



Minutes  
November 6<sup>th</sup>, 2025  
2:00 pm – 3:30 pm EDT

## Zoom Meeting

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**Attendee:** Tracy Richardson, Kim Menke, Suhas Kulkarni, JC Gregory, Dave Williams, Brent Harrison, Alice Houston, Rachel R. Adams, Stephanie Collins, Sean Jackson, Rick Jones, Pepe Lopez, Brandon Combs, Ankur Gopal, Myra Wilson, Travis Winkler

**Staff:** Alisher Burikhanov, Elishah Taylor, LaChrista Ellis

### Welcome and Introductions

**Kim Menke, Co-Chair, Provision Process Solutions**, called the November *AI Workforce Readiness Taskforce* meeting to order. He summarized recent presentations from Interapt, Amazon Web Services (AWS), and IBM, highlighting Kentucky's progress and best practices in AI workforce readiness. He outlined the meeting goals: reviewing baseline recommendations, discussing AI readiness, workforce training and upskilling, lifelong learning, governance, and partnerships. He emphasized developing final recommendations for the KWIB by year-end to position Kentucky as a leader in AI workforce readiness.

### Recap & Baseline Recommendations

Taskforce Baseline Understanding of AI:

**Alisher Burikhanov, Executive Director, Kentucky Workforce Innovation Board (KWIB)**, thanked attendees for their continued participation and briefly provided an overview of the AI Workforce Readiness Taskforce's progress. He reiterated the group's mission to prepare Kentucky's workforce, learners, and businesses for the evolving impact of artificial intelligence on Kentucky's economic development.

He gave a recap on the taskforce, beginning with co-chair Dr. Sun's AI presentation in May. Since then, members have established a baseline understanding of AI's impacts, completed a Kentucky-focused SWOT analysis, and emphasized the state's collaborative strength and challenges, which include keeping up with rapid technology changes and ensuring equitable access to AI opportunities.

Business Presentations: Interapt, AWS, IBM:

Alisher highlighted presentations from partners, including Interapt, Amazon Web Services (AWS), and IBM. Interapt shared how it is adapting to client demand for AI tools. AWS emphasized Kentucky's potential to lead in AI training with state-backed credentials, and IBM demonstrated its internal "Client Zero" model and Watson X technology as examples of innovation in practice. He encouraged members to begin developing initial recommendations based on their collective insights, with the goal of finalizing actionable proposals for state leadership by the December meeting. He thanked everyone for their ongoing commitment and engagement throughout the process.

### Group Consideration for Recommendations

*What is our state's "AI-Readiness" baseline?*

The group discussed Kentucky's current AI-readiness, beginning with an update on the University of Kentucky's (UK) AI education initiatives. A member reported that UK launched an AI certificate program consisting of four courses, attracting approximately 100–120 students across diverse majors in its first year.

Building on this momentum, UK has created a full AI major—an extension of its computer science program—which is pending final approval from the Council on Postsecondary Education and expected to launch in the fall. Additional efforts include TEK100, an online introductory AI and machine learning course accessible to any student and plans to integrate a comparable introductory AI course into the university's core curriculum. UK is also developing an AI minor to allow students in other fields to apply AI in their disciplines. Mr. Kim Menke noted similar AI expansion efforts underway at the University of Louisville.

The group also discussed how universities could expand beyond undergraduate certificates to develop more workforce-oriented, career-focused programs for adults seeking reskilling. It was noted that current programs are primarily geared toward traditional students, leaving a gap for working professionals.

UK has already seen significant interest from local graduates seeking to return for AI training. The university is exploring flexible, online asynchronous options modeled after TEK100. TEK100 demonstrated that rapid course development is possible, and participants noted that creating practitioner-level, asynchronous AI coursework could be feasible.

Additionally, the Kentucky Department of Education is developing a teacher-focused AI literacy course through the Friday Institute, contributing to a broader statewide ecosystem for lifelong AI learning.

#### *How do we equip All Kentuckians with necessary AI-related skills?*

The group noted that some education leaders rated Kentucky's statewide AI readiness as "1 out of 5", citing challenges such as scaling education, training faculty, and improving student data skills. Without a coordinated statewide strategy, efforts remain fragmented. Mr. Kim Menke emphasized the need to build a strong foundational understanding of AI that supports both general awareness and workforce pathways, developed through collaboration between education and industry.

Participants agreed that AI education must be broadly accessible, integrated into schools, certification programs, and business partnerships. Workforce shifts may widen gaps between AI users and non-users, making core skills like numeracy, data literacy, and hands-on exposure essential. It was suggested that technical programs and early interventions beginning in middle school could help prepare students for roles less vulnerable to automation. Achieving this would likely require statewide coordination or legislation.

#### *How will we retrain and upskill our current workforce?*

Mr. Menke underscored that retraining the current workforce requires building foundational skills while also ensuring workers understand how to verify the accuracy of AI outputs. He noted that many businesses use closed, governed AI systems to ensure safer and more reliable results.

The group discussed KCTCS's experiences with Microsoft Copilot, describing it as a safer and well-integrated tool for their environment, though less capable than open tools like ChatGPT or Gemini. Participants acknowledged that Copilot continues improving through machine learning and personalization, illustrating ongoing tradeoffs between security, usability, and capability when selecting AI tools for workforce training.

#### *How will we fund and scale lifelong learning and micro-credentials?*

Participants raised concerns about effectively reaching mid-career “legacy” workers who may feel AI skills are unnecessary or lack time for training. It was suggested that employer-partnered digital literacy and AI programs—offered onsite and aligned with workplace needs—could increase participation and relevance. Empowering frontline workers with AI competencies benefits both individual employees and overall organizational performance.

*Specific to workforce development, what governance and ethical safeguards will we put in place?*

The group discussed gaps and opportunities in AI adoption and governance. It was noted that most AI startup inquiries originate outside Kentucky, indicating that the state would benefit from regional collaboration rather than a solely state-based strategy. There was emphasis put on leveraging nearby metro areas and innovation hubs to stimulate AI applications and entrepreneurship.

Participants proposed the creation of AI Innovation Hubs and hackathons to provide hands-on AI experience, with local colleges serving as hosts and resource centers. Rick Jones highlighted opportunities to integrate multiple AI tools and develop organizational capacity for building custom AI solutions.

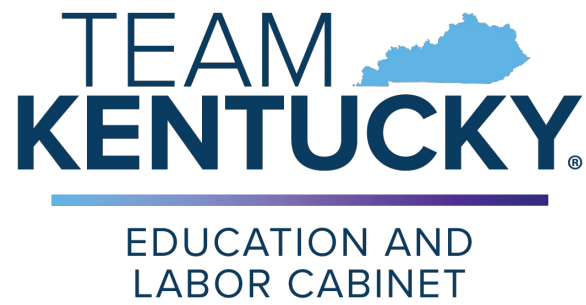
*What specific public-private partnerships are needed to make this work?:\*

The group also examined opportunities for AI to improve government efficiency. It was reported that Kentucky’s executive branch is exploring AI adoption, including draft policies outlining agency-specific use and collaboration with trusted external partners. Mr. Menke noted that Kentucky’s previous workforce modernization initiatives provide a strong foundation for expanding AI integration across both education and government.

#### **Next Meeting – Final Recommendations**

The group agreed on prioritizing AI initiatives by urgency: immediate workforce needs, short-term workforce development, and long-term education for younger students. Members were encouraged to submit additional ideas before the next meeting on Wednesday, December 3<sup>rd</sup>, 2p-3:30 pm EST (virtual), where draft recommendations will be reviewed and refined.

#### **Adjournment 3:30 pm**



**AI Workforce Readiness Taskforce**  
**Meeting Briefing Packet**

**November 06, 2025**

**2:00 – 3:30 pm EST**

**Co-Chairs**

**Kim Menke, Provision Process Solutions**

**Jeff Sun, Ph.D., University of Louisville**



**AI Workforce Readiness Taskforce Meeting**  
**November 06, 2025, 2 pm - 3:30 pm EST**

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# Kentucky Workforce Innovation Board (KWIB)

## AI Workforce Readiness Taskforce Meeting

**AGENDA**  
**November 6<sup>th</sup>, 2025**  
**2:00 pm – 3:30 pm EST**

**Join Zoom Meeting**

<https://us06web.zoom.us/j/87468892028?pwd=gcaebWJpKiLMFOa6mdqtq5oXO2kn7R.1>

**Meeting ID: 874 6889 2028**

**Passcode: 677117**

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- |                |  |
|----------------|--|
| <b>2:00 pm</b> | <b>Welcome and Meeting Objectives.....</b> <i>Kim Menke, Taskforce Co-Chair</i><br><i>Provision Process Solutions</i>  |
| <b>2:10 pm</b> | <b>Meeting Focus: Recap &amp; Baseline Recommendations.....</b> <i>Alisher Burikhanov</i><br>- <i>Recap: Executive Director, Kentucky Workforce Innovation Board</i> <ul style="list-style-type: none"><li>○ <i>Taskforce Baseline Understanding of AI</i></li><li>○ <i>Business Presentations: Interapt, AWS, IBM</i></li></ul>   |
| <b>2:30 pm</b> | <b>Group Consideration for Recommendations.....</b> <i>Kim Menke</i> <ul style="list-style-type: none"><li>- <i>What is our state's "AI-Readiness" baseline?</i></li><li>- <i>How do we equip ALL Kentuckians with necessary AI-related skills?</i></li><li>- <i>How will we retrain and upskill our current workforce?</i></li><li>- <i>How will we fund and scale lifelong learning and micro-credentials?</i></li><li>- <i>Specific to workforce development, what governance and ethical safeguards will we put in place?</i></li><li>- <i>What specific public-private partnerships are needed to make this work?</i></li></ul> |
| <b>3:20 pm</b> | <b>Next Meeting (Final Recommendations).....</b> <i>Alisher Burikhanov</i> <ul style="list-style-type: none"><li>- <i>Wednesday, December 3<sup>rd</sup>, 2p-3:30pm EST (virtual)</i></li></ul>  |
| <b>3:30 pm</b> | <b>Adjournment</b>   |

# Appendix

# IBM: Corporate Social Responsibility





# IBM Corporate Social Responsibility



IBM is committed to skill 30 million people globally by 2030, and as part of this larger goal, IBM aims to skill 2 million people in the United States in AI and other technologies by 2028.

[At the White House, IBM CEO, Arvind Krishna announced U.S. commitment to support AI education \(Sept. 2025\).](#)





# Focus areas

IBM brings the power of its technology and talent to address societal challenges and create an impact for our global communities at scale. Together, IBMers activate our shared commitment to creating a better world.



## Education and workforce development



## Social innovation



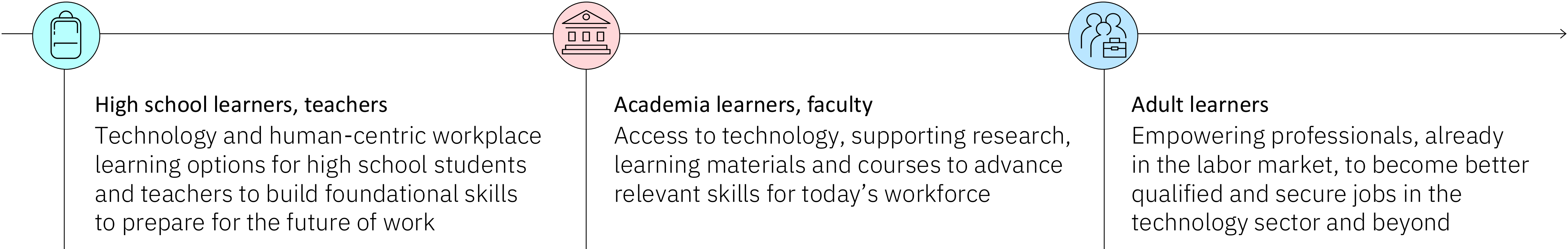
## Volunteerism and giving

# About the program

IBM SkillsBuild® is a free education program aimed at increasing access to technology education. Through the program, we support adult learners, and high school and university students and faculty, to develop valuable new skills and access career opportunities.

The program includes an online platform that is complemented by customized practical learning experiences delivered in collaboration with a global network of partners.

We support learners and instructors across ages and stages of their learning journey ↻





# Industry-backed Digital Credentials

**Digital Credentials** are an industry standard for skills—a modern approach to translating knowledge into a portable and everyday language that benefits employers and learners:

## Benefits for the employers (hiring organizations)

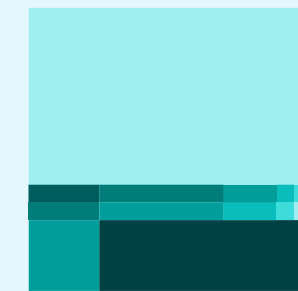
- Expand talent pool
- Skills validation
- Better matching between candidates and job positions
- Understand competencies and learning agility of the applicants

## Benefits for learners

- Portability
- Security
- Increased visibility

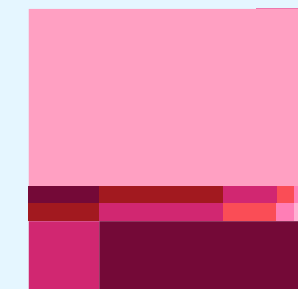
In IBM SkillsBuild, the Digital Credentials are split by skills levels, ensuring significant skill achievement tied to resume-worthy activities:

### 1. Awareness



- General knowledge and fundamental competencies
- Technical skills

### 2. Comprehension



- Extended knowledge and competencies
- Technical skills

### 3. Application



Proficiency and experience in applying a skill in a real-life environment (on the job, project, capstone)

# Our Offering for Adult Learners

Digital training, project-based learning, and professional credentials, designed to help gain the skills needed to secure an entry-level tech job.

## Available now for Non-Profits

### Access to online credentials

- » In-demand AI, Data, Cyber skills
- » Available as asynchronous self paced learning with flexible implementation models

### Hands on capstones

- » Select credentials assesses the technical and professional skills learned through experientia-based learning

### Virtual events

- » Learners can join IBM SkillsBuild events, webinars, and cohorts held by experts and receive digital credentials

### Faculty training (*academic institutions only*)

- » In development

## Available to selected partners

In addition to what is already available to adult learners, select organizations can access:

### IBM SkillsBuild Certificates

- » Stacked on to selected credentials, organizations can offer the final assessment and final capstone that leads to the IBM SkillsBuild Certificate
- » Cybersecurity and Data Analytics certificates qualifies for American Council on Education (ACE) credit recommendations (12 or cyber, 8 for data).

### Access to Opportunity

- » Certificate completers are eligible to join IBM’s exclusive talent community, led through a collaboration with CareerCircle





# Warren County Public Schools Impact Center

In collaboration with Warren County Public Schools (WCPS) Impact Center, IBM SkillsBuild will:

1. **Integrate IBM SkillsBuild Certificates into the high school curriculum\***
  - AI Certificate
  - [Data Analytics Certificate](#)
  - [Cybersecurity Certificate](#)
2. **AI Teacher Training**
  - Series of 60-minute webinars across AI topics specifically geared for teacher upskilling
3. **AI Teacher Professional Development Program**
  - Comprehensive 10-hour program leading to a certificate
4. **Virtual Webinar & Guided Learning Experiences (GLEs)**
  - Webinars: 60-minute webinars designed for adults to encourage AI exploration and awareness across various industry sectors
  - GLEs: Cohort based training designed for adults to learn about AI, data, Cybersecurity, and employability skills needed for careers

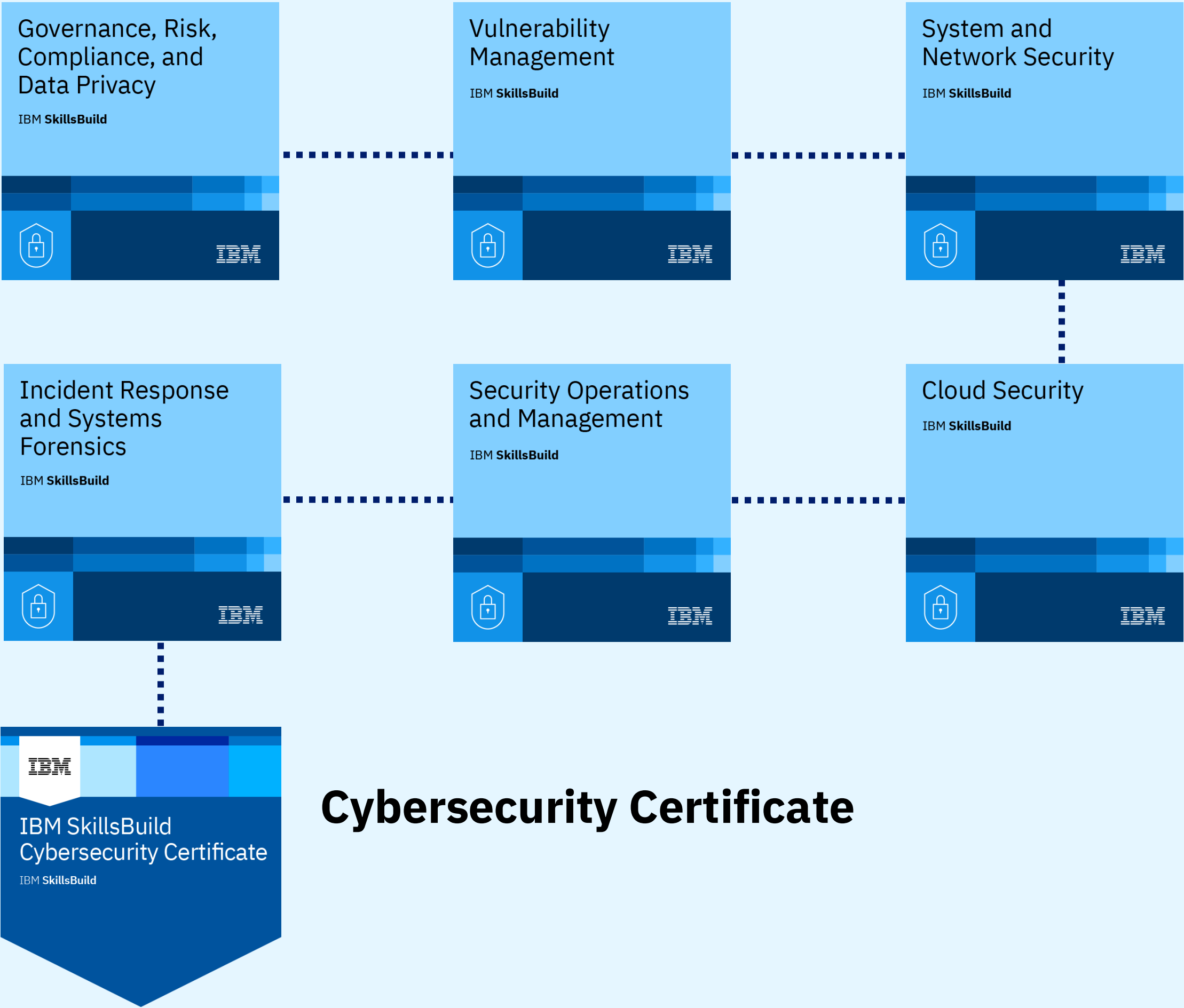




# Certificate Journeys

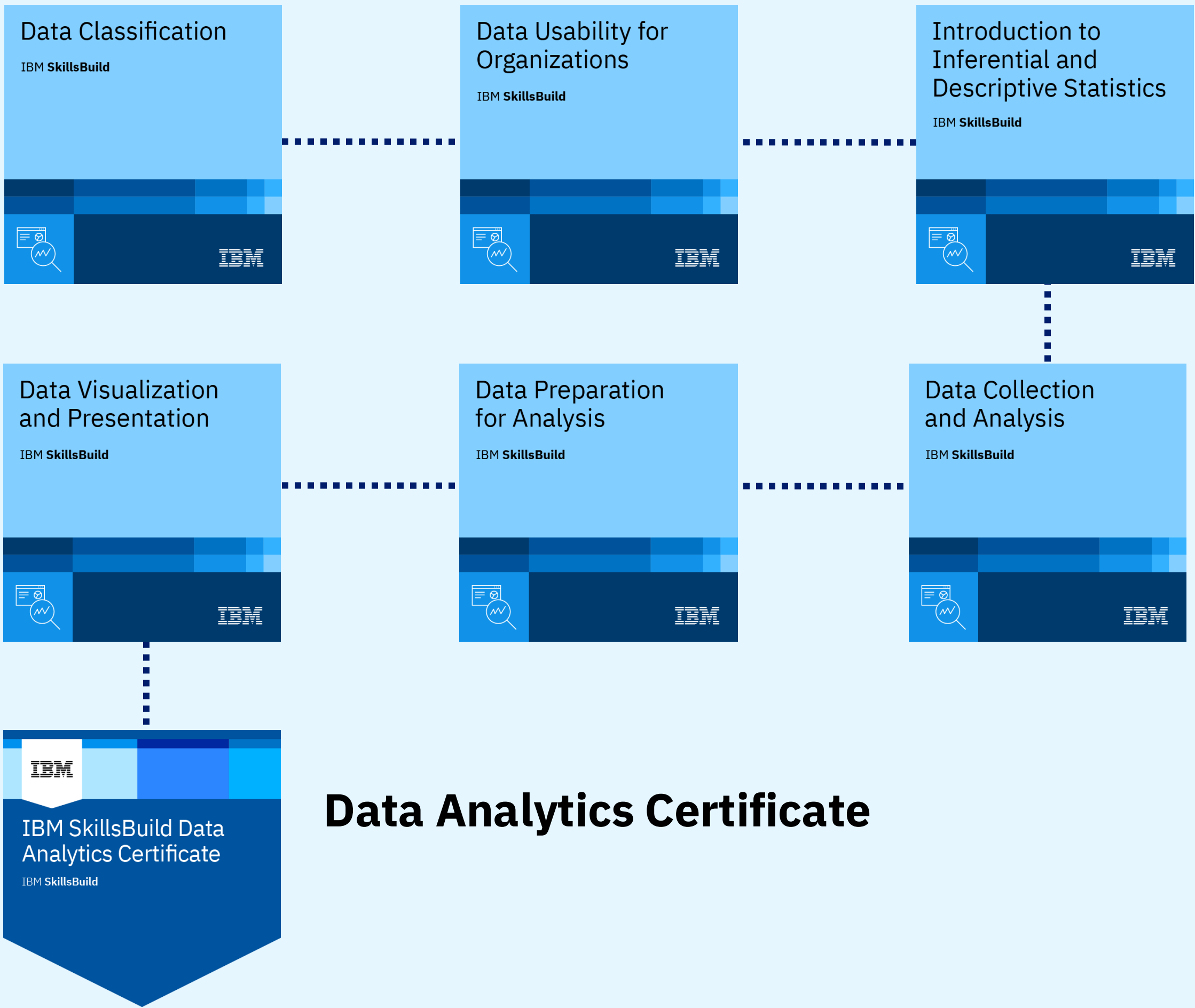
## Cybersecurity Certificate Journey

Badges students will earn include

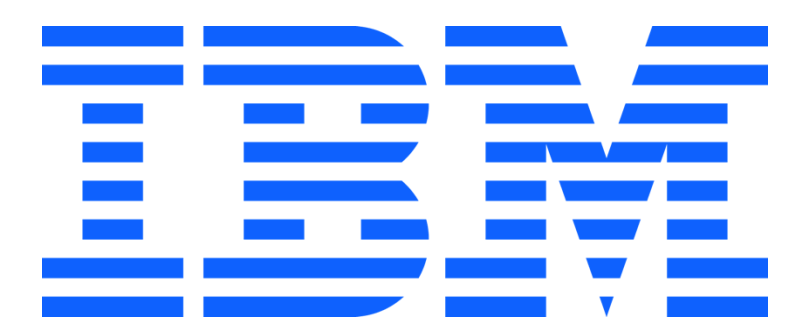


## Data Analytics Certificate Journey

Badges students will earn include





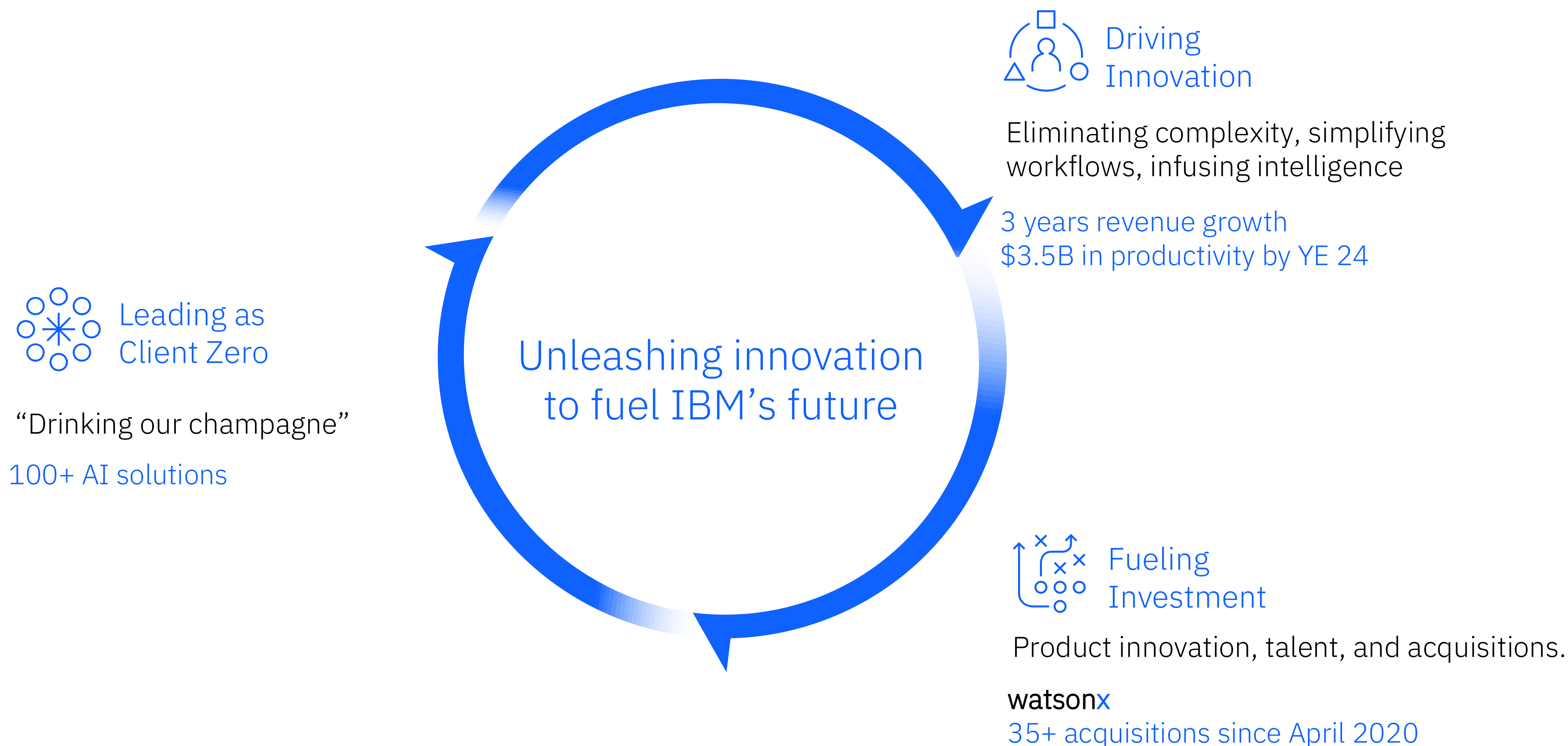


# AI in Action: IBM as Client Zero

**Steve Moss**

Director, watsonx Americas  
IBM Technology

# IBM is Client Zero for AI driven enterprise innovation



# The execution framework for our transformation journey



Transformation Steering Committee

CEO and C-suite demonstrating commitment

Transformation Project Office

Cross-functional project office driving productivity

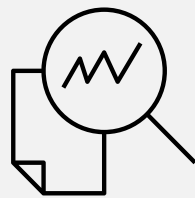
Productivity Discovery Team

External benchmarking to ID productivity opportunities

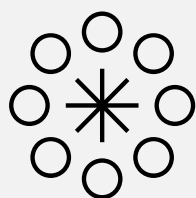
Workforce of Productivity Catalysts

IBMers Eliminate, Simplify, and Automate

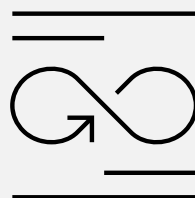
## THE APPROACH



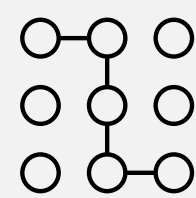
External  
Benchmarking



Cross-Functional  
SWAT Teams



2 – Week Rapid  
Discovery



Rethinking Processes  
& Policies

# The path to \$4.5B (and counting)

## AskEPM

100% of questions answered

watsonx.ai

## Customer Service

\$1.1M annual savings from support case summarization

watsonx

## Sales Assistant

50-70% of repetitive tasks automated

watsonx Orchestrate

## IT Operations

70% of Ansible Playbook content generated 6x faster

watsonx code assistant

## Supply Chain

\$150M reduction in supply chain costs

watsonx

## Marketing

67% content creation efficiency gain for supported asset types

watsonx.ai

## HR

94% inquiries resolved by AskHR

watsonx Orchestrate

## Finance

95% benchmark accuracy of touchless forecasting

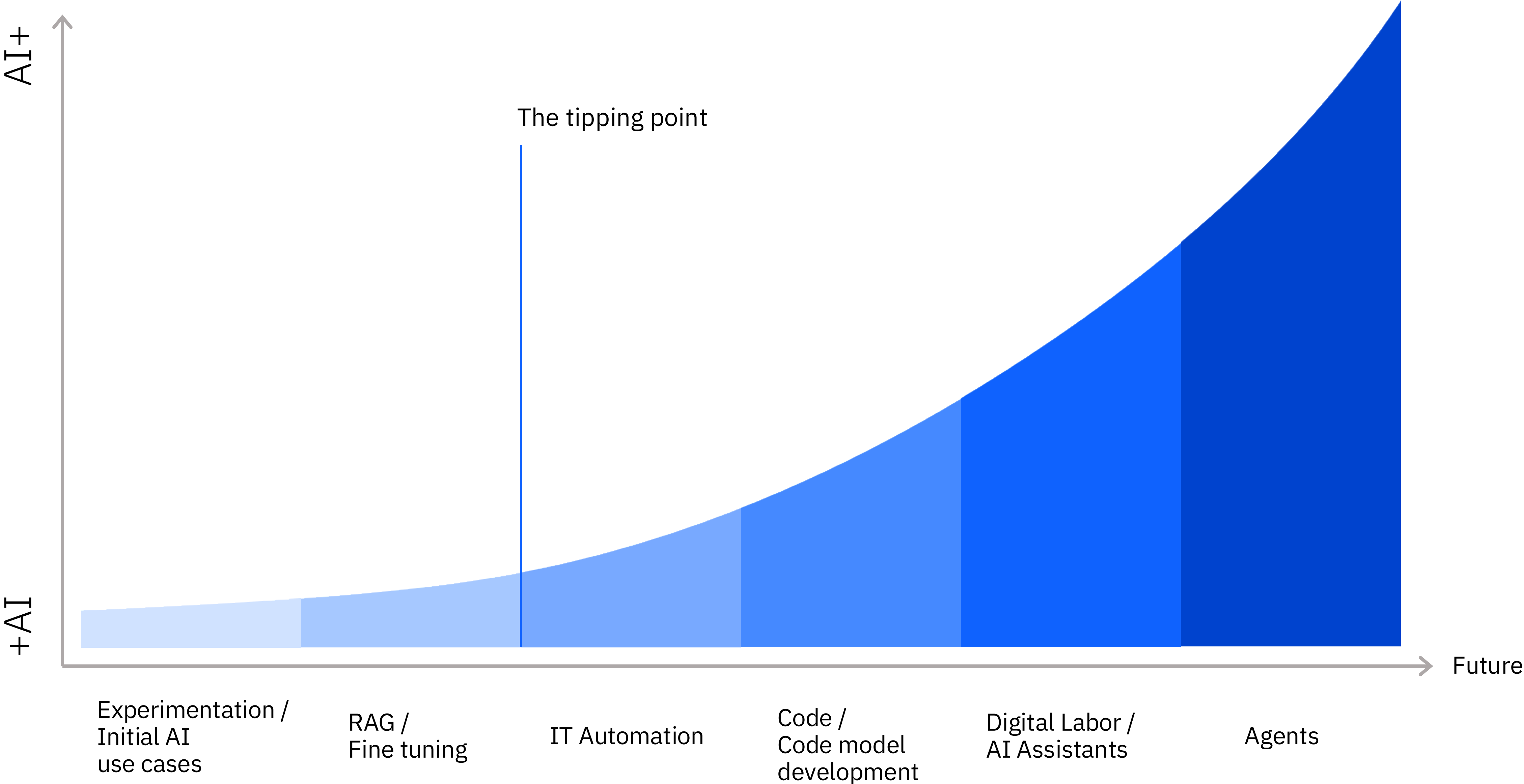
watsonx

## Procurement

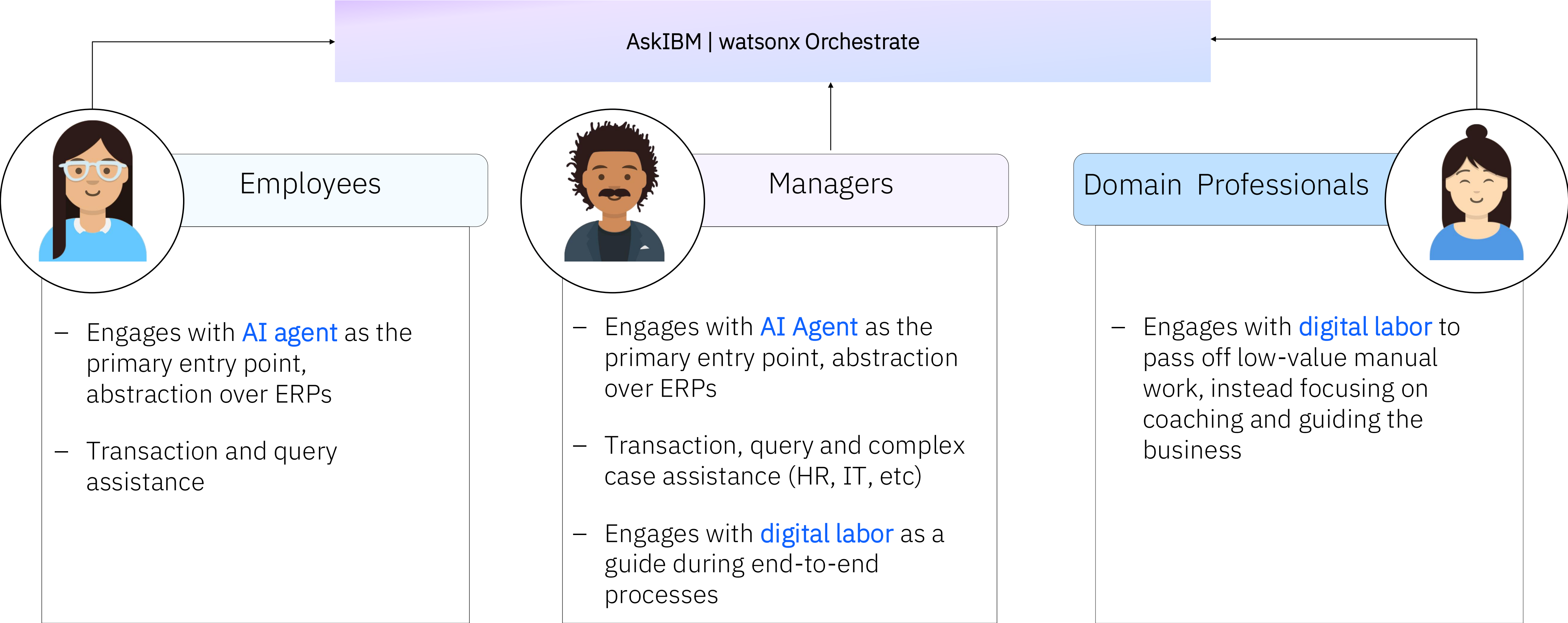
90%+ reduction in time to solve blocked invoices

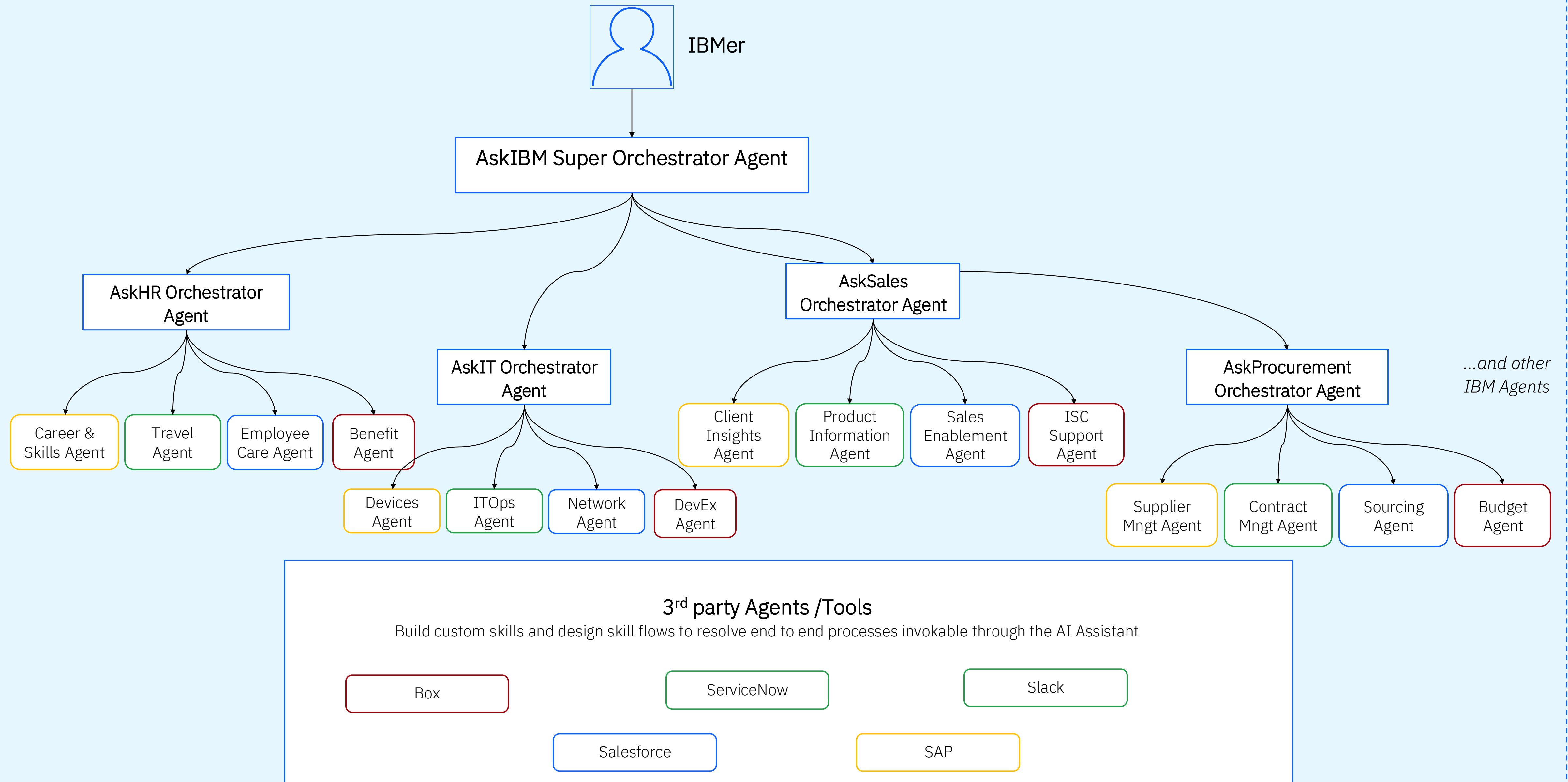
watsonx.ai  
watsonx Orchestrate

# AI Value Creation Curve



# Employee Productivity | Persona Experience







# watsonx Orchestrate Multi-Agent Demo

# Measuring business value



## Central tracking

Enterprise-wide repository of use cases

- Status tracking
- Implementation progress



## Quarterly review

Steering Committee Benefits Review

- Value realization tracking
- Program adjustments
- Strategic alignment



## Aligned value definition

Cross business alignment on value metrics

- Standardized KPIs
- Measurement methodology
- Value categories

## Pre-Tax Income

Hard benefit

Incremental/additional revenue as a result of the implementation

## Cost Reduction

Hard benefit

Demonstrated ledger reductions resulting from the implementation of AI Solution

## Cost Avoidance

Soft benefit

Avoidance of incurring incremental cost or expense while managing increased volumes

## Productivity

Soft benefit

Dollarized view of time savings from a process transformed resulting from implementation of AI solution

# Business value benefit framework - IBM watsonx for HR

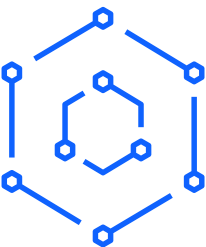
Category	Value Driver	Benefit Description	Benefit Calculation	% Improvement Range (Low-High)	
HR Customer Service Support (AskHR)	HR Content and Q&A	Reduce HR customer service call and ticket volume by providing employees with ‘self-service’ capabilities to frequent HR content and policy questions (“Policy Recall”)	Benefit = #inquiry volume (calls + tickets) x %addressable share x \$cost per inquiry x %containment	\$TBC	TBC
	HR Transaction Support	Reduce the effort required for completing HR transactions that involve one or several HR software applications by streamlining and automating the transaction steps	Benefit = #HR transaction volume x %addressable share x \$cost per transaction (current - watsonx benefit)	TBC	TBC
Digital Labor for HR	Talent Recruitment	Reduce the end-to-end process cost of recruiting talent by automating current manual and time-consuming process activities	Benefit = #annual hiring volume x \$new hire process cost x %addressable process activities x %watsonx benefit	TBC	TBC
	Talent and Skills Development	Reduce the end-to-end HR process cost of ‘Talent and Skills Development’ for activities such as knowledge & skill gap identification, learning content creation & class management	Benefit = \$current ‘Talent and Skills Development’ process cost x %addressable process activities x %watsonx benefit	TBC	TBC
	Performance, Compensation, and Benefits	Reduce the end-to-end HR process cost of ‘Performance, Comp, Benefits’ process cost while freeing up manager time for activities such as quarterly promotions and bonus evaluations	Benefit = \$current ‘Performance, Comp, Benefits’ process cost x %addressable process activities x %watsonx benefit	TBC	TBC
	HR IT Infrastructure & Applications	Reduce cost of development and maintenance of multiple front-end UIs and systems of engagement for HR and related applications	Benefit = \$total current spend x %addressable share x %watsonx benefit	TBC	\$TBC
Qualitative	Employee Satisfaction (Net Promoter Score)	Mitigate HR-related risks and ensure legal and ethical compliance (e.g., avoid bias in hiring, promotion and compensation decisions)			
	Legal Compliance	Mitigate HR-related risks and ensure legal and ethical compliance (e.g., avoid bias in hiring, promotion and compensation decisions)			
	Decision Making	Access accurate insights derived from consolidated HR analytics made easily accessible by AskHR, fostering informed and data-driven decision-making.			

# Build an AI Agent in a Day with IBM watsonx

Recommended for: CIOs, CTOs, IT leaders, and other technology execs

Join us for an interactive half-day workshop and leave with your own custom agent to kickstart your enterprise transformation

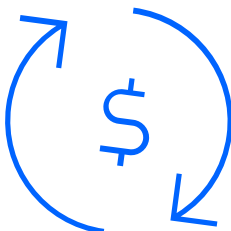
## What will you get from this session?



A prototype of an **AI agent** built in a controlled IBM environment accelerated with our prebuilt tools



**Prioritized use cases** that deliver the most impact for your business, leveraging the tools your enterprise already uses today



A high-level **Business Value and ROI Assessment** for your selected use cases

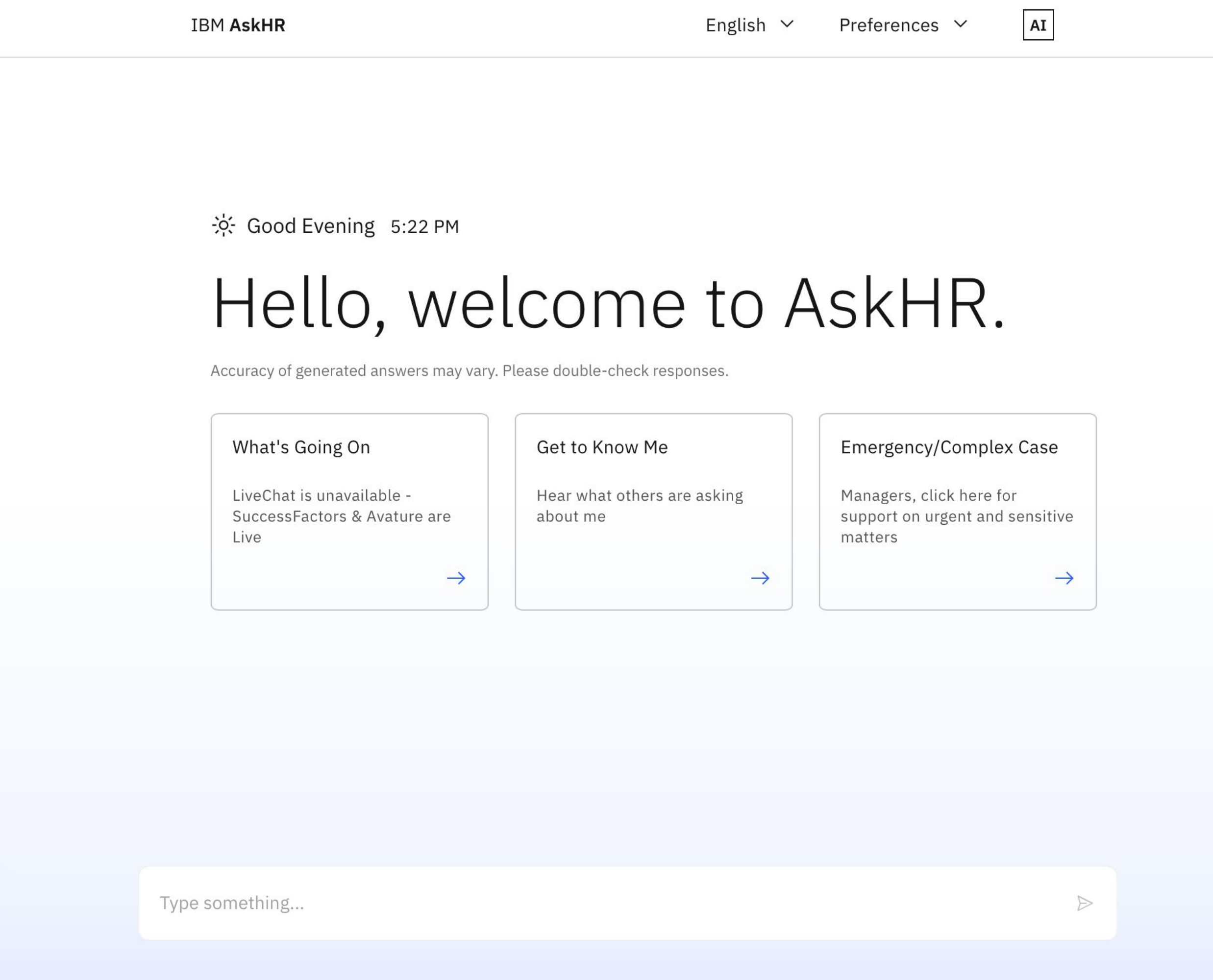
## What do you need to bring?

- Exported documents that can be used to create Q&A responses in your agent. Think IT policy documents, employee guides, how-to materials – anything your employees would prefer to not sort through themselves
  - Acceptable formats: PDF and docx
- [Recommended] For Business Value Assessment, data points like ticket volume, Mean Time to Resolution (MTTR), common areas or topics of tickets, size of IT team, current vendors and spend, etc.
- Working list of biggest pain points for employees, managers, and IT professionals



# IBM AskHR

An HR Agent driving a seamless experience for employees and empowering HR professionals to focus on higher-value tasks.



11M Yearly interactions, 1M increase YoY

1.1M Automated tasks, a 42.5% volume increase YoY

40% Reduction in HR Operating Budget

94% Employee inquiries handled by AskHR

+55 Improvement of HR NPS score from +19 → +74

96% Manager adoption

93% Executive adoption

4700+ Pages of HR content



# AI-first IT Support transformation powered by AskIT

AskIT is IBM's conversation-based solution built with **watsonx** helps IBMers solve IT issues quickly and effectively.

- Addresses 500+ IT Support topics
- **Task automations** like Mac Recovery key for lockouts, device compliance checks, and emergency device replacements
- Automated IT support **ticket creation**
- **Seamless handoff** to live advisor for urgent or complex issues
- **Personalized experience** based on role, profile, Operating System, and device type

100

Days to launch MVP

82%

Containment rate within AskIT

1.1M

AskIT sessions since global launch

~79%

Reduction in IT Support operating budget

90%

CSAT Score

~\$18M

IT Support cost reduction

56%

IT Support ticket reduction from 2023 to 2024

~86%

Of IBMers have used AskIT since global launch

514

Intents in AskIT

# IBM Case Study: AI driven Client Support transformation



# Our Client Support Journey with watsonx

## Landscape

235k+

Current Users across  
CSP/ISC/Partners

2.9M+

Support cases per year

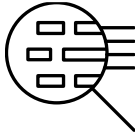
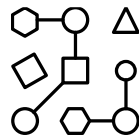
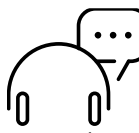



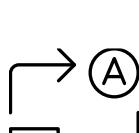
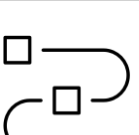
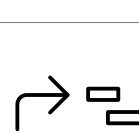
100%

Support cases assisted  
by **watsonx** each year

60k+

webpages using Unified  
Chat framework supporting  
**20K** conversations/month

## Challenge

Summarize cases upon specific case events for Support Teams		watsonx.ai
Eliminate repetitive, redundant work for Support Professionals		Intelligent Automation
Require a cognitive, sophisticated self-service experience		watsonx Assistant
Obtain a consistent, high quality problem description		Question Assistant
Accurately predict best suited Support Professional to solve a case		Cognitive Routing
Maximize time spent on cases to improve TTR and NPS		Cognitive Case Prioritization
Expedite response for non-English speaking clients		Watson Language Translation
Deliver actionable case insights into the hands of Support Professionals		Watson Discovery
Bypass remote technical support with known field service action plans		Automated Work Order Action Plans

## Solution

## Business Outcomes

15k

Monthly hours saved by  
Cognitive Routing

323k

Cases deflected/assisted  
with **watsonx**

1.53M

Hours saved in 2023  
across CSP/ISC/Partners


>309K


Hours saved with case  
summarization (YTD)




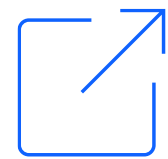
# IBM AskProcurement

A conversational agent that delivers timely insights to sourcing professionals and executives

- 

Answers frequently asked questions and performs routine supplier compliance checks
- 

Answers on contract, PO and invoice status, balance of trade, and sourcing events
- 

Consolidating multiple systems onto one conversational experience
- 

Leveraging low code, conversational AI and automation to fast-track development

## One

Data location from dozens of systems

## Anytime

Insights without waiting for experts

## Automated

Reporting through an easy user experience

# The continuum of AI Agents

Fixed Flow – Human Led

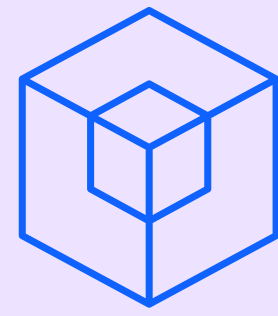
Hybrid – AI Augment

AI-Led



## Chatbots

- Rules based
- Deterministic
- Preprogrammed



## Virtual Assistants

- NLU powered
- Intent recognition
- ML and DL techniques
- Human created responses



## AI Assistants + Automation

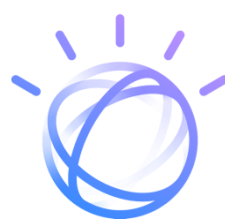
- Conversational AI: LLM powered intent recognition
- Knowledge grounded Q&A (RAG)
- Call Gen AI tools (entity extraction, document processing)
- AI Augmented Workflows (Intelligent Automation)
- Connect to Enterprise Apps
- Unify Assistant Experience with LLM-Powered routing



## AI Agents

- AI Orchestrator Agent (LLM) can reason, plan, and execute on a given task or problem
- Connected to multiple agents, assistants, data, tools and applications
- Understands Complex multi-threaded problems
- Autonomous action taking, self-correcting and self-reasoning
- Conversational or Non-Conversational

# watsonx Orchestrate as an Orchestrator Agent



watsonx Orchestrate

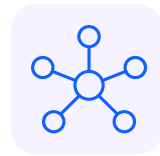
LLM powered  
Orchestrator Agent



Routing



Disambiguation



Tool calling



Planning



Reasoning

## Tools & Connectors



Connector Agents



Knowledge (Documents)



Data Sources (SQL, etc.)



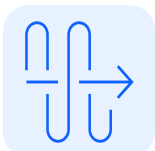
Pro-Code Tools



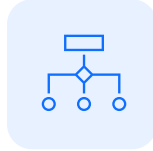
API Skills



Web Search



Business Automation Skills



Actions and Dialog Flows

## Expert AI Agents



Custom Built Agents on watsonx Orchestrate  
Low Code



External Agents  
Langchain, Copilot, 3rd Party, crewai open source



Custom Built Agents on watsonx.ai  
Pro-Code



Pre-Built Agents on watsonx Orchestrate  
Customize

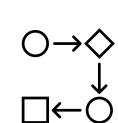


HR Agent  
IBM Pre-Built Domain Agent for HR

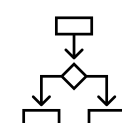


Sales Agent  
IBM Pre-Built Domain Agent for Sales

## Fixed Flow Assistant / Automation Builder



Workflows  
Model business processes within workflows



Decision  
Automate business decisions with rules & decision tables



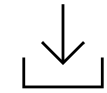
Document extraction  
Define gen AI prompts to extract info from documents



Conversational Flow  
Build AI augments and deterministic conversational flows



Generative AI  
Analyze or create contextual content



Existing Tools  
Import / Connect to existing tools and Automations



Pre-Built Tools  
IBM pre-built integrations and automations



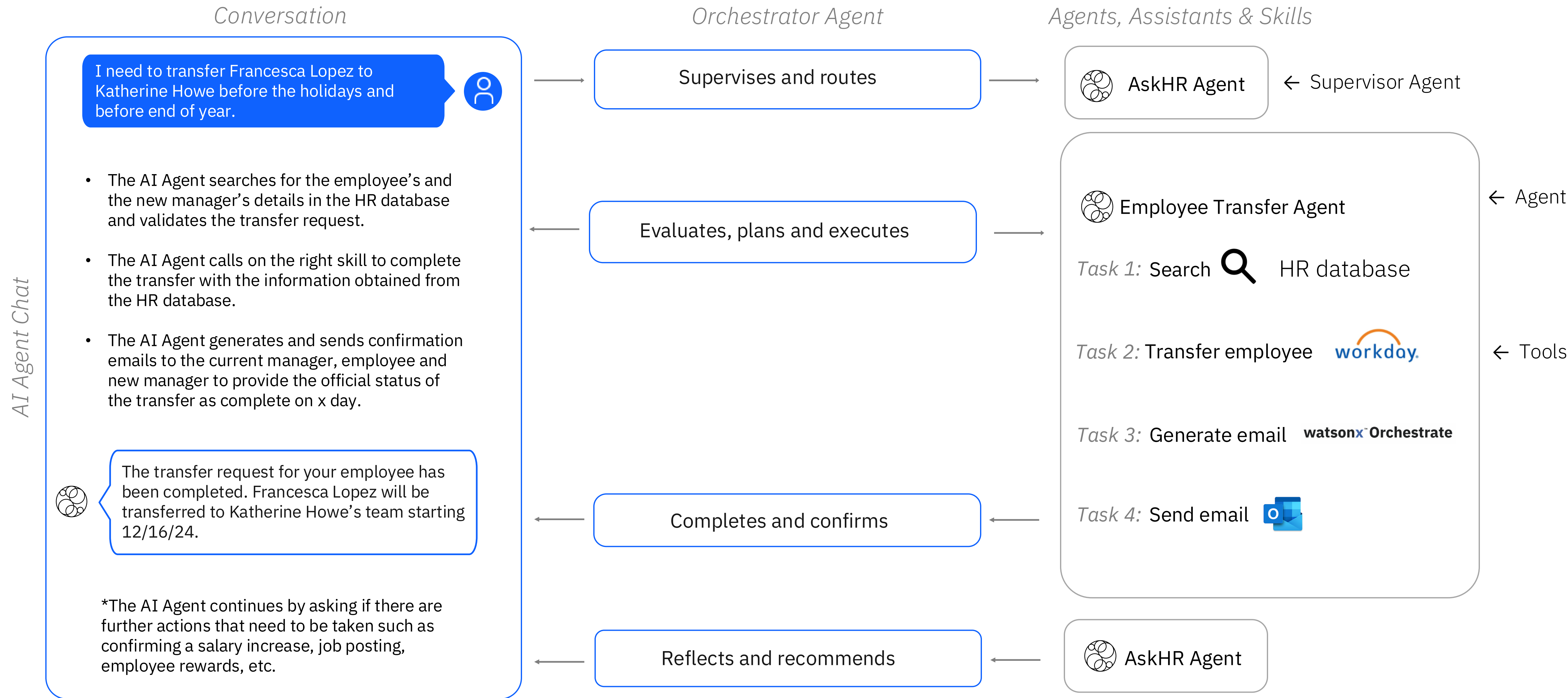
Knowledge Search  
Resolve Common domain specific FAQs

## Pre-Built tools & Integrations



# Example Task → Transfer an Employee

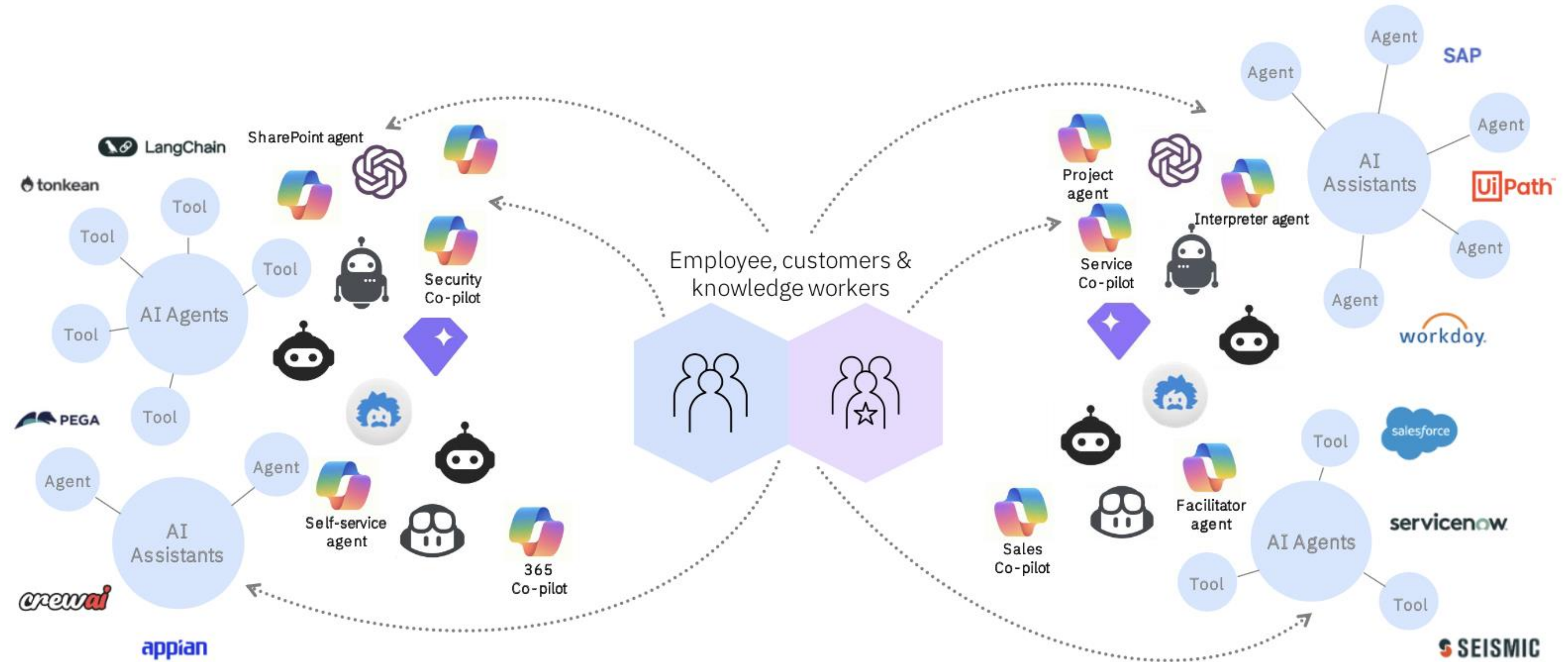
*AI Agent:* Orchestrator Agent navigates task on behalf of the user





# AI Agents are going to be everywhere increasing complexity

- Agents and assistants will quickly proliferate making them difficult to maintain and create a fragmented user experience
- Agents are often siloed within their functions and applications which will lead to vertical build vs horizontal orchestration
- Organizations have already made investments in automation and assistants and need to be able to leverage them



# watsonx Orchestrate → Build, accelerate and manage enterprise Agents

## Build

Custom designed assistants, agents and tools

Design, deploy, and manage AI agents, assistants & automations with ease using pro-code and low-code options

## Manage

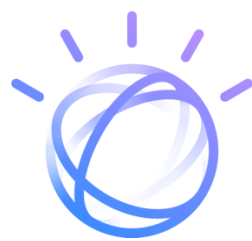
Multi-agent orchestration & AgentOps

Leverage Multi-Agent Orchestration to deploy and manage any agent for any task within a simple and unified user experience optimized to scale.

## Accelerate

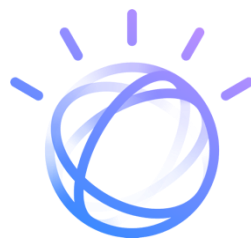
Pre-built agents & Agent Catalog

Get started quickly with pre-built AI agents powered with business logic and seamless integration to the tools that power your business.



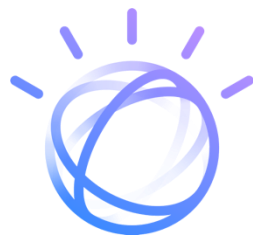
Custom Built Agents on watsonx Orchestrate

No/Low Code



Custom Built Agents on Orchestrate ADK or watsonx.ai

Pro-Code



Multi-Agent Orchestrator

Multi-agent, multi-tool supervisor, router, and planner



External and 3<sup>rd</sup> party Agents

Langchain, Copilot, 3<sup>rd</sup> Party, crewai open source



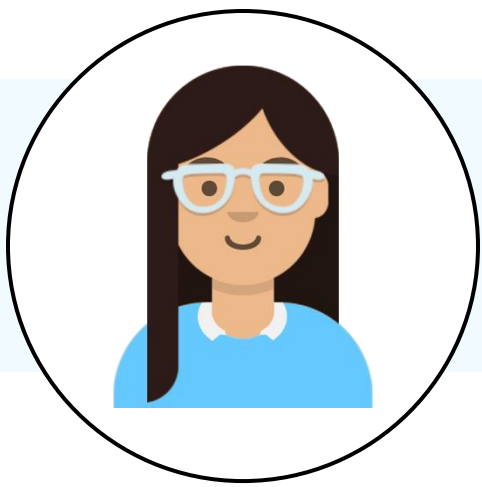
Pre-Built Agents on watsonx Orchestrate

Customize



IBM Agent Catalog IBM & 3<sup>rd</sup> Party

Customize



## Meet Sarah, a Financial Analyst

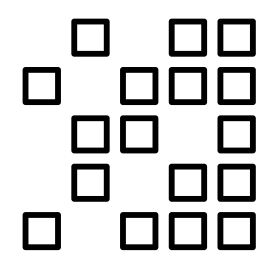
Sarah is a Financial Analyst at Marriott, responsible for analyzing financial data, forecasting revenue, and providing insights to support strategic business decisions. Her role involves working with complex financial data, identifying trends, and predicting future financial performance.

Before the integration of watsonx for Finance and Enterprise, Sarah faced several challenges:



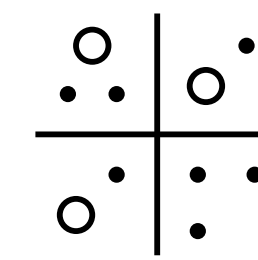
### Manual Forecasting

Creating detailed financial forecasts was a time-consuming process, requiring manual aggregation and analysis of data from various sources.



### Siloed insights

Traditional forecasting methods often failed to capture the full complexity of financial data, leading to less accurate predictions and a lack of deep insights into revenue drivers.

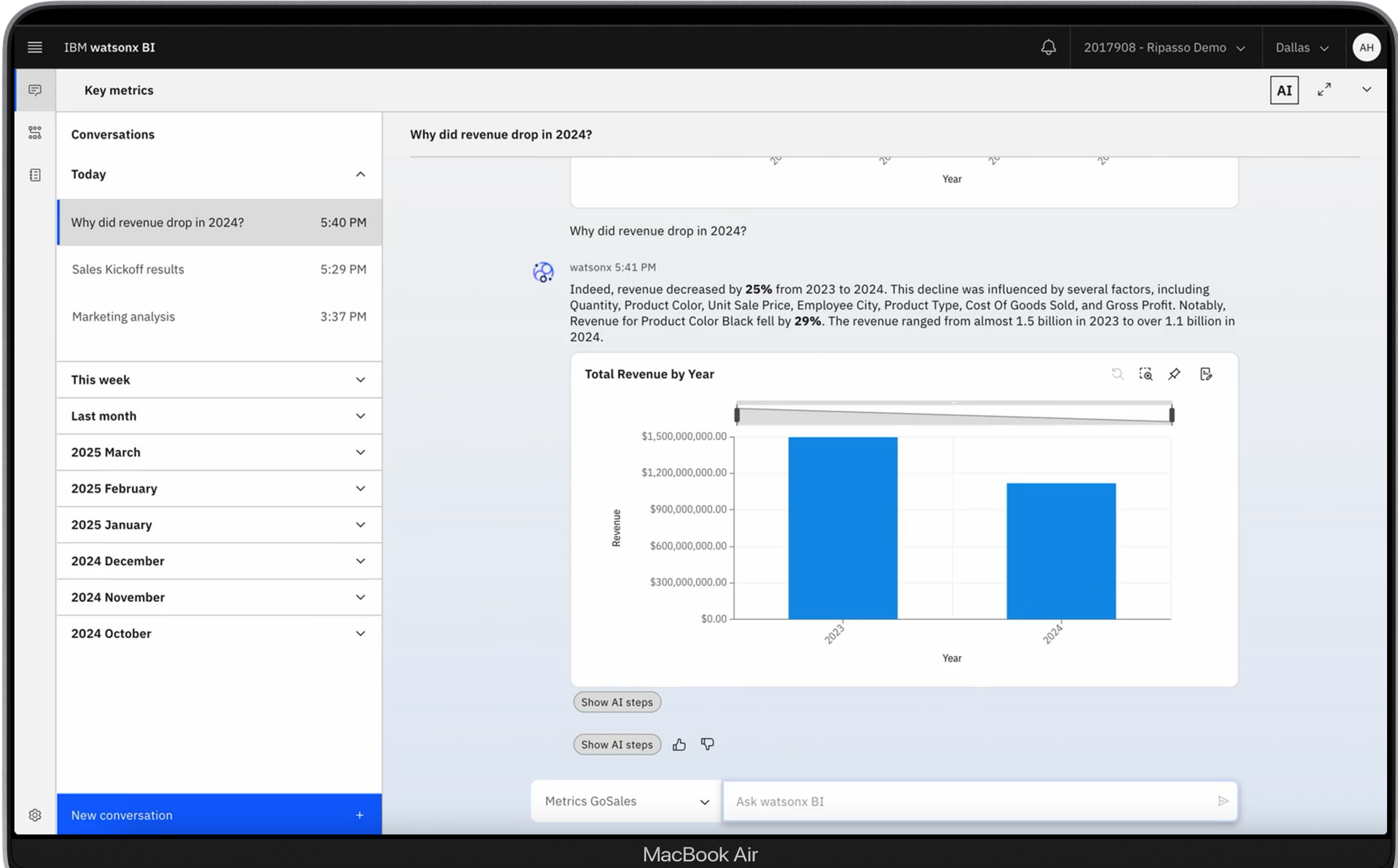


### Data overload

Managing and interpreting large datasets was cumbersome, making it difficult to identify key trends and anomalies.



# Data Inquiry

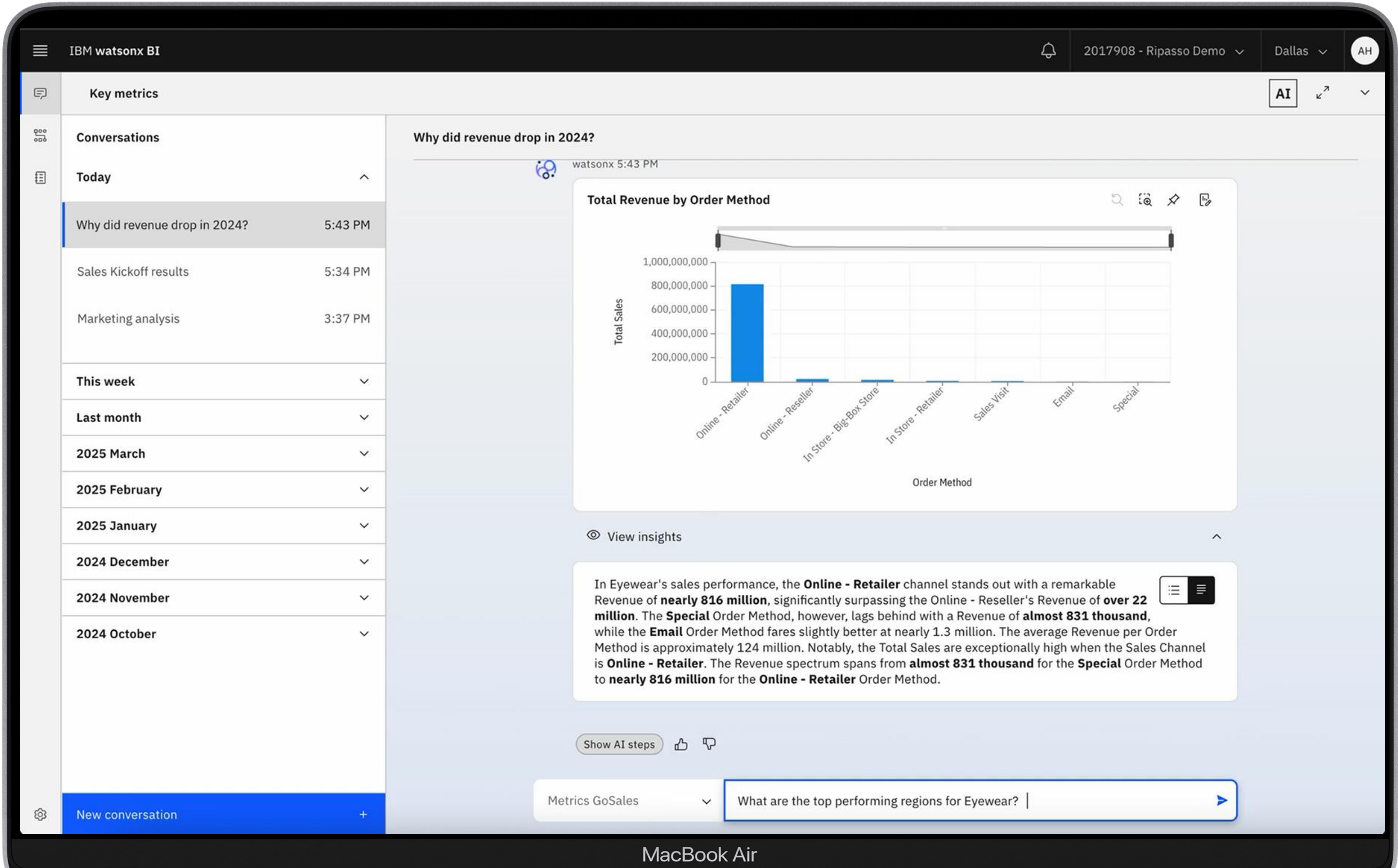


Remove the complexity from analytics and get contextual answers to your business questions.

Trust the insights with progressive disclosure that clearly shows how answers are reached.

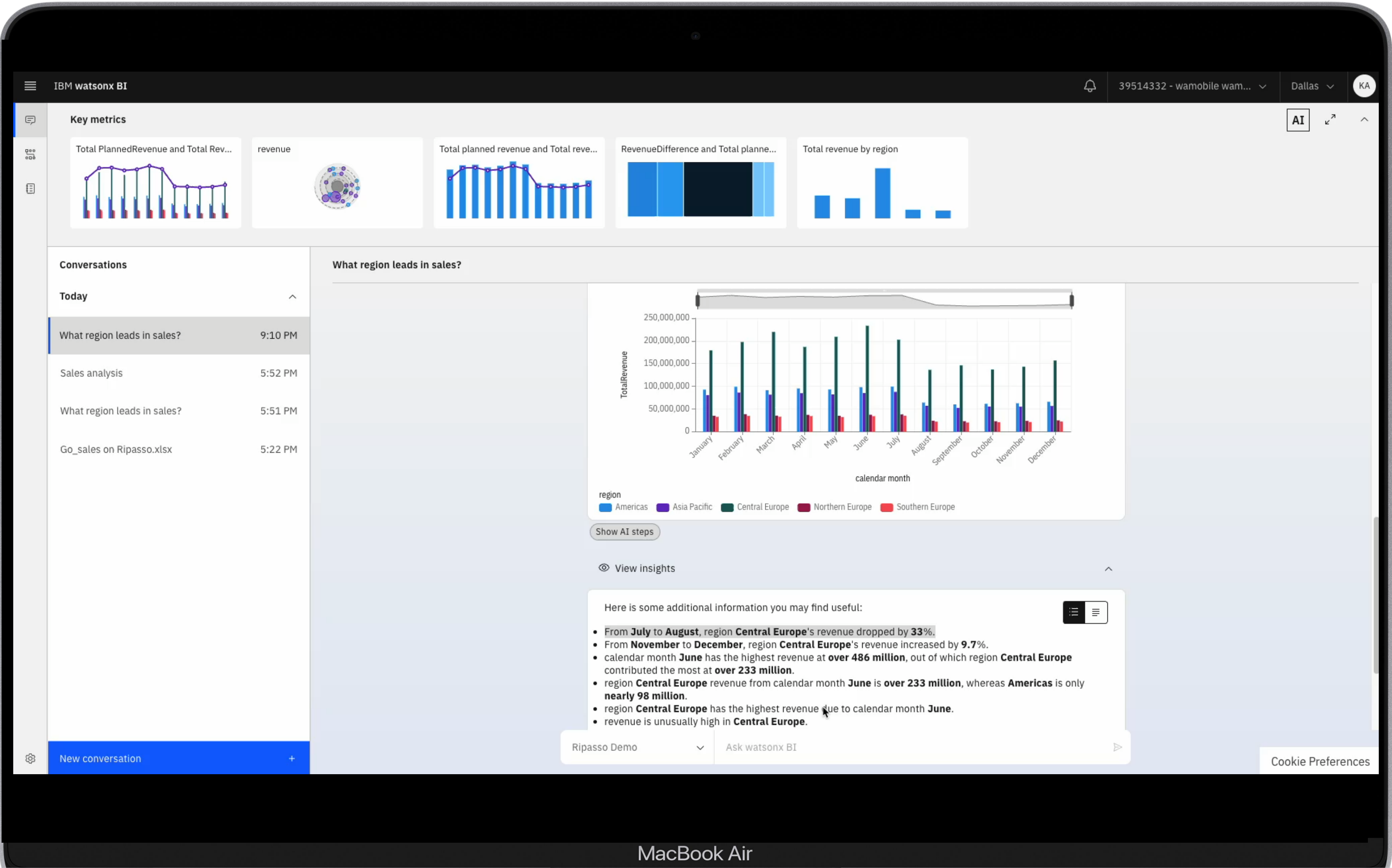


# Confidence and Traceability



Eliminate confusion with simple disambiguation to not only know where the data is coming from but also make changes.

# AI Driven Analytics



Gain insights from all data that not only tells you what happened, but also why it happened, what will happen, and what you can do.



# Contract Analysis: Automation and Insight through AI



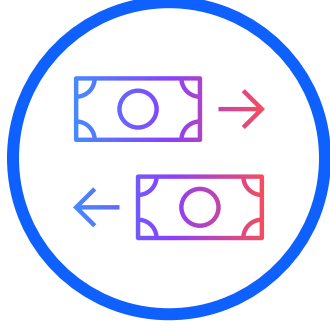
**Accounting**  
*Contract review and analysis*



**Tax**  
*Tax Compliance and invoice validation*



**Corporate Development**  
*Client contract due diligence*



**Quote-to-Cash**  
*Contract language analysis*



**Procurement**  
*Vendor onboarding and analysis*

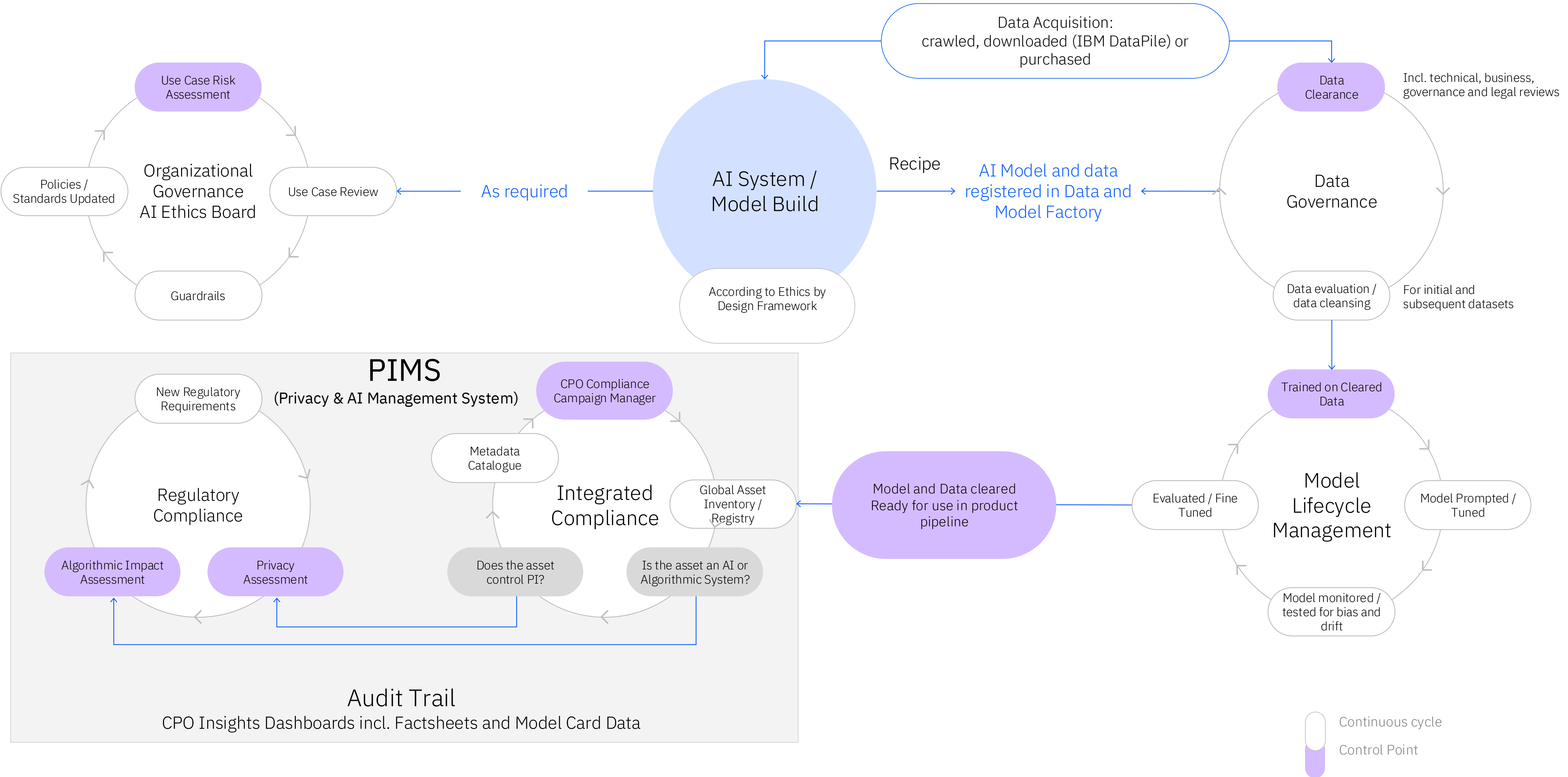


**Legal**  
*Risk analytics and negotiations*

The background of the slide features several thick, curved, overlapping lines in shades of purple, blue, and white, creating a sense of depth and movement. The lines sweep across the frame from the bottom left towards the top right.

**watsonx™**

# Integrated Governance Program Operating Model

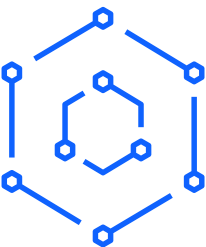


# Build an AI Agent in a Day with IBM watsonx

Recommended for: CIOs, CTOs, IT leaders, and other technology execs

Join us for an interactive half-day workshop and leave with your own custom agent to kickstart your enterprise transformation

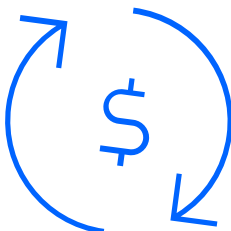
## What will you get from this session?



A prototype of an **AI agent** built in a controlled IBM environment accelerated with our prebuilt tools



**Prioritized use cases** that deliver the most impact for your business, leveraging the tools your enterprise already uses today

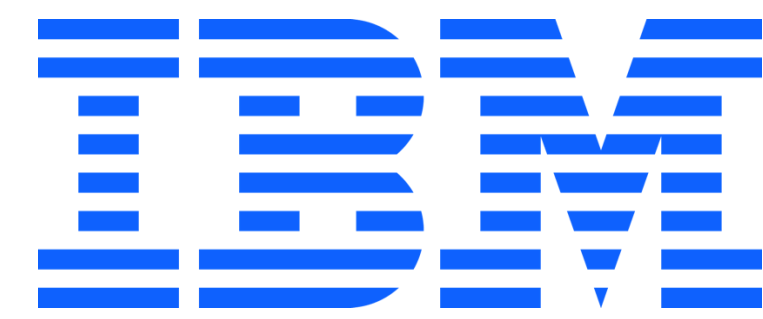


A high-level **Business Value and ROI Assessment** for your selected use cases

## What do you need to bring?

- Exported documents that can be used to create Q&A responses in your agent. Think IT policy documents, employee guides, how-to materials – anything your employees would prefer to not sort through themselves
  - Acceptable formats: PDF and docx
- [Recommended] For Business Value Assessment, data points like ticket volume, Mean Time to Resolution (MTTR), common areas or topics of tickets, size of IT team, current vendors and spend, etc.
- Working list of biggest pain points for employees, managers, and IT professionals







watsonx

# IBM's AI Platform Explained

watsonx Orchestrate,  
where rubber meets road  
Open agent platform, unifying pre-built,  
custom and domain agents

Stay on track with watsonx.governance  
Direct, manage, and monitor business AI activities

Fuel = watsonx.data

A hybrid, open data lakehouse that combines the  
benefits of data lakes and data warehouses

Engine – watsonx.ai

Train, validate, tune, and deploy models to power  
enterprise AI activity

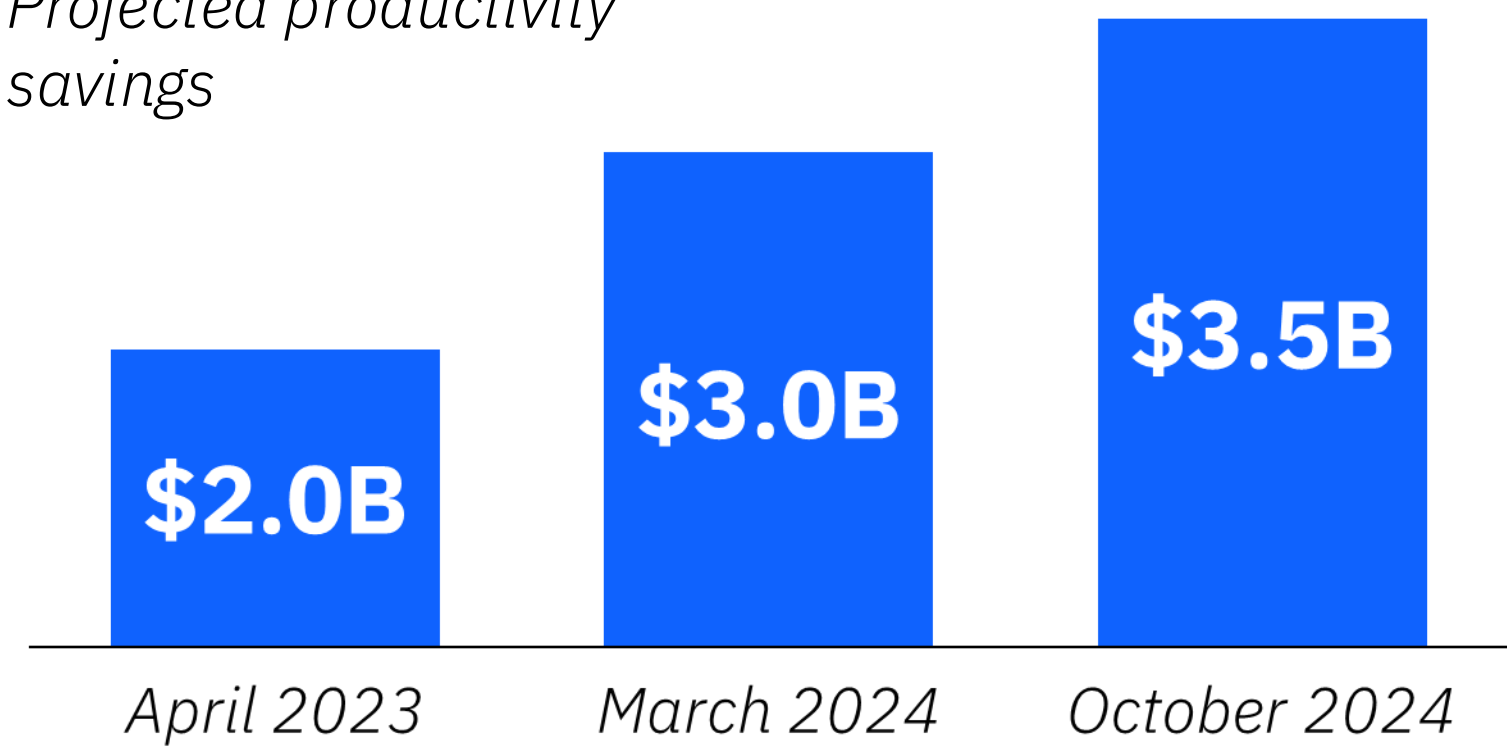




# Productivity fuels investment, revenue growth, margin expansion, and FCF



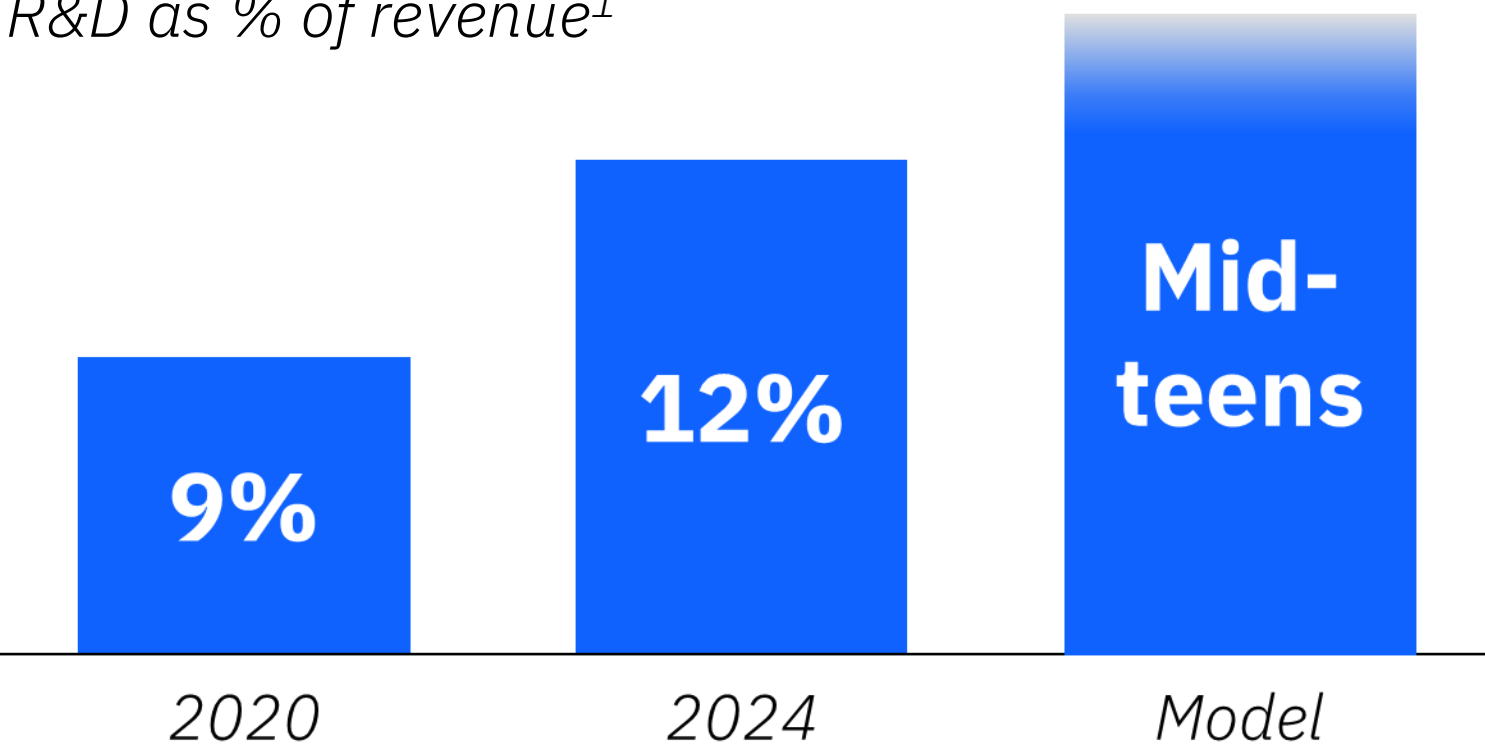
Projected productivity savings



- >\$1B reduction in vendor spend
- ~\$2B reduction in enterprise operations spend
- ~50% increase in enterprise operations productivity

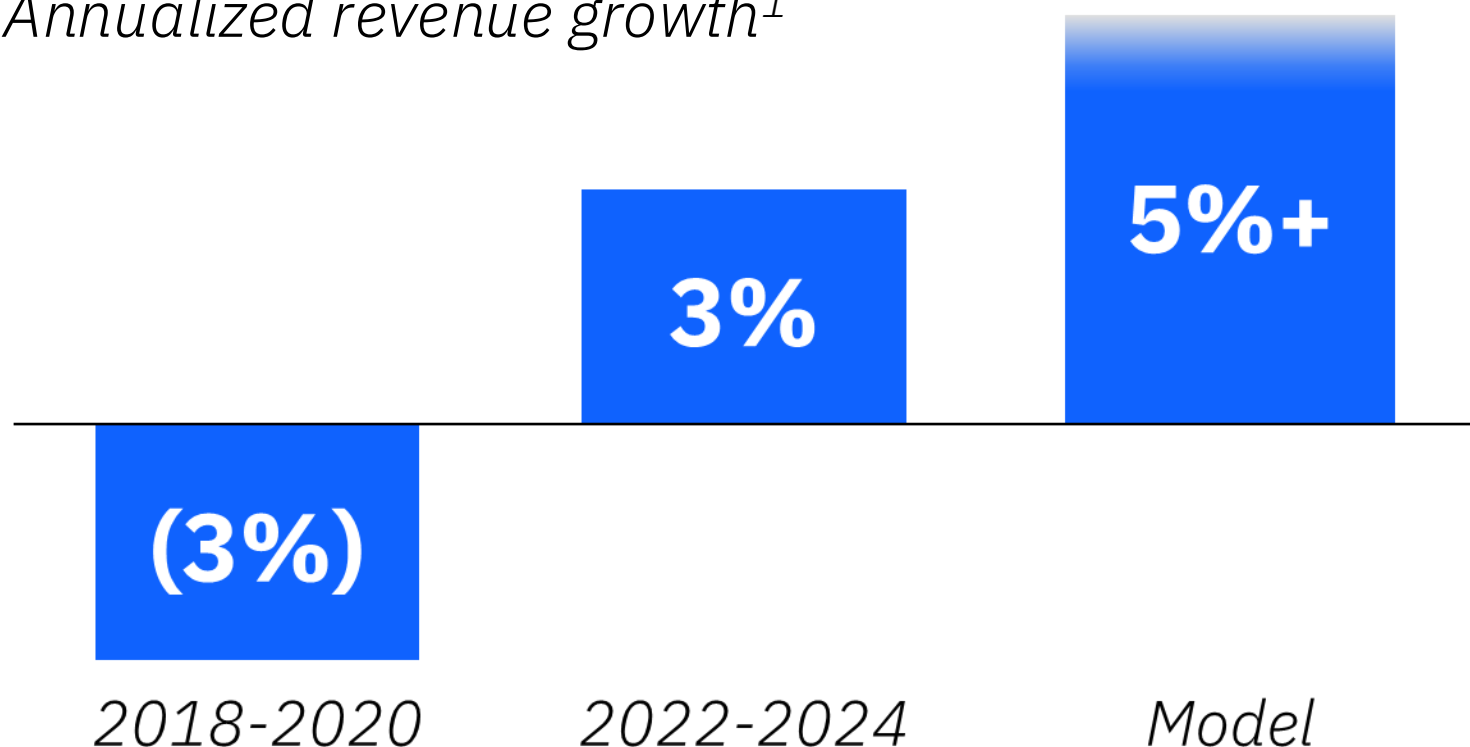
Included in \$3.5B exit run rate, achieved in 2024

R&D as % of revenue<sup>1</sup>



- Focused R&D spend in Hybrid Cloud and AI solutions, IBM Z, Quantum, and advanced semiconductor research
- Increased GTM investment in ecosystem and technical sales
- Invested \$18B in 31 acquisitions to extend Hybrid Cloud and AI leadership<sup>2</sup>

Annualized revenue growth<sup>1</sup>



- +2pts expansion in Operating PTI margin<sup>3</sup>
- \$3.5B increase in free cash flow<sup>3</sup>; achieved highest reported free cash flow margin in history, in 2024
- Model for high single digits FCF growth and ~1pt per year PTI margin expansion

(1) Data as reported in each referenced years' 10-K

(2) Represents acquisitions from 2022 – 1Q'25

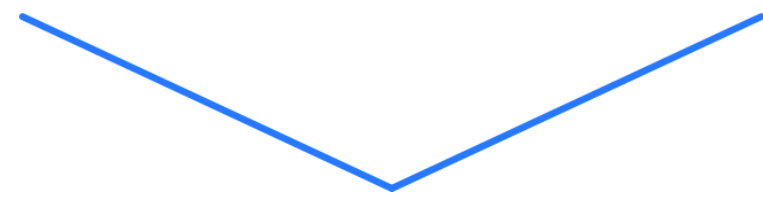
(3) Represents data from 2022 – 2024

For reconciliation of non-GAAP measures, refer to notes 1, 2, 3, 5, 12, 13 from IBM's 2025 Investor Day

# Solving enterprise pain points has accelerated IBM's AI adoption...

## Data

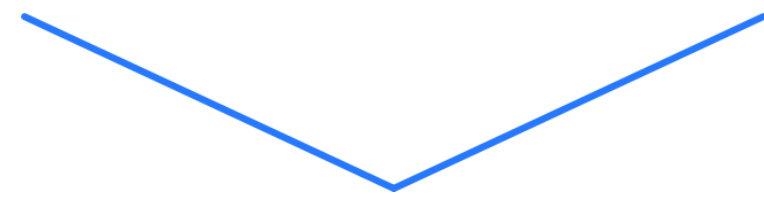
Data was scattered and generally not shared or integrated



Now governed, secured, and integrated, providing single source of truth and an enterprise foundation for AI

## Workflow

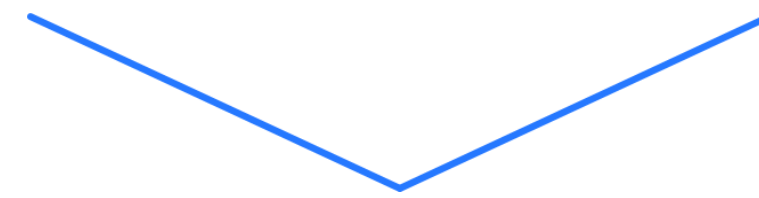
Workflows were vertically siloed across functions and geographies



Implemented simplified horizontal workflows that move across silos

## Technology

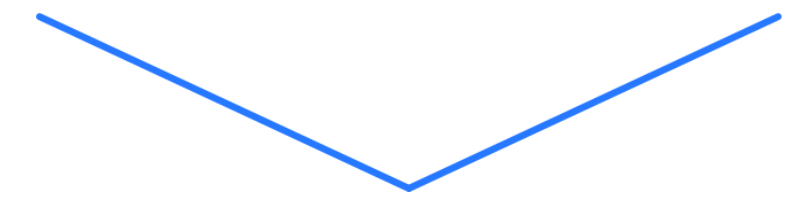
Business complexity led to ad-hoc point solutions and application sprawl



Moved IBM workloads to Hybrid Cloud and strategic partner platforms

## Cost / Value

Spend and impact across organizations were difficult to track



Shift to value generation with aligned, managed and optimized cost transparency, enabling significant ROI

# AI is driving productivity across our business

## HR support

11.5M

Employee interactions

94%

Inquiries resolved  
by AskHR

## IT support

100

Days to build and deploy  
AskIT from scratch

74%

Deflection rate  
since launch

## Financial planning & analysis

300TB

Of integrated  
enterprise data

40%

Productivity gains  
in FP&A

## Pricing analytics

>70%

Of bids are no/low touch

\$100M+

Revenue uplift driven by  
optimal price and  
accelerated cycle time

# HR Help Desk: IBM AskHR

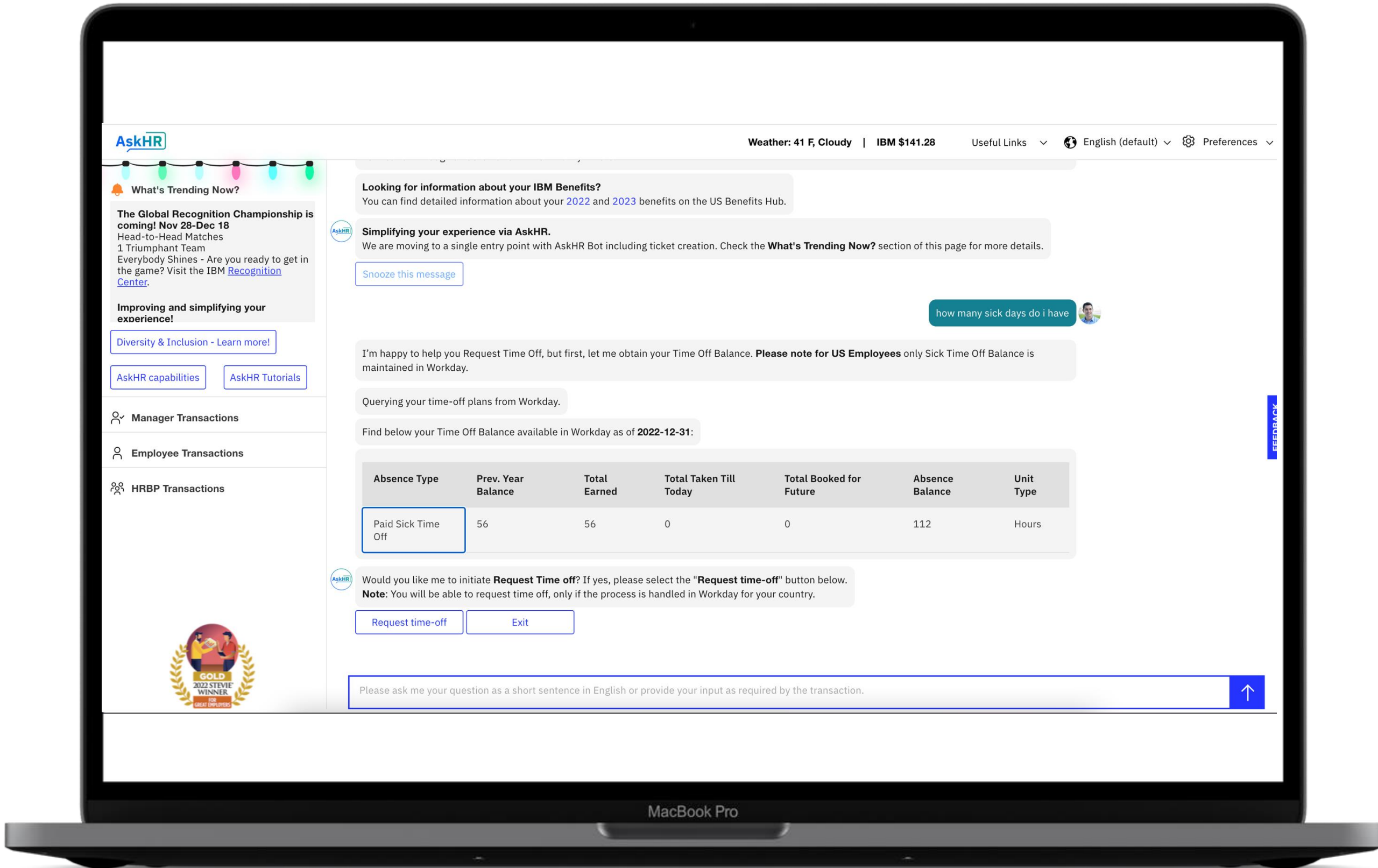
Allow a seamless experience for employees and empower HR professionals to focus on higher value tasks

## Opportunity

Create a single digital experience for all employees to access relevant and personalized information, and complete automated tasks across multiple systems

## Solution Overview

- *Interactive:* Accessible through multiple channels including intranet, Slack, and Mobile
- *Personalized:* Includes News and Updates, country-specific responses and 80+ Automated tasks e.g. Employee Transfer, Time-off, Compensation Planning
- *Integrated:* Access 4700+ policy pages and 2700+ FAQs, Integrated with SAP Success Factors, Concur, Weather Channel, Zendesk



11M	1.1M	40%	94%	+55	75%	96%	94%	+2
Yearly interactions → +1M YoY	Automated tasks → +42.5% volume YoY	Reduction in HR Operating Budget	Employee inquiries handled by AskHR	Improvement in HR NPS Score from +19 → +74	Improvement in speed of transaction execution (\$5M+ in productivity)	Manager Adoption	Executive Adoption	Increase in HR employee 'level'



# Sales Support: IBM AskSales

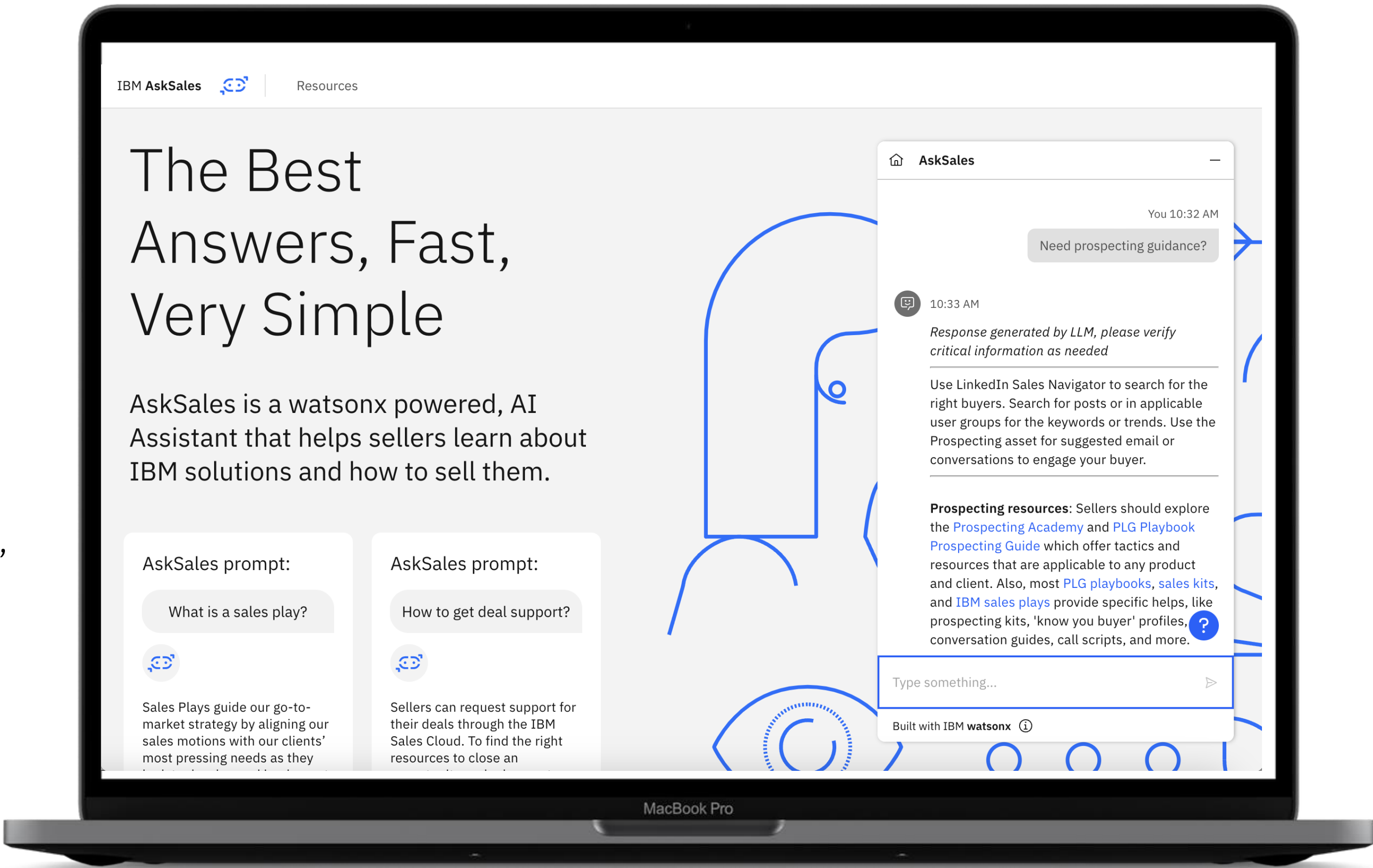
Streamline sales with AI driven insights, tailored recommendations and automated outreach

## Opportunity

Create a unified experience with watsonx to enable sellers to focus on high-value activities, increase productivity, and drive revenue growth, while reducing errors and inefficiencies

## Solution Overview

- *Account Planning & Prospecting Support:* Competitive analysis, relevant product recommendations, summarized industry trends, drafting outreach messages, and more
- *Sales Enablement:* Empower sellers with key selling points, comparative capability summaries, and digital assets
- *Integrated:* Provide a unified, omni-channel, proactive user experience through horizontal data integration, connecting multiple sources like Salesforce, Salesloft, and Seismic



19K

Sellers supported

70%

Reduction in time spent on repetitive sales tasks

2x

number of scheduled meeting with customers

18K

Estimated hours saved each month for sellers

75%

Positive feedback rate from users

2.5x

Month to month adoption after first 6 months

35%

Improvement in quality of personalized output

# Digital IT Support transformation powered by AskIT

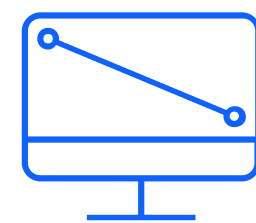
## Outcomes (2023 to 2024)

~79%

- IT Support labor reduced
- IT Support Advisor to employee ratio increased from 1:891 to 1:4248

~\$18M

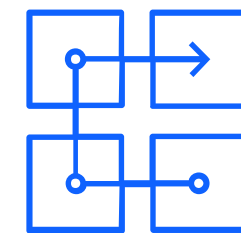
- IT Support cost reduced



### Eliminate

top support call drivers

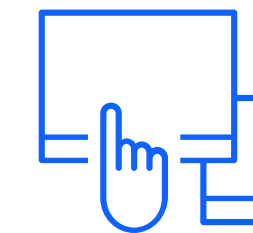
- 514 intents now in AskIT
- IT Support tickets down 56% from 2023-2024



### Simplify

end-to-end support

- AskIT triage and resolution
- Phone lines no longer needed
- Human chat support 24 x 7 for complex issues



### Automate

manual tasks

- Mac Recovery Key automated for end user
- Device compliance check
- Device upgrade eligibility
- Support ticket creation

## Phase 1 *Better than benchmark*

### Consolidate, Standardize

- Support content silos consolidated into w3 IT Support
- ServiceNow migration for strategic content and ticketing

## Phase 2

### AskIT IT Support Front Door

- Strategic tool implementation
- Automate top call drivers preventing help desk contacts
- Sunset phone lines to drive AskIT front end with 24 x 7 human chat support as back-up
- Executive IT Support reimagined

## Phase 3 - Today

CSAT - 90%  
Chat Quality - 96%

### 80% Automation for Support

- Eliminated 80% of support queries being handled through to the Help Desk
- Automate further with Watsonx Orchestrate conversations
- Eliminate simple tasks like password resets and certificate **simplify** resolution steps like Mac recovery Key

## Our Journey Forward

### Enhancements & Reimagined ThinkDesk

- Guided resolution beyond keyword intents
- Device telemetry for proactive support
- IT Support data for more productivity insights
- Reimagined ThinkDesk experience powered by AskIT to triage and offer on site appointment if IT Advisor needed (piloting at selected sites)
- Emergency device loaner via on site lockers & emergency IT peripherals at pilot sites

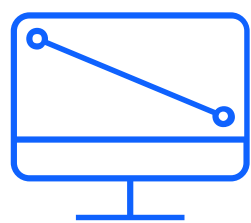


# Using an AI First data driven approach, we reimagined IBM Procurement

Outcomes

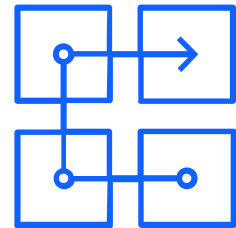
**~20%**  
Labor Cost Reduction YoY

**~\$2B**  
Vendor Spend Reduction



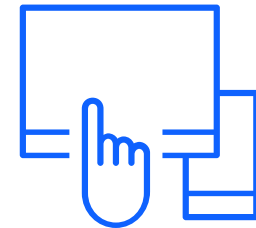
**Eliminate**  
operating complexity

- 40+ systems to 1 business data view
- Right sized roles and activities



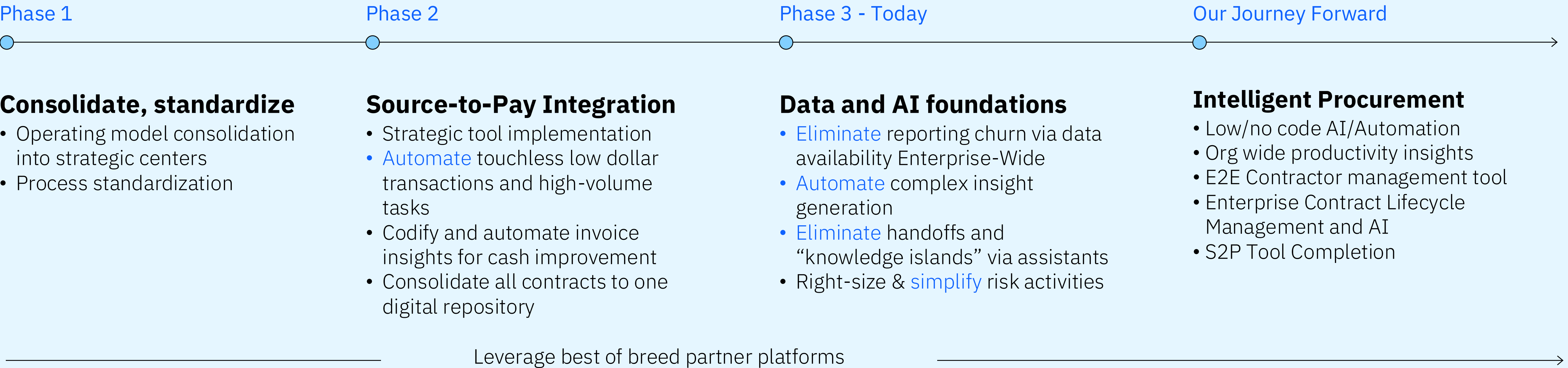
**Simplify**  
end-to-end workflows

- Reducing redundant handoffs
- Transparency and Self service for all stakeholders



**Automate**  
manual tasks

- Automating manual reporting and analysis
- Repetitive and/or high churn tasks and Q&A's



# “Touchless” Financial Forecasting with **watsonx**

## What is it?

IBM’s Finance team has transformed their P&L forecast process with machine learning and AI, powered by watsonx.

Integrated with EPM, Touchless Forecasting ingests IBM’s proprietary financial data and **instantly generates highly accurate financial forecasts** that analysts can react to and edit in IBM Planning Analytics.

49

The Touchless Forecasting Explainability Assistant, powered by watsonx, allows analysts to converse in get instant **natural language responses on questions around how or why the model predicted a particular value** so they can confidently complete their work. As a result, analysts focus on higher value work.

## How does it work?

High level product architecture:

- Enterprise Performance Management (EPM) as trusted integrated data platform
- EPM data flows into proprietary data science pipelines that generate more than 120K individual revenue and expense forecast values each month
- Predictive forecast data is instantly populated in IBM Planning Analytics, where analysts review and adjust as needed
- In parallel, forecast data is fed to a GenAI model that is pretrained to answer a wide variety of questions in natural language about the modeled forecast, powered by watsonx

## What results have we seen?

# 95-99%

Accuracy of generated baseline forecasts

# 50%

Estimated reduction in forecasting effort

# 65%+

Forecast accuracy improvement

# 120K

Unique data points generated each month through our touchless pipelines

# Competitive Market Analysis with **watsonx**

## What is it?

IBM Finance is leveraging watsonx to gain real-time insights into competitive markets.

Our IBM Competitive Market Analysis solution uses watsonx.ai generative AI capabilities to **quickly ingest, analyze, and summarize a broad range of materials including earnings releases and transcripts** in a format that is easily digestible by finance leaders.

50

As a result, IBM can continuously track entire markets to identify spending expectations and changes in trajectory; segment opportunity by geography, industry, and type of service; and gain insights on emerging trends in real time.

## How does it work?

High level product architecture:

- Text-based data including earnings transcripts and analyst reports are ingested, transformed, and stored in a vector database
- Pretrained LLMs have been prompt-tuned to extract, analyze, and summarize the extensive data set to the most important facts
- Retrieval Augmented Generation (RAG) identifies the original documents and locations that the information was extracted from for cross-referencing and verification.

## What results have we seen?

# 30+

Companies' earnings reports and transcripts analyzed (and growing)

# 75%

Reduction in research and analysis effort

# 10x

Increase in coverage of competitor reports

# Journal automation with **watsonx**

## What is it?

IBM Finance is leveraging a GenAI-powered chat platform to **streamline journal entry automation**. The platform emphasizes self-service and guided support and integrates into CP4BA and Apptio **for insights and analysis** of journal entries.

The journal process is currently highly manual and repetitive, handling large volumes of data from multiple sources.

51

watsonx orchestrate now empowers analysts to transform these manual tasks into automated workflows using simple natural language commands. This approach gives them greater control, enabling analysts to build, adjust, and deploy automation themselves, increasing efficiency and reducing the dependency on IT resources.

## How does it work?

High level product architecture:

- Apptio assists with managing journal volumes in IT environments, especially tracking, analyzing, and optimizing costs and resources.
- Business Automation Workflow (BAW) is the interface with an embedded chatbot powered by watsonx.
- User responses are captured through the GenAI-enabled watsonx orchestrate platform and translated into RPA commands, enabling the configuration of unique, customized automation workflows.
- Monthly, IBM RPA executes the specified commands, handling tasks from IBM DB2 data extraction and calculations to submissions within ERP systems such as GLUI NG and SAP.

## What results have we seen?

>60K

Yearly volume of total journals

>90%

Cycle time improvement for journal processes

24/7

Instructional AI Assistant for journal configuration

AWS: Competing in the age of AI





# Competing in the age of AI

Mary Strain

Artificial Intelligence and Machine  
Learning Strategist, Public Sector  
AWS



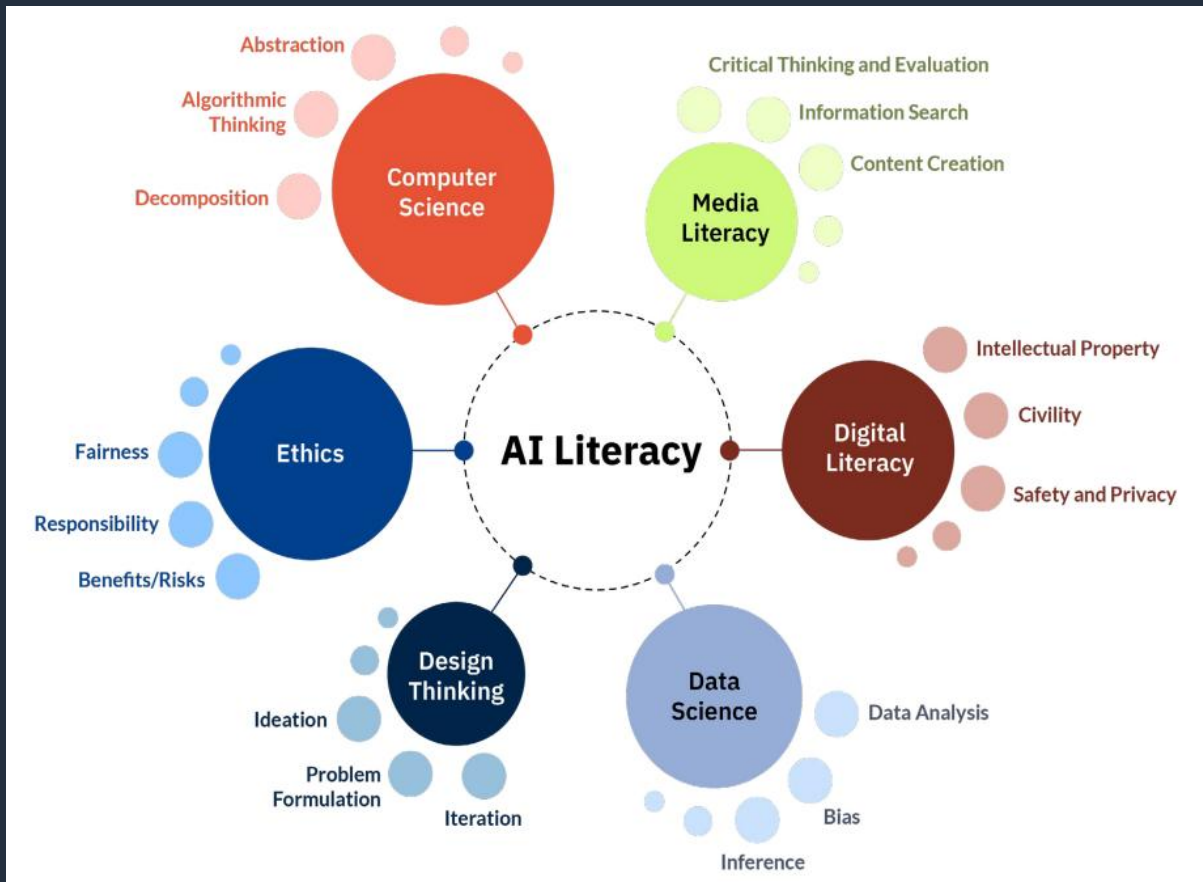
***“AI Literacy represents the technical knowledge, durable skills and future ready attitudes required to thrive in a world influenced by AI. It enables learners to engage, create with, manage and design AI, while critically evaluating its benefits, risks, and ethical implications ”***

**EU AI Act, OCED, UNESCO and other organizations**

Teach AI Skills Framework

# Emerging skills and competency frameworks

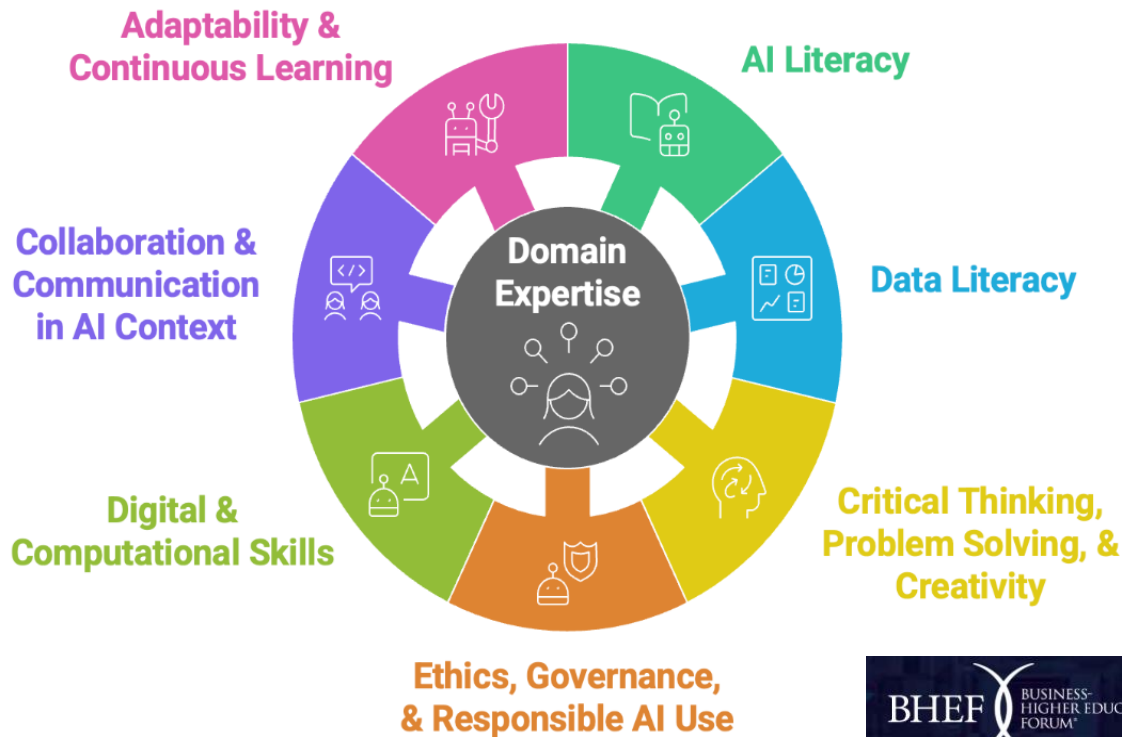
# Teach AI Framework: K-12





# Competency Framework: Higher Ed and Workforce

Source: Business-Higher Education Forum



# Opportunities and incentives



# Current Approaches to a competitive workforce

## Internal training

- Tiered training
- Executive- strategy, responsible AI, risk management
  - Managers – redesign workflows and integrate AI into teams
  - Frontline – hands on use of chatbots, Using natural language (NL) to engage analytics

## Partnerships

- Support from tech partners
- Certifications, creating sandboxes, immersion days and labs
- Deeper technical skills and applied learning

## Incentives

- Internal credentialing; digital badges
- Making AI part of KPIs for performance reviews
- Career pathways aligned to AI

# How AWS is driving AI adoption and innovation

## Strategies

Training and Certification programs

Learning/leadership tracks

Senior leadership signals Free internal tooling; sandboxes

Embedding AI into workflows

## Metrics

Ticket request volume reduction

Onboarding time

Measuring cost savings/time

Tracking increased use of knowledge bases

Internal surveys

Competitions and recognition





# Micro-Credentialing Example

## What is the AAAI Micro-Credential?

SDSU's Academic Applications of AI (AAAI) Micro-Credential prepares you to apply generative AI technology efficiently, effectively, and ethically to level up learning – which is at the heart of SDSU's mission.



Topics covered include: Overview: How Does AI Work? Ethics & Responsible Use; What Can AI Do? Finding Apps; Prompt Engineering Activities.

# Kentucky Leadership



# Kentucky: AI for All Credential

Free foundational AI literacy course

Accessible content  
Focused on responsible AI,  
foundational tech and AI  
stewardship

State endorsed digital credential

Recommended pathways for  
additional learning through  
higher ed, workforce and private  
offerings

KPI for students and employees



# Appendix





# Foundations of an AI Ready Organization

## YOUR APPLICATIONS



Internal productivity



Domain Transformation



AI enhanced analytics

## MODELS AND TOOLS TO BUILD GENERATIVE AI APPS



Amazon Bedrock  
Models



Agents, Knowledge  
Base, Data Automation;  
Quicksight



GenAI Data  
preparation and  
enrichment

## FOUNDATIONAL INFRASTRUCTURE



Accessible and holistic  
Data



AI Governance



Storage

# Generative AI use cases

TIME TO VALUE



## DATA PREPARATION

DATA MAPPING

DATA RELATIONSHIP

META DATA CREATION

DEVELOPER PRODUCTIVITY

DATA MODERNIZATION

## INTERNAL TRANSFORMATION

FINANCE/HR/OPERATIONS

PROCUREMENT

COMPLIANCE AND LEGAL

EFFICIENT PROCESSES

PROCESS AND REVIEW

SECURITY

## MARKET TRANSFORMATION

CONSTITUTENT

ENGAGEMENT

AI ENHANCED ASSESSMENT

PERSONALIZED

EXPERIENCES

DATA AUTOMATION

# AI Assisted Financial Aid: Highline College

Quicker and more transparent way for constituents to access their information—anywhere and anytime.

Drastically reduced the manual burden on the financial aid department,

lowered the number of emails, calls, and visits about an applicant's status by 75%



# Transcript Processing: Illinois Tech

60,000 pages of international academic transcripts required review annually.

Converting international grades to US equivalents

Enhancing the user interface to visualize extracted information

Integrating insights with the university's CRM system for quicker academic data handling and reduced manual labor

Providing multilingual support for international students





# PDF Accessibility: The Ohio State University

A scalable GenAI powered solution that can quickly and efficiently bring parts of its collection into compliance with WCAG 2.1 Level AA standards



# The case for AI in the public sector

## AI PROACTIVELY SUPPORTS

- 1 **Engagement** across the stakeholder experience cycle and beyond
- 2 **Access** can minimize affective filters for seeking assistance
- 3 **Personalization** for recommendations, civic engagement
- 4 **Efficiency** allowing staff to focus on higher value work





**2025 Kentucky Workforce Innovation Board  
Artificial Intelligence Workforce Readiness Taskforce**

Thursday, November 6

Wednesday, December 3

All meetings are scheduled for 2:00-3:30 pm ET and will be conducted virtually on Zoom.

