

Hype or hyperbole?

CRACK THE CODE ON WINNING STRATEGIES FOR AI
INFORMATION MANAGEMENT





Our **information-rich**
work environment creates
complexity and
digital friction

The AI productivity frontier:

Navigate with purpose. Reap the best rewards.



What you'll learn in this workshop

- 🌟 AI success starts with strong information management
- 🚀 Real-world examples of AI in action
- 🔍 Learn how to evaluate AI use cases for impact & feasibility
- 📌 Hands-on exercises to identify and refine AI opportunities
- ✅ Practical frameworks for AI decision-making
- 🎯 Walk away with actionable strategies for your organization



Tracy Caughell

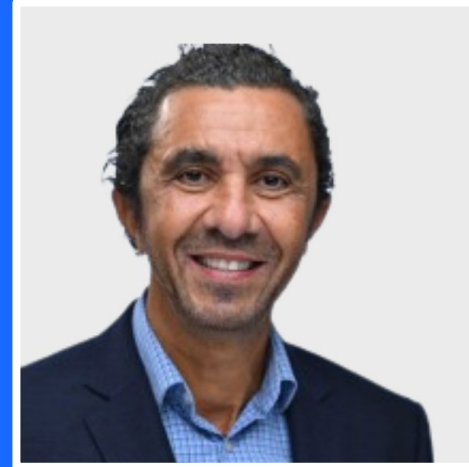
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How do you feel about AI for information management in the workplace?



A. We have a plan, but there is worry we might be missing something



B. Things happen fast, and at times it feels a bit unorganized



C. I have confidence. We will get this right. We know what needs to be done.

2 TRUTHS
AND A LIE!



Can you spot the lie?

A quarter to a third of employees fail to gain value from piloting GenAI

1

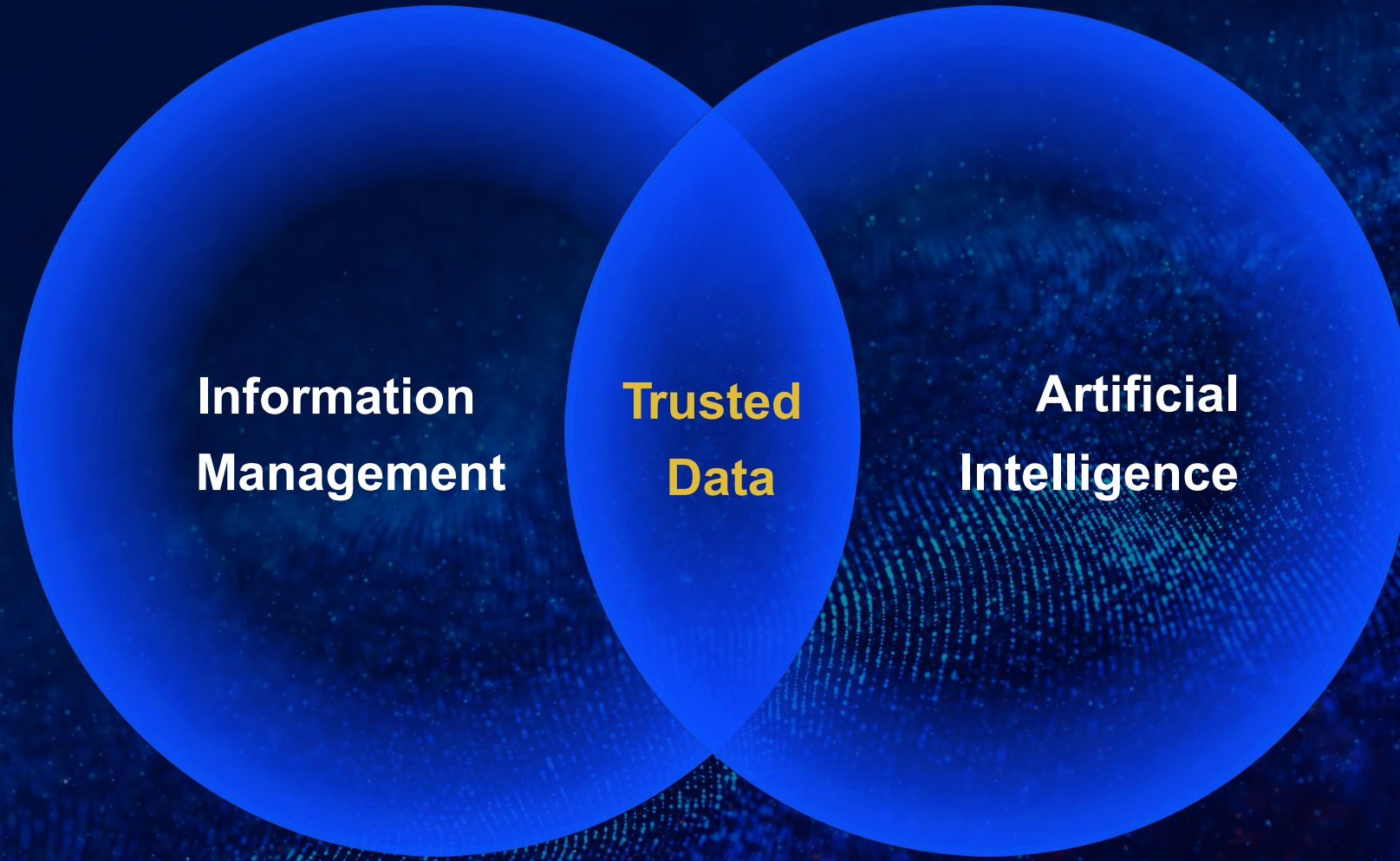
GenAI can prioritize project tasks, providing ongoing optimal resource allocation

2

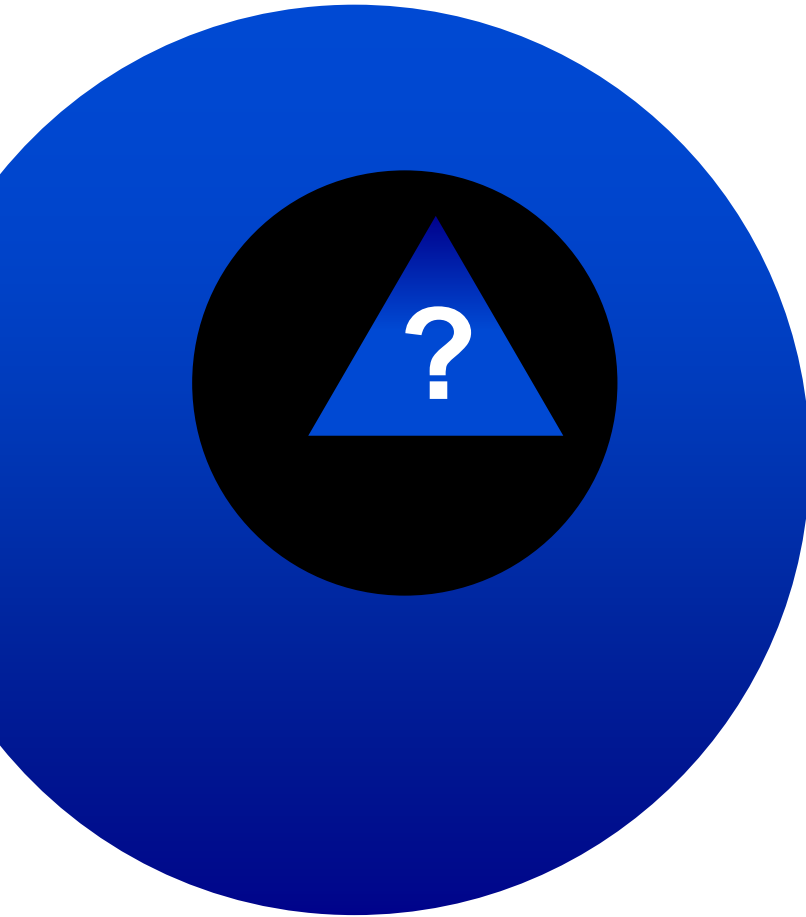
Pivoting to AI can lead to job displacement for employees whose roles are automated

3

Great **AI** needs great Information Management



Predictions



“By 2028, at least 15% of day-to-day work decisions will be made autonomously through agentic AI, up from zero percent in 2024”

– Top Strategic Technology Trends for 2025: Agentic AI, Gartner

“By 2026, 20% of frustrated knowledge workers with no development experience will take charge of transforming how they work by building their own agentic workflows, improving cycle times by 40%.”

– IDC FutureScape: Worldwide Generative Artificial Intelligence 2025 Predictions, IDC

Group exercise: What makes a good use case?

Review the examples and discuss the following questions:

- Name one or two use cases from your organization
- What are some common pitfalls or challenges in defining AI use cases?
- Come back together: was it easy to remember, easy to tell? (took more than a few phrases)
- Share your examples with the group

Group Exercise: Spot the Difference!

- What makes a good use case for AI? What makes a bad use case?
- Can you spot the difference?



Is a good idea a good use case?

A use case is effective if it is feasible, saves or generates time and money, and simplifies the user's experience with the information

Impact. Feasibility. Success.

- Good for the company
- Good for the user
- Achievable and provable

Let's look at a few examples of good use cases

Keep the metrics in mind..



Retail:

- Retailer builds an internal assistant to improve claims processing



E-commerce:

- The product team creates ad headlines and product descriptions



Construction:

- A major developer builds an internal tool that answers technical queries



Legal:

- The legal department uses generative AI to identify problematic terms and clauses in negotiation



Technical support:

- Classifies support inquiries



Learning:

- Provides tailored learnpaths for students



Industry: Insurance

Department: Claims Adjustment

Aviator use case: The company has received a large damage claim, and insurance adjustor, Kate, needs to resolve it quickly to guarantee a successful outcome for the claimant and her employer.

Kate uses Aviator to:

- Summarize the case
- Ask what is required to close it, rather than manually searching through thousands of files
- Get contact details for an adjustor on a similar case
- Draft an email to ask the adjustor for help on the case
- Translate the email into Spanish

Results

Aviator has:

Summarized the case

Provided details to help close it

Limited access to content the user has permission to see

Identified a contact who can help

Drafted and translated an email



Aviator helped this insurance company complete critical work on a claim in less than 5 minutes versus days





Industry: Technology

Department: Human Resources

Aviator use case: A tech company has received new funding and needs to fill a product management role immediately. They can't afford to hire the wrong person, and HR manager, Sam, must identify the top candidates for the job.

Sam uses Aviator to:

- Summarize the job description
- Ask what candidates are available for the role, and who has skills matching the job requirements
- Get a comparison of their skills and references
- Quickly access reference letters and translate a summary from German to English
- Draft an email in English and translate to German to invite the best candidate for an interview

Results

Aviator has:

Summarized a large workspace of candidate files

Identified where to find specific details in resumes

Answered a key question: which candidate matches requirements

Drafted and translated related communications



Aviator helped this tech company cut the hiring time for a pivotal role by 50%



Use case: Industrial Manufacturing

Departments: Manufacturing and Maintenance

Aviator use case: A parts manufacturer with global production facilities needs visibility into equipment maintenance manuals and repair reports to minimize production downtime in the absence of IoT sensors.

Chris uses Aviator to:

- Process and understand maintenance logs and reports to summarize frequency and part numbers of equipment failure
- Gain key insights and summaries from manufacturing manuals and guidelines
- Summarize safety regulations and standards
- Query documentation for manufacturing processes, equipment manuals, and maintenance procedures

Results

Aviator has:

Pinpointed common points of failure in equipment

Helped to comply with the latest safety requirements

Enabled informed maintenance decisions in real time

Query safety training materials for employee training and onboarding.



Aviator helped this manufacturer minimize production downtime and improve safety.





Use case: ESG Compliance

Departments: Corporate Compliance; Supply Chain

Aviator use case: Sustainability and ethical business practices are increasingly important in supply chain risk management. Organizations need visibility into ESG-related documents within their organization and supply chain, including trading partner and suppliers.

Sandy uses Aviator to:

- Create workspaces for **multiple types of documents** including: Compliance certificates, compliance reports, contracts, conflict mineral reports, AS2 connectivity and more
- Summarize supplier profiles to help determine which will be most successful with ESG goals
- Identify which suppliers are least aligned with our ESG goals
- Summarize the highest opportunity for ESG improvements

Results

Aviator has:

Summarized workspace documents and applied metadata

Identified where to explore specific ESG risk and opportunity

Answered a key question:
Which suppliers present the highest risk?

Pinpointed suppliers to partner with for key initiatives



Aviator helped this supply chain improve its ESG position and build a strategy for new supplier onboarding



Methodology: Evaluating a potential use case

- **STEP 1:** Define the problem or opportunity
- **STEP 2:** Assess the data
- **STEP 3:** Evaluate the complexity of the problem
- **STEP 4:** Determine the AI readiness
- **STEP 5:** Assess the business value and ROI
- **STEP 6:** Evaluate the ethical and regulatory considerations
- **STEP 7:** Prioritize and decide within the context of other AI initiatives
- **STEP 8:** Refine the use case

Methodology: Effective use case articulation

- Refine the use case by iterating on the problem statement, data requirements, and AI solution
- Consider using the AI Project Canvas to get your ideas down

Main Areas

- Business context
- Use case description
- Requirements and constraints
- Success metrics and evaluation
- Technical considerations

Communicating AI use cases: Clarity & impact

The Challenge

- AI's potential is vast but often misunderstood
- Stakeholders need clear, concise explanations

Our Goal

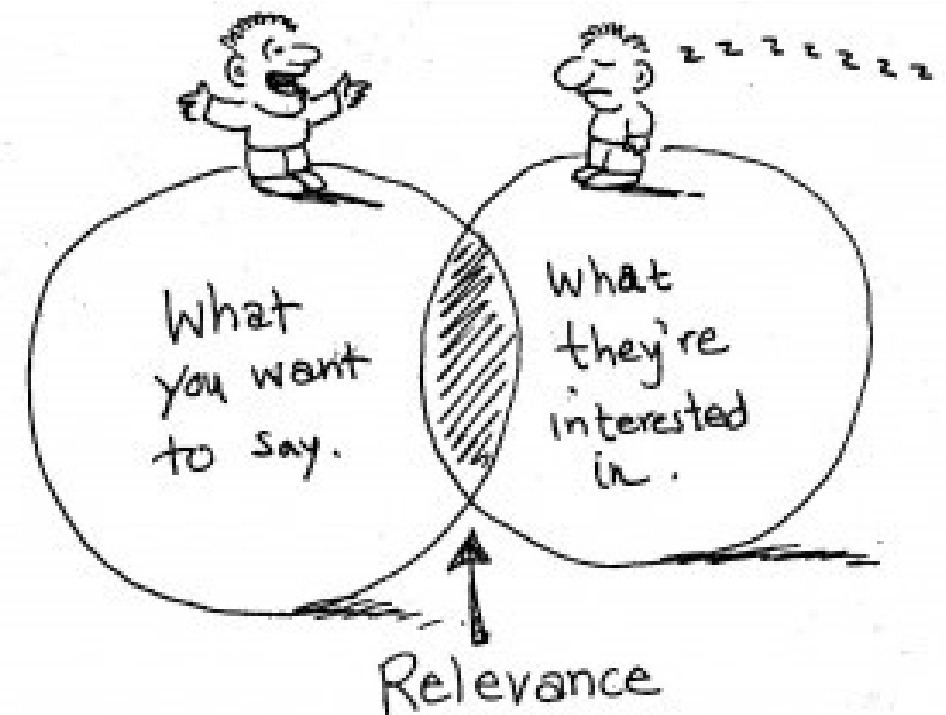
- Provide a framework for effective communication



Know your audience

Tailor your message to resonate

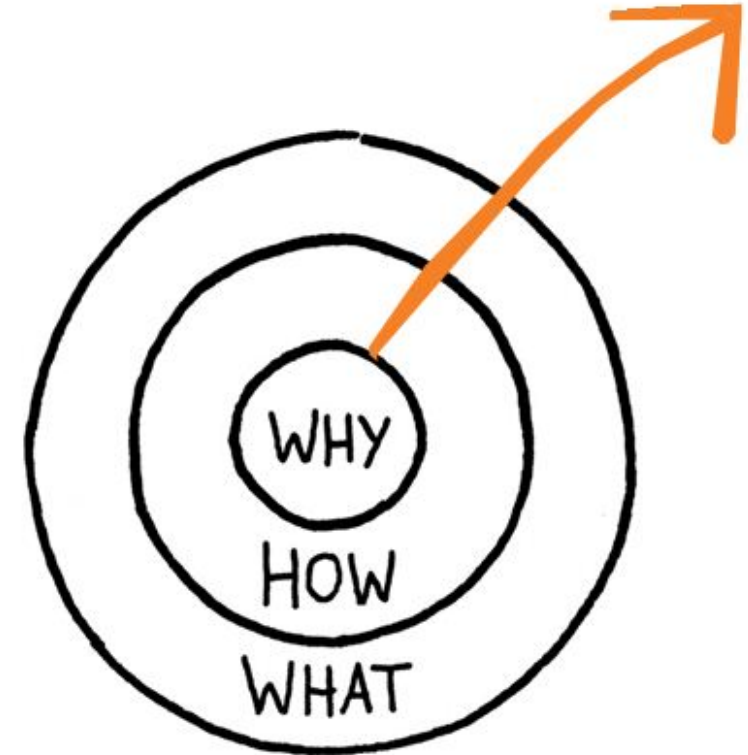
- **Executives:** Focus on strategic value, ROI, and business outcomes
- **Technical Teams:** Emphasize the solution's architecture, data, and methodology
- **End Users:** Highlight ease of use, impact on their daily tasks, and benefits



Define the problem

Clearly articulate the business challenge

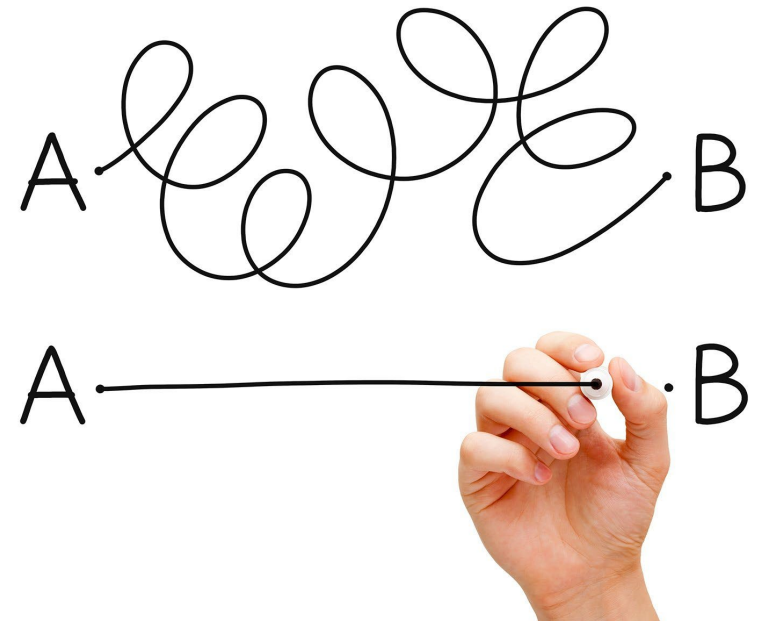
- What is the current pain point or inefficiency?
- What are the consequences of not addressing it? (e.g., costs, risks, lost opportunities)
- Use quantifiable metrics and real-world examples whenever possible



Explain the solution

Demystify the AI, focus on what it **does**

- Avoid excessive technical jargon. Use simple language
- Focus on the core AI techniques (e.g., machine learning, natural language processing) in an accessible way
- Use analogies, metaphors, or visuals to illustrate complex concepts



Showcase the impact

Quantify the value proposition

- What are the tangible benefits? (e.g., increased efficiency, reduced costs, improved accuracy)
- Use metrics, data, and visuals (charts, graphs) to demonstrate ROI
- Tell a compelling story of how the AI solution drives positive change



Address concerns

Acknowledge potential concerns and proactively address them

- Transparency: Explain how the AI works and how decisions are made
- Ethics: Discuss how the AI is being used responsibly and ethically
- Data Privacy: Explain how data is protected and secured



Communicate with clarity
Drive AI adoption



Group assignment #2: Evaluating a Real-World Use Case

Select a relevant use case

Drawing from your organization's AI experiences, choose a use case that resonates with your team



Apply the evaluation methodology

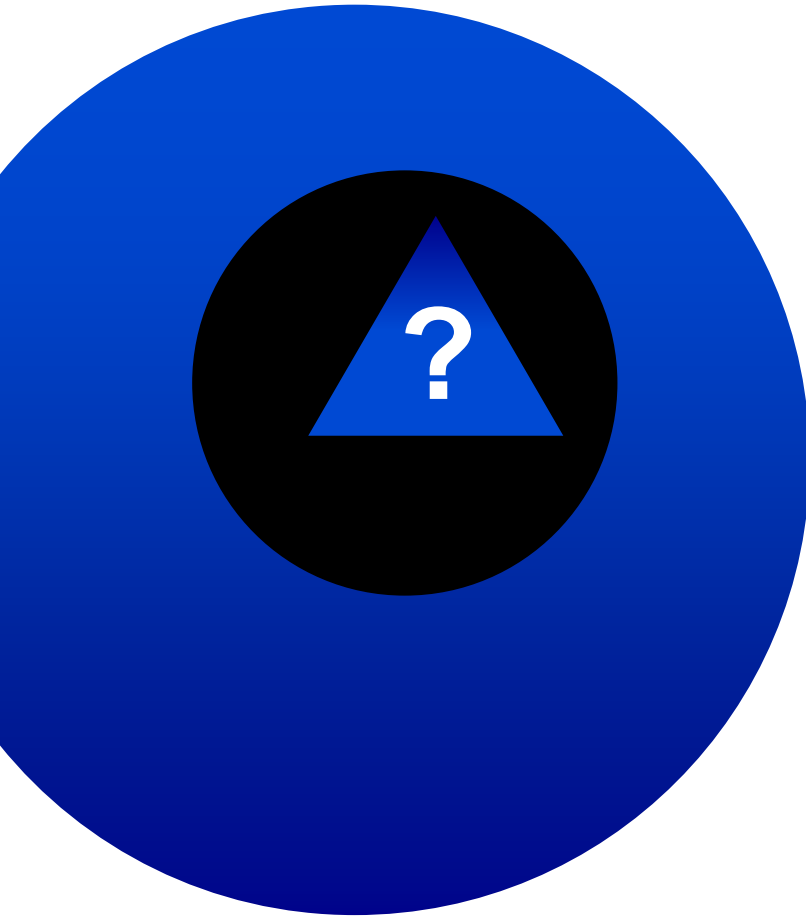
Use the framework outlined earlier to assess the suitability of generative AI for your selected use case



Prepare a pitch

Assign a team member to present their evaluation and recommendations, highlighting the potential benefits and challenges of applying generative AI to the chosen use case

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Don't miss tomorrow...

4:15 - 5:00 PM INTERACTIVE BREAKOUT SESSION WORKFLOW AND PROCESS AUTOMATION PATHWAY

TURNING DOCUMENTS INTO DECISIONS: CAPTURE, PROCESS, AND POWER YOUR WORKFLOW

Repetitive, manual document processing slows productivity and creates delays in critical workflows. In this session, Jeremy Smith from Mohawk Industries will share how

Intelligent Document Processing (IDP) and strategic capture to achieve minimal human effort. Learn how Mohawk is improving operational efficiency by using AI as a source to streamline workflows and reduce IT burdens. Gain insights into how IDP workflows, and enabling smarter, faster decision-making. The session will focus on readiness.



Jeremy Smith
Senior Manager, Business Relationships, M
in

2:00 - 2:45 PM INTERACTIVE BREAKOUT SESSION ARTIFICIAL INTELLIGENCE AUTOMATION PATHWAY

PROMPT PERFECT: MASTERING AI INPUTS FOR INFORMATION MANAGEMENT SUCCESS

As AI reshapes how we manage information, mastering the art of prompt engineering is essential to fully leverage its capabilities. In this 45-minute session, we'll explore how to craft precise and effective prompts that deliver valuable, relevant results for information management and governance. You'll learn the key principles of prompt structure, discover examples tailored for information professionals, and gain strategies for streamlining workflows, improving decision-making, and achieving better outcomes. Whether you're new to AI or looking to refine your prompt engineering skills, this session will equip you with practical tools to fast-track your success. You'll walk away with a toolkit of techniques to improve content categorization, automate routine data management, and maintain compliance—empowering you guide others in your organization in adopting AI confidently in their daily workflows.



Driss Chahboune
OpenText Content Cloud AI Solutions
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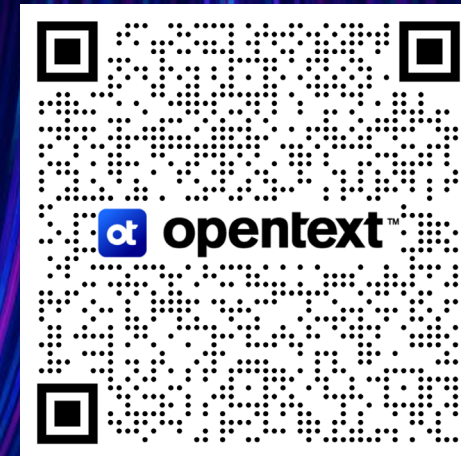


Sheila Woo
Sr. Director, Cloud Services – AI and Analytics | OpenText
in

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