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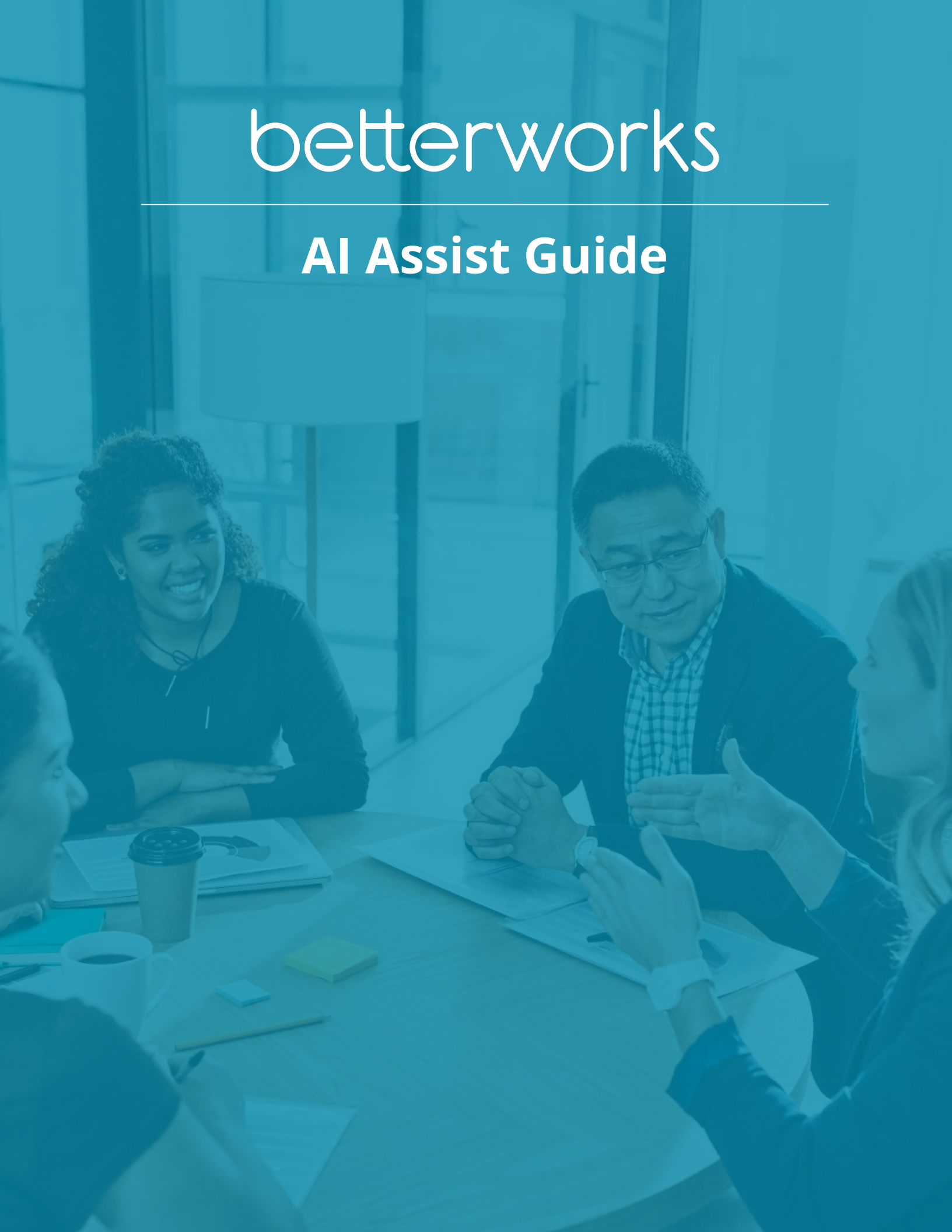
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Betterworks AI features can only be turned on by a system administrator. To turn on AI features please reach out to your CSM or the support team.

AI Assist: Improve Response

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.

It puts everyone in the same playing field which was huge on on our end, and the first time in my Hr. Experience where the employees completed the reviews on time.

Bryan Singer
HR Director, Zilliant

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AI Assist: Improve Response

Streamline your Conversations 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 **Conversation** 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: Improve Response** 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 conversation response.

AI Assist: Improve Feedback

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**.

> It's it's giving our Hr business partners time back, because they've told us they've had a lot less calls with their leaders because of the AI Assist.

Jizelle Reguindin
Learning & Development Specialist, West Coast University

AI Assist: Improve Feedback

Streamline your 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 **Feedback** template.

> 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: Improve Feedback** to see the results.

> ✨ 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.

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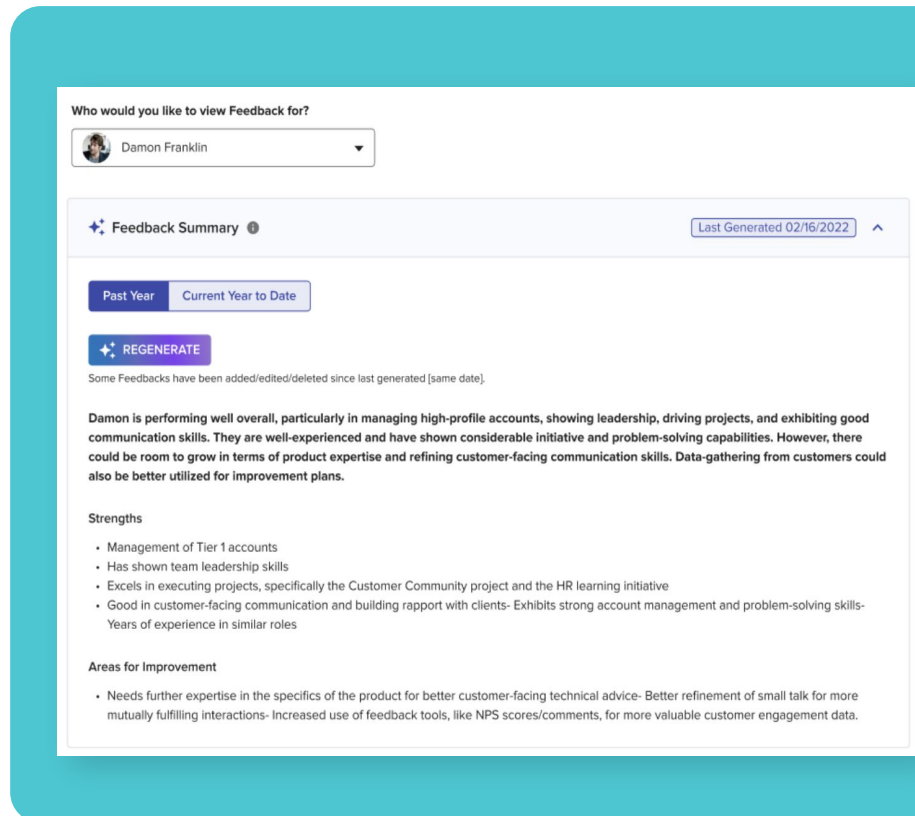
AI Assist: Summarize Feedback

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.
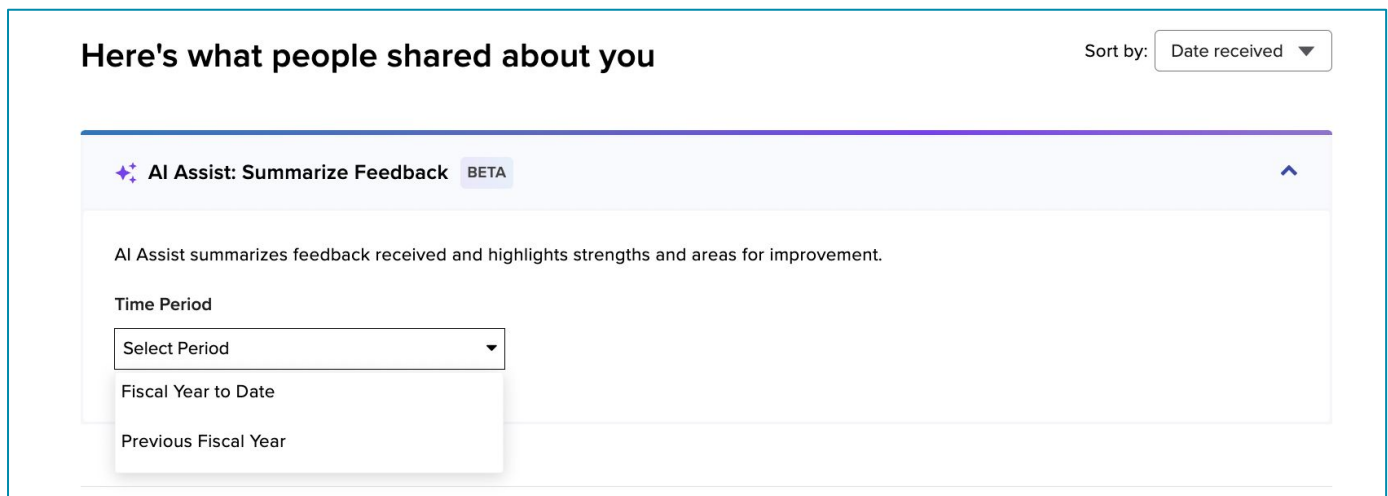
Q: Can a user generate multiple summaries?

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.

AI Assist: Summarize Feedback

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

Feedback	Recognition	Insights	Calibration

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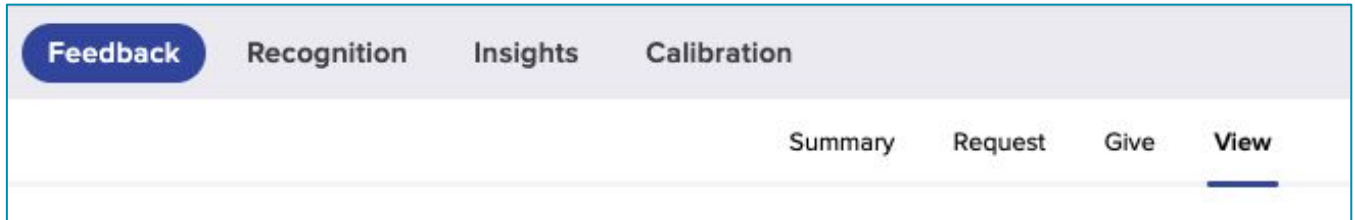
Step 2 Select the time period you would like to view for your Feedback Summary and click **Summarize** to see the results.

Here's what people shared about you

Sort by: Date received ▼

✦ **AI Assist: Summarize Feedback** BETA

AI Assist summarizes feedback received and highlights strengths and areas for improvement.

Time Period

Select Period ▼
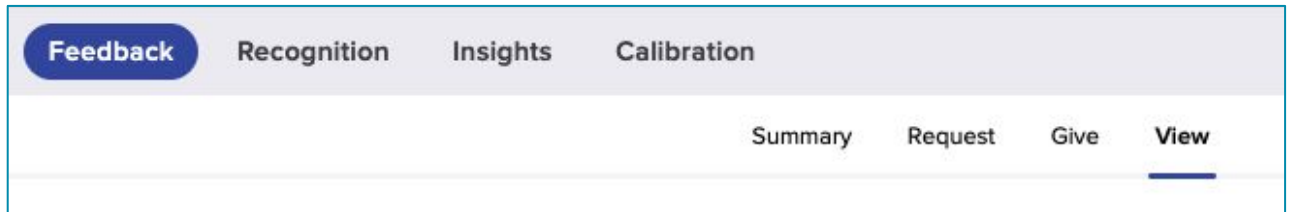
Fiscal Year to Date

Previous Fiscal Year

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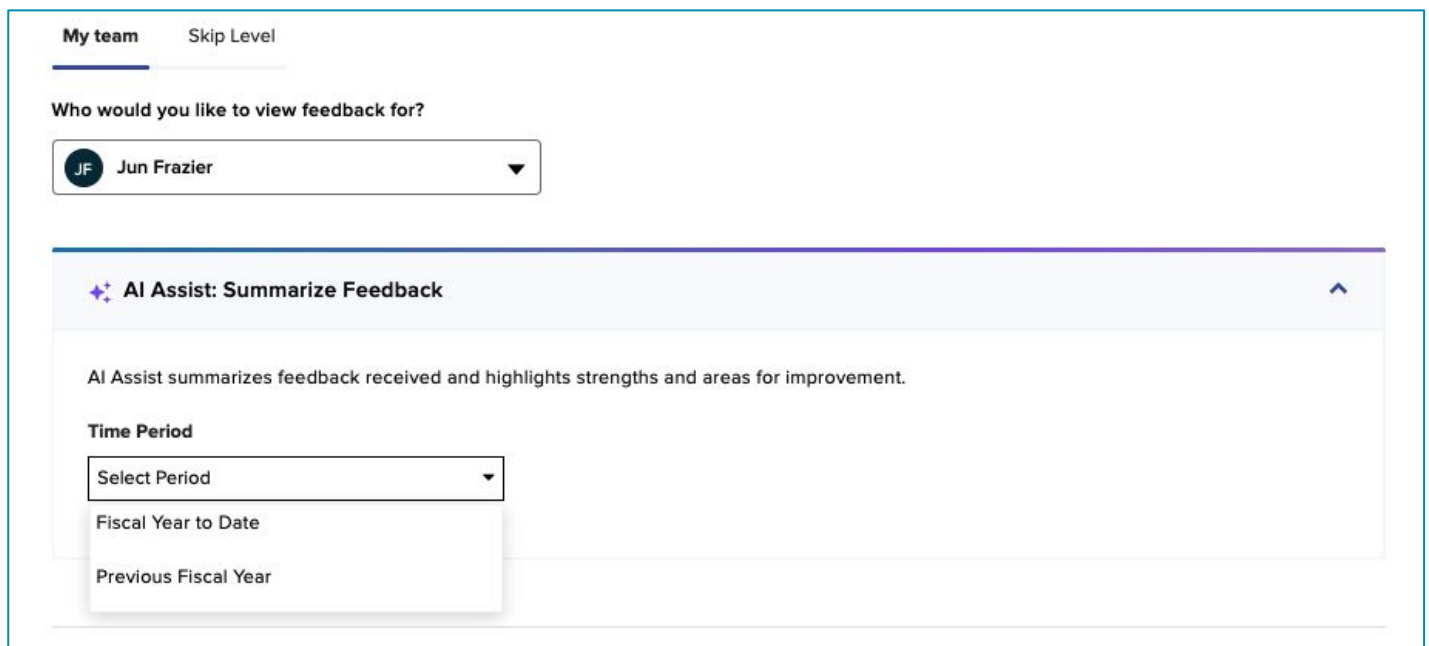
Step 1 To generate a **Feedback Summary** for yourself or the employees you have access to in your downline, navigate to the **View** tab in the **Feedback** module.

Feedback	Recognition	Insights	Calibration				
				Summary	Request	Give	View

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.

My team   Skip Level

Who would you like to view feedback for?

JF   Jun Frazier   ▼

✦ **AI Assist: Summarize Feedback**   ^

AI Assist summarizes feedback received and highlights strengths and areas for improvement.

Time Period

Select Period   ▼

Fiscal Year to Date

Previous Fiscal Year

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 an AI assisted **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.

Step 2 Select the time period from the dropdowns and 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.
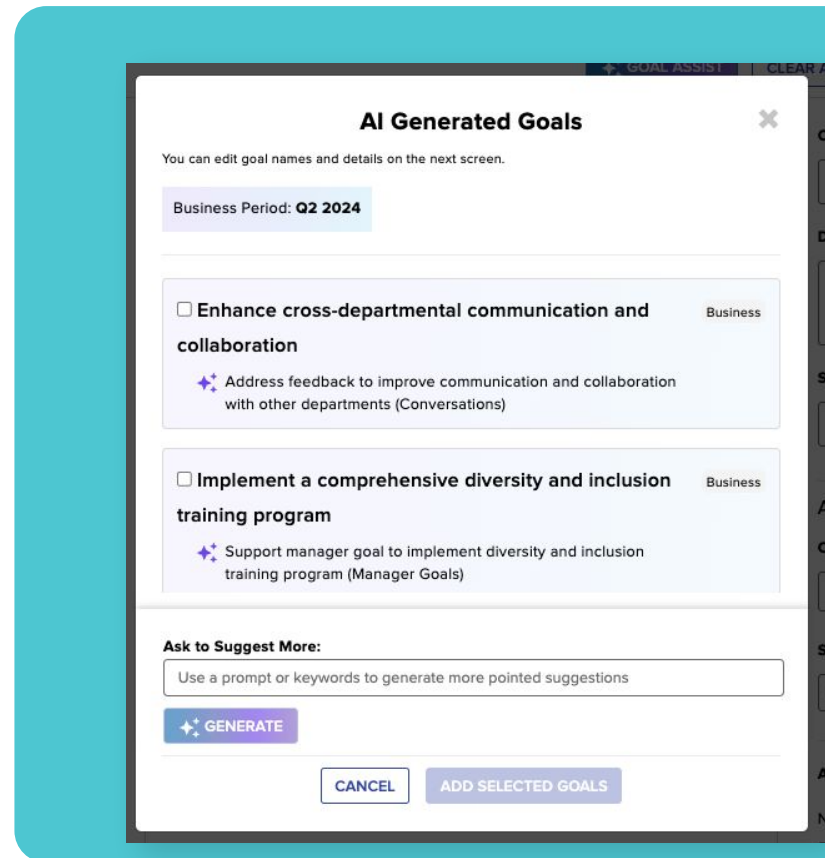
Goal Assist

Always craft goals that are specific, measurable and aligned

Opt-In

Goal Assist analyzes an employee's Betterworks data - goals, feedback, employee role/title, and more - to suggest personalized goals.

The result: Precise, measurable, challenging yet attainable goals that align with both team and company objectives.

Q: What information does OpenAI get access to with the AI Goal Assist?

Individual's Goals, Manager's Goals, Feedback from peers and Conversations with their manager that they have access to from the previous business period.

Q: If an employee is new and does not have previous goals or feedback, what information gets pulled to suggest goals? What about if there are no topline goals?

It will use a person's job title to generate business/development goals

Q: Does Goal Assist suggest key results or milestones for the goals it generates?

No, at this time Goal Assist will only suggest Goals, milestones/key results will be added in the future.

Q: We use OKRs and have renamed Goals to Objectives, how does this impact Goal Assist?

If you have renamed Goals to Objectives, or anything else, your naming convention will transfer to the feature; for example it will say "Objective Assist" within the product.

AI Goal Assist
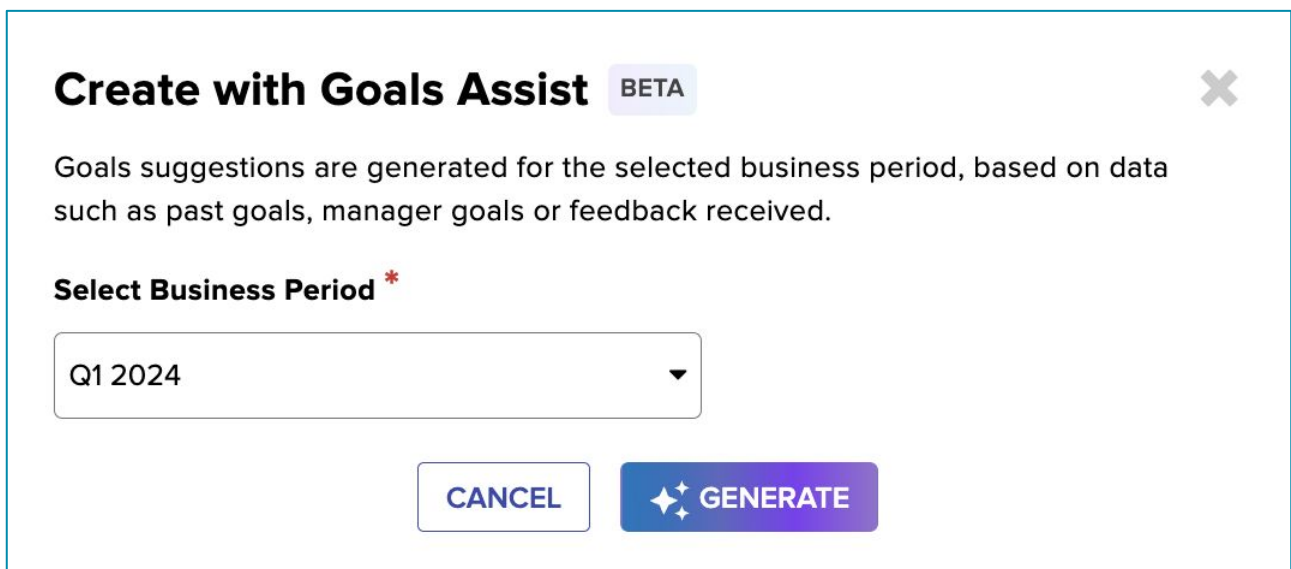
Step 1 Navigate to the **Goals module** and click **Create Goal.**

Step 2 Then click **Goal Assist** to launch the AI Assist feature.

Step 3 Next, define which **business period** you are creating goals for. *This informs the Betterworks system to look back one previous period to analyze previous period's data.*

Step 4 A list of suggested goals are generated.
- The list will contain a mix of business and developmental related goals.
- Each goal will also have an explanation. The explanation will contain the data that was used as the reason for suggesting the goal and the module or section the helped generate it (My Goals, Manager Goals, Feedback, Conversations, etc.)

AI Generated Goals

You can edit goal names and details on the next screen.

Business Period: **Q2 2024**

☐ **Streamline cross-regional communication for improved collaboration**   Business

✦ Based on feedback from peers and performance reviews (Andreas)

☐ **Enhance technical documentation skills for effective knowledge transfer**   Developmental

✦ Based on feedback from peers and performance reviews (Carla)

Ask to Suggest More:

Use a prompt or keywords to generate more pointed suggestions

✦ GENERATE

CANCEL   ADD SELECTED GOALS

AI Goal Assist

Step 5 Select the goals you'd like to create from the provided list.

☑ **Streamline cross-regional communication for improved collaboration**   Business

✦ Based on feedback from peers and performance reviews (Andreas)

☑ **Enhance technical documentation skills for effective knowledge transfer**   Developmental

✦ Based on feedback from peers and performance reviews (Carla)
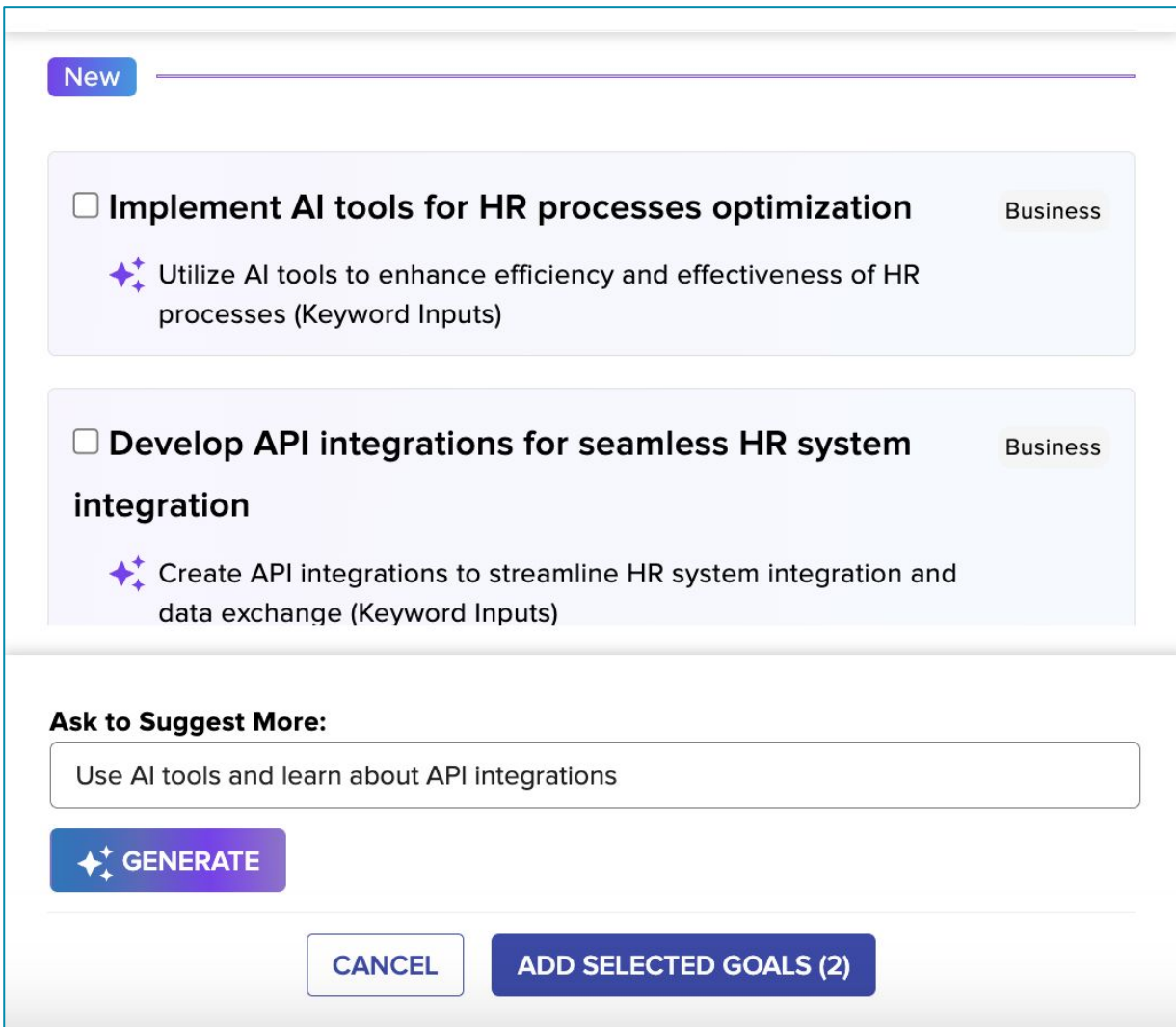
Ask to Suggest More:

Use a prompt or keywords to generate more pointed suggestions

✦ GENERATE

CANCEL   ADD SELECTED GOALS (2)

To get even more AI generated goals, you can enter in keywords or phrases in the **Ask to Suggest More** text box and then select **Generate** to see new goals.

Step 6 The newly suggested goals will go at the bottom of the list under the "New" line. Once you've selected the goals you'd like to create, click **Add Selected Goals.**

Once you have added the selected AI generated goals, you will be taken to the Goal Creation screen. From there you can add milestones as well as the attributes on the right side. The scope (Business or Developmental) will be carried over though from the AI screen.

Responsible AI

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.
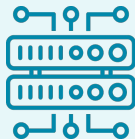
Rich Data

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: 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: 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: 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: 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 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 Assist features for Conversations and Feedback responses only pull data entered into open text boxes.
- The feedback summary includes all questions and responses (open text and rating) that the user has access to.
- No Personal Identifiable Information (PII) about the user who is using the AI product is sent to Open AI.
- For Goal Assist it includes individual's Goals, Manager's Goals, Feedback from peers and Conversations with their manager that they have access to from the previous business period.

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: 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: 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?
OpenAI does NOT use data provided to train their models. OpenAI may securely retain API inputs and outputs for up to 30 days to provide the services and to identify abuse. Refer to https://openai.com/enterprise-privacy section API Platform FAQ

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: 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: 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.

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FAQs

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

Q: How does Betterworks train the model to get better (now and in the future)?

Our integration with Open AI today does not use data to train or fine-tune their model. We will fine-tune (not train) our private llm model to get it better to align with our human resource domain knowledge and we will never use customer data to train or fine-tune the model.