



Kentucky Workforce Innovation Board (KWIB)

AI Workforce Readiness Taskforce Meeting

Minutes
December 3rd, 2025
2:00 pm – 3:30 pm EST

Zoom Meeting

Welcome and Meeting Objectives

Kim Menke, Taskforce Co-Chair, Provision Process Solutions, and *Jeffrey Sun, Ph.D., Taskforce Co-Chair, University of Louisville*, welcomed taskforce members and outlined the meeting's purpose, emphasizing the importance of collaboration in developing a statewide framework for AI and workforce development. They highlighted that the discussion would focus on sharing current projects, identifying best practices, and exploring ways to integrate AI across sectors. Members were encouraged to provide input on the framework, raise concerns, and suggest additional elements to ensure the plan is inclusive, practical, and people-centered. The goal is to create actionable recommendations that will be reviewed by the executive branch and KWIB.

Meeting Focus: Recap & Baseline Recommendations

The taskforce focused on reviewing current AI initiatives, sharing best practices, and establishing baseline recommendations for a statewide AI and workforce development framework. Members discussed regional training strategies, professional development for faculty and staff, and potential applications of AI in education and industry, including workplace safety and union-related activities. Emphasis was placed on ensuring the framework is inclusive, people-centered, and adaptable, with opportunities for pilot programs and iterative feedback before final recommendations are submitted to the executive branch and KWIB.

Group Discussion & Identification of Final Recommendations

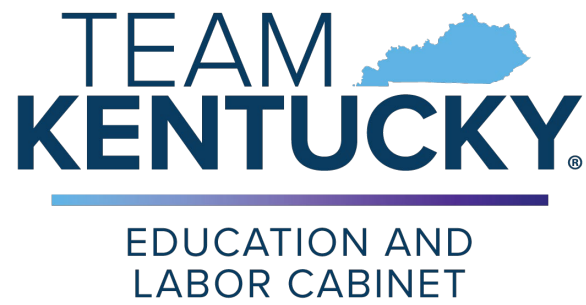
During the group discussion, members shared updates on current AI initiatives across KCTCS, the Office of Adult Education, public libraries, and industry partners like UAW and Ford. Participants highlighted the need for faculty and staff professional development, hands-on training, and the practical application of AI in workplace safety, collective bargaining, and instructional content. Members also discussed using AI for content creation, process automation, and workforce engagement, noting both its potential and limitations.

Regarding the identification of final recommendations, the taskforce agreed to finalize a draft of recommendations based on the framework, and then to be reviewed by the taskforce. These recommendations would then be submitted for executive branch review.

Adjournment 3:19 pm

The meeting concluded with taskforce members confirming the timeline for drafting and reviewing the final recommendations. Kim Menke and Dr. Jeffrey Sun thanked participants for their engagement and emphasized the importance of continued collaboration through KWIB and related initiatives. *Alisher Burikhanov, Executive*

Director, Kentucky Workforce Innovation Board (KWIB), acknowledged the contributions of all members, highlighted the resources in the appendix (including the SWOT analysis and presentations from Interapt, AWS, and IBM), and thanked Co-Chairs Kim Menke and Dr. Jeffrey Sun for their leadership.



**AI Workforce Readiness Taskforce
Meeting Briefing Packet**

December 03, 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

December 03, 2025, 2 pm - 3:30 pm EST

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Kentucky Workforce Innovation Board (KWIB)

AI Workforce Readiness Taskforce Meeting

AGENDA
December 03rd, 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

2:00 pm	Welcome and Meeting Objectives..... <i>Kim Menke, Taskforce Co-Chair</i> <i>Provision Process Solutions</i>
	<i>Jeffrey Sun, Ph.D., Taskforce Co-Chair</i> <i>University of Louisville</i>
2:10 pm	Meeting Focus: Recap & Baseline Recommendations..... <i>Jeffrey Sun & Kim Menke</i>
2:30 pm	Group Discussion & Identification of Final Recommendations..... <i>Jeffrey Sun & Kim Menke</i>
3:30 pm	Adjournment



Minutes
October 31st, 2025
2:00 pm – 3:30 pm EDT

Zoom Meeting

Attendees: Alice Houston, Alexandra Sherwood, Brandon Combs, Brent Harrison, Cathy Hoehn, Chabela Sanchez, Chris Fawbush, Dr. Sean Jackson, Emma Holbrook, Hilary Writt, Dr. JC Gregory, Dr. Jeffery Sun, Jen Lucia, Joe Cosenza, Jose Luis Lopez, Kim Menke, LaKisha Miller, Leslie Sizemore, Melinda Worth, Michael Lee Ramage, Pamela Jacob, Rachel Adams, Rick Jones, Ron Bunch, Sam Keathley, Stephanie Collins, Steve Moss, Suhas Kulkarni, Tabitha Berger, Travis Winkler, Willie Wilson

Staff: Alisher Burikhanov, Elishah Taylor, LaChrista Ellis

Welcome and Introductions

Kim Menke, Co-Chair, Provision Process Solutions, thanked members for attending, noted the group is near completion of its AI best practices review, and emphasized the task force's goal to develop recommendations for the Governor on how to best position Kentucky for the future of AI by the year's end. Mr. Menke asked members to consider workforce preparation, lifelong learning, and upskilling needs, as well as Kentucky's economic development opportunities in AI.

Dr. Jeffrey Sun, Co-Chair, University of Louisville, welcomed guests from Murray and invited **Alisher Burikhanov, Executive Director, Kentucky Workforce Innovation Board (KWIB)**, to introduce the presenters.

Chris Fawbush, IBM's North American Transformation Leader and Senior State Executive for Kentucky, thanked the KWIB AI Workforce Readiness Taskforce and state leadership for the opportunity to participate. He recognized several Kentucky leaders and partners for their collaboration and highlighted IBM's ongoing commitment to advancing education and workforce development in the Commonwealth.

Mr. Fawbush shared his personal background growing up in Shelby County and how early exposure to technology in high school sparked his lifelong career in enterprise technology. He emphasized IBM's dedication to innovation, ethics, and education, noting the company's leadership in artificial intelligence, patents, and open computing.

IBM: Corporate Social Responsibility Overview

Pamela B. Jacob, North America Corporate Social Responsibility Leader, highlighted IBM's workforce development and social impact initiatives. She shared IBM's global goals to scale education and AI skills for millions by 2030.

Ms. Jacob outlined IBM CSR's three pillars: Education and workforce development, social innovation, and volunteerism. She focused on the [SkillsBuild.org](https://skillsbuild.org) platform, a free resource offering courses, digital credentials, capstone projects, and mentorship for high school, college, and adult learners. The program aims to increase access to technology education and upskill communities, including faculty and instructors.

She also described virtual events, webinars, and curated learning plans, including initiatives on responsible AI, emphasizing IBM's commitment to empowering learners and supporting workforce development across the U.S.

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 3rd, 2p-3:30 pm EST (virtual), where draft recommendations will be reviewed and refined.

Adjournment 3:30 pm



Minutes
November 6th, 2025
2:00 pm – 3:30 pm EDT

Zoom Meeting

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.

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Adjournment 3:30 pm



KWIB AI Workforce Readiness Taskforce

December 3rd, 2025

1. SHORT TERM: Vision for AI Workforce Readiness.....

1. The commonwealth will be the nation's leader in AI workforce readiness by embracing innovation, collaboration, and execution in prioritizing Kentucky businesses, workers, and education.....

2. SHORT TERM: Foundational AI principles for Kentuckians: common language

- a. Kentucky certificate/credential
- b. Skilling up Kentucky workers & learners
- c. Opportunities for Kentucky employers (small, medium, & large enterprises)
- d. Commonwealth & taskforce members as “client zero”

3. MID TERM: AI Innovation Hubs: Regional Skills Development

- a. Leverage local boards, regional universities/colleges, school districts, economic development, local chambers of commerce (SWATT partners)

4. LONG TERM: Industry Hackathons

- a. Facilitate key industries collaboration

Appendix

SWOT Summary



EDUCATION AND
LABOR CABINET

KWIB AI Workforce Readiness Taskforce

SWOT Summary

SWOT Summary

Strengths:

- Strong education infrastructure: K-12 data systems, universities, professional associations.
- Business efficiency and productivity: AI tools for data prediction, customer service, and inclusion.
- Government collaboration and strong datasets (KYSTATS).
- Low energy costs, cyber/digital talent pipelines, and existing industrial footprint.

SWOT Summary

Weaknesses:

- Uneven adoption: infrastructure gaps, digital readiness, broadband, and funding.
- Workforce mindset/literacy challenges (fear of job loss, limited AI familiarity).
- Rapid tech change and fragmented platforms.
- Risk of overreliance on AI/inaccuracies (“hallucinations”).

SWOT Summary

Opportunities:

- Position Kentucky as an AI hub.
- Partnering: universities + business + government.
- Curriculum and workforce development (career-ready local talent).
- Business growth: small and medium enterprise adoption.

SWOT Summary

Threats:

- Falling behind other states in adoption.
- Trust and credibility risks (AI errors, hallucinations).
- Legal/accountability and regulatory gaps; cybersecurity (scams, deepfakes, phishing).
- Job displacement and workforce resistance.
- Talent retention challenges.

Interapt



Building an AI-Powered Workforce

WITH THE INTERAPT TALENT SYSTEM®



40%

AI-trained teams report
40% faster project
delivery ¹

Future-Proof Your Workforce with AI

Interapt partners with organizations to equip leaders and teams with the skills, strategies, and support needed to adopt AI responsibly and effectively. We provide foundational training for executives and leadership to set strategy and governance, and applied training for teams to integrate AI into daily workflows. To ensure impact, all offerings are paired with 1:1 coaching and supported by our IT Consulting Team.

Available courses include but are not limited to: **Applied Generative AI, AI for Business Users, AI for Leaders & Manager, AI for Executives, GenAI for Product Managers, GenAI for UX Designers, AI for Modern Marketers, Applied AI Engineering.**

The Interapt Difference

Some Key lessons

- 1) **Differentiate Hype from Reality:** Gain an understanding of **AI capabilities and limitations** (especially for Generative AI/LLMs) to set realistic expectations.
- 2) **Establish an AI Roadmap:** Develop an executive-level plan for **phased AI adoption** across functions, moving beyond pilots to scalable enterprise solutions.
- 3) **Identify High-Impact Use Cases:** Learn a framework for prioritizing AI projects that align directly with **core business objectives** (e.g., revenue growth, cost reduction, customer experience).
- 4) **Hands-On AI Literacy:** Engage with simple, **practical AI tools** (like prompt engineering) to build intuition and credibility when leading technical teams.
- 5) **Ensure Compliance and Privacy:** Understand the evolving enterprise **legal and regulatory landscape** for AI (e.g., data privacy, intellectual property, and emerging AI regulations).

Amazon Web Services (AWS)



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 ”

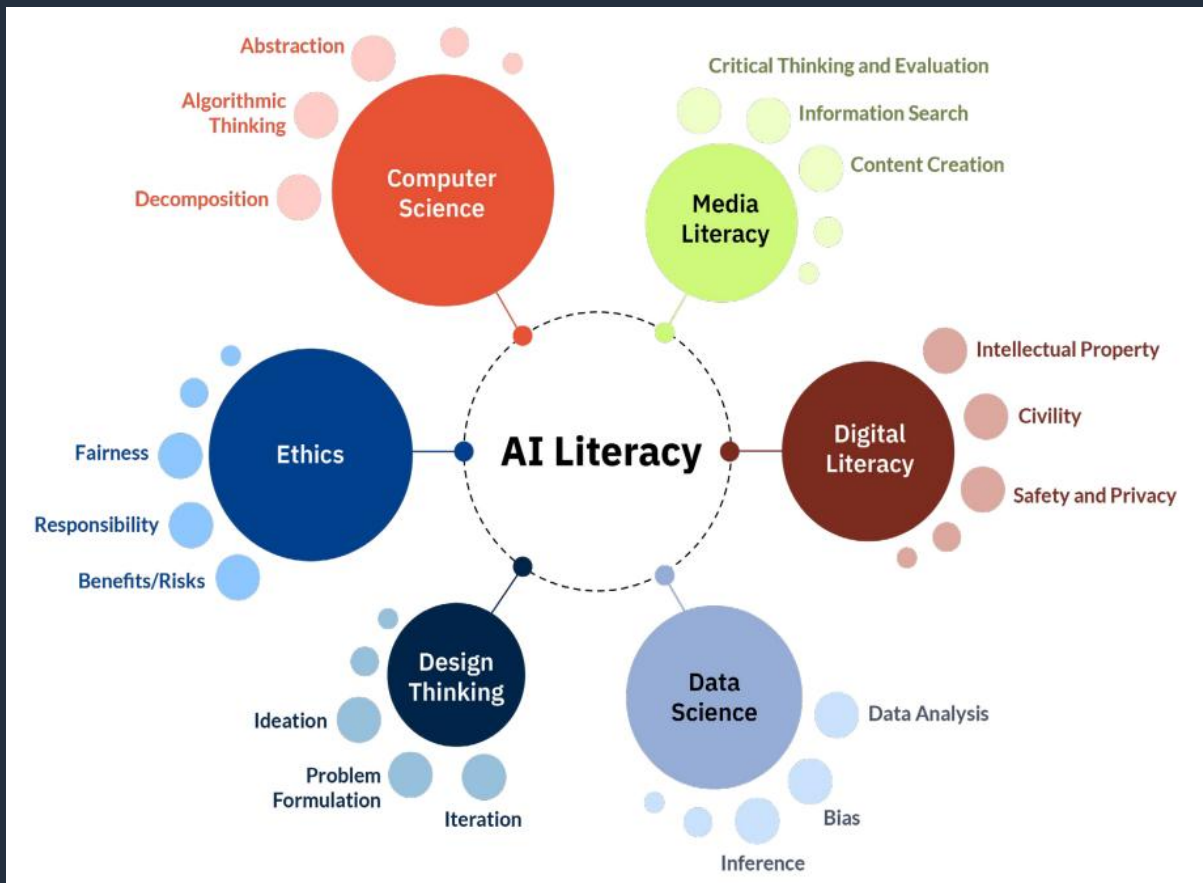
EU AI Act, OCED, UNESCO and other organizations

Teach AI Skills Framework

Emerging skills and competency frameworks

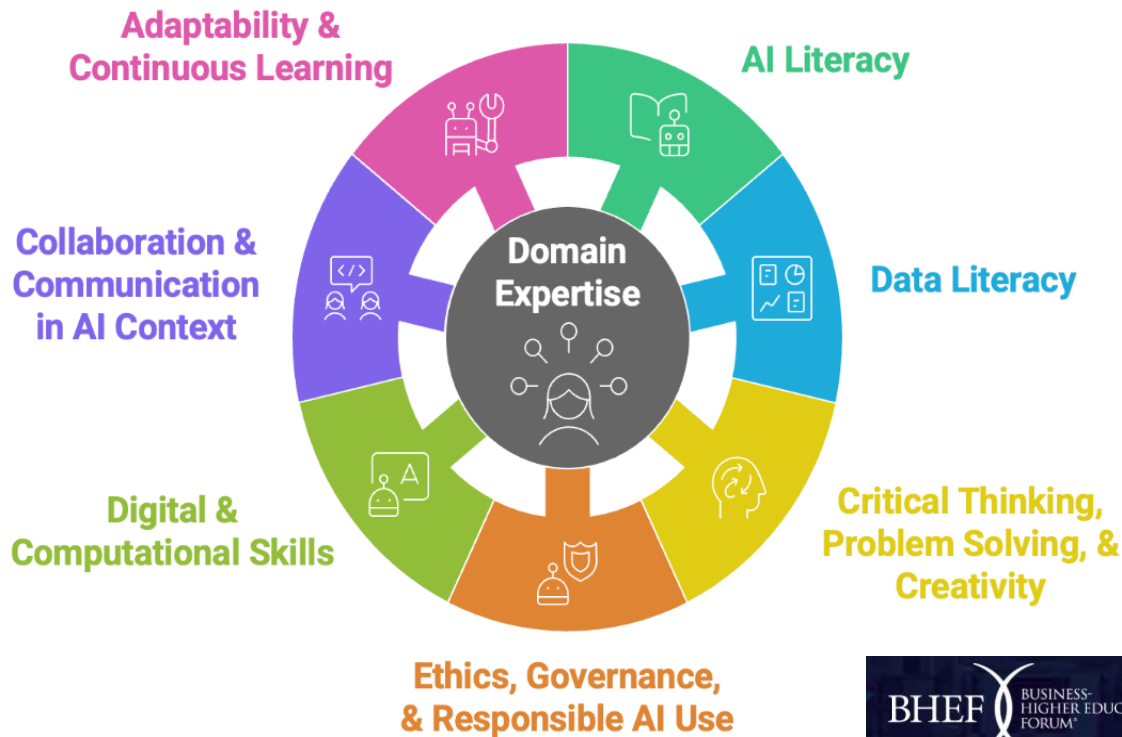


Teach AI Framework: K-12



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



San Diego State
University

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



IBM



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



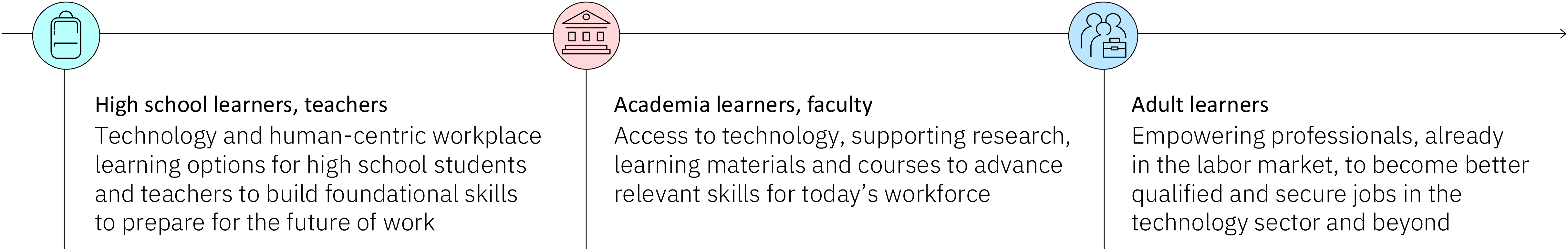
Volunteerism
and giving

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)

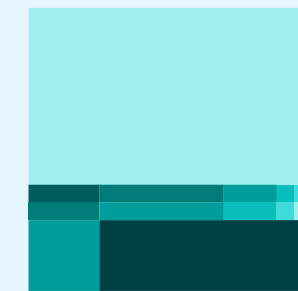
- Expand talent pool
- Skills validation
- Better matching between candidates and job positions
- Understand competencies and learning agility of the applicants

Benefits for learners

- Portability
- Security
- Increased visibility

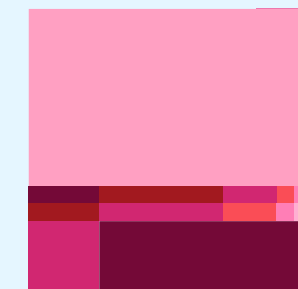
In IBM SkillsBuild, the Digital Credentials are split by skills levels, ensuring significant skill achievement tied to resume-worthy activities:

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



Press release: [New IBM SkillsBuild Cybersecurity and Data Analytics Certificates to be Deployed in Community College Systems across Alabama, California Bay Area, Colorado and Louisiana](#)

Warren County Public Schools Impact Center

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

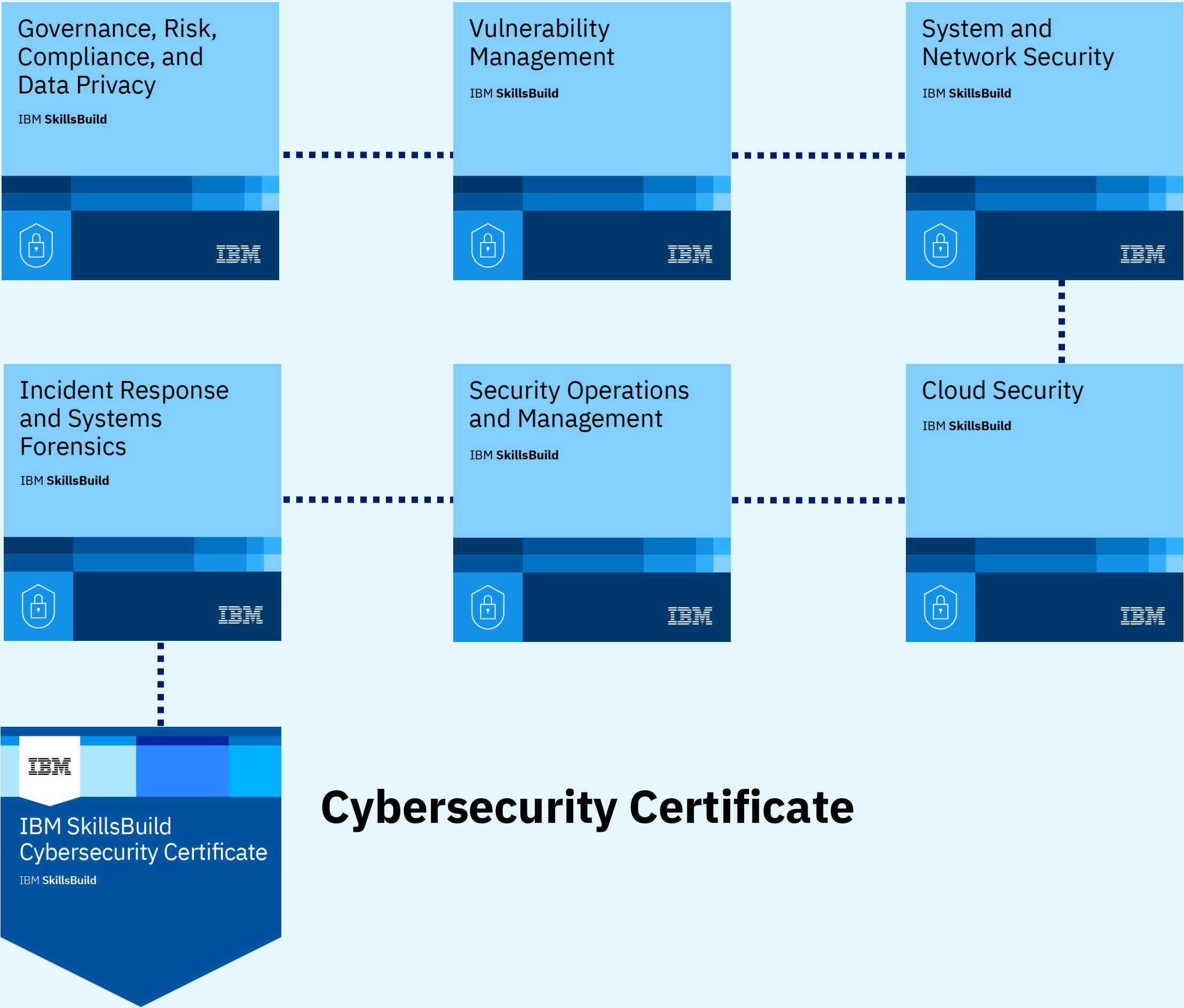
1. **Integrate IBM SkillsBuild Certificates into the high school curriculum***
 - AI Certificate
 - [Data Analytics Certificate](#)
 - [Cybersecurity Certificate](#)
2. **AI Teacher Training**
 - Series of 60-minute webinars across AI topics specifically geared for teacher upskilling
3. **AI Teacher 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

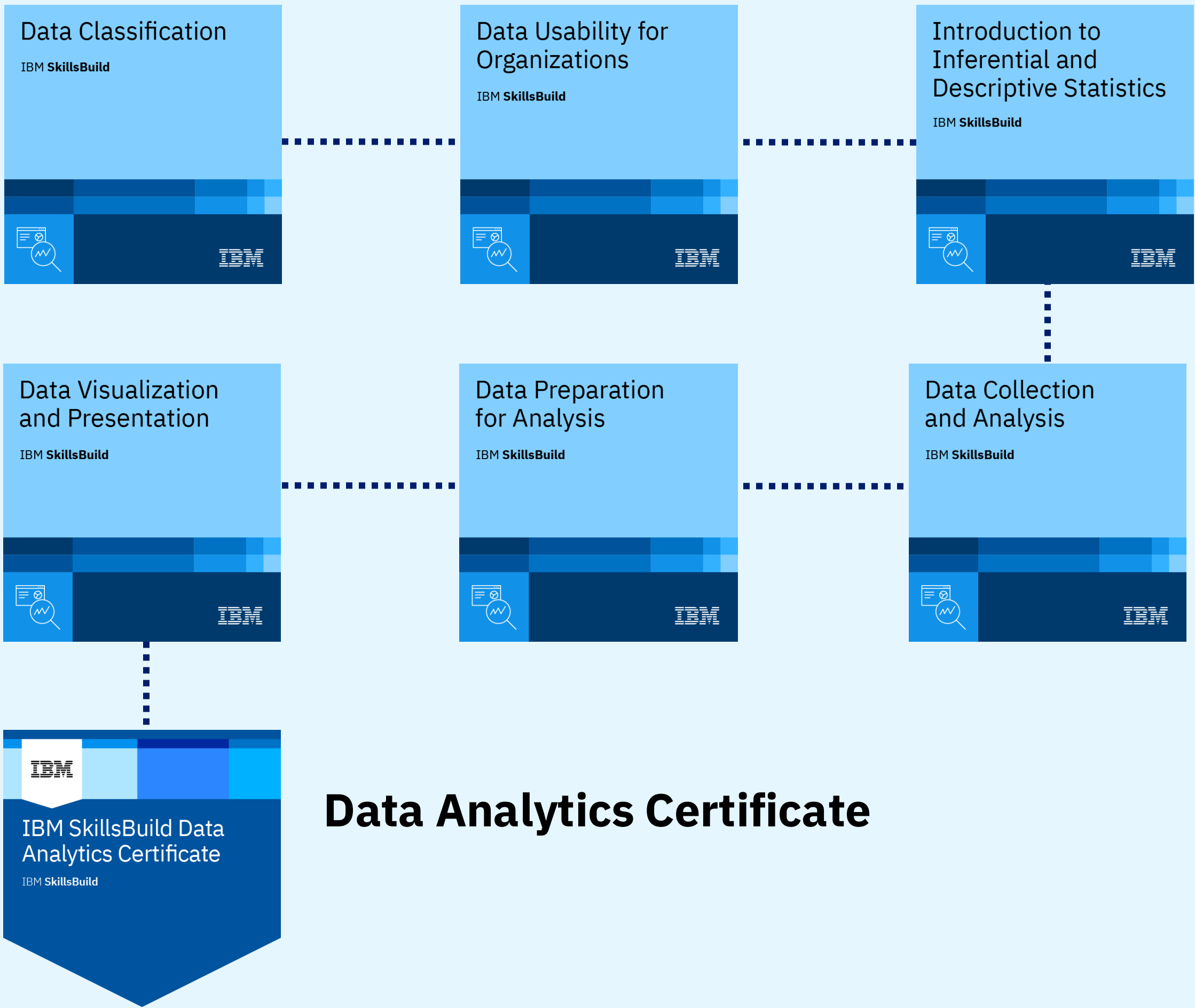
Cybersecurity Certificate Journey

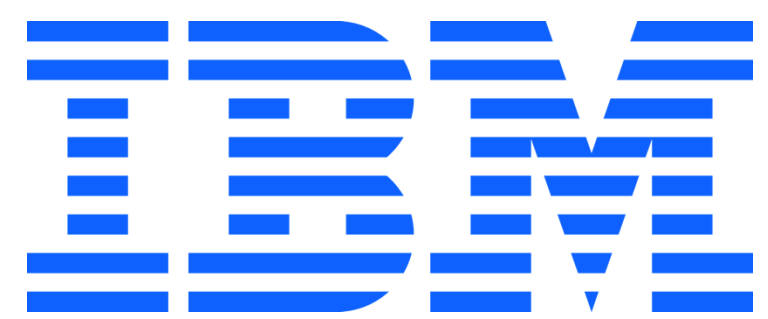
Badges students will earn include



Data Analytics Certificate Journey

Badges students will earn include



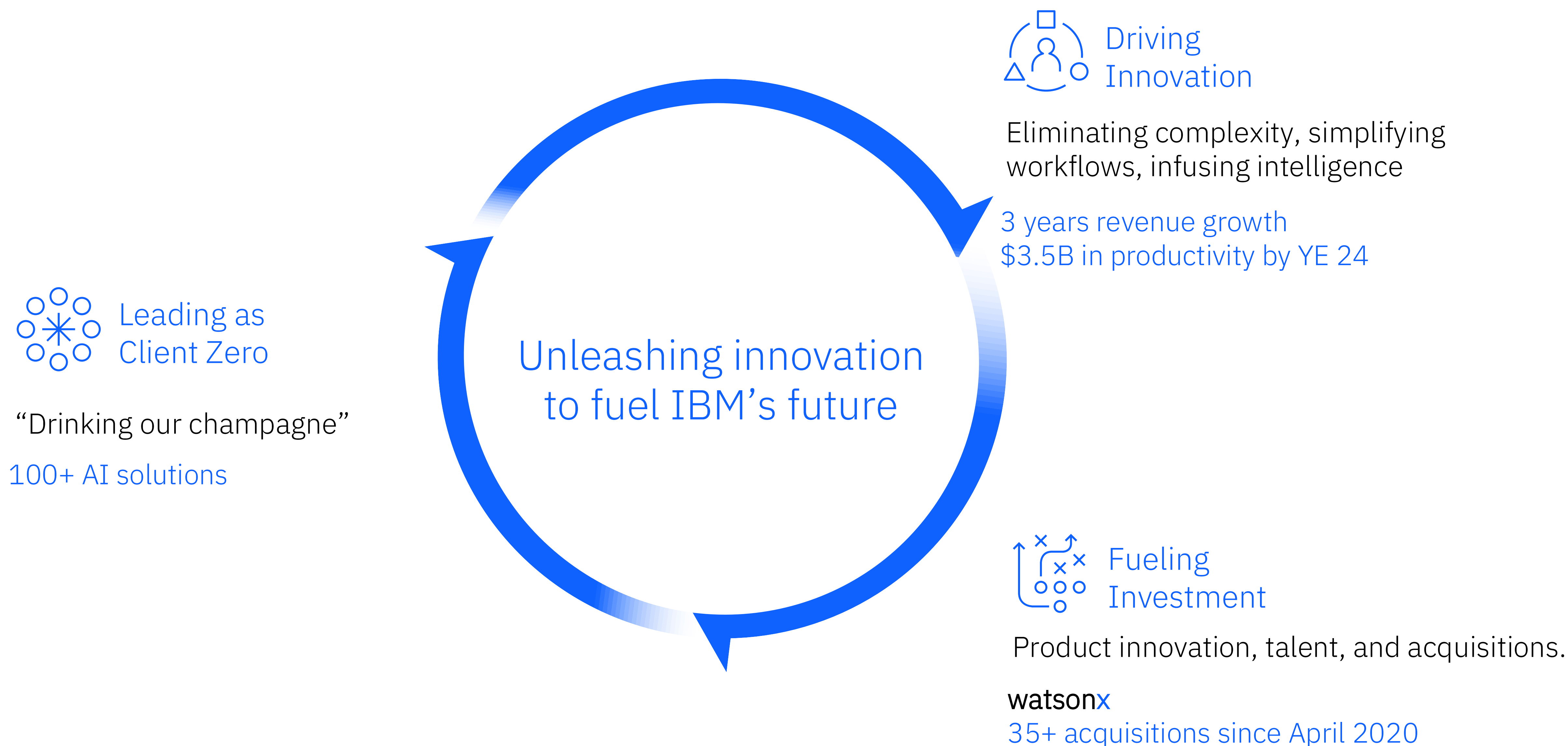


AI in Action: IBM as Client Zero

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

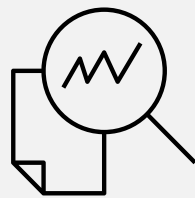
Productivity Discovery Team

External benchmarking to ID productivity opportunities

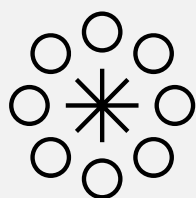
Workforce of Productivity Catalysts

IBMers Eliminate, Simplify, and Automate

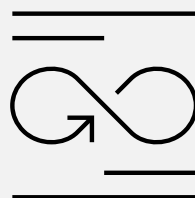
THE APPROACH



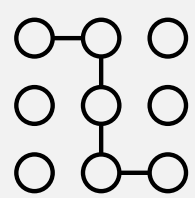
External
Benchmarking



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

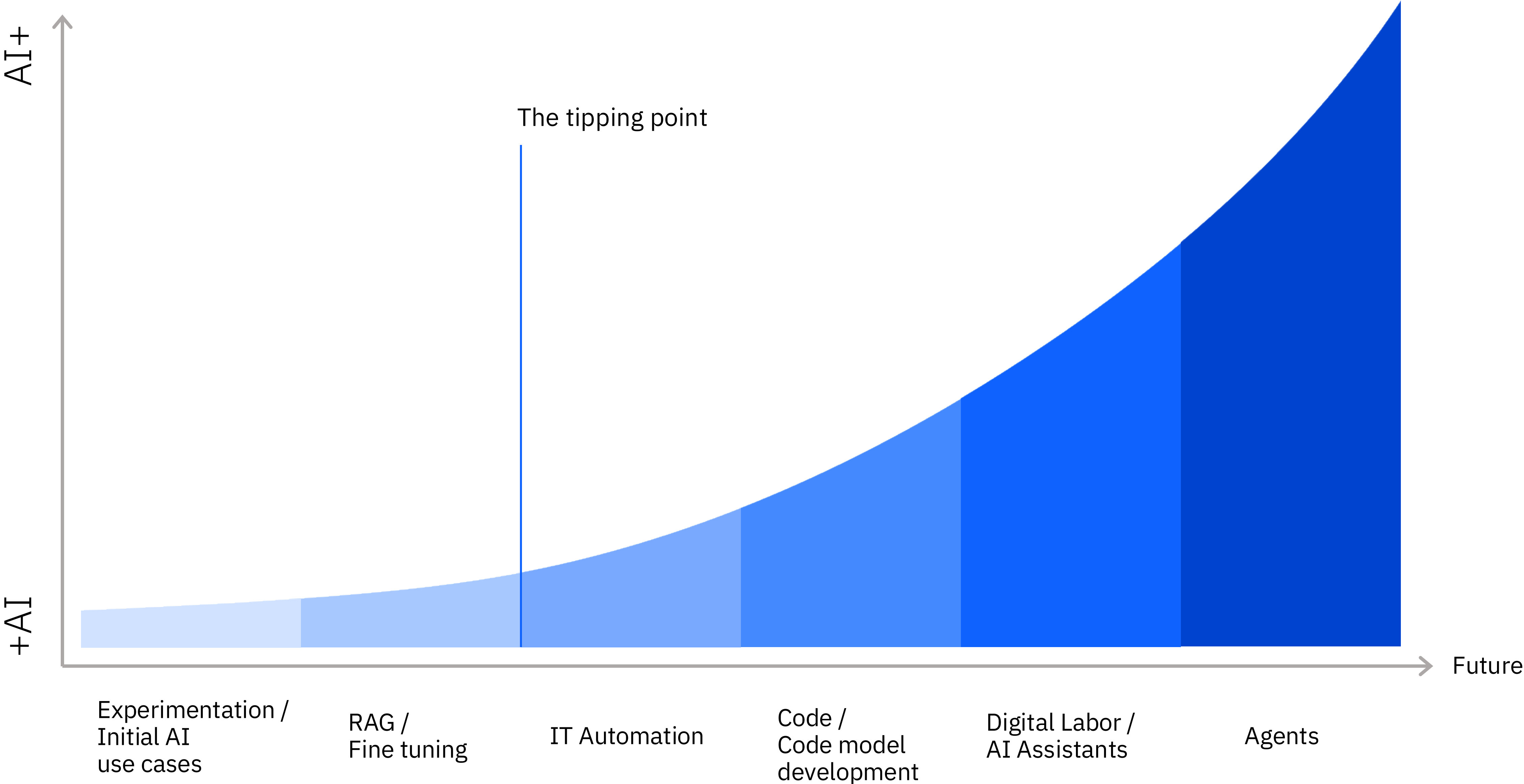
watsonx

Procurement

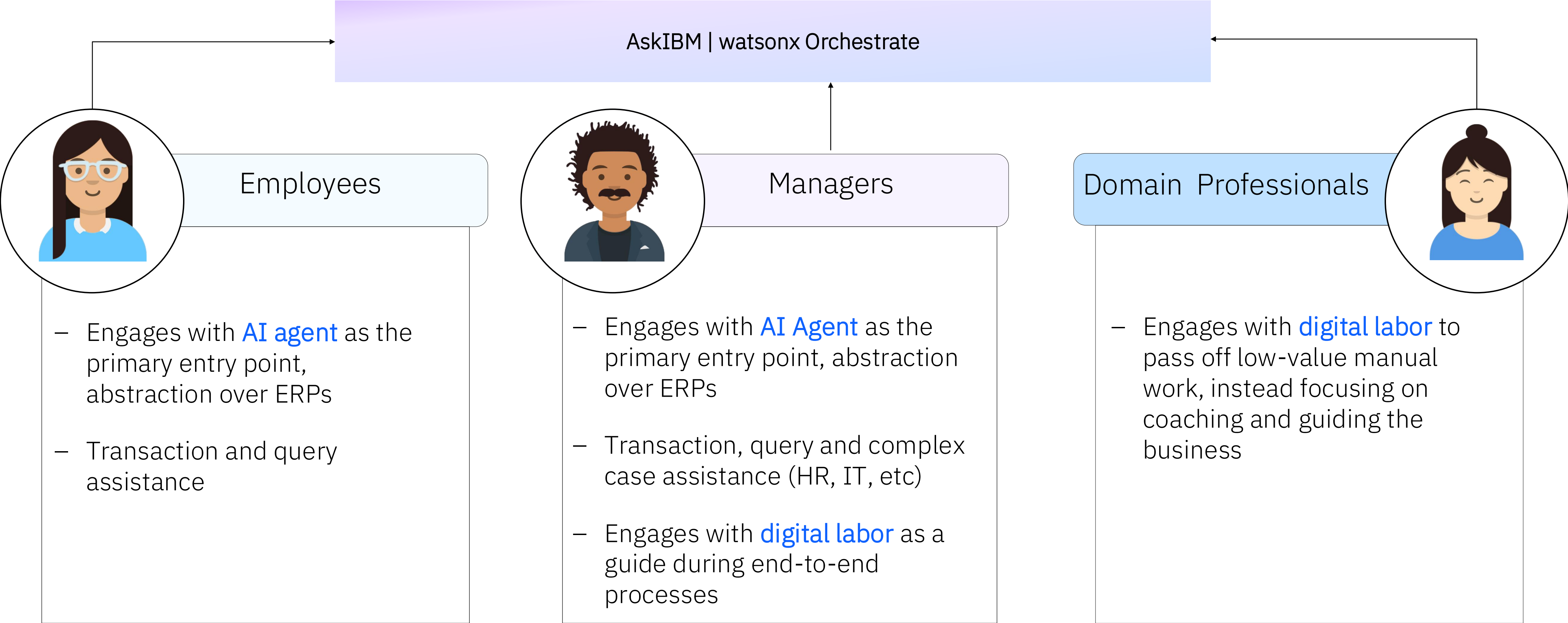
90%+ reduction in time to solve blocked invoices

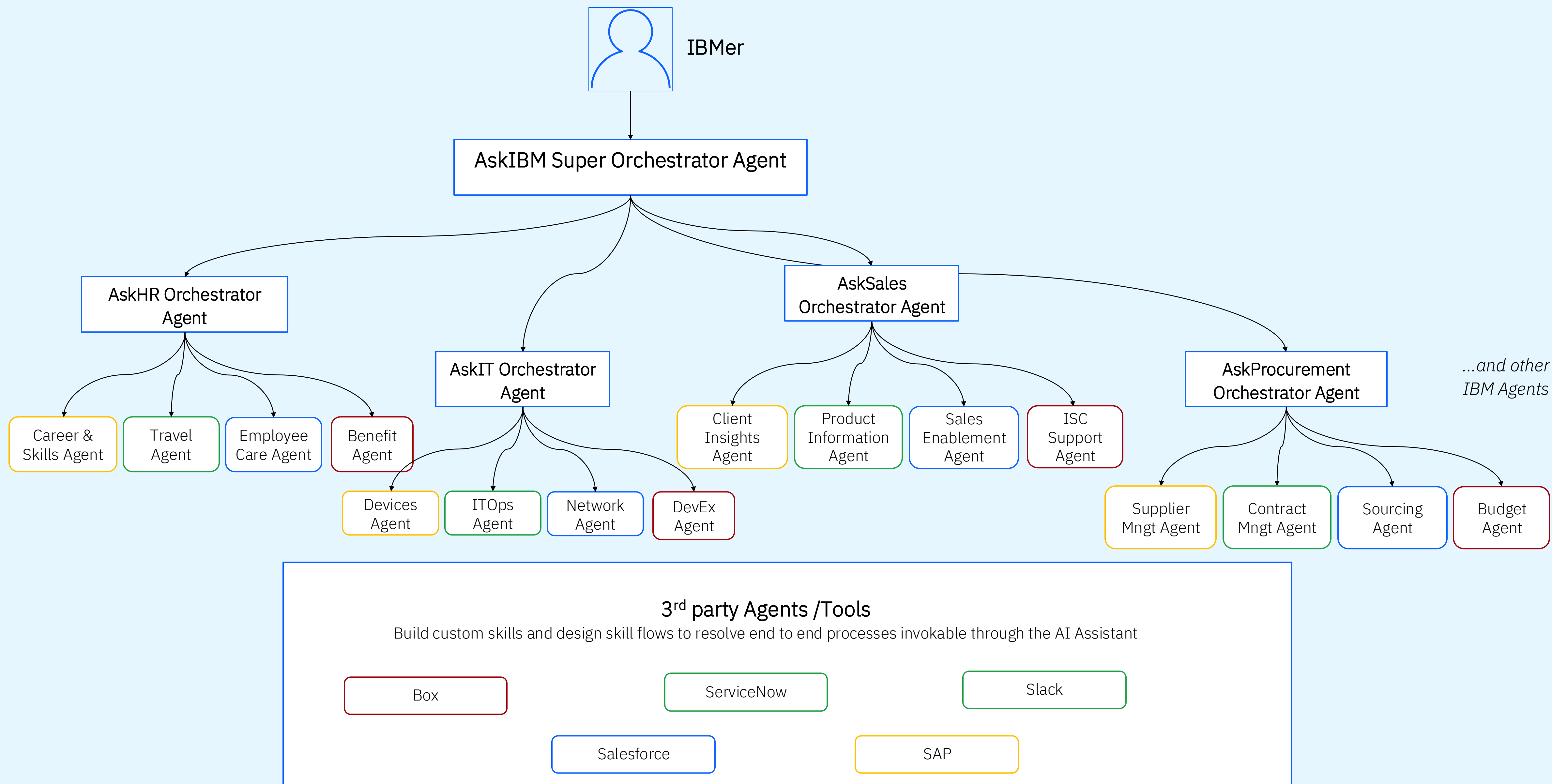
watsonx.ai
watsonx Orchestrate

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

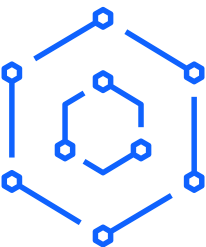
Category	Value Driver	Benefit Description	Benefit Calculation	% Improvement Range (Low-High)	
HR Customer Service Support (AskHR)	HR Content and Q&A	Reduce HR customer service call and ticket volume by providing employees with ‘self-service’ capabilities to frequent HR content and policy questions (“Policy 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

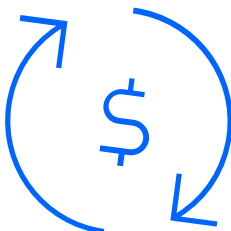
What will you get from this session?



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

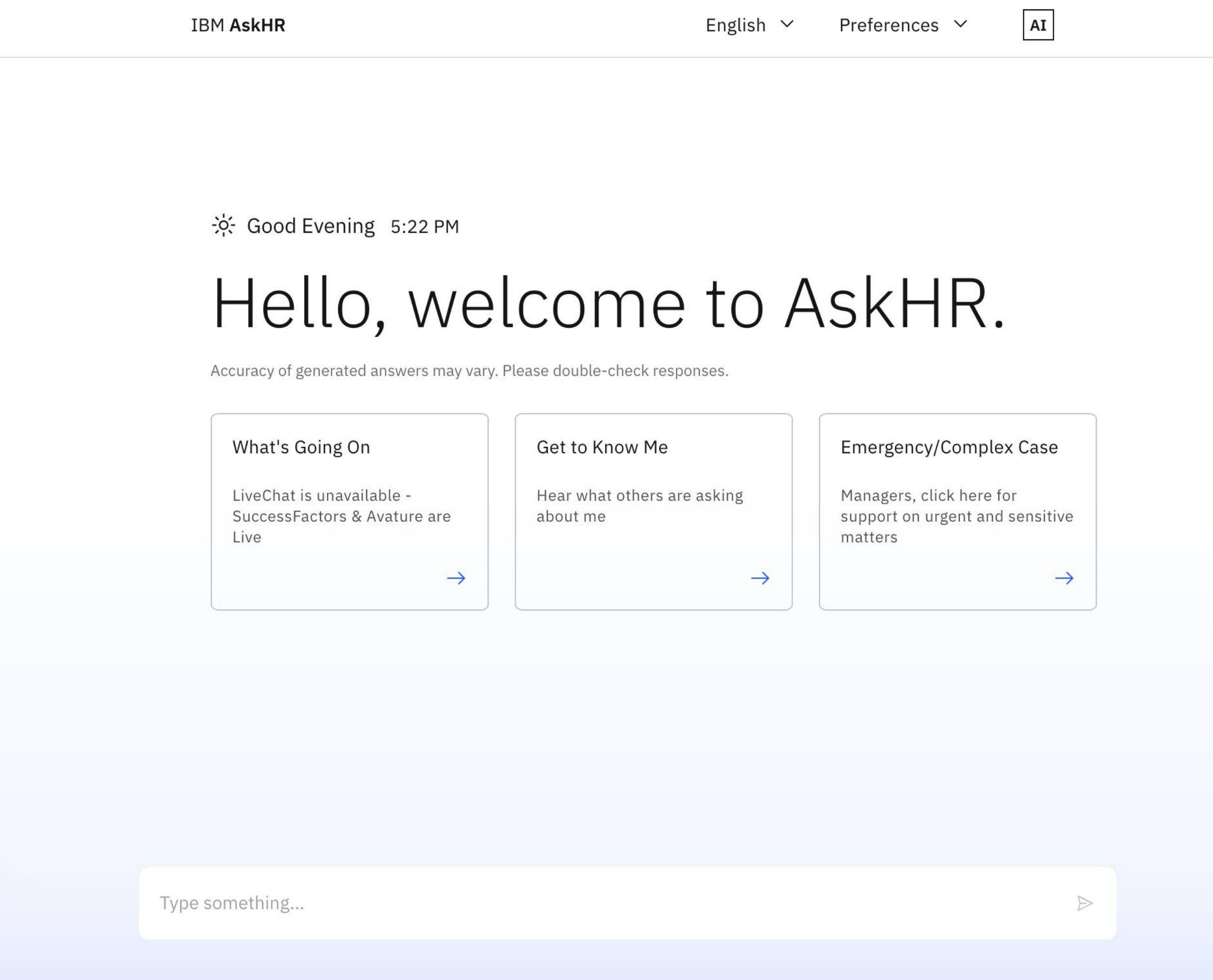
What do you need to bring?

- 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

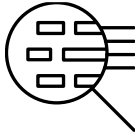
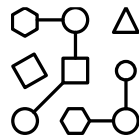
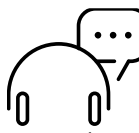



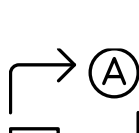
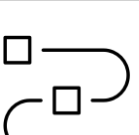
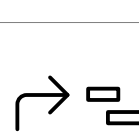
100%

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)

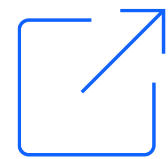
IBM AskProcurement

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

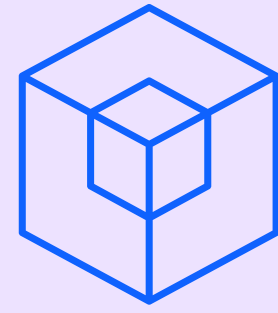
Hybrid – AI Augment

AI-Led



Chatbots

- Rules based
- Deterministic
- Preprogrammed



Virtual Assistants

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



AI Assistants + Automation

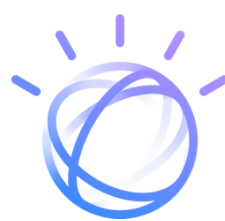
- Conversational AI: LLM powered intent recognition
- Knowledge grounded Q&A (RAG)
- Call Gen AI tools (entity extraction, document processing)
- AI Augmented Workflows (Intelligent Automation)
- Connect to Enterprise Apps
- Unify Assistant Experience with LLM-Powered routing



AI Agents

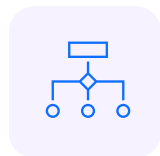
- AI Orchestrator Agent (LLM) can reason, plan, and execute on a given task or problem
- Connected to multiple agents, assistants, data, tools and applications
- Understands Complex multi-threaded problems
- Autonomous action taking, self-correcting and self-reasoning
- Conversational or Non-Conversational

watsonx Orchestrate as an Orchestrator Agent



watsonx Orchestrate

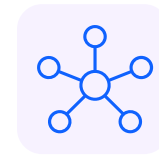
LLM powered
Orchestrator Agent



Routing



Disambiguation



Tool calling



Planning



Reasoning

Tools & Connectors



Connector Agents



Knowledge (Documents)



Data Sources (SQL, etc.)



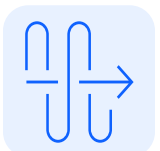
Pro-Code Tools



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

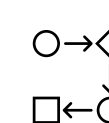


HR Agent
IBM Pre-Built Domain Agent for HR

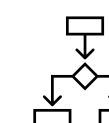


Sales Agent
IBM Pre-Built Domain Agent for Sales

Fixed Flow Assistant / Automation Builder



Workflows
Model business processes within workflows



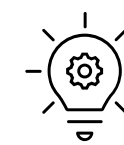
Decision
Automate business decisions with rules & decision tables



Document extraction
Define gen AI prompts to extract info from documents



Conversational Flow
Build AI augments and deterministic conversational flows



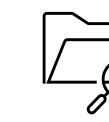
Generative AI
Analyze or create contextual content



Existing Tools
Import / Connect to existing tools and Automations



Pre-Built Tools
IBM pre-built integrations and automations



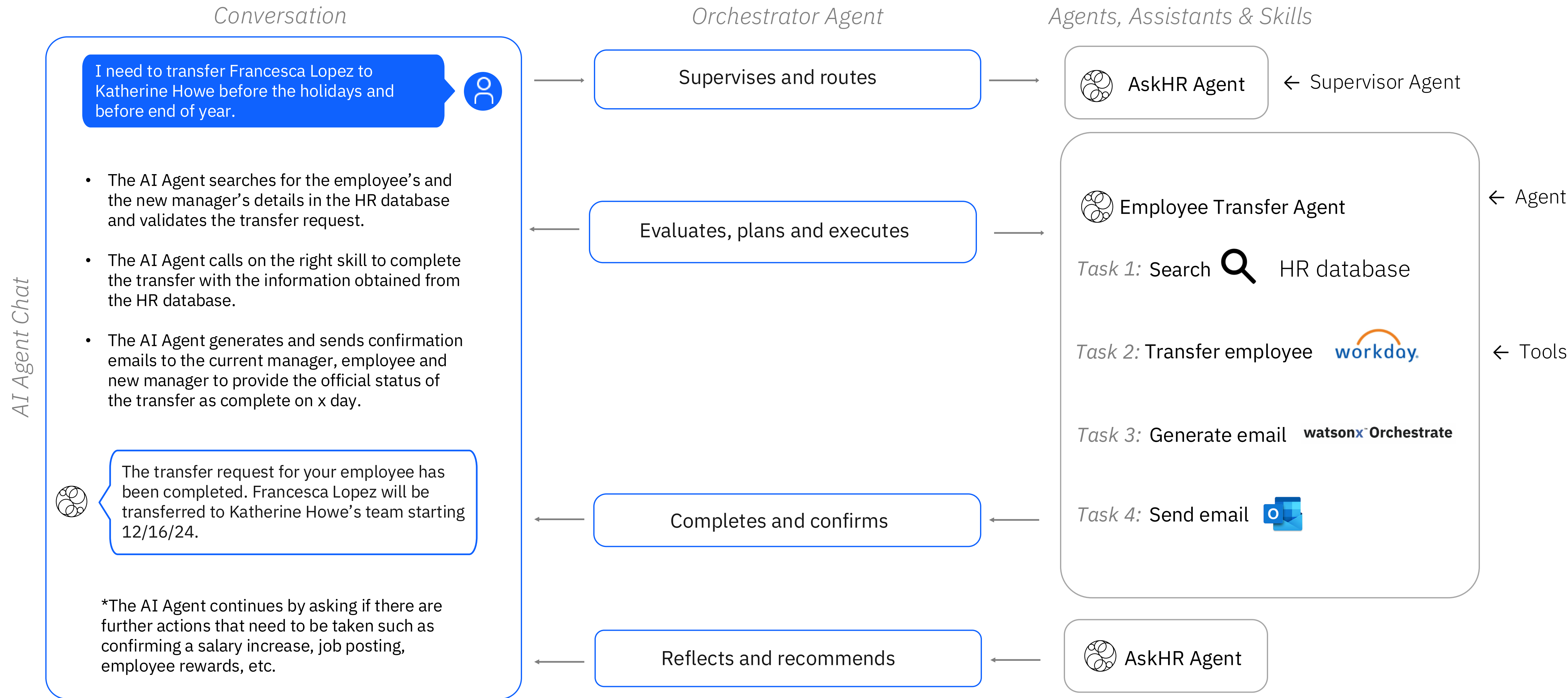
Knowledge Search
Resolve Common domain specific FAQs

Pre-Built tools & Integrations



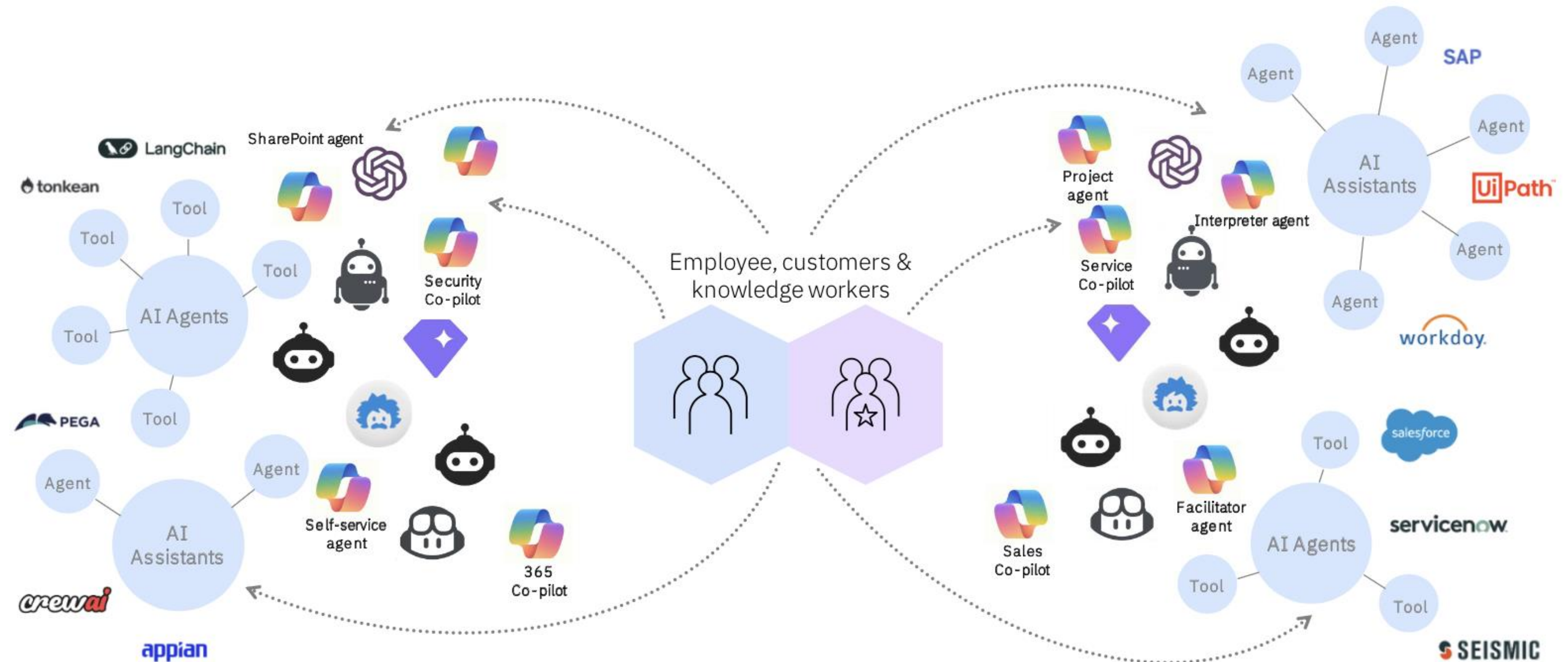
Example Task → Transfer an Employee

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

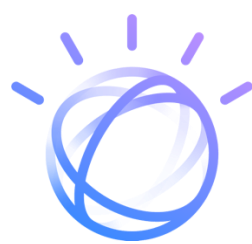
Multi-agent orchestration & AgentOps

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

Accelerate

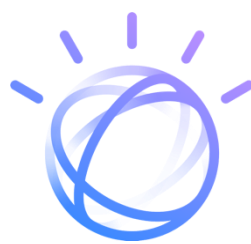
Pre-built agents & Agent Catalog

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



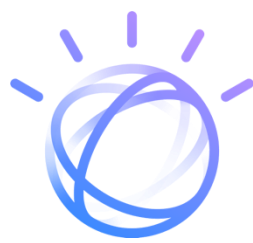
Custom Built Agents on watsonx Orchestrate

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 3rd party Agents

Langchain, Copilot, 3rd Party, crewai open source



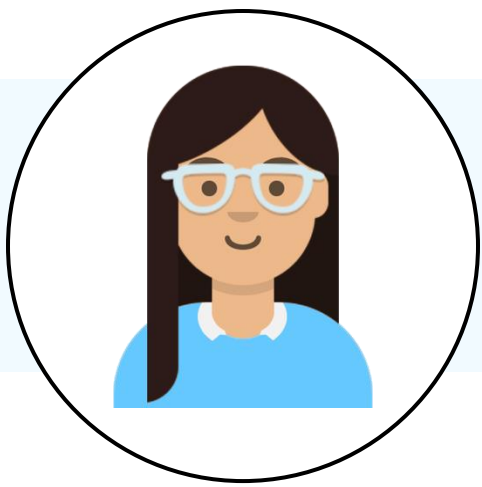
Pre-Built Agents on watsonx Orchestrate

Customize



IBM Agent Catalog IBM & 3rd Party

Customize



Meet Sarah, a Financial Analyst

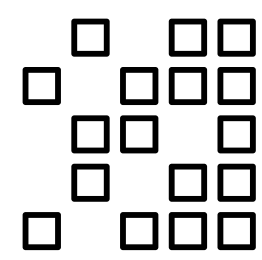
Sarah is a Financial Analyst at Marriott, responsible for analyzing financial data, forecasting revenue, and providing insights to support strategic business decisions. Her role involves working with complex financial data, identifying trends, and predicting future financial performance.

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



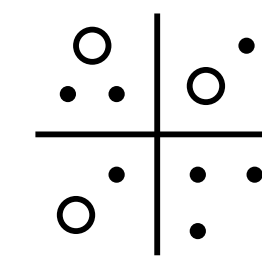
Manual Forecasting

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



Siloed insights

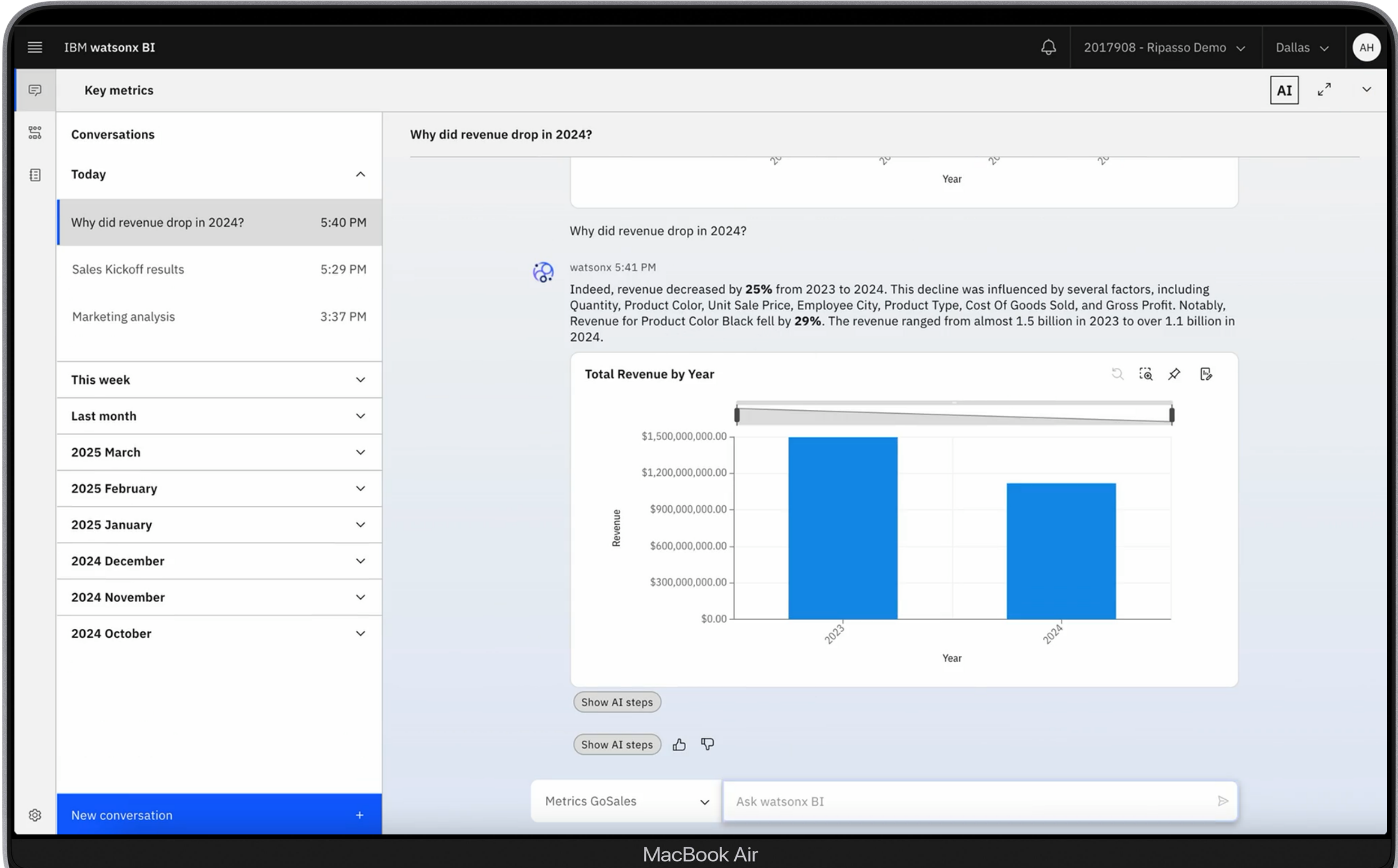
Traditional forecasting methods often failed to capture the full complexity of financial data, leading to less accurate predictions and a lack of deep insights into revenue drivers.



Data overload

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

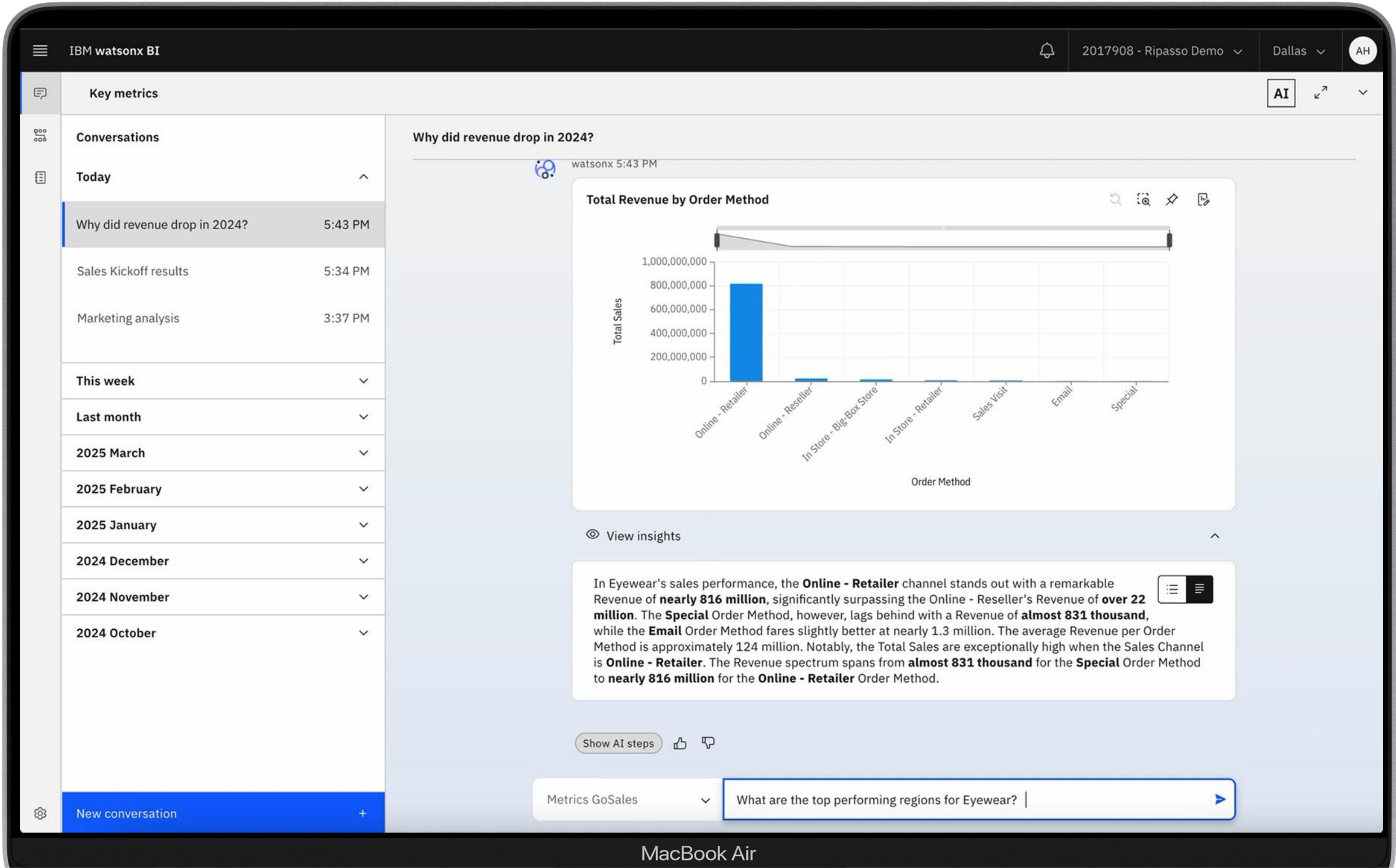
Data Inquiry



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

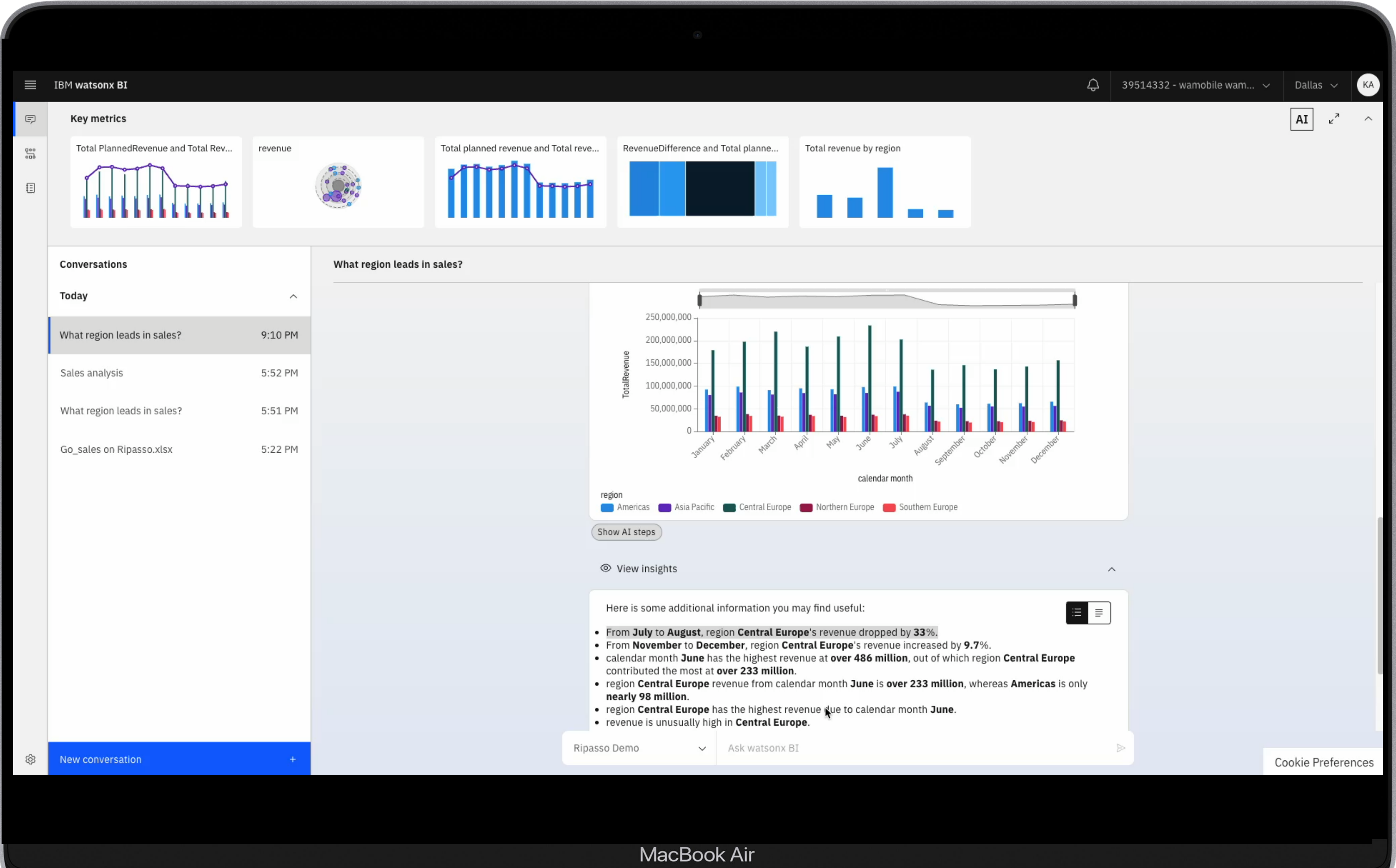
Trust the insights with progressive disclosure that clearly shows how answers are reached.

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



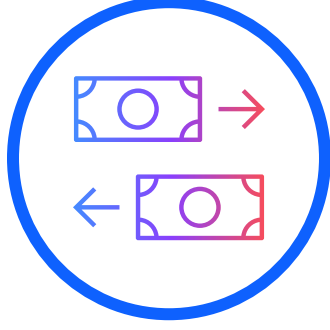
Accounting
Contract review and analysis



Tax
Tax Compliance and invoice validation



Corporate Development
Client contract due diligence



Quote-to-Cash
Contract language analysis



Procurement
Vendor onboarding and analysis

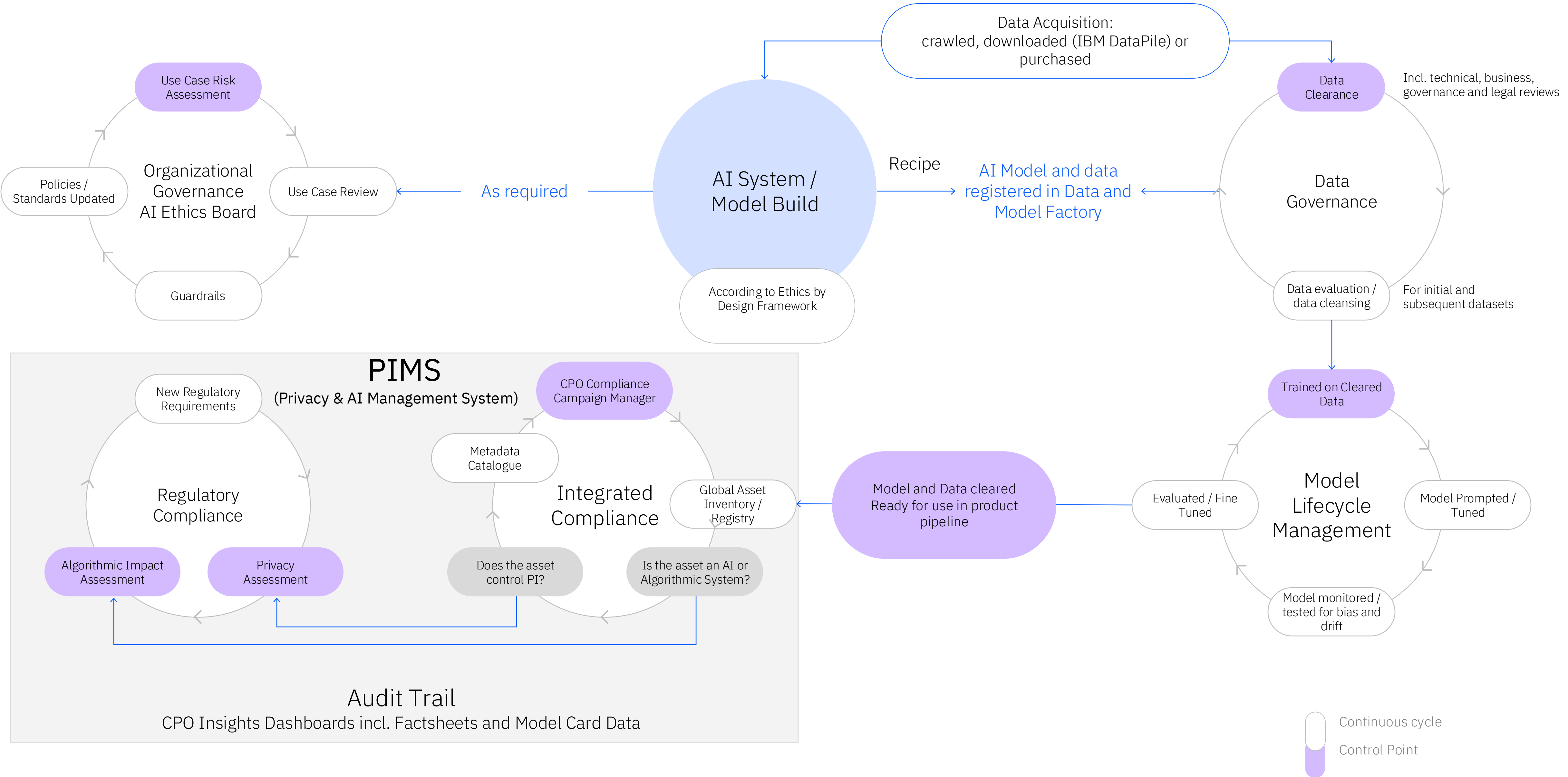


Legal
Risk analytics and negotiations

The background of the slide features several thick, curved, overlapping lines in shades of purple, blue, and white, creating a sense of motion and depth. 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

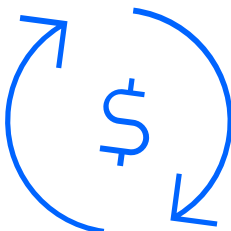
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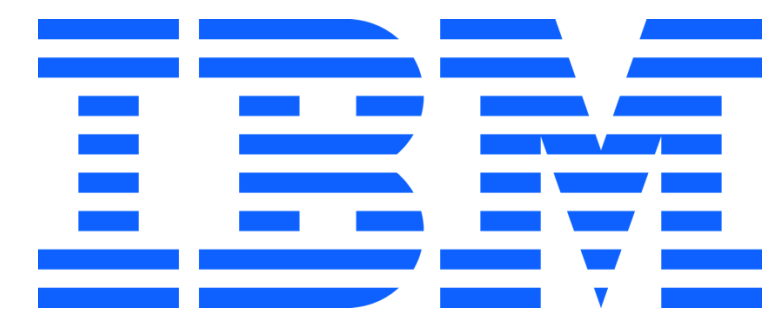


A high-level **Business Value and ROI Assessment** for your selected use cases

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- 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
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- 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

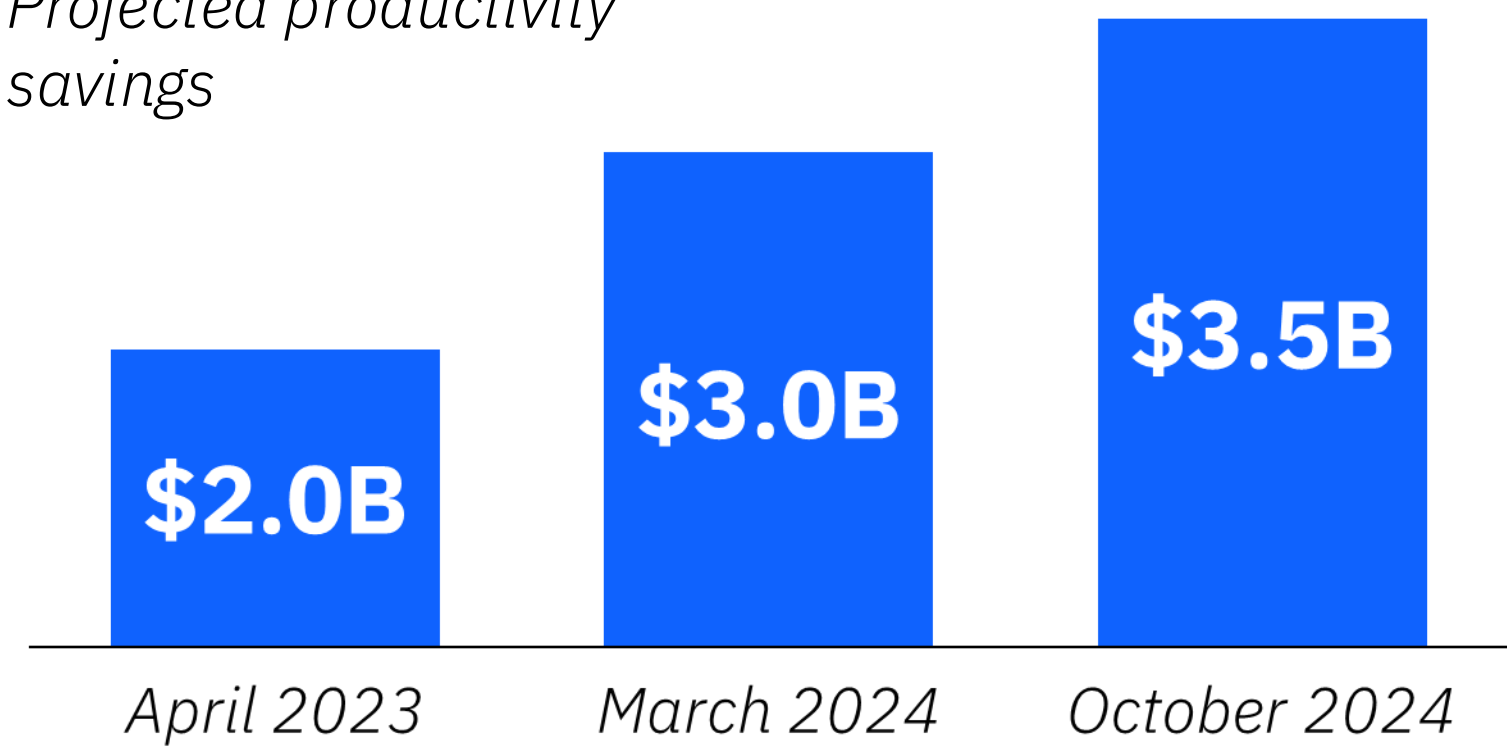
Train, validate, tune, and deploy models to power
enterprise AI activity



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



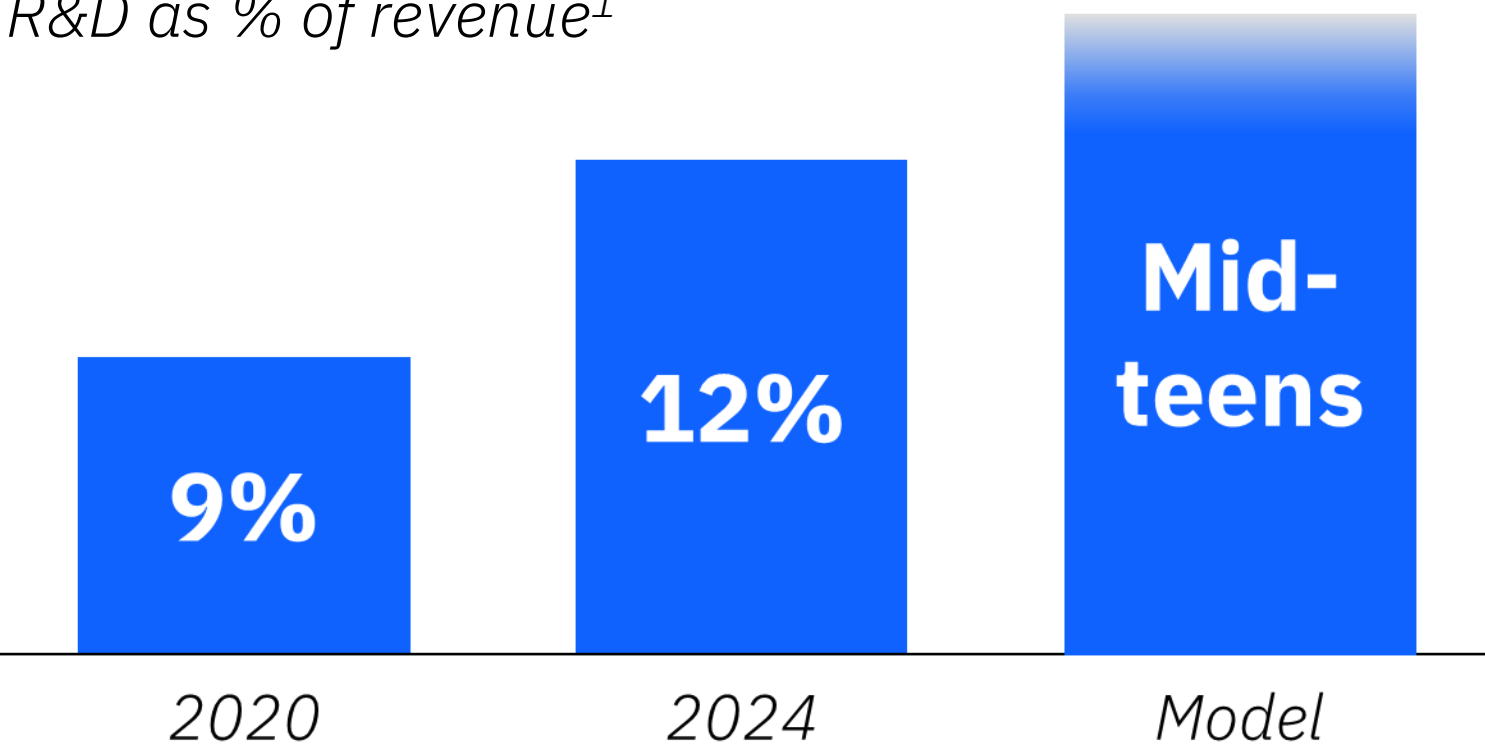
Projected productivity savings



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

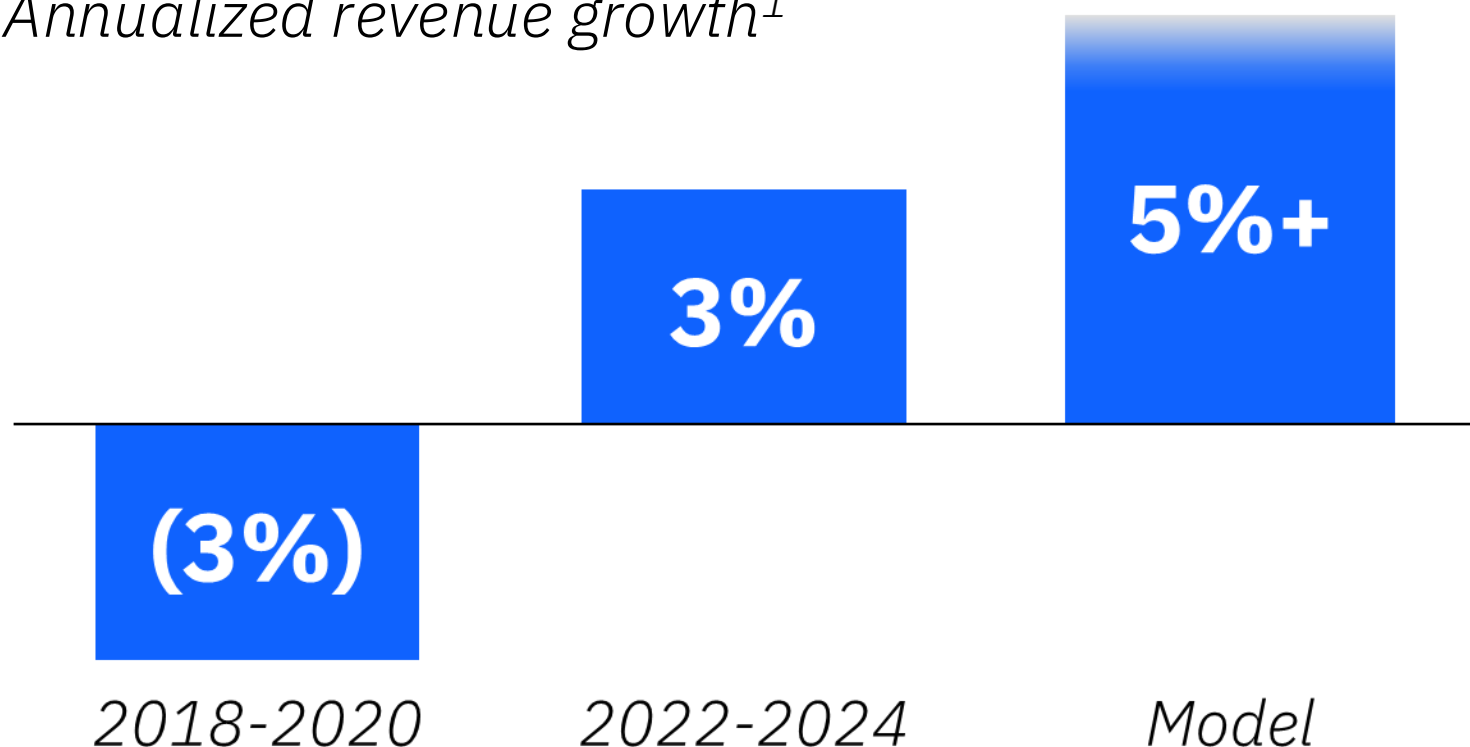
Included in \$3.5B exit run rate, achieved in 2024

R&D as % of revenue¹



- 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 leadership²

Annualized revenue growth¹



- +2pts expansion in Operating PTI margin³
- \$3.5B increase in free cash flow³; 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

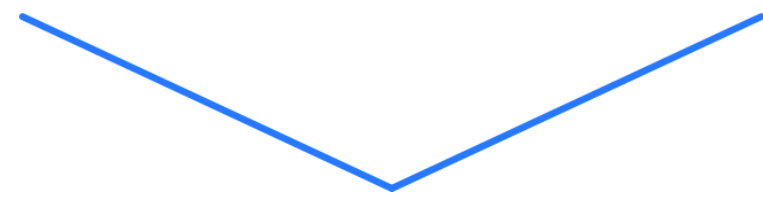
(3) Represents data from 2022 – 2024

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

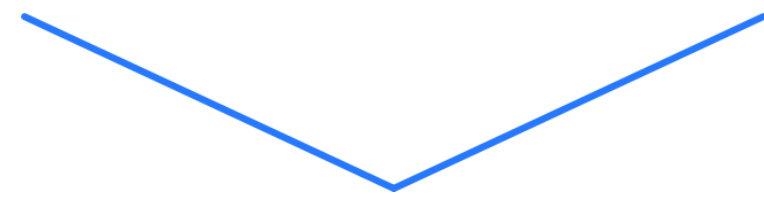
Data was scattered and generally not shared or integrated



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

Workflow

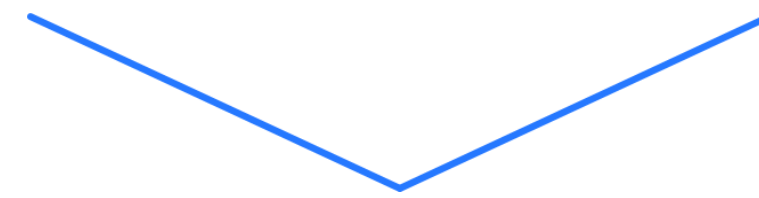
Workflows were vertically siloed across functions and geographies



Implemented simplified horizontal workflows that move across silos

Technology

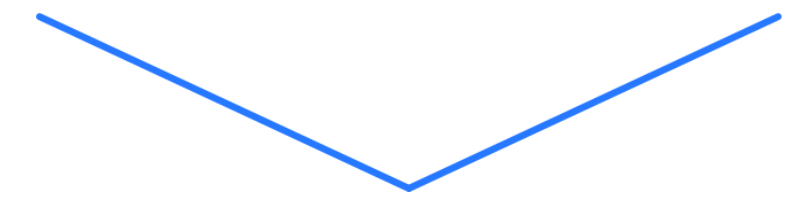
Business complexity led to ad-hoc point solutions and application sprawl



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

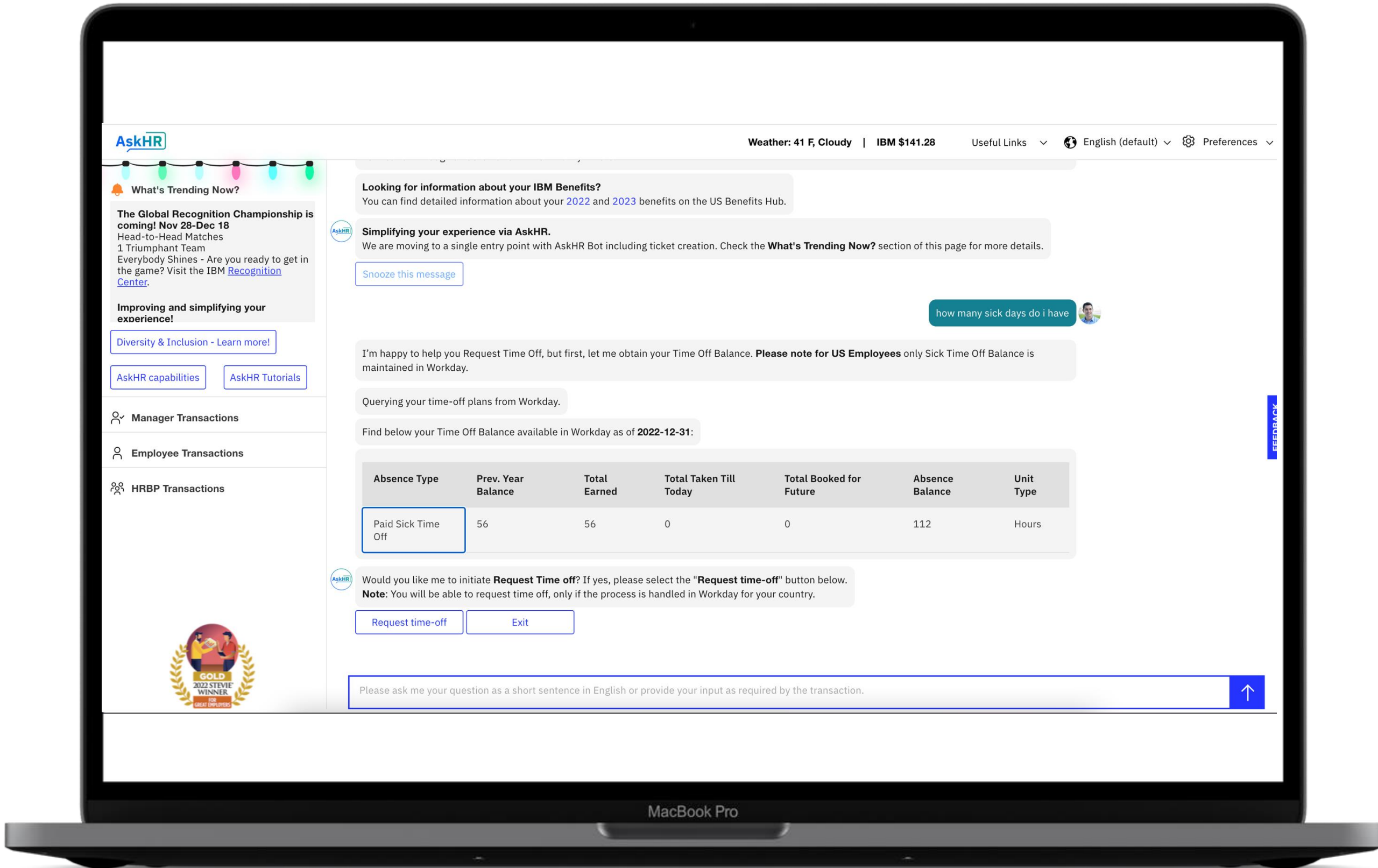
Allow a seamless experience for employees and empower HR professionals to focus on higher value tasks

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

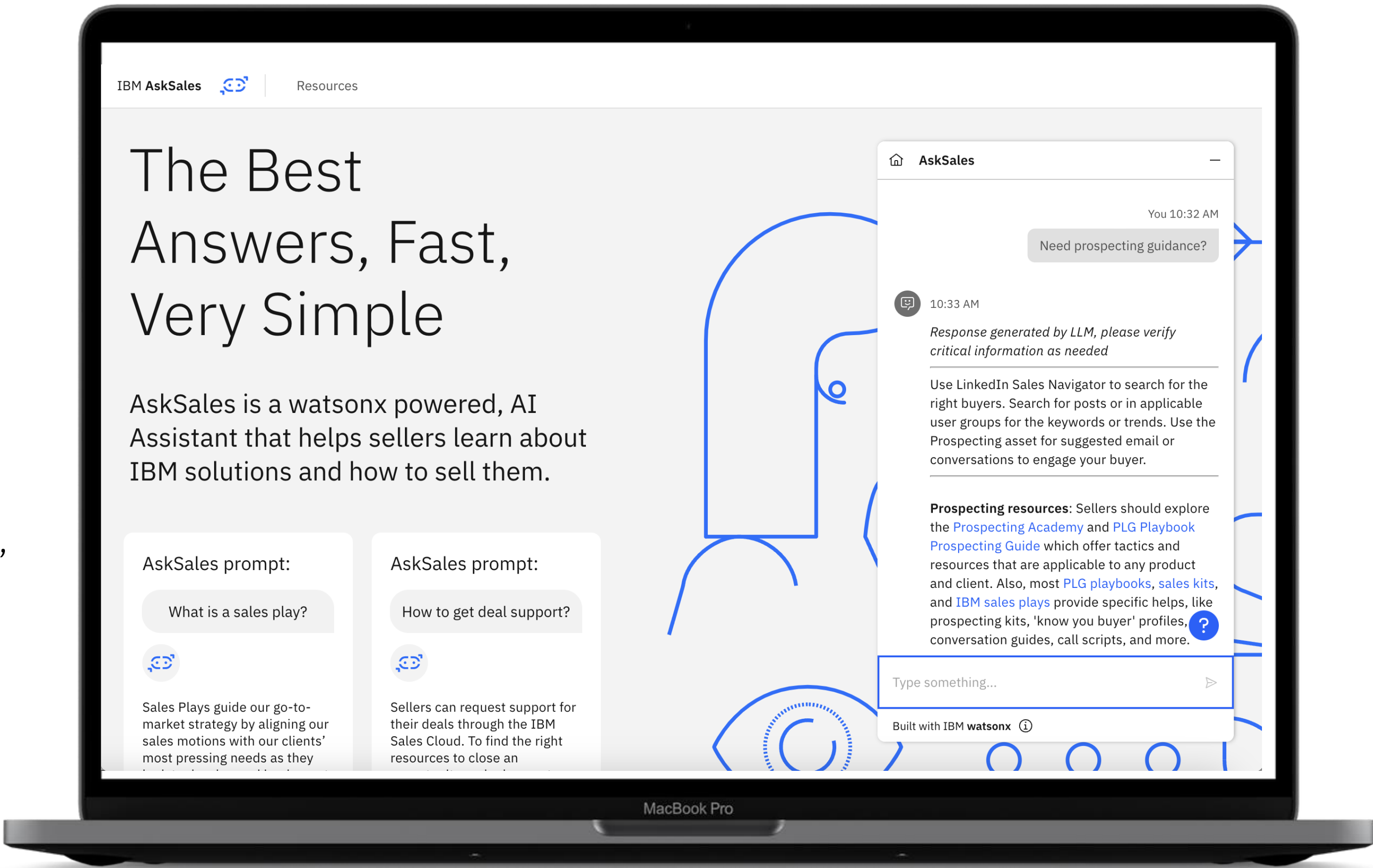
Streamline sales with AI driven insights, tailored recommendations and automated outreach

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

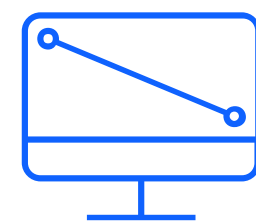
Outcomes (2023 to 2024)

~79%

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

~\$18M

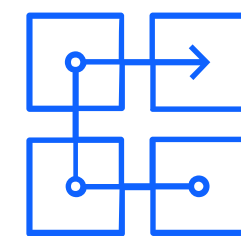
- IT Support cost reduced



Eliminate

top support call drivers

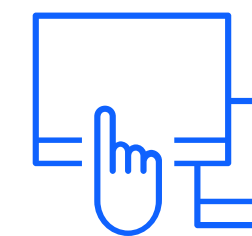
- 514 intents now in AskIT
- IT Support tickets down 56% from 2023-2024



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

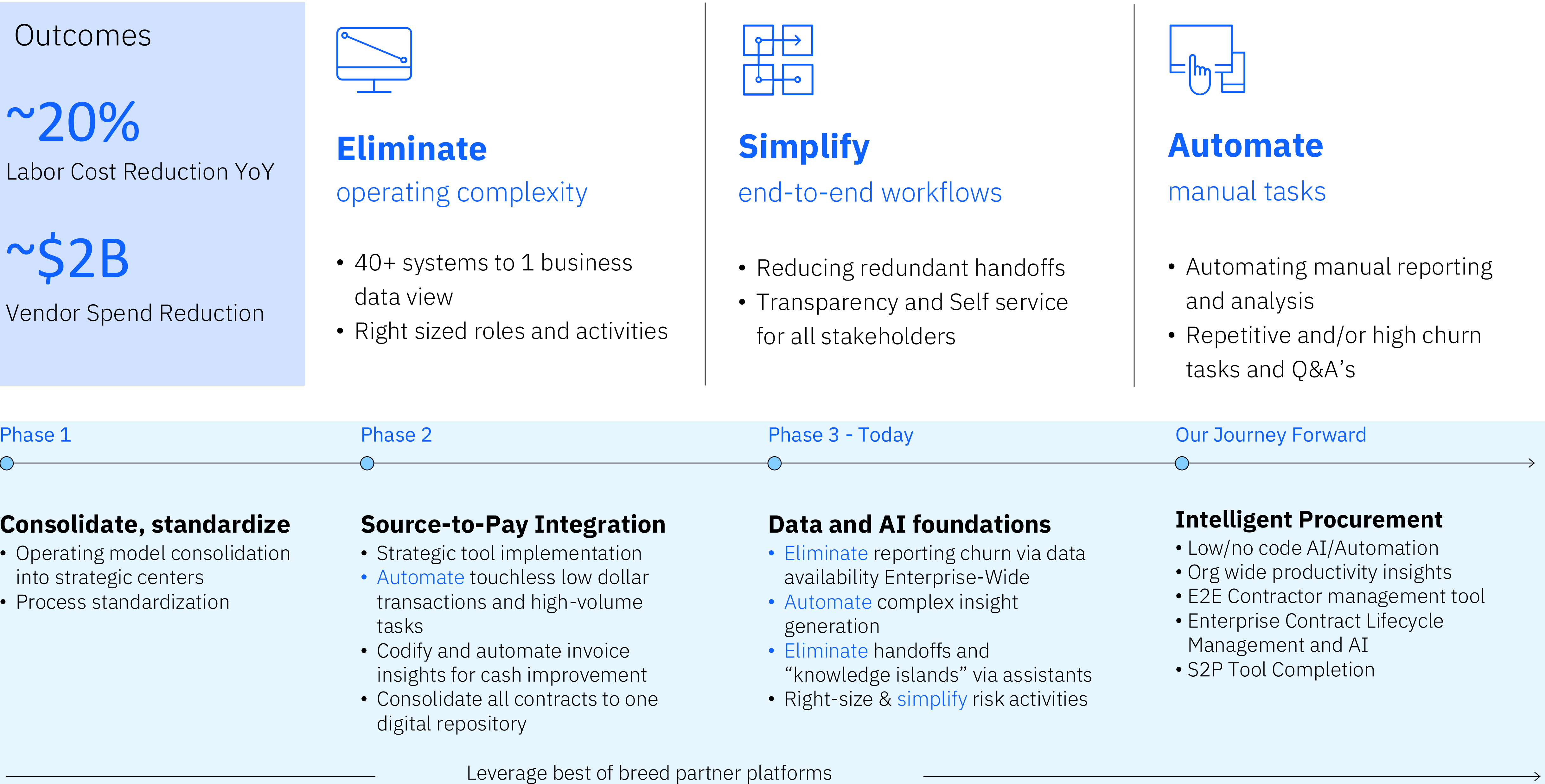
- Eliminated 80% of support queries being handled through to the Help Desk
- Automate further with Watsonx Orchestrate conversations
- Eliminate simple tasks like password resets and certificate **simplify** resolution steps like Mac recovery Key

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



“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.

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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.

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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.

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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