GENECA

Custom Software Solutions for Content Management

DEFINING AN AI ASSISTED SEARCH TO PRODUCE JOYFUL RESULTS

THE CLIENT:

A global consulting leader delivering innovative solutions for clients in the areas of health and benefits, pension and investments, and workforce and careers. The company's consultants and clients have access to a wealth of information to guide their thinking and solutions for benefit strategies and program designs. Additionally, insights gathered from comparative and competitive analytics are used to evaluate program effectiveness and inform changes to positively impact employee wellness and clients' bottom line.

THE BUSINESS NEED:

As a leader in the enterprise consulting space, this company is known for the breadth and depth of information they gather, anonymize, analyze, and make available in different ways to their consultants. One of the capabilities that differentiate the consultants in this company is their ability to mine the company data and uncover emerging trends and new relationships between seemingly disparate or conflicting results. The resulting ideas and questions help their clients to look at issues and solutions in a new way. Consultants implement strategies based on these new conclusions. These results are gathered to expand the body of knowledge and make new insights widely available.

The company realized that creative thinking and solution design takes time and requires the ability to quickly get to the information needed 'right now' so that an idea can be validated to see if it warrants deeper study and analysis. Using their current search technologies, many consultants were spending hours searching for what they needed and feeling overwhelmed by the breadth of available sources. Veterans had spent years honing their analysis skills and created their own reference libraries or sourcebooks so they could work more efficiently. The content managers were frustrated that their work wasn't easily accessible when relevant, and left feeling like it had no value.

THE SOLUTION:

The company wanted to create a new way for their consultants to find information. They envisioned an AI assisted search that would let consultants follow their instincts while serving up search results that give the consultant what they need. The AI algorithms would leverage the content managers' abilities to initially relate information and 'learn' by leveraging the veterans' collective 'sourcebooks'. New consultants and ultimately clients would benefit from their collective knowledge and veterans would find what they needed without having to rely on their own external guides.

The company decided to fund a short project to define a first release and prototype design for the new search.

WHAT GENECA DID:

The client needed a tight-knit team consisting of the product owner, the program manager and a lead analyst who could quickly define a feature set for the first release. Their charter also included creation of a set of user stories, a workflow, and mockups that could be delivered to the external UI design team. The user stories would also form an Atlassian JIRA backlog for an agile delivery team so that prototype development with an offshore 3rd party AI team would be ready to start when the project ended.

The client needed a lead analyst to join the team who understood the technologies and the business but who also brought user experience capabilities and strong story skills to the team. Scheduling flexibility was critical because the product owner and design firm were located in Europe, the program manager was in the US/East coast and the AI team was in Asia. Not to mention that that this was a race to get all of the deliverables ready in a 2-month window. Geneca's Experience Analyst had the skills they needed to round out the client's team.

THE RESULTS:

Our Experience Analyst delivered what the team needed to enable them to achieve their project goals!

- Synthesized high level vision and breadth of features outlined by product owner
- Designed new consultant and content management workflows with mockups within first three weeks
- Created a 60-user story backlog that was prioritized for prototype and first release
  - o Architecture and UI Design validation readiness at end of week 4
  - o Content ready for SOW with 3rd Party AI team at end of week 6
- Identified and resolved 45 workflow gaps with experience-based suggestions using consultant and content manager feedback

Prototype Design Timeline

Designed new workflows with mockups.	Architecture and UI validation readiness.	Content ready for SOW with 3rd party AI team.	Resolved 45 workflow gaps and delivered 60+ stories!
03 weeks	**04** weeks	**06** weeks	**08** weeks