

# betterworks

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## AI Feature Guide





- AI Assist Features
- AI Feedback Summary Overview
- Betterworks Responsible AI Policy
- FAQs

Betterworks AI features can only be turned on by a system administrator. To turn on AI features please reach out to your CSM or the support team.

## Conversation Assist

Deliver impactful coaching and simplify performance evaluations.

Opt-In

Use of generative AI to refine conversation responses to **enhance precision, clarity & actionability, and reduce bias.**

1. How well do you think you performed this quarter with respect to your professional goals ? \* 09/12/2023

I was OK I guess. I mean I think I could have done better with the deployment of the real time chat service but the sad support received from the cloud service provider kind of messed up my deliverables as well. I'll try to be more proactive about these things in the future. Overall, I think I could have done better.

AI Assist suggestion

I believe there is room for improvement, especially with the deployment of the real-time chat service. However, the support from the cloud service provider impacted my deliverables. Moving forward, I will prioritize being proactive in managing such situations. In general, I acknowledge that there is scope for improvement in my performance.

REGENERATE

APPLY

Why apply this suggestion?

The sentence has been rephrased to present a more professional and objective tone. The use of casual language like 'OK I guess' has been replaced with a more formal expression. The sentence has been structured to highlight specific areas of improvement and acknowledge the impact of external factors on the deliverables.

3. What specifically could they work on or improve to increase their impact next time?

You did a decent job on your projects this quarter but definitely missed the mark on a couple things. There are still some outstanding items that should have been completed. Delivery projects faster and work better cross functionally. You are not an island, make sure you reach out for help.

AI Assist: Improve Feedback BETA

You did a good job on your projects this quarter, but there were a few areas where improvements could be made. There are still some outstanding items that need to be completed. Aim to increase the speed of project delivery and enhance collaboration across functions. Remember, asking for help when needed is important.

REGENERATE

APPLY

Why apply this suggestion?

The feedback has been balanced to acknowledge the good work while also providing constructive criticism for improvement. The language has been adjusted to be more supportive and inclusive.

## Feedback Assist

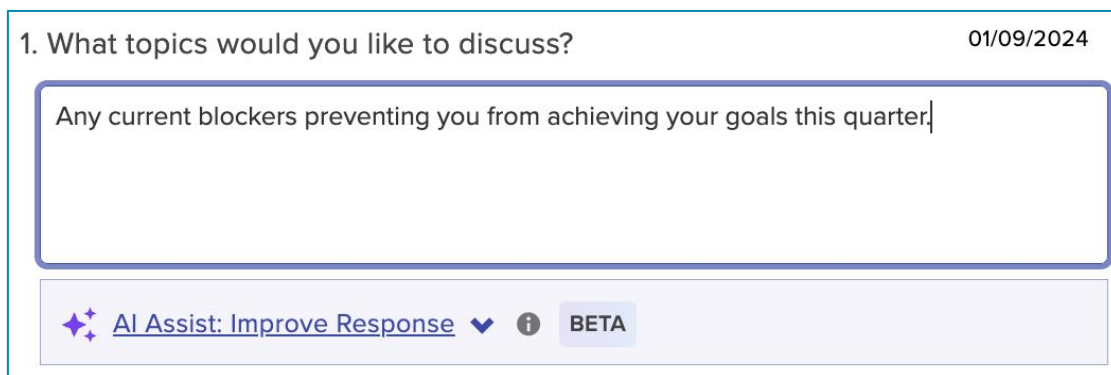
Provide constructive, actionable and unbiased feedback, every single time.

Opt-In

Refine feedback responses to **enhance precision, clarity & actionability, and reduce bias.**

Streamline your Conversations and Feedback processes in Betterworks by harnessing the AI Assist functionality. Simply follow the provided directions to effectively utilize generative AI, enhancing the quality of your responses and facilitating continuous learning on the go.

- **Step 1** Start entering your responses to the prompts within your **Conversations** and/or **Feedback** requests.

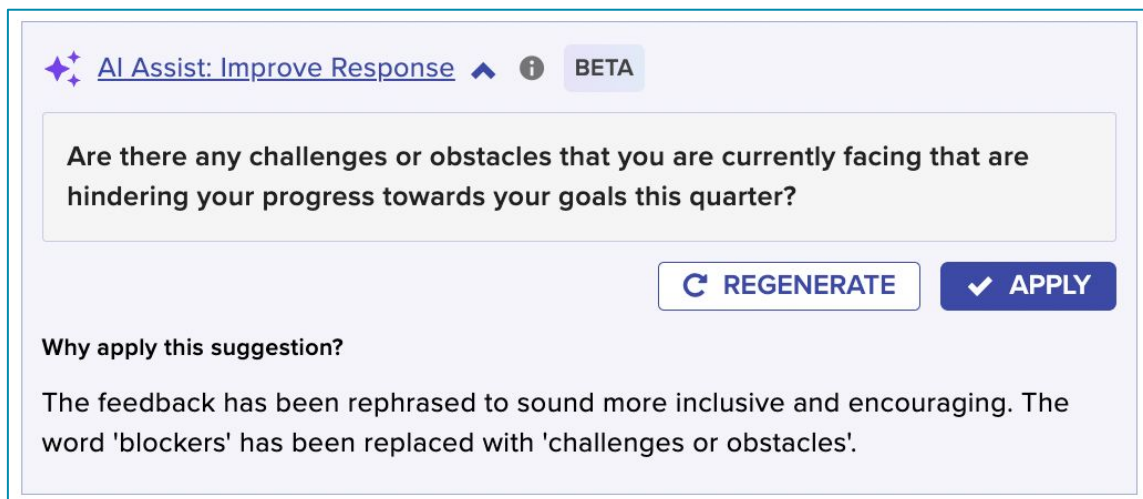


1. What topics would you like to discuss? 01/09/2024

Any current blockers preventing you from achieving your goals this quarter.

AI Assist: Improve Response ▼ ⓘ BETA

- **Step 2** Once you have entered text click the arrow next to **AI Assist** to see the results.



AI Assist: Improve Response ▲ ⓘ BETA

Are there any challenges or obstacles that you are currently facing that are hindering your progress towards your goals this quarter?

↻ REGENERATE ✓ APPLY

Why apply this suggestion?

The feedback has been rephrased to sound more inclusive and encouraging. The word 'blockers' has been replaced with 'challenges or obstacles'.

- **Step 3** Click **Regenerate** to view a different response or click **Apply** to copy the AI generated content into your response.

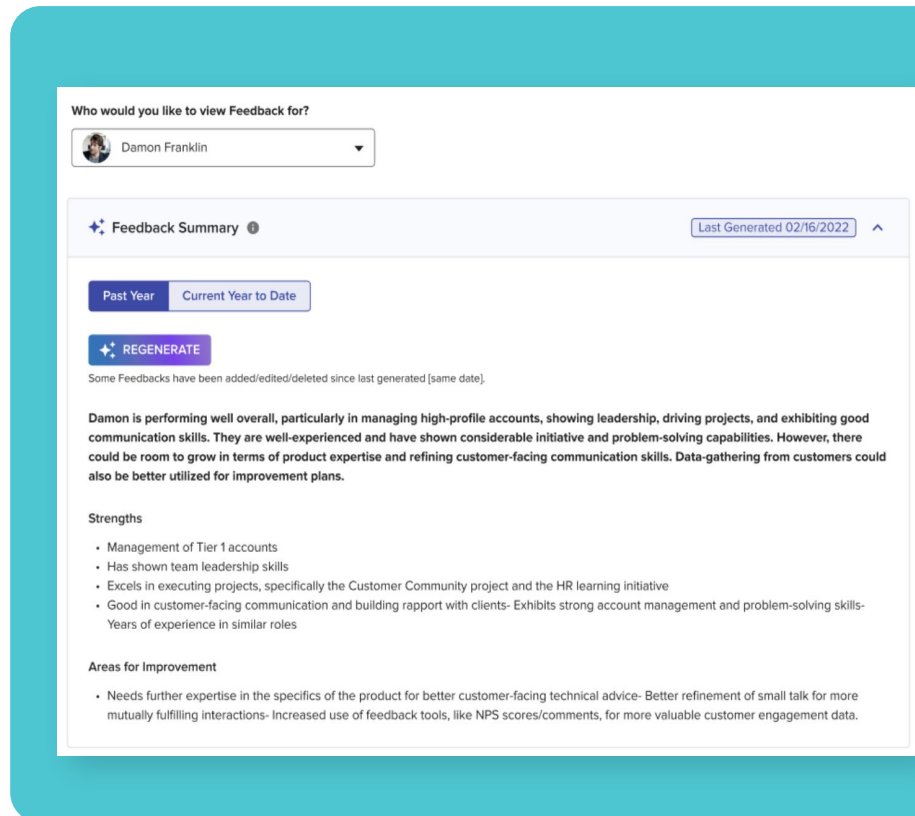


## Feedback Summary

Deliver impactful coaching and simplify performance evaluations.

Opt-In

Provide a **summary of past feedback**, find recurring themes in strengths and areas for improvement.



### Q: Who can generate a Feedback Summary?

Feedback summary can be executed by individual employees, managers and skip level managers based on organizational hierarchy and privacy requirements of the feedback.

### Q: What is required for the feedback summary to be generated?

A user must have at least 2 feedbacks within the business period for a summary to be generated. Summaries are limited to the current and previous fiscal year.

### Q: Are private or confidential feedback included in the summary?

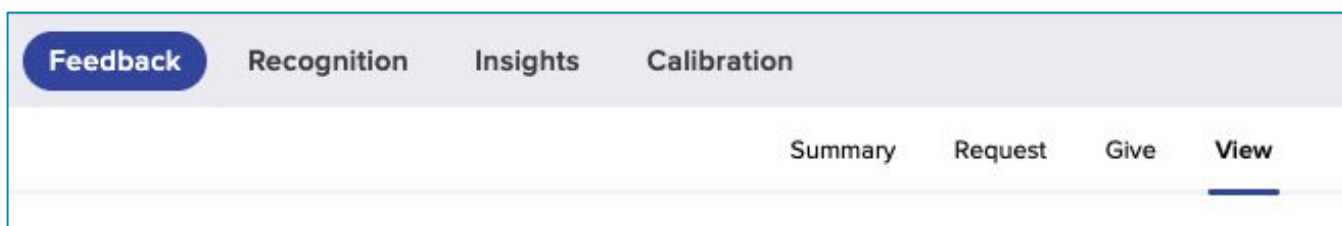
No, private/confidential feedback is excluded from the summary if the individual requesting it doesn't have permission to view specific feedback.

### Q: Can a user generate multiple summaries?

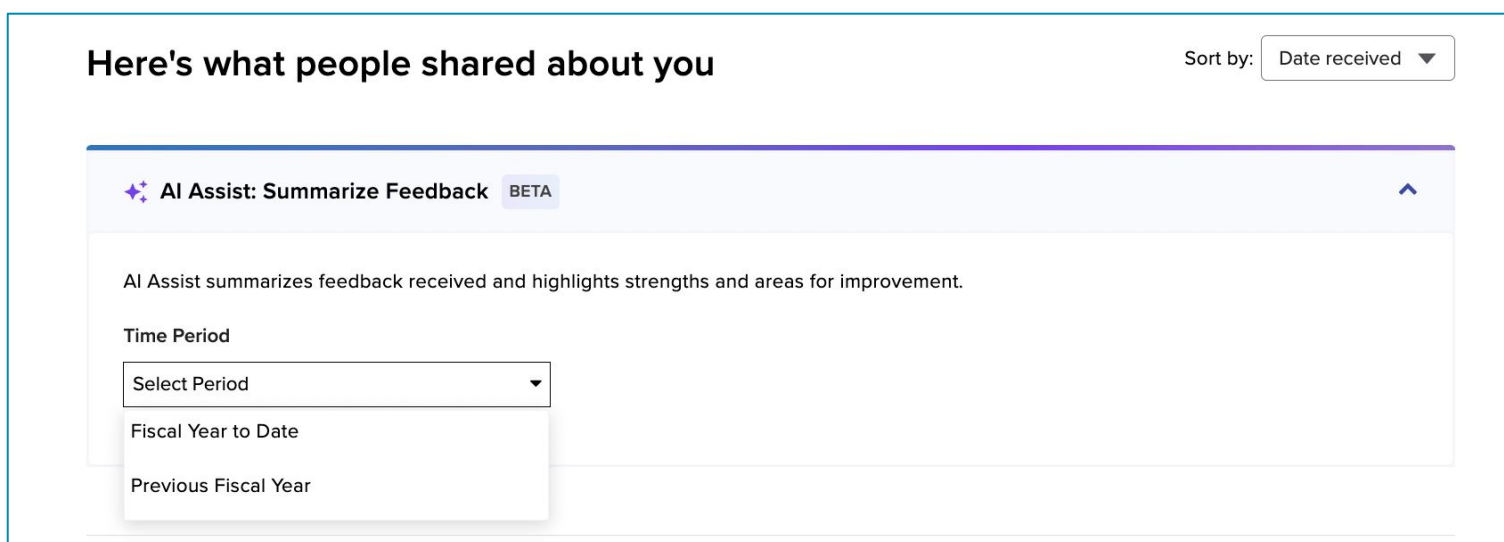
No, a user can generate the summary only once, unless feedback has been added, edited, or deleted. In such cases, re-generation is recommended for an up-to-date summary.



- **Step 1** To generate a **Feedback Summary** for yourself, navigate to the **View** tab in the **Feedback** module.



- **Step 2** Select the time period you would like to view for your Feedback Summary and click **Summarize** to see the results.

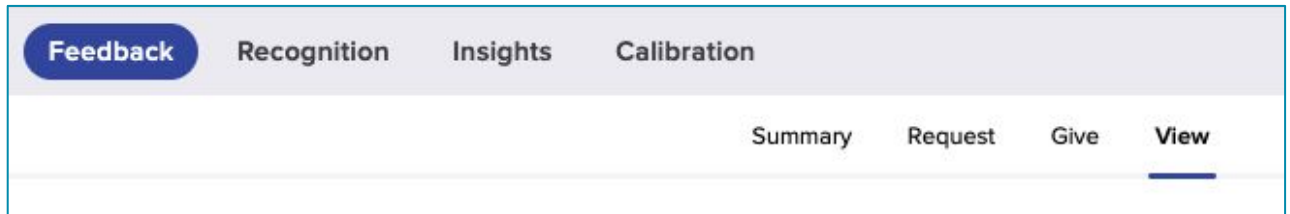


**Note:** A feedback summary can only be generated for the current and previous fiscal year if you have received at least 2 feedbacks during that time period. Feedback Summaries can only be regenerated if feedback has been edited, deleted, or added.

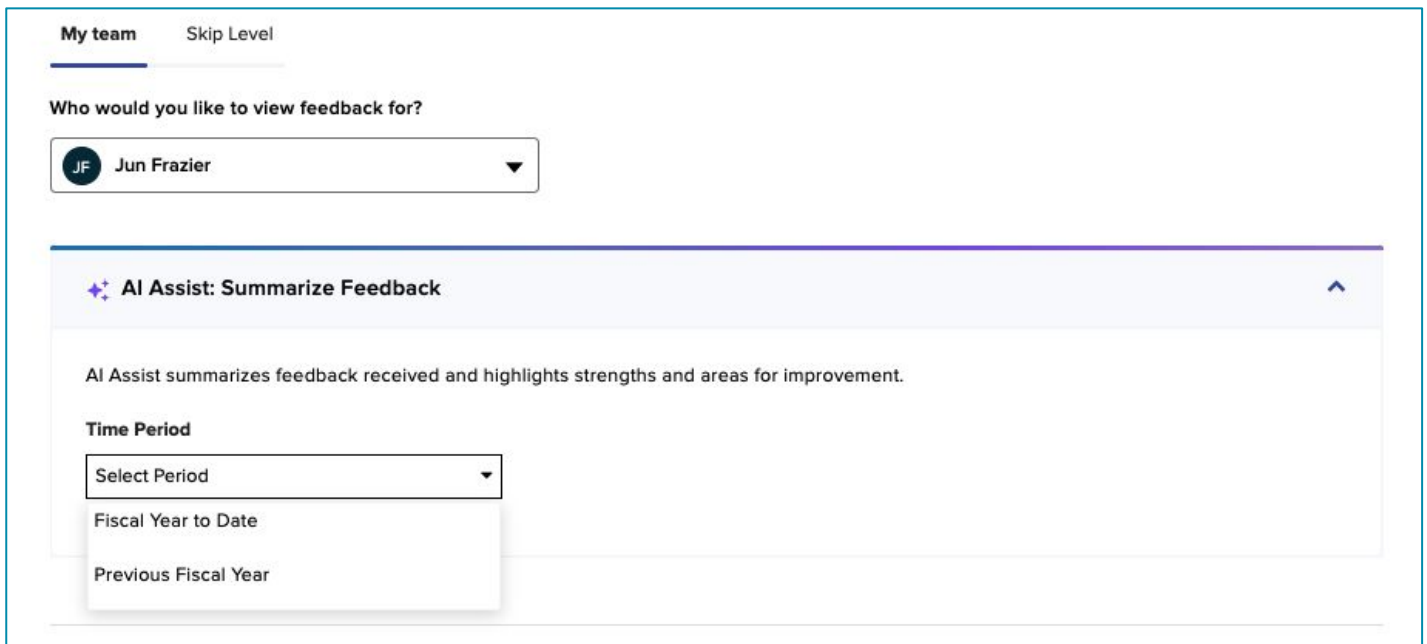
# Manager- Feedback Summary AI



- **Step 1** To generate a **Feedback Summary** for yourself or the employees you have access to in your downline, navigate to the **View** tab in the **Feedback** module.



- **Step 2** Select who you would like to view the Feedback Summary for and the time period from the dropdowns. Then click **Summarize** to see the results.



**Note:** A feedback summary can only be generated for the current and previous fiscal year if you have received at least 2 feedbacks during that time period. Feedback Summaries can only be regenerated if feedback has been edited, deleted, or added.



- **Step 1** To generate a **Feedback Summary** for your employee or yourself during an active **Conversation**, click on **Feedback** in the right panel. If a Feedback Summary has already been generated, you will see that display in the Feedback panel.

The screenshot displays the Betterworks interface for a 'Manager Evaluation' of 'Damon' due on 02/27/2023. The interface includes a navigation bar with 'Conversations', 'Feedbacks', 'Recognition', 'Insights', and 'Admin'. The main content area shows a 'Next Step: Answer - Due 02/27/2023' box. Below this, the 'You' section is set to 'Damon'. The '1. Summary:' section contains a list of bullet points:

- Damon was by far the most impactful engineer on the Merchandising team in H1. He was the live example of a 10x engineer. He brought a step function increase in velocity and quality.
  - Before Damon, we were delivering up to 3 major features in each quarter. After his ramp up, we are adding 7+ major features and at least one brand new tool each quarter.
- He is a prolific IC. He has 248 PRs (excluding runtime) in H1, 200 out of them are PRs in [web repo](#).
- He led a group of 4 frontend engineers, improved the campaign manager, built the creative studio and ads manager for operators.

The right-hand panel shows the 'Feedback' section with a 'VIEW PERFORMANCE SNAPSHOT' button. Below this, the 'AI Assist: Summarize Feedback' feature is highlighted, with a description: 'AI Assist summarizes feedback received and highlights strengths and areas for improvement.' A 'Time Period' dropdown menu is set to 'Select a time period'. A 'SUMMARIZE' button is visible. At the bottom, there is a 'Previous Feedback' section with a 'See less' link.

- **Step 2** Select who you would like to view the Feedback Summary for and the time period from the dropdowns. Then click **Summarize** to see the results.

**Note:** A feedback summary can only be generated for the current and previous fiscal year if you have received at least 2 feedbacks during that time period. Feedback Summaries can only be regenerated if feedback has been edited, deleted, or added.



## Responsible AI at Betterworks

We believe it is essential to develop and deploy generative AI in a responsible manner. That's why we have a comprehensive responsible AI governance program in place. This program ensures that our generative AI solutions are aligned with our privacy principles and are developed and used in a way that minimizes risk and maximizes benefits.

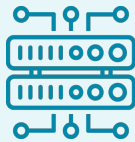
One of our guiding values at Betterworks is **"Do the right thing."** This means being candid, authentic, and transparent, and matching our words with our actions. We are applying this value as we incorporate more and more AI capabilities into our platform. Betterworks is committed to using generative AI responsibly to transform performance management, and we are excited to continue working with our customers to harness the power of generative AI to improve business outcomes.

## Betterworks Builds Trustworthy AI



### Purpose Built

Domain-specific, purpose-built use cases lead to accurate results that enhance performance and generate confidence-inspiring results.



### Rich Data

Our vast, high-quality dataset fuels our AI, enabling it to deliver accurate, meaningful, and trustworthy results.



### Explainable

Receive transparent explanations for every AI-generated recommendation. Use AI as a co-pilot to eliminate bias, and improve clarity and professionalism.



### Human-Centric

Your judgment remains pivotal in decision-making, giving you accountability and control.



### Secure

The protection of your data is built into every innovation. We are transparent about our data practices and never use customer data for model training.

Every Betterworks AI feature includes an on-and-off toggle at the most granular level, providing customers with complete control over what AI features they use.

## **Q: What is the process for customers to opt in?**

Please email your Customer Success Manager or Program Architect to opt-in and request which AI features to enable.

## **Q: Do customers need to pay an additional cost for these Generative AI capabilities?**

No, customers do not need to pay any additional cost for these features.

Also, customers have the option to activate AI capabilities at their discretion, with each feature controlled by separate toggles to allow selective activation.

## **Q: Who is authorized to opt-in?**

A program administrator needs to request for the feature to be turned on by Betterworks. AI Assist features are only enabled via written request to the Customer Success Manager or Program Architect.

## **Q: What services are considered opt-in?**

Each AI feature is enabled separately to opt-in. Customers can choose to opt-in to one, many or all AI Assist features depending on the modules available in their Betterworks application.

## **Q: Can I turn the features on for select users?**

At this time, no. When features are enabled, they would be available to all users in an organization, regardless of permissions.

## **Q: Can you please clarify if OpenAI will be granted access to our data if and only if we opt into the use of the OpenAI services?**

The connection via API to Open AI is only turned on when the feature is enabled. Open AI does not access all data contained at Betterworks. OpenAI is only active when the feature is turned on and a user requests support via AI Assist to improve or summarize written content the user has already entered.

## **Q: What controls does Betterworks have in place in that someone from the company does not turn on the features without customer authorization?**

Credentialed access to our US and EU production environment and system admin controls are limited at Betterworks. All system admins have SSO permissions which are secure and track and audit functions that are made to each customer's environment. AI Assist features are only enabled via written request to the Customer Success Manager or Program Architect. Through proper approval, a system administrator can request to enable each AI feature one by one.

## **Q: Can customers test the features out in their preview or test environments?**

Yes, you can elect to opt-in and turn on the AI features only in your Test or Preview environment. Doing so will not have any impact on your Production (main) environment, and none of the data in the Production environment will be exposed to the AI capabilities.

## Q: What security and privacy is enabled to ensure my data is safe?

- Feature flag enabled for each client. Your data will never go to OpenAI if you do not turn on any AI features. Betterworks maintains separate environments for each client. Your data will not be used to train anyone else's models or prompts.
- Prompt engineering has been refined to filter out malicious and false language, as well as, PII that may be submitted by users and inform the user that it was removed and why.
- After using an AI Assist Feature, users will be notified that they have reviewed the suggested AI response for errors and consider the submitted response their own.
- Open AI's policy states that data sent over API is not used to train any models.

## Q: What type of data does Betterworks Generative AI capabilities pull?

- Currently, the AI features only pull data entered into open text boxes and the questions for writing assistants. The feedback summary will include all questions and responses (open text and rating).
- No information specific about the user who is using the AI product is sent to Open AI.

## Q: Are there any privacy concerns with reporting on potentially sensitive information such as diversity groups, compensation data etc.? Does our existing security and privacy clause cover this new capability?

Our existing [privacy policy](#) covers this new capability.

## Q: What Generative AI application does Betterworks use in the background? For example: Is it a free version of public, openly hosted application, such as ChatGPT? Is it an in-house built proprietary model?

Betterworks leverages gpt-3.5-turbo hosted by OpenAPI. It is OpenAI's enterprise API model that we interact with via API. Data that we securely send to gpt-3.5-turbo via API is NOT used to train OpenAI's models including gpt-3.5-turbo. Our customers' data is not at all used by a third-party for model training purposes.

## Q: How will Betterworks keep customer data private?

- Betterworks system is a multi-tenant SaaS system. Each customer's data is stored and handled based on the customer ID and user ID in the application. Each feature is behind the feature flag and will be enabled/disabled individually for each organization.
- Data is not used to train any models

## Q: Will I know if someone utilized this in their Conversation or Feedback response?

The writer of the response will receive a modal pop-up, in the UI before sharing to confirm they have reviewed the AI response for errors/accuracy and that they confirm the response as their own. The recipient does not receive notice that the response may have been assisted by AI.

**Q: What specifically is Betterworks doing to combat the concern of Generative AI producing biased outputs because the sources of information it draws from could be biased?**

Through our prompt we are informing Open AI to identify and remove biases that may be detected. We are tracking outputs from Open AI via audit logging and will have the ability to review if biased outputs are being generated.

**Q: What specifically is Betterworks doing to combat the concern around the sources of information that open source Generative AI models refer to being inaccurate?**

Betterworks tracks inputs (prompts and user submitted data) as well as outputs via audit logging. As needed we have the ability to track Generative AI's accuracy of our use cases related to Performance Management.

**Q: Does Betterworks rely upon the usage controls put in place by our customer organizations to ensure privacy and security?**

All information can be found [here](#)

**Q: What data gets stored and pulled across betterworks that gets applied to OpenAI in phase 1? This information goes back to AI to train in your area and OpenAI will have access to this information.**

For Phase 1 only feedback and conversation data will be used in the Assist and Summary features.

- Assist features will be only using the question and open text box input entered by the user and the user's request for suggestion. This data will be sent to Open AI for assistance in re-writing. The data transmitted is limited to what the user inputs, which is why we discourage inputs containing personal information.
- Summary feature will use all the questions and responses (open text and rating scales) in a submitted feedback and will go to Open AI for summarization.
- On the Betterworks side we will be storing the inputs and outputs and other data points about usage in an audit log in the database. We will not use this data to train a model or use any other data from other customers to train a model.

**Q: What data is stored and pulled across Betterworks for future phases e.g. goal assist?**

We can provide more information about goals assist as it becomes available.

**Q: Is the information used to train the model under HIPPA we can get documentation for?**

No, the information is not used to train the model.

**Q: If a user enters bullet points in the text area, will AI reformat it as paragraph text or take my formatting and re-adjust the text?**

In this beta phase, AI will provide a suggestion in paragraph format. Additional options *may* be considered in future phases.

**Q: If we opt-in to AI beta features now, are future AI features going to be automatically rolled out on our Betterworks instance or will we have the option to opt-in to each individual feature? If it's using a different set of data we will want to consider what access it has and ensure we are in compliance before any authorization of additional access and information.**

Each AI feature must be requested to be deployed to your Betterworks production instance individually. If you have previously opted into AI features they will only be automatically turned on for your preview/test instance as they are made available.

**Q: Is there some sort of prompt in the background that can be adjusted or manipulated by us? e.g. pretend you are a manager/employee completing feedback/conversation.**

No, this is not under consideration at this time.

**Q: Can we look at keywords to add in, which we can change/modify in the logic?**

In this beta phase, we are not looking to change or modify keywords or logic.

**Q: What are the filtering/prompts looking for specifically? Excluding proprietary information, what is the logic on the backend?.**

In summary, the AI will assist in writing conversation and feedback responses by evolving the text to:

- Be professional, and promote constructive and encouraging responses
- Identify and remove biases
- Check for grammatical and spelling errors
- Identify and remove PII, as well as, toxic and malicious language