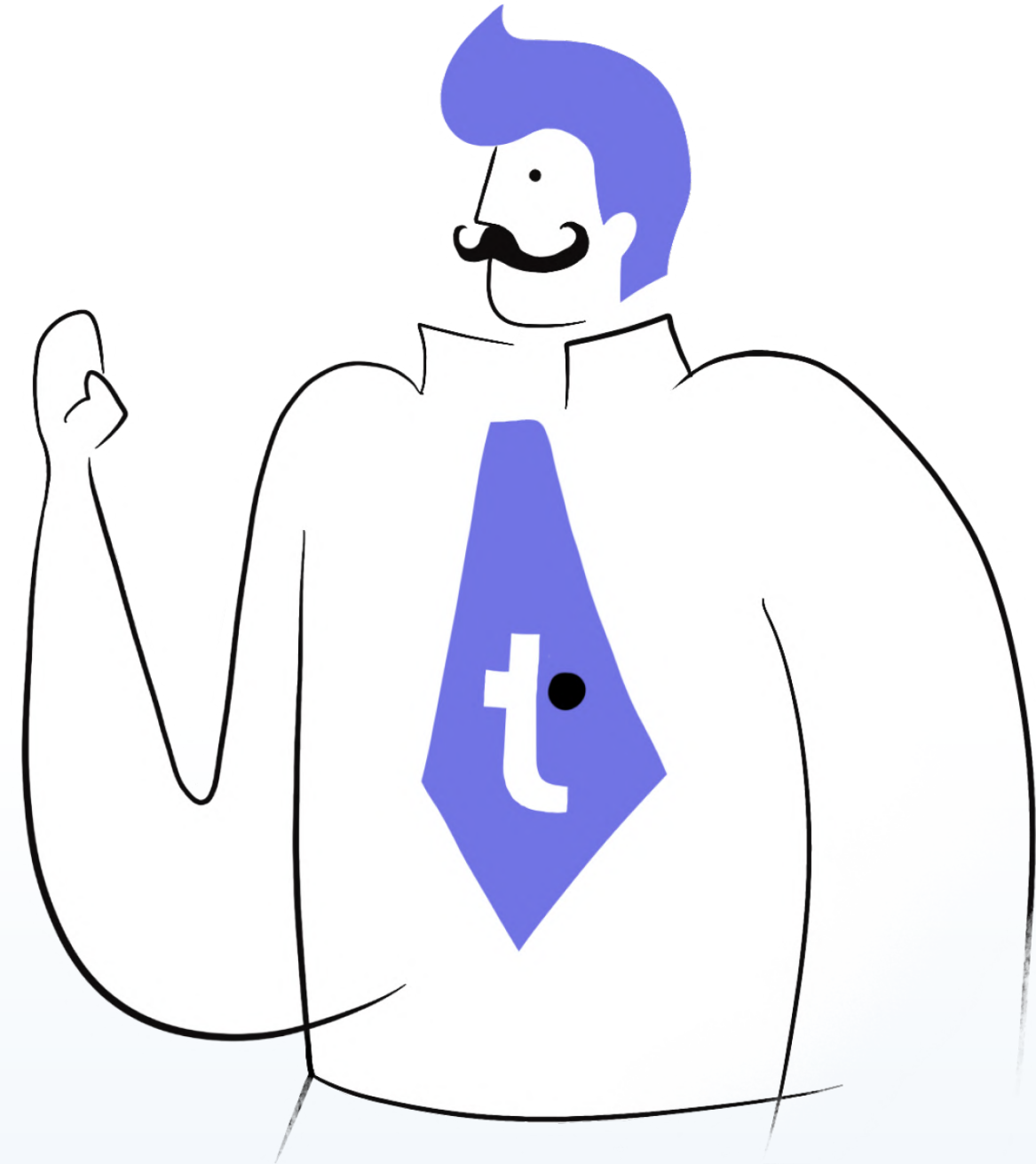
About Tovie AI

Since 2018, Tovie AI has been a key player in conversational AI automation. We've seen AI adoption grow, trends shift, and employees adapt to new technology. Businesses benefit from AI by automating routine tasks and handling customer queries, allowing employees to focus on more creative work.

Despite these advances, conversational automation still needs to improve with internal inefficiencies. Employees often search through multiple databases and documents, leading to operational exhaustion. The introduction of ChatGPT and similar AI tools was a game-changer, offering a way to simplify these tasks.

We developed our GenAI-powered virtual assistant for data management, launching [Tovie AI's Data Agent](#). This solution helps organisations use generative AI for data management through AI-powered search bots.

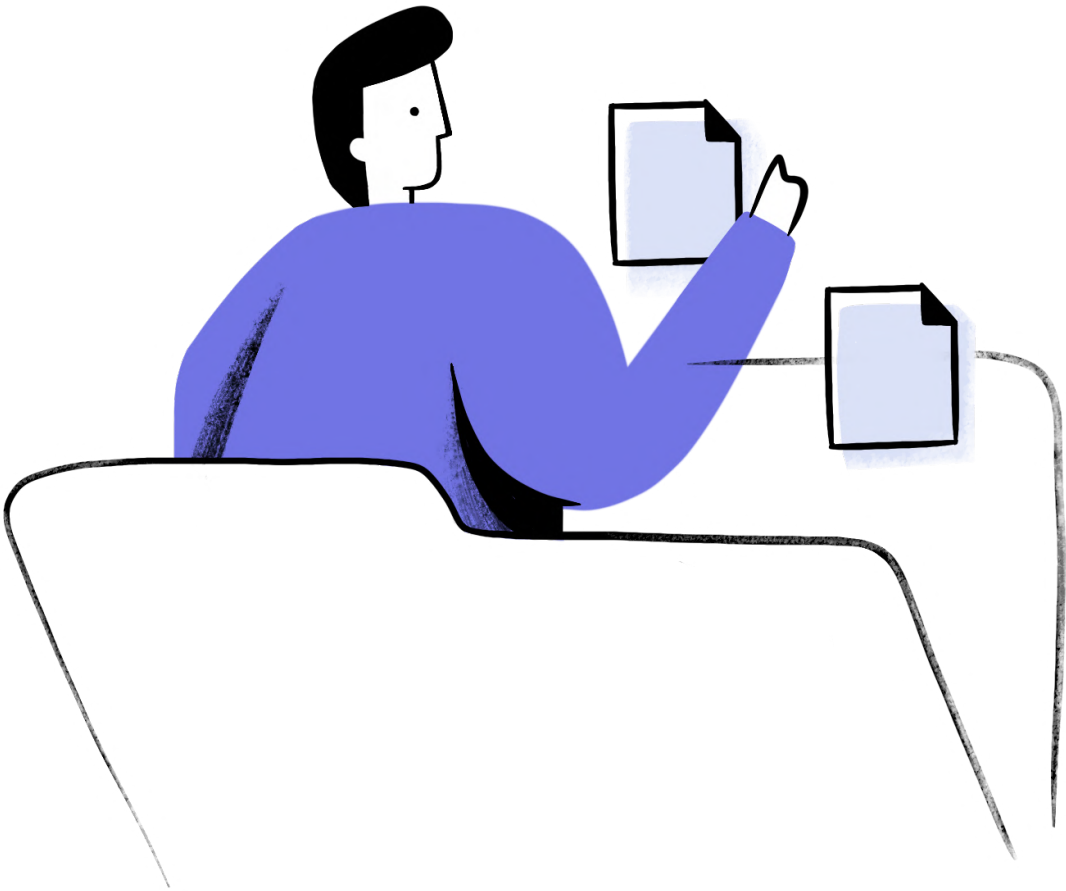
Confident in generative AI's potential to automate mundane tasks and boost productivity, we've compiled a list of typical work scenarios enhanced by generative AI in this whitepaper.



What is generative AI?

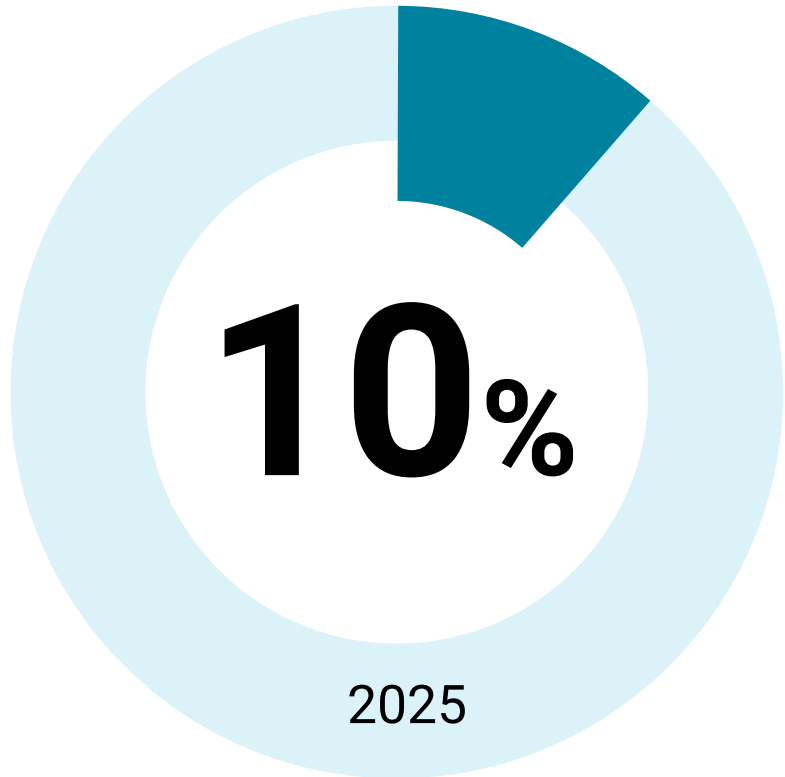
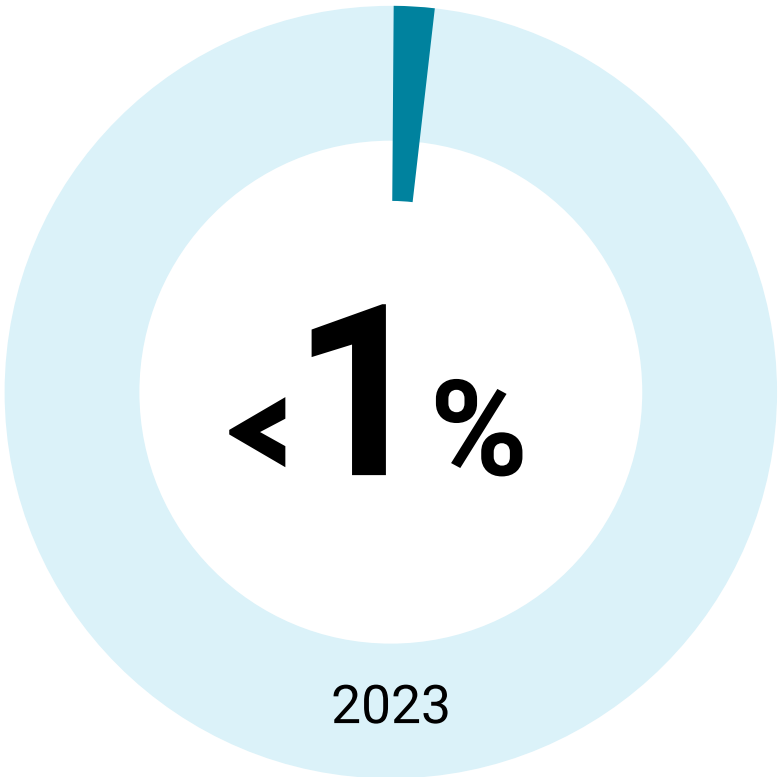
ChatGPT, Claude and Google Gemini have entered the scene. If you're not using AI at work, you might be missing out on some productivity shortcuts.

This guide shows how to use generative AI for data in your daily tasks. What can AI do for your company? What problems can it solve?



Generative AI is a type of artificial intelligence that enables the creation of original content. It often resembles content created by humans. Generative models are trained on large datasets, learning from millions or even billions of images, texts, music pieces, or videos, depending on the domain.

Content created using Generative AI



Where do we use generative AI?

Generative AI creates new data or content and generates insights using natural language processing (NLP) and machine learning (ML).

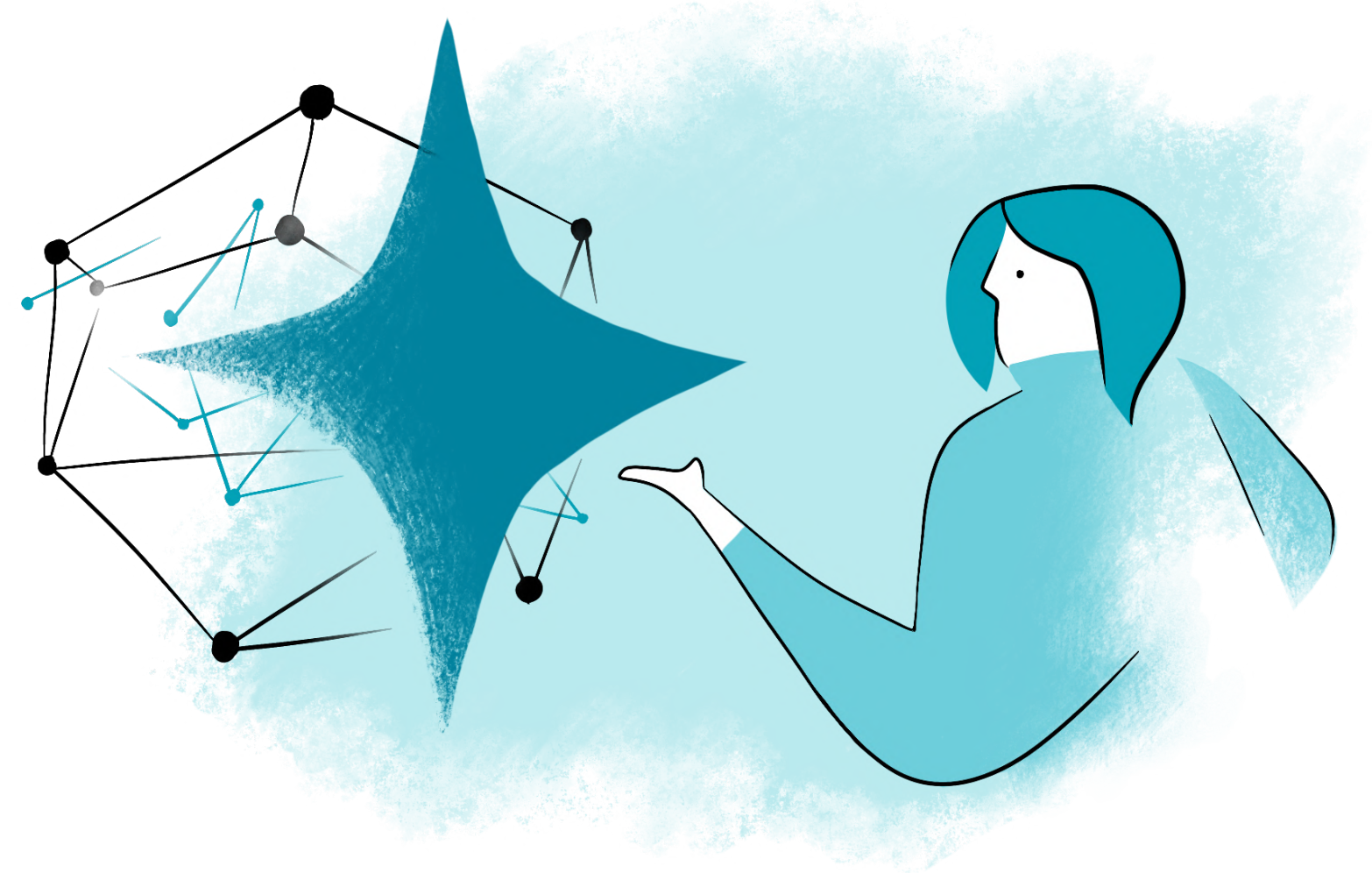
Here are four key functionalities where it excels:

- **Text generation**
- **Text summarisation**
- **Data structuring and analysis**
- **Information retrieval and Q&A**

In the following pages, we'll explore the most useful use cases for each functionality.



[2024 Work Trend Index Annual Report from Microsoft and LinkedIn](#)



What do we love GenAI for?

Generative AI can solve the following work challenges:

1

Production bottlenecks

It automates processes, enhances efficiency, and enables quicker, more informed decision-making by your team

2

Tedious tasks

Generative AI handles repetitive tasks, freeing time for more strategic work

3

Inconsistencies and noncompliance

It helps maintain consistency and adherence to standards across operations

4

Training hurdles

Generative AI aids in training and skill development, supporting continuous improvement

Generative AI is here to enhance work, not replace human workers yet. To stay indispensable, learn how to harness AI for your productivity



[2024 Work Trend Index Annual Report](#)

Exploring the use cases

Text generation

1. Reporting automation

Generative AI technologies offer powerful capabilities for automating the creation of textual reports summarising key performance indicators, market trends, and other critical analytics. This automation significantly reduces the time traditionally spent on manual report generation, enabling analysts to focus more on interpreting results and providing strategic recommendations.

One of the key advantages of generative AI is its ability to understand the specific needs of stakeholders, producing customised and accurate reports efficiently.

Your company can use a customised [AI-powered FAQ bot](#) to address follow-up questions and quickly access accurate information. This complements the reports effectively. This capability not only saves time but also facilitates swift responses to inquiries.

For added convenience, such bots can be integrated into platforms like Microsoft Teams or Slack, serving as specialised resources for handling queries related to reports.



PRO tip

It's crucial to prioritise data protection by avoiding including sensitive personal or company information in third-party AI tools. For enhanced data security, consider acquiring enterprise-grade AI solutions that can be deployed [on-premise](#) to maintain control over sensitive data.

2. Document drafting

AI offers significant benefits in document drafting, including contracts, legal agreements, and more. By automating the generation of routine documents, AI saves time and minimises the risk of errors.

Consider leveraging AI as a virtual assistant to draft product documentation tailored to your company's needs. AI can adapt to the required tone of voice and technical complexity for internal use or external communication.

Another valuable application is using AI to draft official emails, claims, and appeals. Simply outline your requirements and provide the necessary documents to the AI tool, which swiftly generates drafts for your review and refinement. This streamlines the process, freeing up time while AI handles most of the workload.

By automating clerical tasks, AI services alleviate your administrative burden, enabling you to dedicate more energy to creative tasks and interpersonal communications.

3. Idea generation, content creation and task setting for marketing

Generative AI empowers marketers to scale and distribute hyper-personalised content, tailoring marketing messages to specific customer groups and individual clients. By generating high-quality, human-like content for marketing materials, product descriptions, and more, AI helps save time and resources while maintaining a consistent and engaging brand voice.

GenAI can also analyse customers' preferences and online behaviour, enabling it to segment leads into different groups. From these segments, you can create detailed buyer personas and plan highly targeted marketing campaigns.



PRO tip

Like any AI application, ensure robust [data security protocols](#) are in place to safeguard sensitive information.



PRO tip

Upload detailed information about your buyer personas, market segments, and product details to your generative AI tool. The more familiar the AI is with your company's products and target audience, the better the results it will produce.

4. Writing a job description

GenAI is also great for crafting job posts. For optimal accuracy, make the bot conduct a short interview with the “customer” (the prospective manager) and review sample job descriptions from the company.

During the interview, the bot will ask about the anticipated salary range, key requirements and metrics, desired location (city/office or remote), and other pertinent details. The outcome is a complete job posting that can be shared on HR platforms.



Sample prompt:

Your task is to prepare a job description for an employee needed by the HR department. To do this, you need to conduct a brief interview with the client—the future supervisor—and review examples of other job descriptions from the company (I will provide them below).

During the interview, you should clarify the expected salary range, possible remote work, and the location (city, office)

where the employee is required. You need to prepare the description for the job position: Data Scientist.

Ask questions and seek clarifications from the client in a dialogue format. It is preferable to ask no more than 6-7 questions. Ask one question at a time, and you can ask the following question after receiving an answer to the previous one, taking that answer into account (in each iteration, you will see all the previous questions, answers, and tasks).

Here are two existing job description examples from the company:

Job 1:

Job 2:

Text summarisation

1. Financial document summarisation

In finance, producing reports is crucial but extremely time-consuming. Our experience with financial clients revealed a significant obstacle: the laborious task of summarising extensive financial documents and reports from multiple sources and teams. Manually analysing, summarising, and generating insights from this data is not just slow—it's daunting.

The solution lies in utilising [generative AI](#) to summarise financial documents. By integrating AI bots into their workflow, finance professionals can overcome the challenges associated with traditional report generation.

These sophisticated AI models can extract essential information from lengthy documents and transform it into concise, accessible summaries.

This improvement saves time and facilitates quicker decision-making, allowing professionals to dedicate more attention to strategic planning and innovation rather than getting bogged down in data analysis.

2. Analysis of recorded contact centre conversations

AI can analyse transcribed conversations between clients and a contact centre to provide a summary and offer recommendations for improvement. It will extract relevant information, identify key points, and analyse the language and sentiment used in the conversations to understand the overall positive, negative, or neutral tone.

Based on this analysis, the AI model can provide recommendations to enhance customer satisfaction, improve communication strategies, or address any identified issues to enhance the overall contact centre performance.

3. Follow-ups and meeting minutes

One of Generative AI's most amazing capabilities is creating meeting follow-ups by summarising key discussion points, action items, and decisions made. Additionally, it can generate comprehensive meeting minutes by capturing essential details, including attendee names, agenda items, and any relevant attachments or links shared during the meeting.

Moreover, for the AI model to function effectively, it requires just the recording of the meeting. It will then transcribe it and generate a concise follow-up summarising the key discussions, resolutions, and assigned tasks.

Data structuring and analysis

1. Financial planning, analysis and forecasting

Data coming into tables and reports from various sources often creates processing bottlenecks. An AI-powered chatbot can analyse this data, draft a roadmap, and enhance forecasting for both short-term and long-term perspectives.

Users can input specific documents and define their forecasting timeline. Generative AI crafts tailored forecasts and strategic plans by leveraging this data and a deep understanding of the company's background. This approach particularly benefits finance, legal, and corporate development departments.



PRO tip

You can help the AI extract key topics from your discussion by listing them in your prompt. For more precise results, include the names of the participants and use the following prompt:

“Make a meeting summary according to the 80/20 principle so that it contains 80% of the meaning but only 20% of the text volume.”

It offers several key benefits:

- Quickly model complex scenarios without manually sifting through data and adjusting parameters.
- Accelerate testing and analysis for a dynamic understanding of potential financial outcomes.
- Expand scenario modelling beyond finance, allowing tailored models and prompts to be shared across departments for comprehensive strategies.

2. Market research and gathering insights

Generative AI can extract crucial information, including current and historical market prices and sales data. It excels at generating comparative analysis reports and providing pricing insights.

Additionally, AI can analyse competitor data, helping departments identify trends and develop marketing strategies.

By sifting through unstructured data such as text-heavy documents, reports, and articles, AI extracts insights and patterns to enhance understanding of market trends, competitor activities, and customer sentiments.

3. Compliance monitoring

Generative AI ensures regulatory compliance by monitoring documents and transactions against laws and regulations, flagging potential issues for prompt resolution. This capability aids organisations in adhering to policies without manual effort, reducing the overall cost of compliance.

This use case is precious for legal and [finance](#) departments, as well as industries such as [healthcare](#), where stringent compliance requirements are crucial.

Generative AI helps streamline legal document drafting, summarising financial reports, and analysing contracts to identify terms, obligations, and risks.

It enhances legal research efficiency by automatically processing case laws, statutes, and regulations. It can also monitor changes in laws and regulations and notify the legal department about any developments that may impact the organisation.

4. Customer reviews analysis

Companies can use generative AI to analyse customer reviews from various online platforms. This can identify patterns and trends in customer satisfaction levels and areas for improvement.

For example, AI could be used to identify customers' most common complaints about the company's products or customer service. This information will then help improve them.

AI can also help evaluate customer service replies to reviews and recommend how to correct them. It determines the tone of voice in customer comments, summarises them in several words, and suggests an answer.

5. Compliance analysis of candidate CVs with company vacancies

AI models facilitate compliance analysis of candidate CVs with company job requirements, streamlining the recruitment process.

These tools efficiently analyse resumes, match candidate qualifications with job criteria, and provide valuable insights to recruiters. This capability enables informed decision-making to identify the most suitable candidates for specific roles within the organisation.



PRO tip

Use AI tools trained on your company's product data. For instance, [Tovie Data Agent](#) can learn from your databases to swiftly and accurately prepare responses to customer reviews.



PRO tip

This approach is particularly beneficial for mass recruiting scenarios. Interviews remain essential for highly qualified candidates, but AI can assist in comparative analysis and decision-making, enhancing the efficiency of candidate evaluation.

Information retrieving and Q&A

1. AI-powered document FAQs

AI is leveraged to create document FAQs for parsing and processing documents to extract key information. When users ask questions, it provides deep, contextually correct responses to queries across your data collection.

[Tovie Data Agent](#) simplifies information retrieval. It functions like a personal assistant that understands natural language and instantly delivers responses with links to pertinent documents from the database.

This smart AI-powered FAQ bot proves invaluable for employees who spend considerable time searching for documents within the organisation. Its versatility and accessibility make it an ideal centralised tool across departments, ensuring swift access to information.

Implementing such a solution accelerates access to information, reduces the time spent searching for documents, and enhances productivity. This translates directly into cost and time savings for the organisation.



PRO tip

Deploying an AI chatbot integrated with organisational databases is a valuable investment in employee productivity. To maximise the benefits, ensure readiness for AI deployment and database organisation. [Contact our experts](#) to evaluate your company's AI readiness and guide you through this process.

2. Improved customer services

Train your AI chatbot on company guidelines and product documents to deploy across customer service channels, delivering personalised and prompt responses to client queries.


For instance, imagine a medical clinic specialising in specific surgeries. Your staff often spend significant time providing post-surgery information online, referencing medical standards and best practices. AI tools like Data Agent automate patient queries via chatbots, providing personalised responses from reliable data sources.

Data Agent is highly customisable and [deployable across various](#) channels, such as website chatbots, ensuring real-time responses to natural language queries. This reduces call volumes for operators, enhances customer satisfaction, and lowers costs. For complex queries needing personal information, customers can be directed to human agents or personal managers.

3. Onboarding & general information

Onboarding involves numerous procedures and processes, which can be overwhelming for new colleagues. Data Agent simplifies this by offering a centralised, easily accessible resource for the company's databases.

AI chatbots can significantly streamline the onboarding process for new team members by providing easy access to relevant documents, training manuals, policies, procedures, and equipment user manuals. Serving as a unified source



PRO tip

Leverage AI Agent's analytics to monitor query processing and customer satisfaction. Use insights to update guides and databases, ensuring they align closely with customer needs and enhance service delivery.

of truth, they help new employees quickly acclimate to their roles, filling knowledge gaps and boosting productivity.

As a result, new team members become more efficient and quicker, increasing throughput. Moreover, the HR department can onboard and upskill new colleagues more efficiently. And teams get a universal, easily consumable source of truth for procedures and policies.

4. Equipment troubleshooting

AI chatbots can be configured to provide step-by-step instructions to help users troubleshoot equipment and processes following established policies and procedures in the industrial and tech sectors.

Troubleshooting complex equipment and processes requires specialised expertise, which can be scarce. GenAI can accelerate troubleshooting by quickly and efficiently accessing relevant logs and manuals. This reduces the time needed to diagnose and rectify problems, making it easier for teams to address equipment issues effectively.

Data Agent can be implemented as a virtual field assistant, providing engineers with on-demand access to engineering knowledge and support in troubleshooting. This increases efficiency, productivity, and decision-making.

For instance, if a problem crops up in the field, the engineer can describe it to the AI assistant, which will respond with appropriate questions to identify the cause or guide the engineer through a step-by-step process to resolve it.



PRO tip

Leveraging generative AI can enhance operational efficiency and cost savings by supporting engineers. However, to maintain accuracy, ensure the AI chatbot is trained on high-quality data. Inaccurate or outdated data can lead to equipment damage or operational downtime.

Data security challenges and avoiding hallucinations

One of the primary concerns when utilising generative AI in business is the security and privacy of sensitive information, especially in industries with strict regulatory requirements. Companies may face legal and financial risks, data misuse, lack of data consistency, and regulatory non-compliance.

[Data Agent](#) for corporate data search is designed with robust security measures to ensure the safety of your information.

1

Access control

The application is controlled in terms of access to only specified staff members, allowing to maintain control over who can search and access sensitive data.

2

Data security and privacy

Deploying Data Agent [on-premises](#) guarantees proper safeguarding of sensitive data and maintains control over the database's access levels. By deploying AI models on-premises in your private cloud, you can leverage their powerful capabilities while maintaining complete control over how your data is handled, stored, and managed.

3

Data masking

We also employ [data masking](#) of sensitive information to prevent non-anonymised data from leaking and being inappropriately disclosed. This tool acts as a privacy firewall for AI models, anonymising sensitive data when accessing cloud-based LLMs and ensuring that data does not leave your organisation.

4

Tackling hallucinations

AI answers are only as good as the data they are exposed to. Hallucinations in AI models occur when input data is poorly processed. If documents are chunked or pre-processed inadequately, or if the context is fragmented across different chunks, the AI model can become confused and produce incorrect answers.

Solution

To prevent this, documents must be pre-processed correctly to ensure all necessary context is included. While it would be ideal to simply upload PDFs or CSVs, additional pre-processing is often required, especially for tabular or graph-based data. This may involve semi-manual or manual processing to achieve better results.

Our services

Tovie AI offers services to assist clients with data pre-processing, enhancing the accuracy of AI-generated answers.

Data Agent for easy data search



Selecting AI tools and technologies that align with your unique business needs is crucial. With the generative AI sector rapidly expanding and numerous emerging startups, choosing a vendor with a proven track record in conversational and generative AI is essential. Prioritise secure, dependable, and customisable tools that work with various data sources and formats.

A prime example is [Tovie AI's Data Agent](#), which offers an effortless way to develop a no-code AI chatbot tailored to specific requirements. Data Agent is a powerful GenAI tool that integrates diverse data sources. It generates contextually accurate responses across your company's data and knowledge bases.

It works with multiple data sources like Google Drive, Dropbox, SharePoint, CRMs, and MP3 audio files. Data Agent provides deep and contextually correct responses to queries in a chat format.

You can effortlessly create a no-code AI chatbot for any use case. The AI bot is trained on your data, easily customisable, and deployable across various channels.

My assistant



All my knowledge and work settings are stored here. You can also modify the AI model that influences my thought process and communication style.

10:51



I have processed the documents and am ready to answer your questions.

10:52



Always happy to help! 😊

10:53

Write a message



Set the AI model for your needs



GPT 4.0

Suitable for most cases

ChatGPT

All languages

Tone of voice

😊 Friendly



AI consulting

To clearly understand your needs and avoid unnecessary costs, seek specialists who can evaluate your business processes and AI readiness. [Generative AI consulting](#), best provided by experienced technology vendors, helps in this process.

Tovie AI consulting services leverage generative AI expertise to identify your business optimisation potential. Our experts will collaborate with you to map the best use cases for your company and determine where the disruptive technology can bring the most value.

We establish and guide the adoption of AI tools across your organisation, helping you learn how to orchestrate the technology effectively and derive maximum benefit from it.

As a result, you get powerful tools for your business performance improvement within your team.

Are you looking for your use case in the field of Generative AI? [Contact us](#), and we will help you.



AI readiness checklist for companies

Understanding your company's position on the AI readiness scale is the first step towards implementing practical solutions to alleviate burnout and enhance productivity. To aid in this assessment, we've compiled a comprehensive checklist to help companies gauge their readiness for deploying generative AI technologies. This tool aims to spotlight areas needing attention and guide strategic planning for a smooth and successful AI adoption.

Data Management

- ✓ Do you possess clean, organised, high-quality datasets necessary to train AI models?
- ✓ Is there an established data governance policy to ensure data privacy, security, and ethical use?
- ✓ Have you defined clear goals for how AI can enhance data management and employee productivity?

Organisational Culture and Leadership

- ✓ Is there C-suite support for AI initiatives and digital transformation?
- ✓ Does your company culture encourage innovation, continuous learning, and adaptation?
- ✓ Are leaders committed to investing in AI training and development for employees?

Technical Infrastructure

- ✓ Do you have a robust IT infrastructure capable of supporting AI technologies?
- ✓ Is there sufficient data storage and processing power for AI applications?
- ✓ Are your data formats and structures AI-compatible for easy integration?

Ethical and Legal Considerations

- ✓ Have you assessed the potential ethical implications of deploying AI in your operations?
- ✓ Are you aware of and prepared to comply with relevant regulations concerning AI deployment?
- ✓ Do you have mechanisms to evaluate AI's impact on ethical and legal standards?

Evaluation and Scaling

- ✓ Have you established KPIs to measure the success and ROI of AI integration?
- ✓ Is there a framework for collecting and analysing feedback on AI performance and employee satisfaction?
- ✓ Do you plan to scale successful AI implementations across different departments or functions?

Employee Engagement and Training

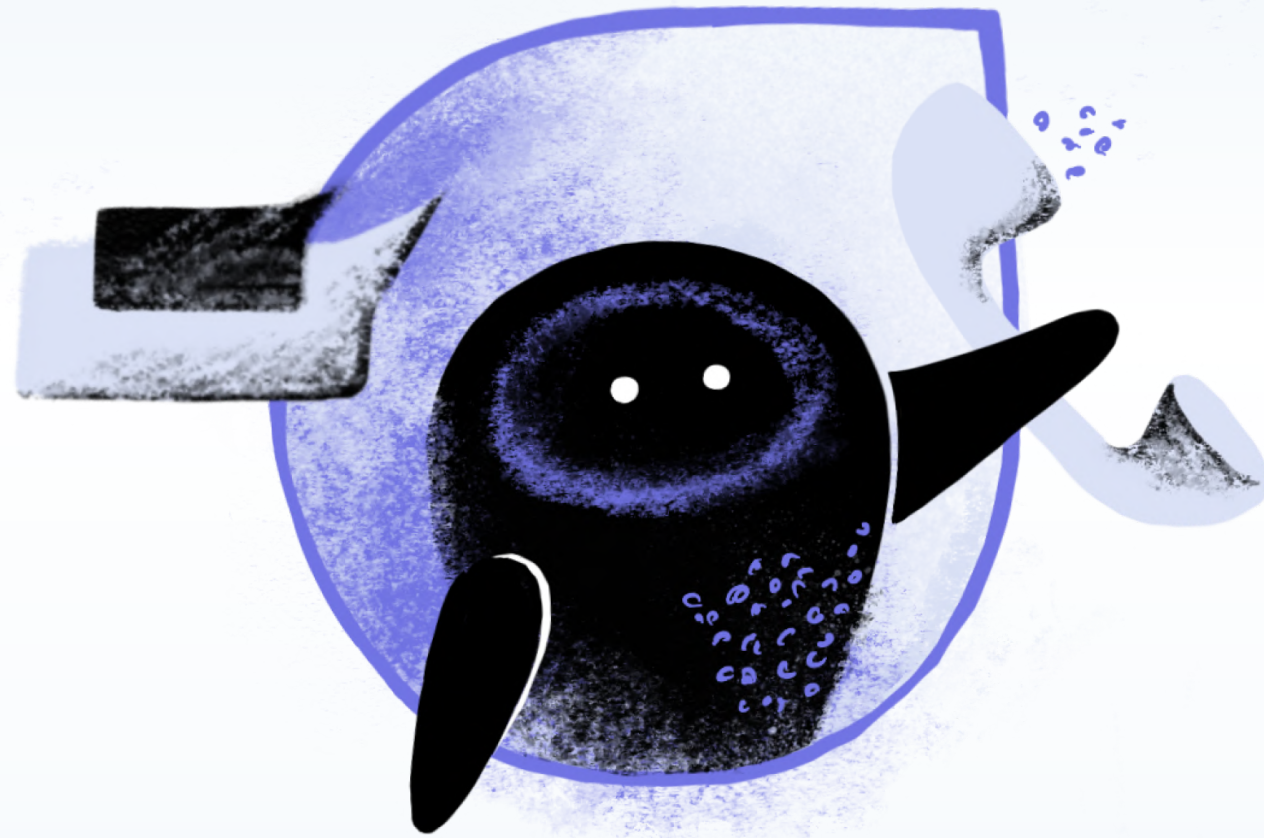
- ✓ Have you identified skill gaps you must address to implement and use AI effectively?
- ✓ Is there a plan to upskill employees to work alongside AI technologies?
- ✓ Have you established channels for employee feedback and concerns regarding AI implementation?

Strategic Planning and Implementation

- ✓ Have you defined clear, measurable objectives for your AI initiatives?
- ✓ Is there a strategic roadmap for the phased implementation of AI technologies?
- ✓ Do you have contingency plans for managing potential challenges or setbacks in AI deployment?

Completing this checklist will provide insights into your organisation's current AI readiness and highlight areas requiring focus and improvement. It's a step towards making informed decisions on integrating generative AI technologies effectively to mitigate employee burnout and enhance overall productivity.

Contacts



Contact us today to schedule a free consultation and explore the potential of AI for your business.

contact@tovie.ai

+44 20 4577 1007