



# Work AI

## Departmental Outcomes

September 2025

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**Questions?**  
[#help-departmental\\_outcomes](#)

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# Glean Drives Business Outcomes in Every Department

## Sales

- Increase win rates & rep participation
- Increase pipeline generation
- Accelerate time to first deal
- Improve forecast accuracy

## Engineering

- Accelerate delivery timelines
- Improve code quality
- Reduce time to first commit
- Automate documentation creation

## IT

- Optimize IT support efficiency
- Accelerate business innovation
- Reduce time to proficiency
- Reduce total cost of ownership

## Customer Service

- Reduce operational costs
- Improve customer satisfaction
- Increase first call resolution rate
- Reduce inefficient call transfers

## Security

- Reduce overall security risk
- Accelerate incident response time
- Improve incident response quality
- Reduce document creation time

## HR

- Optimize HR operations
- Accelerate talent acquisition
- Increase employee engagement
- Reduce employee attrition

## Operations

- Enhance operational efficiency
- Optimize maintenance operations
- Bolster supplier management
- Reduce SLA misses

## Legal

- Accelerate contract reviews
- Improve contract management
- Manage regulatory workflows
- Reduce external counsel spend

## Finance

- Improve financial planning
- Accelerate financial reporting
- Simplify financial operations
- Streamline investment research

## Marketing

- Enhance customer insights
- Increase campaign effectiveness
- Automate content generation
- Streamline event execution

## Product

- Accelerate development cycles
- Enhance feature prioritization
- Improve product adoption
- Bolster market research

## Enterprise

- Increase operational excellence
- Reduce time to onboard
- Drive skill development
- Reduce software sprawl

# Want to see these pre-built agents in action?

Check out Glean's [Agent Library](#) and [get a demo](#)

Powerful AI agents built for real work.



AI agents, for every user

Built for non-technical users and power builders alike, Glean's agents make it easy to adopt AI across your org.



Start fast, scale confidently

Prebuilt agent templates help your team get started fast and see value in days, not months.



Built for how your team works

Help every team, from Sales to Engineering, streamline work with agents that respect your org's permissions.

# Sales

[EXT] Glean for Sales deck  
Collection: Go/Sales-Department-Solution



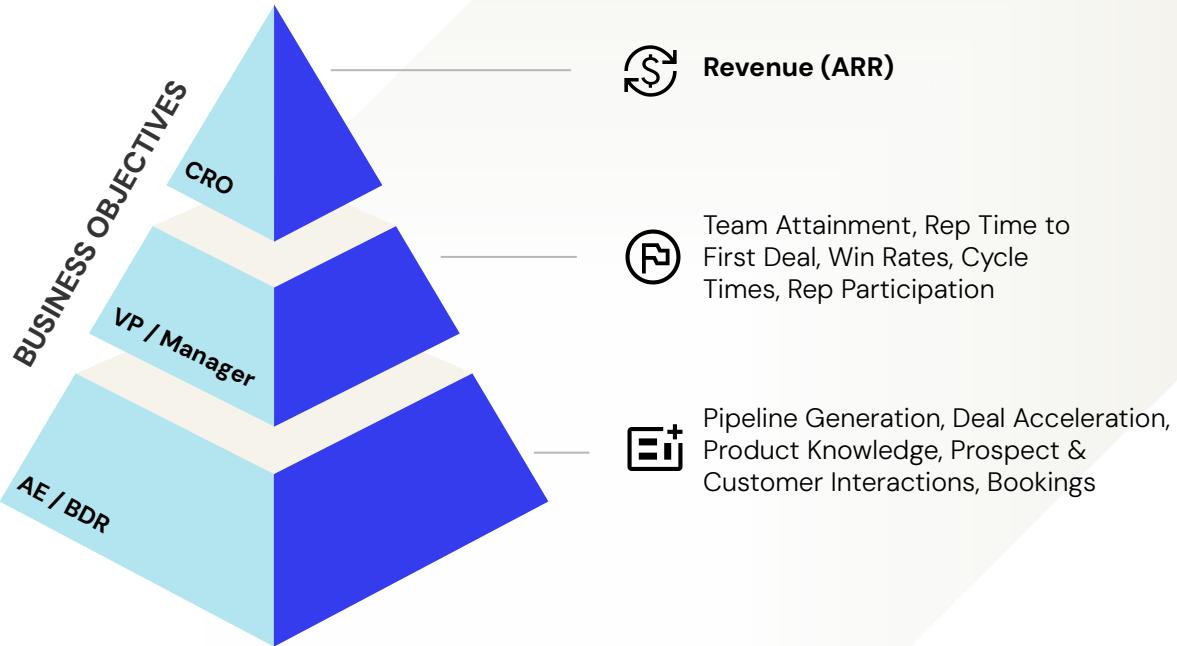
# Glean Drives Outcomes Across Entire Sales Organizations

## Department

Sales

## Challenges

Sales teams are weighed down by time consuming, manual tasks at every stage of the sales cycle, from inefficient prospecting to repetitive call prep, draining focus from **what matters most: selling and closing deals.**

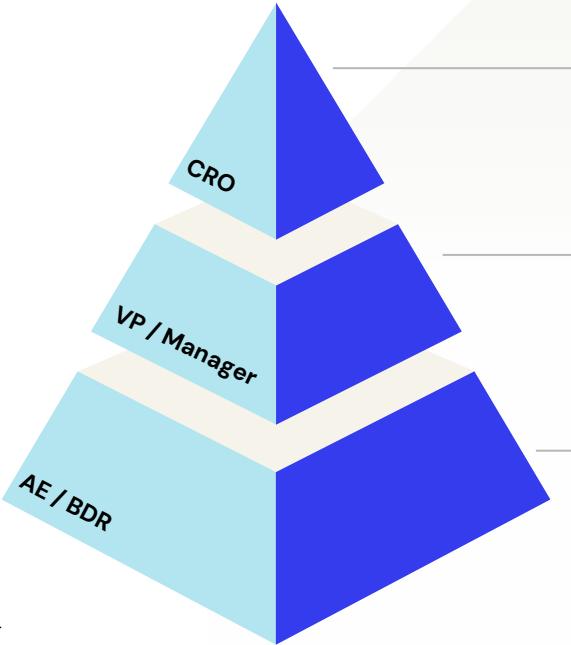


# Drive More Revenue, Faster

**Close deals faster** by delivering instant access to critical insights, enhancing customer interactions, minimizing response times, and automating administrative processes

-  Utilize **Glean Search & Assistant** to easily find and democratize sales related information
-  Utilize **Glean Agents** to streamline processes and automate seller tasks

## Case Studies & Customer Use Cases



## Outcomes Achieved



### INCREASE WIN RATES & REP PARTICIPATION

*Use Glean to... understand where you are losing and why, develop improved messaging, and test and validate with customers.*



### INCREASE PIPELINE GENERATION

*Use Glean to... increase and improve customer outreach, develop improved messaging, and improve employee coaching.*



### ACCELERATE TIME TO FIRST DEAL

*Use Glean to... simplify seller onboarding, provide seamless access to information, and automate manual seller tasks.*

# Outcome: Increase Win Rates & Rep Participation

## Glean Outcome

Increasing win rates means converting more of the pipeline into revenue, boosting rep participation.

## Example Use Cases

- Prepare for customer calls
- Multithread prospecting
- Identify use cases
- Follow up with prospects
- Respond to RFPs / questions
- Post-call analysis

Glean Search & Assistant		Glean Agents	
 <a href="#">Case Studies</a>	Locate case studies or market research to better prepare for prospect meetings.	 <a href="#">Deal Insights</a>	Quickly summarize the status of a deal and related activities.
 <a href="#">Customer Snapshot</a>	Develop a holistic view of a customer's business by analyzing communications across channels, summarizing external news, and assessing usage data to increase precision on expansion opportunities.	 <a href="#">Competitive Insights</a>	Analyze calls for customer commentary on competitor capabilities and strengths/weaknesses.

## Best Practices & Resources

- Integrate Glean into **Slack or Teams** channels to equip sales teams with quick answers
- Use **Glean Sidebar** to generate outbound messaging or gather insights when researching prospect accounts
- Leverage **Glean in Zoom AI Companion** to get real-time answers in customer meetings



# Outcome: Increase Pipeline Generation

## Glean Outcome

Systematically grow the number and quality of new sales opportunities entering your funnel. This ensures sustainable revenue growth, better forecasting, and achieving sales goals.

## Example Use Cases

- Prospect research
- Customized outreach
- Qualification
- Cold call messaging

Glean Search & Assistant		Glean Agents	
 <a href="#">Pitch Materials</a>	Easily locate first call materials across the company corpus of knowledge relevant for prospecting and customer conversations.	 <a href="#">Personalized Outbound</a>	Create personalized outbound email templates at scale.
 <a href="#">Research Prospect Initiatives</a>	Research prospect priorities (i.e. from earnings call insights) to develop personalized POVs for outbound messaging.	 <a href="#">Cold Call Messaging</a>	Personalize cold call scripts and messaging for prospective customers based on company and persona information.

## Best Practices & Resources

- **Schedule Glean Agents** to receive pipeline generation action plans directly in your **Gmail or Outlook**
- Use **Glean Sidebar directly in Salesforce** to query or update information needed to enrich records or fields



# Outcome: Accelerate Time to First Deal

## Glean Outcome

Accelerate time to first deal to maximize new sales team member contributions, drive early pipeline growth, and support sustainable quota attainment.

## Example Use Cases

- Rep enablement
- Rep onboarding
- Collateral sharing
- Proposal building
- Sales training
- Email drafting

Glean Search & Assistant		Glean Agents	
 <a href="#">Competitive Enablement</a>	Quickly locate materials around competitive differentiators to reduce ramp time on product expertise.	 <a href="#">Customer Use Cases</a>	Identify publicly referenceable customers & use case cases to better demonstrate relevance and credibility in customer calls.
 <a href="#">Sales Coaching</a>	Analyze recorded customer calls to assess adherence to sales methodologies and identify coaching opportunities.	 <a href="#">Rep Onboarding</a>	Identify topics or resources most impactful to maximize sales rep onboarding speed.

## Best Practices & Resources

- **Schedule Glean Agents** (in beta) to send email reminders to your **Gmail or Outlook** on in-flight deals
- **Integrate Glean into Slack or Teams** to get quick answers to prospect questions required to move deals forward



# Software Engineering

[EXT] Glean for Software Developers deck  
Collection: Go/department-software-eng



# Glean Drives Outcomes Across Entire Engineering Organizations

## Department

Engineering

## Challenges

Software Engineering teams are often bogged down by manual testing, inefficient code reviews, and identifying and resolving bugs, **diverting critical time from innovation and development of new features that drive business value.**



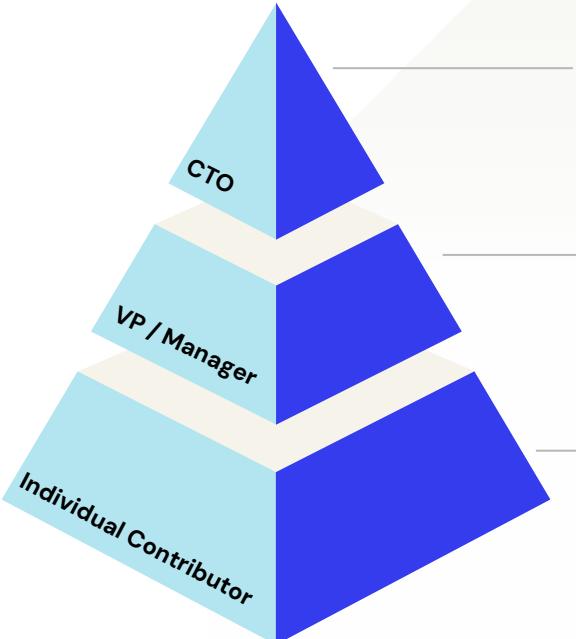
# Increase Velocity & Quality of Code

**Innovate faster** by minimizing debugging and code review time, automate testing cycles, and accelerate code release timelines

-  Utilize **Glean Search & Assistant** to easily find historical context and status of features
-  Utilize **Glean Agents** to automate code review, debugging, and documentation creation processes

## Case Studies & Customer Use Cases



## Outcomes Achieved



### ACCELERATE DELIVERY TIMELINES

Use **Glean** to... identify and resolve bugs faster, streamline testing processes, summarize PRs and design changes, and recommend expert reviewers for guidance



### IMPROVE CODE QUALITY

Use **Glean** to... recommend refactoring improvements, perform code reviews and detect anti-patterns, and ensure adherence to coding standards.



### REDUCE TIME TO FIRST COMMIT

Use **Glean** to... simplify complex documentation, suggest relevant code snippets, and personalize learning paths for skill development.

# Outcome: Accelerate Delivery Timelines

## Glean Outcome

Decrease the overall time from concept to deployment for new features, products, or bug fixes. This optimizes development workflows, reduces bottlenecks, and speeds up every phase of the software development lifecycle.

## Example Use Cases

- Generation of release notes and changelog entries
- Insights and suggested fixes for on-call debugging
- Generate daily standup notes
- Obtain feedback on engineering design specifications

Glean Search & Assistant	Glean Agents
 <a href="#">Find Product Experts</a> Find key contacts for product knowledge and support.	 <a href="#">Company Tooling</a> Quickly identify supported IDEs to maximize engineering productivity through education of available technology resources.

## Best Practices & Resources

- Integrate Glean into **Slack or Teams** channels for instant on-call technical answers
- Call **Glean MCP Server** in [Cursor](#) or [Windsurf](#)



# Outcome: Improve Code Quality

## Glean Outcome

Enhance the correctness, readability, maintainability, and security of the codebase. High code quality reduces bugs, simplifies future development, and lowers technical debt, leading to more robust and reliable software.

## Example Use Cases

- Intelligent code review suggestions and explanations
- Automated bug detection and vulnerability scanning
- Refactoring recommendations
- Code style enforcement and consistency checks

Glean Search & Assistant	Glean Agents
 <a href="#">Find Coding Best Practices</a> Quickly access and learn from company coding standards.	 <a href="#">Summarize Code Changes</a> Provide instant insights into code changes and their impact.
 <a href="#">Code Reviewer</a> Accelerate code reviews with instant feedback to enable faster iteration and merging of changes.	 <a href="#">Historical Context</a> Cut down on research time by automatically surfacing relevant past decisions related to code or architecture.

## Best Practices & Resources

- Enable **Code Actions on GitHub and/or GitLab** to automate build/test/deploy tasks on code merges and PRs



# Outcome: Reduce Time to First Commit

## Glean Outcome

Minimize the time it takes for a new engineer or project to contribute their initial code. This is crucial for rapid onboarding, quick iteration, and ensuring engineers become productive team members faster.

## Example Use Cases

- Code generation
- Project onboarding
- Debugging assistance
- Code refactoring suggestions
- Documentation generation

Glean Search & Assistant	Glean Agents
 <a href="#">Instantly Define Company Terms</a> Provide immediate definitions and context for company-specific jargon and acronyms.	 <a href="#">Project Updates</a> Quickly gain a complete understanding of active engineering projects.

## Best Practices & Resources

- Integrate Glean into **GitHub Copilot** for code understanding, design, and architecture
- Build a **Glean Onboarding Agent** that references connected data sources like BitBucket, GitHub, and GitLab



IT

Collection: [Go/itsm-department-solution](#)



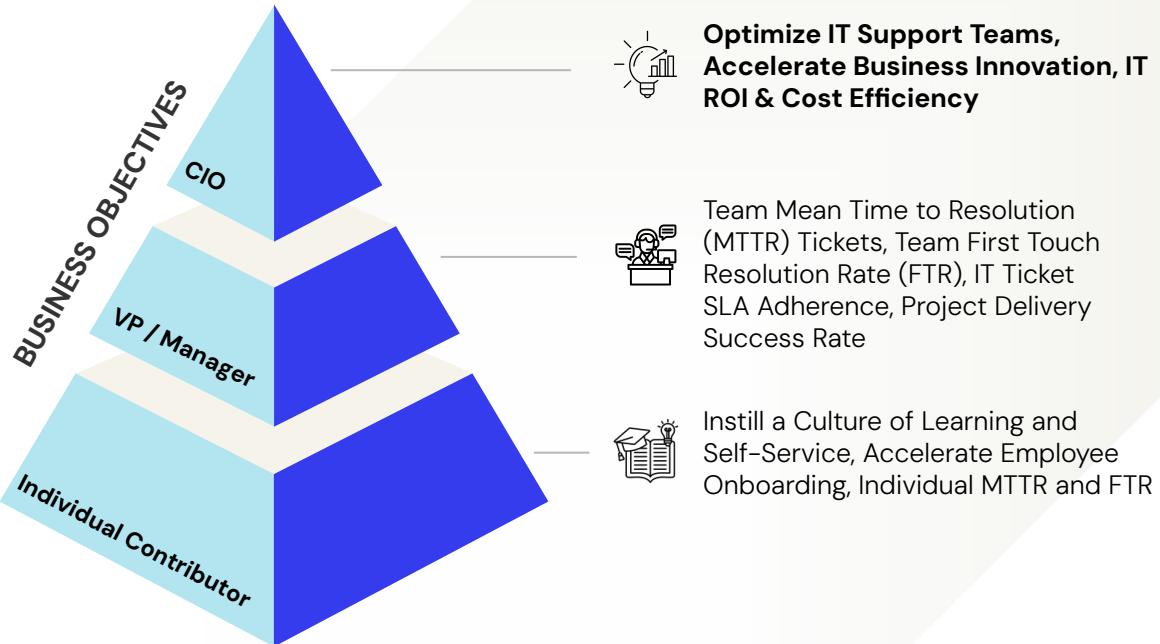
# Glean Drives Outcomes Across Entire IT Organizations

## Department

IT

## Challenges

IT Departments face persistent challenges with reactive troubleshooting, managing a sprawling array of systems, and handling a constant stream of help desk requests, **diverting time from proactive and strategic technology initiatives.**



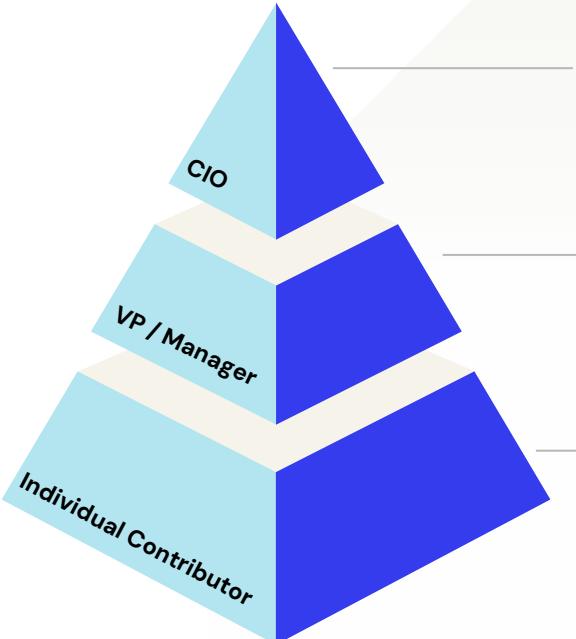
# Empower IT Teams to Focus on Strategic Initiatives

**Transform IT operations** from reactive problem-solving to proactive value creation through higher impact initiatives

-  Utilize **Glean Search & Assistant** to easily find information needed to resolve tickets
-  Utilize **Glean Agents** to automate IT tasks like incident resolution and documentation creation

## Case Studies

## Booking.com



## Outcomes Achieved



### OPTIMIZE IT SUPPORT EFFICIENCY

**Use Glean to...** handle repetitive tasks and inquiries, allowing IT teams to proactively focus on high impact initiatives that drive business value.



### ACCELERATE BUSINESS INNOVATION

**Use Glean to...** allow IT teams to become a proactive driver of innovation rather than a bottleneck, enabling the business to rapidly leverage emerging trends and technologies.



### REDUCE TIME TO PROFICIENCY

**Use Glean to...** foster a self-service learning environment, allowing new IT hires to quickly and easily find and explore historical knowledge.

# Outcome: Optimized IT Support Efficiency

## Glean Outcome

Streamline the process of addressing and resolving IT support issues, leading to faster problem resolution for users and increased operational efficiency for the IT team. This directly impacts user satisfaction and system uptime.

## Example Use Cases

- Automate triage and routing of support tickets
- Intelligent knowledge base search for solutions
- Generative AI-powered chatbots for first-level support
- Automated script generation for common fixes
- Summarize complex ticket histories

Glean Search & Assistant		Glean Agents	
 <a href="#">Find Tickets</a>	Search through company ticketing system(s) for descriptions, errors, system names, and past incident reports to resolve future ones.	 <a href="#">Setup Guidance</a>	Get quick answers about existing processes for access to standard company devices or systems.
 <a href="#">Issue Resolution</a>	Conduct in-depth research on a technology-related issue to understand root cause and troubleshoot potentially related issues.	 <a href="#">Ticket Manager</a>	Identify open tickets requiring approval, ticket statuses, or create tickets in other systems.

## Best Practices & Resources

- Connect your **IT ticketing systems (i.e. ServiceNow, JIRA)** with Glean to enable context-aware search across past incidents and knowledge base articles
- Utilize **Glean in Slack or Teams** to create a self-service experience for common L1/L2 inquiries



# Outcome: Accelerate Business Innovation

## Glean Outcome

Accelerate the integration of new technologies within the enterprise by proactively researching trends and providing an automated assessment new tools reducing weeks of communication to minutes.

## Example Use Cases

- Application and documentation discovery
- Automated technology assessment
- Internal tool capability comparison
- Technology trend analysis (internal and external)
- Recommended process optimization with digital tools

Glean Search & Assistant	Glean Agents
 <a href="#">Find Software Documentation</a> Find detailed documentation and reviews for internal applications and technologies.	 <a href="#">Summarize New Tech Trends</a> Create a quick summary of conversations, news, and insights to help understand new technology trends.
 <a href="#">Risk Assessment</a> Allow application owners to submit documentation and external resources to generate a risk assessment report.	 <a href="#">Internal IT Pain Point Analysis</a> Analyze non-private internal communications on a recurring basis to determine IT-related challenges and pain points, and recommend new technologies or process fixes.

## Best Practices & Resources

- Leverage **Glean Search** to discover existing applications, documentation, and authorities, reducing duplicate tool development and integration
- Empower new application owners with a **Risk Assessment Agent** to conduct in-depth reviews on new technologies and understand company risks based on historical assessments



# Outcome: Reduce Time to Proficiency

## Glean Outcome

Accelerate the process of onboarding new IT hires, enabling them to become productive more quickly. This enables efficient access to necessary information, tools, and training, leading to faster contributions and improved team capacity.

## Example Use Cases

- Personalized onboarding paths and learning modules
- Automated provisioning of access and software
- Generating summaries of key systems and processes
- Create interactive simulations for training

Glean Search & Assistant	Glean Agents
 <a href="#">Onboarding Documents</a> Search for a collection of onboarding documents specific to a new hire's role to understand first week/month to-dos, training modules, and SOP documentation.	 <a href="#">IT Resource Provisioning</a> Provide a concise overview of a specific IT topic for a new hire, leveraging internal company documentation, and highlighting essential training or documents for review specific to role.

## Best Practices & Resources

- Personalize and automate onboarding checklists with **Glean Agents** to accelerate new hire ramp time
- Use **Glean Collections** to centralize onboarding resources



# Customer Service

[EXT] Glean for Customer Service deck  
Collection: [Go/customer-service-department-solution](#)



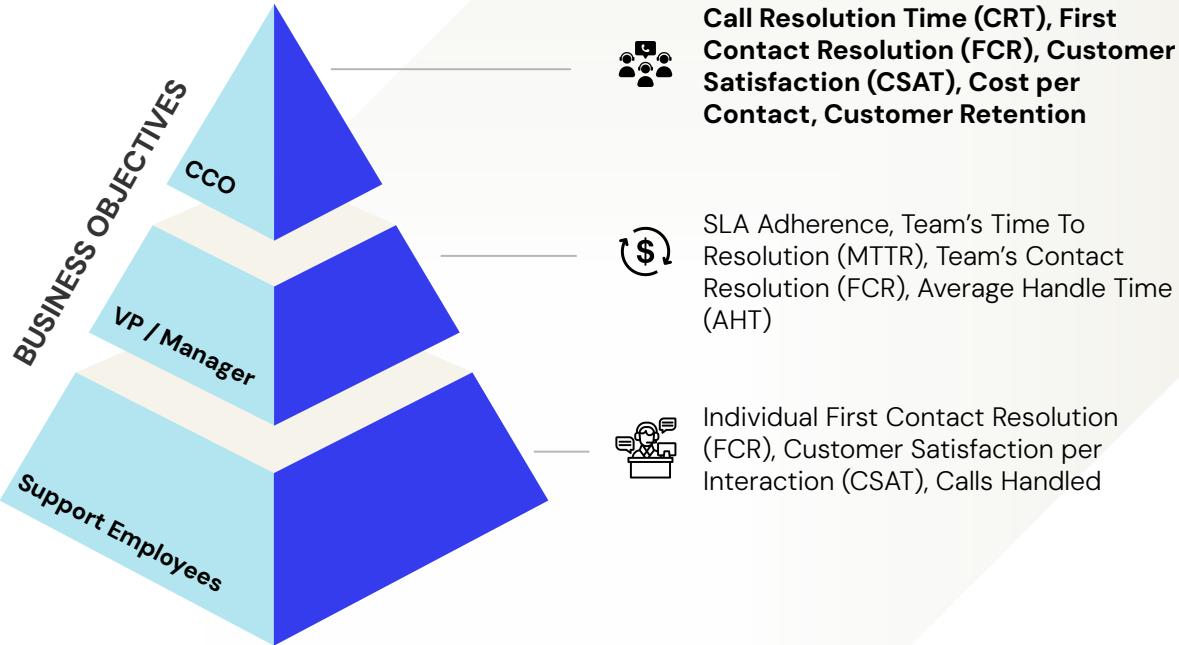
# Glean Drives Outcomes Across Entire Customer Service Organizations

## Department

Customer Service

## Challenges

Customer Service organizations, such as Call Centers, frequently struggle with high call volumes, repetitive customer inquiries, and navigating complex knowledge bases. This leads to **longer resolution times, agent attrition, and a diminished customer experience.**



# Drive Operational Excellence & Customer Experience

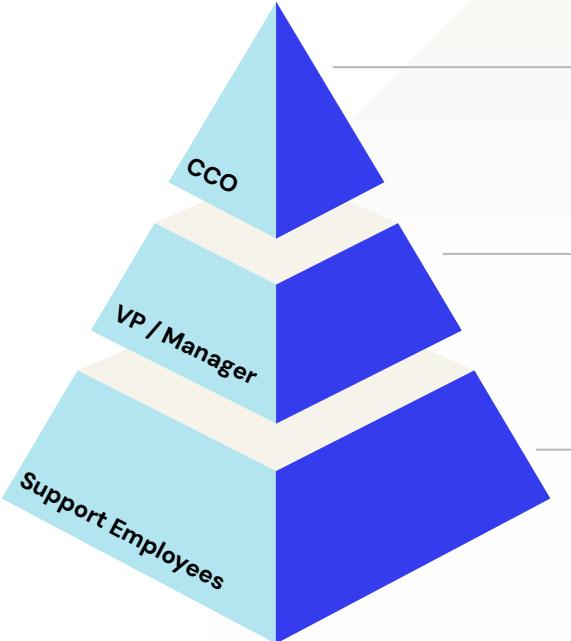
**Reduce cost per contact** through automated data retrieval and real-time knowledge assistance via guided troubleshooting to drive support efficiency

 Utilize **Glean Search & Assistant** to easily find information needed to resolve customer inquiries

 Utilize **Glean Agents** directly within ticketing system workflows to streamline issue resolution and reduce cost per contact

## Case Studies & Customer Use Cases

 **Wealthsimple**  **grammarly**



## Outcomes Achieved

### INCREASE FIRST CALL RESOLUTION RATE

*Use Glean to... provide agents with real-time knowledge assistance and offer guided troubleshooting paths to reduce both call resolution times and repeat callers.*

### REDUCE OPERATIONAL COSTS

*Use Glean to... accelerate agent ramp-up time and mitigate attrition rates through higher quality on-the-job experience.*

### IMPROVE CUSTOMER SATISFACTION

*Use Glean to... personalize communication scripts, identify high-friction customer journeys, and escalate to relevant experts for reduced call handle time.*

# Outcome: Increase First Call Resolution Rate

## Glean Outcome

Dramatically increase representative First Call Resolution Rate (FCR) and reduce call resolution times via real-time knowledge assistance, guided troubleshooting paths, and automated data retrieval from disparate systems.

## Example Use Cases

- Product troubleshooting
- Account update assistance
- Policy clarification
- Auto-summarize new tickets and cases
- Identify SMEs for escalations
- Automate post-call wrap up

Glean Search & Assistant	Glean Agents
 <a href="#">Process Documentation</a> Quickly identify resources across disparate systems regarding frequently asked customer inquiries.	 <a href="#">Policy Explanation</a> Quickly summarize policy details to address a customer's specific inquiry, ensuring explanations are accurate and adapted to individual needs.
 <a href="#">Customer Background</a> Enable agents to quickly summarize historical interactions between the customer and call center, providing full context into an issue for quicker resolution.	 <a href="#">Issue Resolution</a> Quickly summarize a customer issue, provide actionable steps to resolve the issue, and suggest experts as back-up if initial triaging fails.

## Best Practices & Resources

- Build **Glean Collections** to consolidate disparate information sources into a unified, high-quality knowledge base that is continuously updated and accessible to all teams
- Use **Glean Answers** to curate bite-sized responses surfaced directly in search results for frequent customer inquiries
- Utilize **Glean in Zendesk, Service Cloud, or ServiceNow** to surface answers inside your ticketing system



# Outcome: Reduce Operational Costs

## Glean Outcome

Enable agents or representatives to reduce Average Handle Time (AHT) through real-time knowledge retrieval, accelerating time-to-ramp, and enhancing on-the-job experience, mitigating attrition rates.

## Example Use Cases

- Agent/Representative Onboarding
- Post-call summarization and coaching
- Cross-training and skills gap identification
- Find procedures and specifications

Glean Search & Assistant	Glean Agents
 <a href="#">Find Procedures &amp; Specifications</a> Identify resources relevant to resolving customer issues in real-time.	 <a href="#">Live Troubleshooting</a> Provide troubleshooting steps for complex customer inquiries by referencing resolutions of historical similar issues.

## Best Practices & Resources

- Use the **Glean WebSDK** to integrate Glean into your existing CCaaS platforms
- Leverage **Glean Agents** to analyze transcripts and recommend improvements to customer interactions
- Utilize **Glean in Zendesk, Service Cloud, or ServiceNow** to resolve cases faster via integrated workflows



# Outcome: Improve Customer Satisfaction

## Glean Outcome

Automatically review and analyze customer calls and conversations, identify high-friction journeys, and proactively provide actionable insights on increasingly improving customer satisfaction.

## Example Use Cases

- Identifying training gaps and provide coaching recommendations
- Process bottleneck identification
- Optimizing communication scripts
- Real-time customer inquiry resolution

Glean Search & Assistant		Glean Agents	
 <a href="#">Customer Interactions</a>	 <a href="#">Interaction Summaries</a>	 <a href="#">Live Support</a>	 <a href="#">Customer Follow-Up</a>
Review past interactions with customers across CRM notes, chat transcripts, email transcripts, call transcripts, previous support tickets, and more.	Summarize previous customer interactions, identify key issues discussed, primary resolution paths, and overall sentiment of the customer.	Provide immediate, concise troubleshooting steps in a call script format optimized for speed, so that customer service agents can resolve customer issues as quick as possible on the phone.	Create professional responses to customer tickets that demonstrate genuine empathy, a deep understanding of their issue, and, resolution steps, with realistic timeframes.

## Best Practices & Resources

- Use **Glean Agents** to analyze transcripts and convert findings into actionable training, processing optimizations, or product enhancements
- Narrow down **Glean Search results with filters** to quickly identify relevant information across disparate data sources necessary to resolve customer inquiries as quickly as possible



# Security



# Glean Drives Outcomes Across Entire Security Organizations

## Department

Security / SOC

## Challenges

Security teams are often overwhelmed by the sheer volume of alerts, sophisticated threats, and manual incident response and documentation processes, **diverting focus from proactive defense and strategic security posture.**



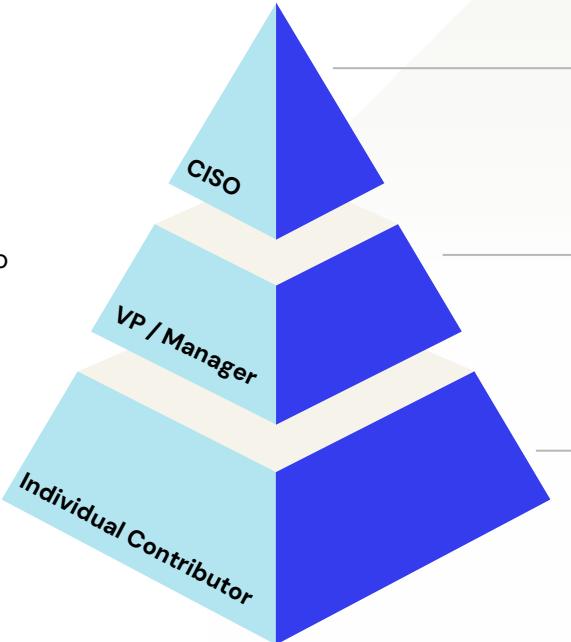
# Drive Improved Security Resilience, Faster

*Empower your security team to automate administrative tasks,*

enabling increased focus on **strategic threat hunting and complex incident investigations**, fortifying **security resilience**.

 Utilize **Glean Search & Assistant** to easily locate SOPs & documentation to investigate incidents

 Utilize **Glean Agents** to automate creation of documentation in accordance with company security guidelines



## Outcomes Achieved



### REDUCE OVERALL SECURITY RISK

*Use Glean to... identify potential vulnerabilities, prioritize security controls, and reduce organizational risk.*



### ACCELERATE INCIDENT RESPONSE & REMEDIATION

*Use Glean to... streamline alert triage, orchestrate response actions, and provide guided remediation steps for security analysts.*



### IMPROVE INCIDENT RESPONSE QUALITY

*Use Glean to... centralize sources of security information, making it easier for analysts to verify alerts and corroborate evidence with supporting data.*

# Outcome: Reduce Overall Security Risk

## Glean Outcome

Empower security teams to neutralize threats and drive rapid resolution of open issue, minimizing the window of vulnerability and safeguarding critical assets from bad actors.

## Example Use Cases

- Surface relevant playbook guidance
- Retrieve historical breach data
- Identify related security alerts
- Access incident response templates
- Quickly locate incident owners

Glean Search & Assistant	Glean Agents
 <a href="#">Open Security Related Tickets</a> Quickly locate security-related tickets associated with specific customer accounts.	 <a href="#">Security Issue Impact</a> Diagnose specific security issues and vulnerabilities to understand complete context into an issue and related actions.
 <a href="#">Device Posture Checks</a> Automate evaluation of company issued work devices to proactively analyze device posture and identify potential risks.	 <a href="#">Customer Risk Analyzer</a> Analyze and categorize risk areas for a customer with quantified impact, probability, and risk mitigation guidance.

## Best Practices & Resources

- **Connect ticketing systems (e.g., ServiceNow, Jira)** with Glean to enable rapid search of security incidents, vulnerabilities, and requests
- Leverage **Glean Collections** to centralize remediation and response documents for consistent, accurate, and complete resolution of threats



# Outcome: Accelerate Incident Response & Remediation

## Glean Outcome

Accelerate incident response by instantly finding relevant intelligence and remediation actions in your environment, enabling faster identification, investigation, and remediation of critical issues.

## Example Use Cases

- Interact with documentation
- Search for related incidents to accelerate response times
- Automate updates to knowledge bases for new incidents
- Compare incidents to historic tickets for pattern recognition

Glean Search & Assistant	Glean Agents
 <a href="#">Incident Response Process</a> Quickly reference incident response playbooks for investigations into lateral movement, account compromise, or privilege escalation for context on ongoing or new alerts.	 <a href="#">Incident Response Documentation</a> Draft documentation around incident response guidelines for new and emerging security threats.
 <a href="#">Security Awareness Campaigns</a> Automate security awareness campaigns to educate employees on what to do when faced with various emerging and prevalent security challenges.	 <a href="#">Incident Correlation</a> Find associated issues, events, tickets, and more that may be similar to an active incident a SOC team is researching.

## Best Practices & Resources

- **Integrate Glean into Slack or Teams** channels to proactively surface relevant insights for during an active incident
- **Use Glean Answers and Glean Pins** to provide security engineers and SOC analysts with previously verified responses to incidents and remediation steps



# Outcome: Improve Incident Response Quality

## Glean Outcome

Improve incident response quality by empowering analysts to instantly retrieve relevant procedures, historical case notes, and playbooks, aligning actions with best practices and known responses to common incident types.

## Example Use Cases

- Assist post-incident reviews
- Summarize threat intelligence
- Streamline shift handovers with scheduled updates
- Detect policy non-compliance
- Summarize event log anomalies

Glean Search & Assistant	Glean Agents
 <a href="#">Identify Incident Experts</a> Discover who authored or contributed to similar incidents post-mortems to guide ongoing efforts.	 <a href="#">Containment Workflows</a> Guide analysts through the step-by-step escalation or containment process for a live incident, referencing specific internal SOPs and compliance documents for consistent resolution of issues.
 <a href="#">Post Mortem Creation</a> Automates the creation of incident reports and post-mortem documentation for security incidents, tickets, or other events by gathering relevant information from multiple data sources.	 <a href="#">BC/DR Navigator</a> Efficiently and safely navigate business disruptions or disasters through suggested resolution steps adhering to company policies.

## Best Practices & Resources

- Use **Glean Collections** to consolidate security response documentation and procedures for standardized responses to common incidents and threats
- Use **Glean Sidebar** to quickly look up related case files or incident tickets when responding to security incidents in other systems (i.e. Wiz)



# HR



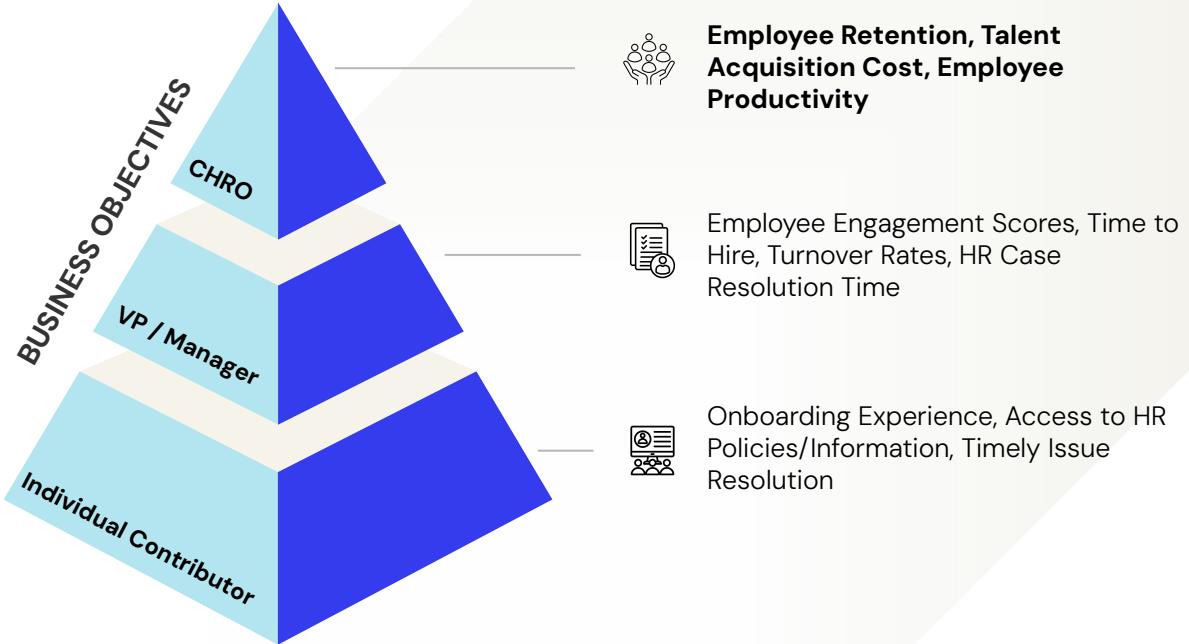
# Glean Drives Outcomes Across Entire HR Organizations

## Department

Human Resources

## Challenges

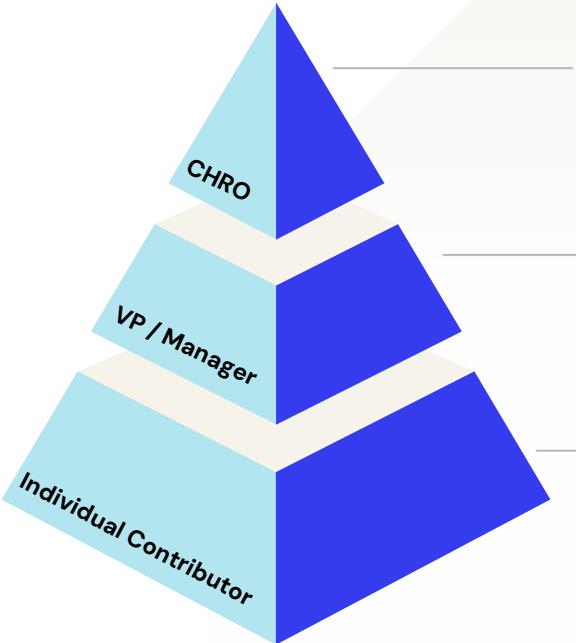
HR teams are often overwhelmed by administrative burdens, repetitive inquiries, and the complexities of talent management, **diverting their attention from strategic initiatives like employee development, engagement, and retention.**



# Improve Employee Experience & Streamline People Ops

**Optimize HR processes** through real-time support for common inquiries and enhanced people operations processes to improve employee experience.

-  Utilize **Glean Search & Assistant** to easily find information about company policies or benefits
-  Utilize **Glean Agents** to write job descriptions and identify potential talent for human reviews



## Outcomes Achieved



### OPTIMIZE HR OPERATIONS

Use **Glean** to... automate responses to common HR inquiries, simplify policy navigation, and reduce administrative workload.



### ACCELERATE TALENT ACQUISITION

Use **Glean** to... streamline candidate sourcing, automate initial screening, aggregate interview feedback, and generate candidate briefs summarizing recruiter notes.



### INCREASE EMPLOYEE ENGAGEMENT

Use **Glean** to... personalize learning paths, empower employees to easily highlight accomplishments, and aid in self or peer reviews.

# Outcome: Optimize HR Operations

## Glean Outcome

Streamline administrative tasks, automate routine inquiries, and improve the operational efficiency of HR processes for both employees and the HR team.

## Example Use Cases

- Automate answers to common HR FAQs
- Process PTO requests faster
- Generate standard HR letters and documents
- Simplify lookup of policies

Glean Search & Assistant	Glean Agents
 <a href="#">Company Policies</a> Quickly locate company policies related to employee benefits.	 <a href="#">Benefits Enrollment</a> Provide step-by-step instructions for complex processes such as enrolling in healthcare benefits.
 <a href="#">Self-Service HR Inquiries</a> Enable employees to get quick answers to common HR questions and request PTO without navigating to different systems.	 <a href="#">Job Responsibilities</a> Quickly identify common tasks or objectives based on historical performance for roles at an organization.

## Best Practices & Resources

- Use **Glean Answers** and **Glean Pins** to provide employees with quick and verified responses to common questions
- Integrate Glean with **Workday** to enable employees to quickly find and take action (i.e. submit vacation requests) directly within Glean's interface



# Outcome: Accelerate Talent Acquisition

## Glean Outcome

Enhance the speed and effectiveness of recruiting efforts, from candidate sourcing to offer management, attracting top talent more rapidly.

## Example Use Cases

- Generate personalized candidate outreach emails
- Summarize and aggregate candidate interview feedback
- Identify ideal candidate profiles for human review
- Streamline offer letter generation

Glean Search & Assistant		Glean Agents	
 <a href="#">Employee Recruiting</a>	Quickly locate information relevant for recruiting processes, such as employee referral programs.	 <a href="#">Draft Job Descriptions</a>	Draft a compelling job description for a new opening.
 <a href="#">Resume Screening</a>	Screen a batch of resumes to identify ones with experience that closely align to a given job description, and recommend for human review.	 <a href="#">Interview Feedback</a>	Aggregate interviewer feedback regarding job candidates.

## Best Practices & Resources

- Use the **Greenhouse connector** to quickly locate information around candidates and scheduled interviews
- Use **Glean Sidebar in LinkedIn** to generate outbound messaging when reaching out to prospective candidates



# Outcome: Increase Employee Engagement

## Glean Outcome

Foster a more connected and supportive work environment, improving employee satisfaction, retention, and overall productivity.

## Example Use Cases

- Provide personalized learning recommendations
- Facilitate internal communication
- Identify overall sentiment from employee feedback
- Suggest team-building activities
- Streamline employee recognition programs

### Glean Search & Assistant



#### [Wellness Programs](#)

Identify employer-provided perks such as wellness and commuter benefits.



#### [Team Building](#)

Identify ideas for team building activities based on past successful events by other teams.

### Glean Agents



#### [Employee Impact](#)

Summarize your own accomplishments to more efficiently prepare for manager meetings, performance reviews, and career conversations.



#### [Self-Evaluation](#)

Analyze your activities and accomplishments to write a self-evaluation, identifying personal strengths and achievements, while also identifying areas for improvement.

## Best Practices & Resources

- Create role-based and community-based **Glean Collections** (i.e. ERGs, Learning Paths) and promote them with **Go Links** to make resources easy for employees to discover
- Use **Glean Agents** to summarize employee survey feedback and share clear, company-wide takeaways to build transparency and follow-through on engagement actions



# Operations



# Glean Drives Outcomes Across Entire Operations Organizations

## Department

Operations

## Challenges

Operations teams grapple with complex forecasting, manual vendor management processes, and reactive issue resolution, **leading to inefficiencies, increased costs, and delivery disruptions.**

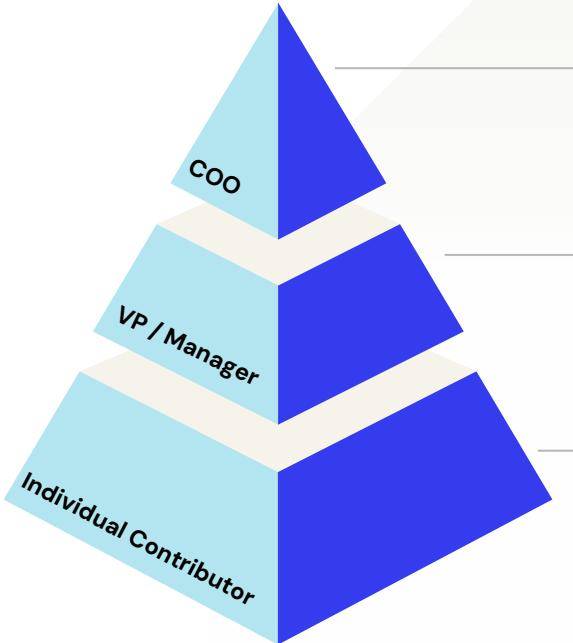


# Drive Process Efficiency & Continuous Improvement

**Optimize operational effectiveness** by automating procurement processes, enhancing quality control, and improving insights into delivery cycles.

 Utilize **Glean Search & Assistant** to easily find data regarding suppliers or inventory

 Utilize **Glean Agents** to streamline procurement processes such as compiling reports or responding to RFPs



## Outcomes Achieved



### ENHANCE OPERATIONAL EFFICIENCY

*Use Glean to... analyze demand, create or respond to RFPs, manage orders, manage staffing, and optimize back office tasks.*



### OPTIMIZE MAINTENANCE OPERATIONS

*Use Glean to... proactively identify disruptions, track maintenance schedules, accelerate downtime resolution, and bolster safety compliance.*



### BOLSTER SUPPLIER MANAGEMENT

*Use Glean to... streamline supplier vetting, harmonize supplier material, and better manage ongoing inventory efforts.*

# Outcome: Enhance Operational Efficiency

## Glean Outcome

Optimize day-to-day operations through demand analysis, intelligent staffing, and purchase order management, and streamlining of various back-office tasks.

## Example Use Cases

- Analyze demand for resources
- Identify underutilized assets
- Propose cost-saving measures
- Optimize inventory levels
- RFP creation and submission review
- Monitor PO statuses and flag discrepancies

### Glean Search & Assistant



#### [Process Guidelines](#)

Quickly locate information on existing assets, equipment, procurement guidelines, and more.



#### [Summarize Supplier Details](#)

Quickly summarize supplier details like payment terms, agreement expiration, and good & service provided.

### Glean Agents



#### [Franchisee Support](#)

Enable an organization's franchisees to answer questions and obtain resources around company policies, product performance, financial performance & royalties, and more.



#### [Technician Staffing](#)

Enable field service managers to efficiently staff jobs while considering technician availability, skills, certifications, weather, and other criteria.

## Best Practices & Resources

- Create **Glean Answers** and pin them in search results related to SOPs, facility questions, escalation paths, and more, so frontline teams can quickly receive consistent guidance
- Use Glean's the [Web SDK](#) to integrate Glean into stock control or inventory management systems



# Outcome: Optimize Maintenance Operations

## Glean Outcome

Identify potential disruptions, track maintenance schedules, accelerate resolution of downtime events, and ensure comprehensive safety compliance.

## Example Use Cases

- Automate documentation of incidents and routing
- Provide real-time diagnostic support
- Suggest solutions for operational bottlenecks
- Summarize incident reports
- Expedite root cause analysis

Glean Search & Assistant		Glean Agents	
 <a href="#">Search for Manuals</a>	Find the latest equipment documentation and training materials to assist in inspections and maintenance tasks.	 <a href="#">Troubleshooting SOP</a>	Provide detailed step-by-step instructions for troubleshooting and resolving equipment issues to reduce downtime.
 <a href="#">Work Orders &amp; Repairs</a>	Help field technicians surface necessary documents required to repair or maintain equipment tied to work orders.	 <a href="#">Technician Staffing</a>	Enable field service managers to efficiently staff jobs while considering technician availability, skills, certifications, weather, and other criteria.

## Best Practices & Resources

- Quickly find and summarize asset manuals, documents, and SOPs with **Glean Search** to reduce downtime by accelerating maintenance and troubleshooting activities
- Use **Glean Agents** to manage maintenance schedules and provide intelligent staffing based on numerous criteria



# Outcome: Bolster Supplier Management

## Glean Outcome

Improve the efficiency and effectiveness of managing external vendors or suppliers, ultimately enhancing performance, compliance, and cost controls.

## Example Use Cases

- Automate vendor performance tracking
- Summarize vendor contract terms
- Identify potential supply chain risks
- Facilitate vendor communication
- Supplier harmonization & standardization
- Sustainability monitoring & analysis

### Glean Search & Assistant



#### [Find Existing Suppliers](#)

Quickly locate information on existing suppliers or procurement processes for new supplier.



#### [Supplier Reporting](#)

Generate a list of third-party suppliers or vendors with a description of their business and an ability to learn more about their role in your ecosystem.

### Glean Agents



#### [ESG Analyzer](#)

Help operations and sustainability teams analyze environmental impact data from manufacturing facilities.



#### [Inventory Management](#)

Monitor stock levels to quickly understand the current status and recommend items to reorder based on historical data.

## Best Practices & Resources

- Use **Glean Sidebar** to reference data or tickets across applications to bring supplier context into negotiations backed by evidence
- Connect to **SharePoint, Google Drive, or other document repositories** that house vendor MSAs, SLAs, or SOWs to query against



# Legal

[EXT] Glean for Legal Teams (Aug 2025) deck



# Glean Drives Outcomes Across Entire Legal Organizations

## Department

In-House Legal

## Challenges

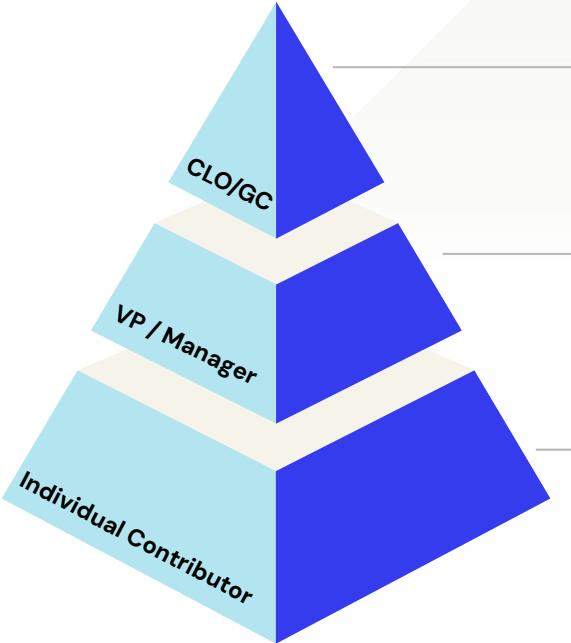
In-House Legal Teams are burdened by extensive document reviews, routine contract drafting, and managing inquiries, **delaying critical business decisions and driving increased operational cost.**



# Drive Legal Efficiency & Effectiveness

**Optimize legal operations** by reducing time to draft and review contracts, and accelerating legal research, to streamline processes and reduce external counsel spend.

-  Utilize **Glean Search & Assistant** to find key contractual clauses
-  Utilize **Glean Agents** to identify deviations in contracts and perform comprehensive analysis over troves of legal documents



## Outcomes Achieved



### ACCELERATE CONTRACT REVIEWS

*Use Glean to... quickly identify relevant clauses, extract key data, and flag potential risks or discrepancies.*



### IMPROVE CONTRACT MANAGEMENT

*Use Glean to... automate generation of standard contracts, suggest optimal clauses, and ensure consistency across agreements.*



### MANAGE REGULATORY WORKFLOWS

*Use Glean to... monitor regulatory changes, identify potential compliance gaps, and provide proactive alerts for legal risks.*



# Outcome: Accelerate Contract Reviews

## Glean Outcome

Significantly reduce the time required to review, draft, and negotiate contracts, enhancing legal team efficiency and business velocity.

## Example Use Cases

- Automate clause extraction and analysis
- Identify non-standard clauses
- Suggest alternative phrasing for clauses
- Summarize key contract terms
- Compare contracts against templates

Glean Search & Assistant		Glean Agents	
 <a href="#">Locate Contracts &amp; Policies</a>	Instantly find previous contracts, legal templates, or specific clauses (e.g. indemnification).	 <a href="#">Legal Concept Research</a>	Research and obtain feedback on complex legal redlines or requests to better understand business implications.
 <a href="#">MSA Redline Review</a>	Streamline reviews of Master Services Agreements (MSAs) from external customers or vendors by flagging deviations from standard contract terms for human review.	 <a href="#">Contract Reviewer</a>	Identify whether key terms or provisions are missing from a customer contract, and provide a comprehensive summary of omissions.

## Best Practices & Resources

- Integrate a **Glean Agent** into Slack or Teams to streamline new contract requests inbound to the legal team
- Use **Glean Sidebar** to bring in historical customer context and conduct real-time research when discussing contractual terms in customer calls



# Outcome: Improve Contract Management

## Glean Outcome

Reduce time invested in contract management by enabling legal teams to quickly locate, review, and compare contract terms to required standards, drive timely action on key obligations, and reduce risk from missed terms or clauses.

## Example Use Cases

- Surface key contract clauses
- Search NDAs by party
- Review negotiation history
- Summarize contract obligations
- Extract party information
- Answer contract FAQs

Glean Search & Assistant	Glean Agents
<p> <a href="#">Identify Contract or Policy Dates</a></p> <p>Quickly locate relevant information within contracts or policies for high-speed legal support.</p>	<p> <a href="#">Contractual History</a></p> <p>Provide a full history of legal communications, including the status of historical contracts, with a specific customer.</p>

## Best Practices & Resources

- Use **Glean Sidebar** to quickly look up related contracts, contract terms, and standard clauses to streamline updates within contract management systems.
- Use **Glean Agents** to prepare for contractual discussions with customers by providing a comprehensive view of historical business context and identify open items



# Outcome: Manage Regulatory Workflows

## Glean Outcome

Drive efficiency around maintaining regional compliance by leveraging your company's prior work and research across all systems, enabling legal teams to interpret requirements and respond to inquiries faster.

## Example Use Cases

- Track regulatory changes
- Summarize new legal precedents
- Identify potential compliance gaps
- Generate compliance reports

Glean Search & Assistant	Glean Agents
 <a href="#">Policy &amp; SME Identification</a>  Identify experts on specific policy or compliance topics for legal assistance.	 <a href="#">Audit Process &amp; Proof Gathering</a>  Gather evidence to prove a key business process is working as intended, a common requirement for audits.

## Best Practices & Resources

- Use **Glean Answers** and **Glean Pins** to provide employees with quick and verified legal responses to common questions
- Regularly analyze legal-tagged inquiries with **Scheduled Agents (in beta)** to identify common questions that are candidates for **Glean Answers**



# Finance



# Glean Drives Outcomes Across Your Finance Team

## Department

Finance

## Challenges

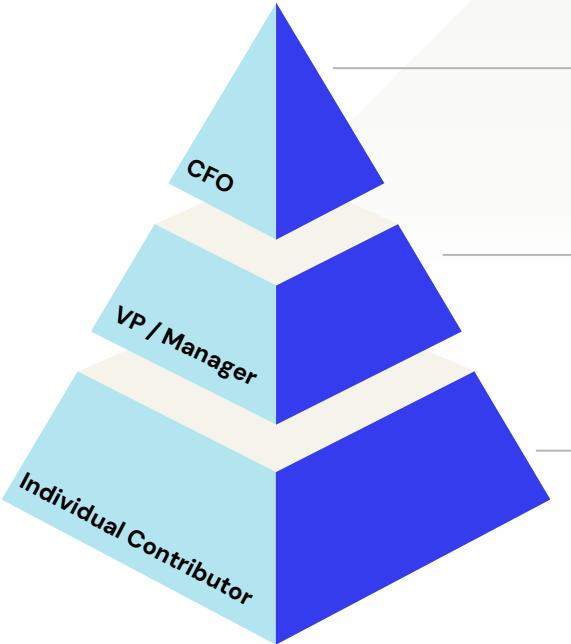
Finance teams are often bogged down by manual data entry and identification, complex forecasting, and monitoring revenue/costs, which can **lead to errors, inefficiencies, and delayed reporting.**



# Streamline Financial Operations, Analysis & Research

**Streamline financial functions** by accelerating investment research, quickly locating financial data, and providing insights to optimize capital efficiency.

-  Utilize **Glean Search & Assistant** to quickly identify key financial data and analysis
-  Utilize **Glean Agents** to aggregate research on market trends or perform financial analysis



## Outcomes Achieved



### IMPROVE FINANCIAL PLANNING

Use **Glean** to... analyze market trends and internal data for revenue and expense insight and analysis.



### ACCELERATE FINANCIAL REPORTING

Use **Glean** to... automate data aggregation, streamline reconciliation processes, and conduct financial analysis.



### SIMPLIFY FINANCIAL OPERATIONS

Use **Glean** to... streamline workflows or inquiries around expense policies, travel guidance, vendor onboarding, and other financial operations topics.

# Outcome: Improve Financial Planning

## Glean Outcome

Enhance the accuracy and efficiency of budgeting, forecasting, and strategic financial decision-making.

## Example Use Cases

- Analyze historical financial trends
- Identify cost-saving opportunities
- Summarize planning meetings
- Draft budget proposals
- Explain variance analysis

Glean Search & Assistant		Glean Agents	
 <a href="#">Financial Policies</a>	 <a href="#">Budgetary Planning</a>	 <a href="#">Financial Risk Assessment</a>	 <a href="#">Investment Research</a>
Quickly locate information around budgetary and invoicing processes.	Model out company expenses based on internal spend policies and estimated employee behavior.	Identify potential financial risks during budget planning. Leverage Glean Agents to highlight areas of potential over/under investment and provide recommended re-allocations.	Conduct research on prospective investment opportunities and evaluate against internal investment standards – for both investment firms and strategic corporate development teams.

## Best Practices & Resources

- Use **Glean Chat** to model out costs based on internal assumptions and company guidelines (i.e. expense policies)
- Use **Glean Answers** and **Glean Pins** to provide quick and verified answers related to company revenue goals and other KPIs



# Outcome: Accelerate Financial Reporting

## Glean Outcome

Streamline the preparation, data consolidation or aggregation, and distribution of financial statements and reports, reducing reporting cycles.

## Example Use Cases

- Consolidate data from disparate systems
- Generate standard financial reports
- Summarize audit findings
- Reconcile accounts faster
- Expedite month-end close processes

Glean Search & Assistant	Glean Agents
 <a href="#">Retrieve FP&amp;A Documents</a> Quickly locate up-to-date financial reporting templates or tax forms necessary for reconciliation, reporting, and audit purposes.	 <a href="#">Audit Inquiries</a> Pose questions about audit trails, supporting documentation, or control processes, and receive direct, sourced answers from across the organization's knowledge base.
 <a href="#">Customer Churn Assessor</a> Analyze recent conversations to identify potential customer churn / downsell risk to aid in identifying potential disruptions to quarterly forecasts.	 <a href="#">Accounts Payable Matching</a> Extract information from invoices and predict coding fields to match invoice information to purchase order line items.

## Best Practices & Resources

- Use **Glean Sidebar** alongside FP&A or BI tools while consolidating statements to fetch contextual background (i.e. contracts, SOWs) without leaving your workflow
- Standardize KPI and policy definitions with **Glean Answers** and **Glean Pins** so that all financial reports reference the same verified definitions (i.e. Gross Margin or ARR)



# Outcome: Simplify Financial Operations

## Glean Outcome

Streamline financial operations through ease of access to policies and simplifying expense and planning processes to drive efficiency across the organization.

## Example Use Cases

- Surface expense policies and approval workflows
- Streamline procurement request routing and status tracking
- Centralize vendor management information
- Provide actionable insights based on organizational spend

Glean Search & Assistant	Glean Agents
 <a href="#">Locate Policies &amp; Procedures</a> Quickly locate up-to-date company policies on expense management, procurement, or travel.	 <a href="#">Purchase Requests</a> Explain step-by-step processes and navigate users to the correct forms and documentation for purchasing processes.
 <a href="#">Expense Planning</a> Enable employees to navigate corporate travel logistics with ease based on company expense policies and mitigate risk of non-compliance.	 <a href="#">Due Diligence</a> Reference existing and completed due diligence questionnaires to streamline completion of future due diligence questionnaires posed by suppliers, vendors, or prospective investors.

## Best Practices & Resources

- Create **Glean Answers** and **Glean Pins** for expense policy, travel guidance, invoice submissions rules, and more to reduce repeat questions and ensure consistent self-service
- Organize procurement and accounts payable operations in a single **Glean Collection** so requesters and approvers follow the same SOPs



# Marketing



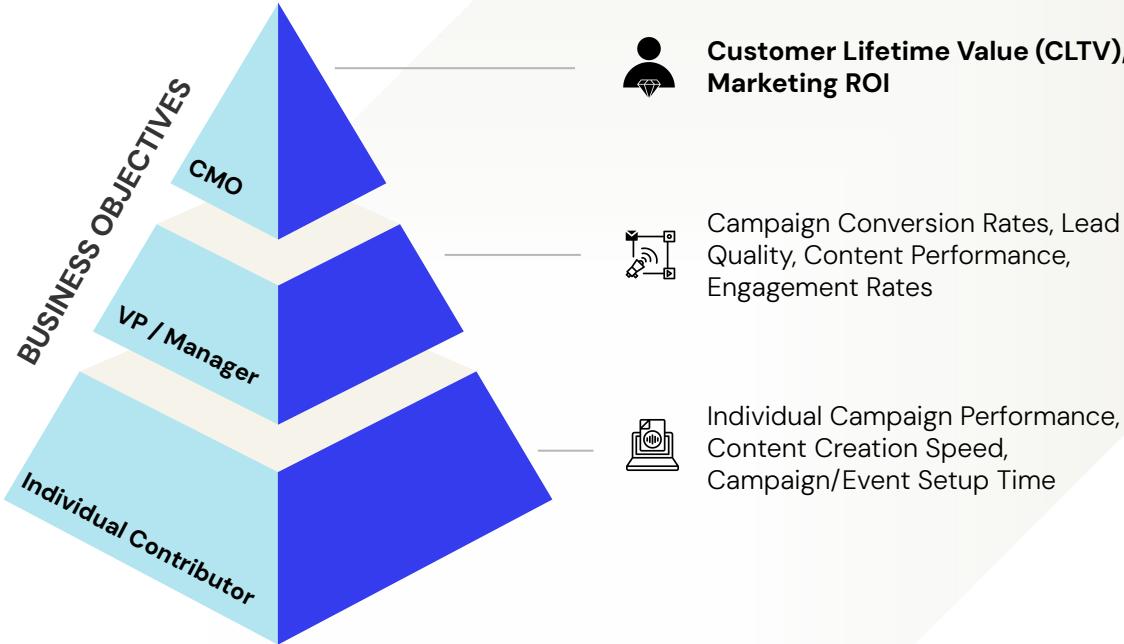
# Glean Drives Outcomes Across Entire Marketing Teams

## Department

Marketing

## Challenges

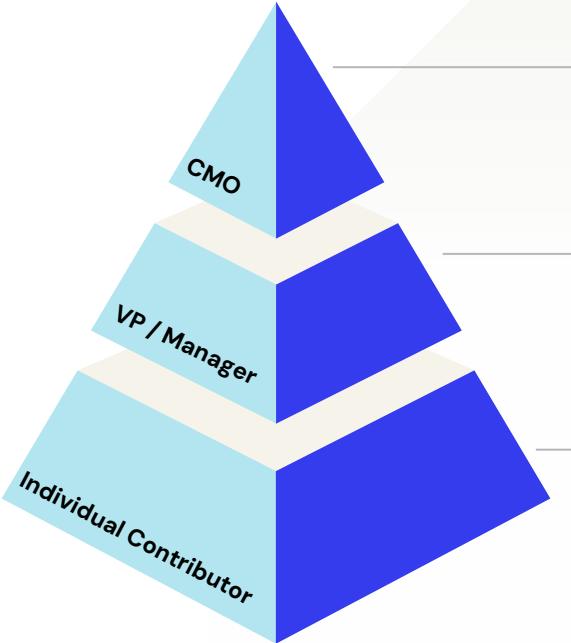
Marketing teams face challenges with understanding complex customer behavior, personalizing campaigns at scale, and optimizing content creation, **leading to suboptimal campaign performance or misallocation of time/funds.**



# Drive Customer Engagement with Data-Driven Decisions

**Maximize customer value and retention** by automating content generation, accelerating persona research, and streamlining event/campaign lead times.

-  Utilize **Glean Search & Assistant** to quickly identify marketing collateral or creative files
-  Utilize **Glean Agents** to perform persona or product research grounded in real customer insights



## Outcomes Achieved



### ENHANCE CUSTOMER INSIGHTS

*Use Glean to... analyze vast amounts of customer insights and data to shape strategy and deliver customer-centric experiences.*



### INCREASE CAMPAIGN EFFECTIVENESS

*Use Glean to... reduce lead time and manual prep work for campaign and event execution.*



### AUTOMATE CONTENT GENERATION

*Use Glean to... generate compelling copy for blog posts, recommend SEO improvements, and modify content with feedback.*

# Outcome: Enhance Customer Insights

## Glean Outcome

Gain a deeper understanding of customer behavior, preferences, and sentiment across all of your enterprise data, enabling more targeted and effective marketing strategies.

## Example Use Cases

- Analyze customer feedback from multiple channels
- Identify emerging customer trends
- Summarize market research reports
- Map customer journeys
- Develop comprehensive customer personas

### Glean Search & Assistant



#### [Find Customer Feedback](#)

Search across all connected platforms (such as email, CRM, support tickets, and survey tools) to quickly locate customer feedback, reviews, and survey responses.



#### [Industry POV](#)

Learn about challenges and pain points within a specific industry, and connect the dots to how your company may solve for those pain points.

### Glean Agents



#### [Industry Research](#)

Research pain points for a specific industry based on internal call transcripts and external research to identify opportunities for targeted marketing.



#### [Customer Research](#)

Analyze customer calls to gauge sentiment and feedback on specific product attributes to influence marketing strategy.

## Best Practices & Resources

- Centralize competitive intelligence and product feedback in a **Marketing Glean Collection**
- Standardize metric definitions (i.e. NPS, CSAT, CAC, LTV, pipeline attribution models) with **Glean Pins** to ensure consistency in reporting



# Outcome: Increase Campaign Effectiveness

## Glean Outcome

Optimize marketing campaigns through enhanced intelligent targeting, personalized messaging, and improved measurement, driving higher ROI.

## Example Use Cases

- Automate audience segmentation
- Generate personalized ad copy
- Analyze campaign performance data
- Identify top-performing content
- Suggest A/B test variations

Glean Search & Assistant		Glean Agents	
 <a href="#">Campaign Assets</a>	Locate campaign assets such as guidelines and strategy, campaign retrospectives, performance reports, and A/B test results.	 <a href="#">Generate New Campaigns</a>	Generate headlines, strategies, and content for new campaigns from product launches to increasing engagement with new customers.
 <a href="#">Campaign Performance</a>	Analyze campaign performance across multiple channels by aggregating data from various marketing platforms, sales reports, and customer feedback.	 <a href="#">Campaign Revenue Impact</a>	Provide insights into product revenue associated with various marketing campaigns to better understand what strategies are working and are not working.

## Best Practices & Resources

- Use **Glean Assistant** on campaign performance files to diagnose under-performance by segment/creative/offer, propose A/B test ideas, and generate experiment briefs
- Standardize UTMs and naming conventions via **Glean Pins** so that marketers can consistently tag assets and maintain clean attribution
- Leverage **Glean Collections** to centralize campaign assets



# Outcome: Automate Content Generation

## Glean Outcome

Accelerate the creation of high-quality marketing content across various formats and channels, scaling content production and distribution.

## Example Use Cases

- Generate blog post outlines
- Draft social media captions
- Create website copy variations
- Summarize long-form content into short snippets
- Develop video script ideas

Glean Search & Assistant		Glean Agents	
 <a href="#">Brand Assets</a>	 <a href="#">Social Media Content</a>	 <a href="#">Press Releases</a>	 <a href="#">Automate Creation of Social Posts</a>
Quickly locate brand assets and marketing collateral for content creation.	Create social media or blog posts regarding company news or product updates.	Draft a press release in AP format with customer and employee quotes based on a product requirements document.	Automate the first draft of a LinkedIn or other social posts in a style that aligns with viral engagement algorithms.

## Best Practices & Resources

- Create a **Content Brief Agent** that, given a topic and persona, outputs a one-pager (with a goal, angle, target CTAs, keywords) to accelerate drafting time
- Create a **Glean Collection** with “ready-to-ship” blog posts, one-pagers, case studies, and other marketing collateral



# Product



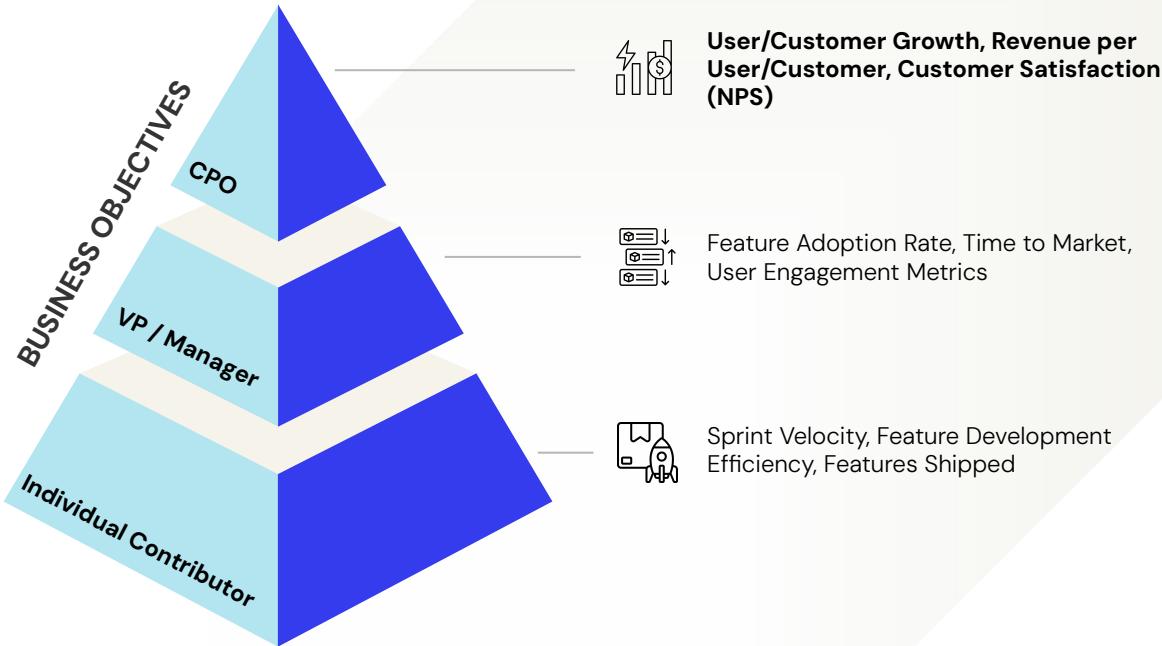
# Glean Drives Outcomes Across Entire Product Organizations

## Department

Product

## Challenges

Product teams face complexities around understanding end-user needs, prioritizing features, and lengthy development cycles, **often leading to missed market opportunities or underwhelming product-market fit.**



# Drive Product Innovation & Stronger Customer Engagement

**Accelerate product development and innovation** by automating administrative processes and streamlining competitor/market analysis, enabling teams to ship better products, faster.



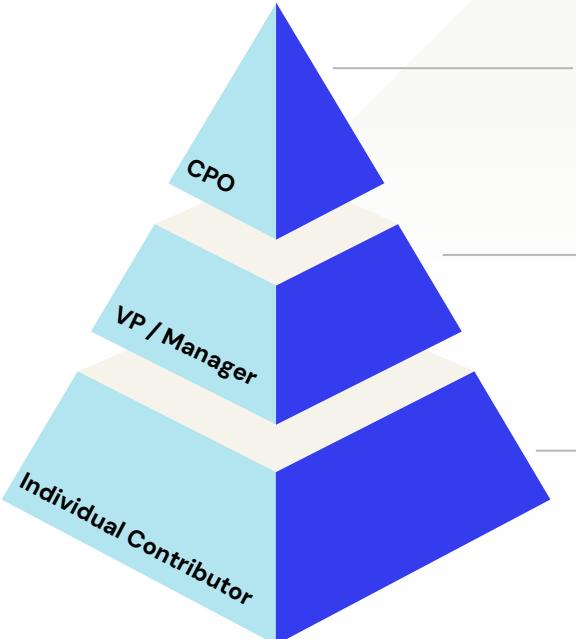
Utilize **Glean Search & Assistant** to quickly obtain insights and status on key features



Utilize **Glean Agents** to create release notes or product requirements documents

## Case Studies & Customer Use Cases

**Super.com**



## Outcomes Achieved



### ACCELERATE DEVELOPMENT CYCLES

Use **Glean** to... provide insights or feedback on product ideas, automate test scenarios, and create product documentation.



### ENHANCE FEATURE PRIORITIZATION

Use **Glean** to... analyze customer feedback at scale, identify emerging trends, and recommend high-impact features.



### IMPROVE PRODUCT ADOPTION

Use **Glean** to... understand product usage patterns, and optimize product capabilities and investments.



# Outcome: Accelerate Development Cycles

## Glean Outcome

Streamline the product development process from ideation to launch, reducing time-to-market for new features and products.

## Example Use Cases

- Automate user story generation
- Summarize market research findings
- Prioritize backlog items based on impact
- Generate functional specifications
- Expedite release planning

Glean Search & Assistant		Glean Agents	
 <a href="#">Find Documentation</a>	Quickly find relevant technical documentation, feature requests, tickets, and other product resources.	 <a href="#">Product Scoping</a>	Propose epics, user stories, and acceptance criteria based on requirements inferred from a product requirements document.
 <a href="#">Release Notes</a>	Draft complete, structured release notes in a company-approved format by analyzing related content about a feature or capability across data sources.	 <a href="#">Product Feedback</a>	Obtain feedback on a work-in-progress product requirements document and identify key gaps while providing concise and actionable recommendations.

## Best Practices & Resources

- Build a **Sprint Planning Agent** that compiles a single view of open PRs, blocker tickets, failing tickets, design handoffs, and on-call incidents
- Standardize product definitions (i.e. "definition of ready", "definition of done") with **Glean Answers** and **Glean Pins** so grooming and reviews use the same thresholds



# Outcome: Enhance Feature Prioritization

## Glean Outcome

Improve the decision-making process for which features to build, ensuring alignment with customer needs and business goals.

## Example Use Cases

- Analyze customer feedback for product ideas
- Quantify potential impact of new features
- Identify dependencies between features
- Suggest A/B test setups for new features

Glean Search & Assistant		Glean Agents	
 <a href="#">Competitor Analysis</a>	 <a href="#">Highest Demand Features</a>	 <a href="#">Feature Status Updates</a>	 <a href="#">Customer Feature Prioritization</a>
Locate research compiled around competitor capabilities to better understand product differentiators and areas of potential investment.	Identify product features highly desired by customers to better prioritize roadmapping.	Provide a comprehensive status update on a specific product feature by summarizing its purpose, ownership, delivery progress, key timelines, and linking to relevant external materials.	Provide a summary of features desired by a specific customer in calls or communications channels, and map to existing roadmap items.

## Best Practices & Resources

- Use **Glean Assistant** or **Glean Agents** to synthesize demand signal across calls, tickets, win/loss notes, and other criteria to enhance roadmapping prioritization
- Standardize metric definitions (i.e. activation, retention, DAU/WAU, feature adoption thresholds) as **Glean Answers** or **Glean Pins** to ensure consistent analysis across teams



# Outcome: Improve Product Adoption

## Glean Outcome

Drive increased usage and engagement with products and features by optimizing user onboarding, usability, and value communication.

## Example Use Cases

- Generate in-app messaging for new features
- Analyze user behavior patterns
- Suggest improvements for user experience
- Summarize user feedback for product iterations

### Glean Search & Assistant



#### [Find Adoption Documentation](#)

Locate materials that help users effectively learn and use a new software product or system.



#### [Product FAQ Hotspots](#)

Pinpoint the most frequently asked questions about products directly from customer interactions. Use this information to refine FAQs, support materials, and product messaging.

### Glean Agents



#### [Product Usage Metrics](#)

Obtain insights around usage trends for a particular customer or customer cohort over a defined period of time.



#### [Product Launch Updates](#)

Provide a summary of recent product launches from the past week, including a description of capabilities and guidance on customer messaging.

## Best Practices & Resources

- Centralize adoption assets (what/why/how, setup guides, troubleshooting guides, customer examples) in a **Glean Collection**
- Create a **Glean Activation & Adoption Agent** that pulls usage reports and support trends to flag activation gaps



# Enterprise Knowledge Worker



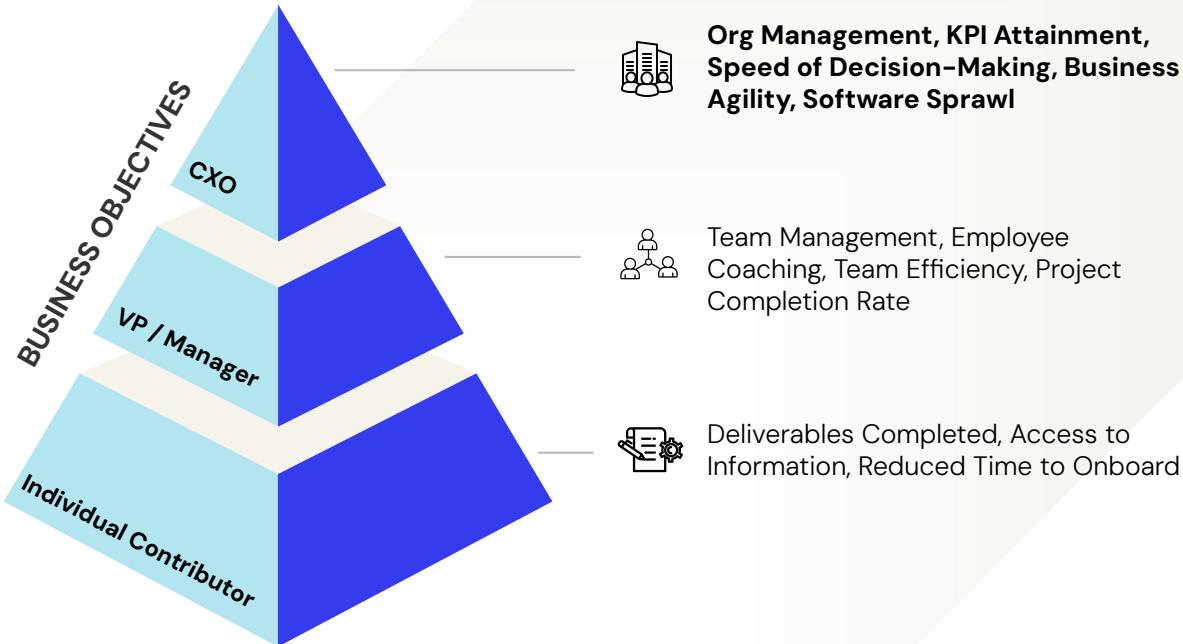
# Glean Drives Outcomes Across Entire Enterprises

## Department

Enterprise Knowledge Worker

## Challenges

Employees spend significant time searching for information siloed across multiple tools and teams, tracking down documents, and identifying the right resources, leading to **lost productivity, duplication of effort, and onboarding friction.**

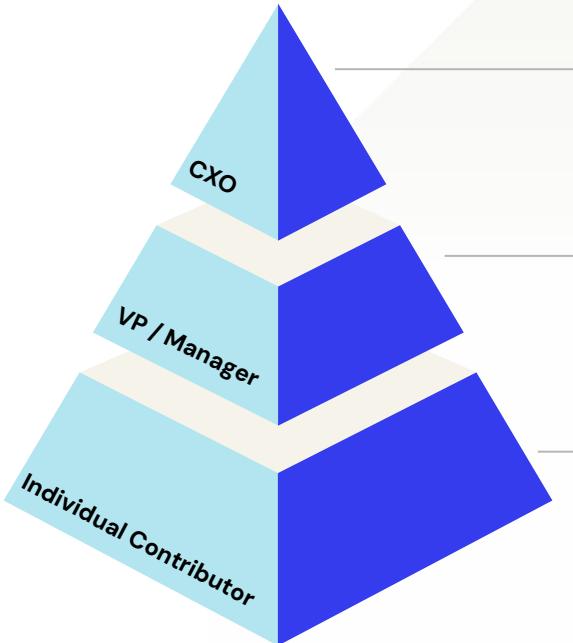


# Boost Enterprise-Wide Productivity & Collaboration

**Drive enterprise-wide efficiency and productivity gains by** empowering every employee to find what they need faster and automate routine knowledge tasks.

 Utilize **Glean Search & Assistant** to instantly surface relevant documents and identify experts

 Utilize **Glean Agents** to automate documentation updates and streamline employee onboarding



## Outcomes Achieved



### INCREASE OPERATIONAL EXCELLENCE

*Use Glean to... streamline business workflows, surface process bottlenecks, and provide for more efficient information retrieval.*



### REDUCE TIME TO ONBOARD

*Use Glean to... answer common employee questions, centralize onboarding resources, and identify organizational best practices.*



### DRIVE SKILL DEVELOPMENT

*Use Glean to... identify experts for further learning, recommend targeting learning opportunities, and develop employee skill sets in a self-paced manner.*

# Outcome: Increase Operational Excellence

## Glean Outcome

Accelerate the identification of operational best practices and information across teams to enhance overall business agility and employee productivity.

## Example Use Cases

- Surface best practices and playbooks from high-performing teams
- Summarize performance metrics
- Recommend targeted process optimizations

Glean Search & Assistant	Glean Agents
 <a href="#">Organizational Assets</a> Quickly locate company-approved materials for general use (i.e. brand logos and assets).	 <a href="#">Customer Updates</a> Enable employees to better understand customer use cases, enabling either preparation for meetings or to develop a deeper understanding of the company's value proposition.
 <a href="#">Call Summarizer</a> Provide a meeting recap of a call you may have missed due to a conflict or vacation, and outline next steps and action items.	 <a href="#">Daily Action Items</a> Schedule a daily reminder of all open action items assigned to you as inferred from emails, calls, communication channels, and other sources.

## Best Practices & Resources

- Use **Glean Answers** and **Glean Pins** to standardize definitions, policies, and approval paths so that all employees see the same verified guidance
- Centralize operating cadence notes (i.e. 1:1's, staff meetings, business reviews) in **Glean Collections** for ease of organization



# Outcome: Reduce Time to Onboard

## Glean Outcome

Accelerate new hire ramp by centralizing verified knowledge, automating workflows, and providing guidance on tasks, so that employees become productive faster with fewer blockers.

## Example Use Cases

- Generate role-specific 30/60/90 day plans
- Summarize team OKRs
- Create onboarding checklists
- Build a stakeholder map with “who meet with” lists

Glean Search & Assistant		Glean Agents	
 <a href="#">Onboarding Checklists</a>	 <a href="#">30/60/90 Day Plan</a>	 <a href="#">Onboarding Assistant</a>	 <a href="#">Company Encyclopedia</a>
Locate onboarding materials to understand resources to review, communications channels to join, and people to meet with.	Generate a role-specific 30/60/90 day onboarding plan that aligns with the broader team OKRs.	Answer a variety of new hire questions that are either role-specific or general (i.e. company benefits) in a conversational and engaging manner.	Help employees get up-to-speed on specific company topics or terminology, and suggest experts on those topics to network with.

## Best Practices & Resources

- Centralize onboarding resources into a **Glean Collection** with ramp plans, primers, trainings, and more
- Use **Glean in Slack or Teams** to quickly answer new hire questions, and publish those responses to benefit other new hires with similar questions



# Outcome: Drive Skill Development

## Glean Outcome

Enable continuous skill growth by connecting people to verified standards, experts, and practice in the flow of work, turning institutional knowledge into actionable learning paths.

## Example Use Cases

- Create role-based learning paths mapped to competency matrices
- Convert internal documents or recordings into trainings
- Recommend targeted exercises or mentors to build skills

Glean Search & Assistant	Glean Agents
 <a href="#">Best Practice Guides</a> Quickly identify resources relevant to building new skill sets or obtaining product knowledge.	 <a href="#">Practice Scenarios &amp; Rubrics</a> Generate practice scenarios and rubrics for assessing knowledge of a certain concept, mapping to varying competency levels.
 <a href="#">AI News Summary</a> Learn about use cases and relevant news around AI, enabling employees to work smarter and better understand company impact.	 <a href="#">Training Programs</a> Create a training path or course lesson based off the transcript of any recorded meeting or past live training.

## Best Practices & Resources

- Use **Glean Pins** to pin competency matrices, skill rubrics, and style guides so assessments and training materials reference the same standards
- Organize training materials, recordings, and exercises into **Glean Collections**



# Thank You!

