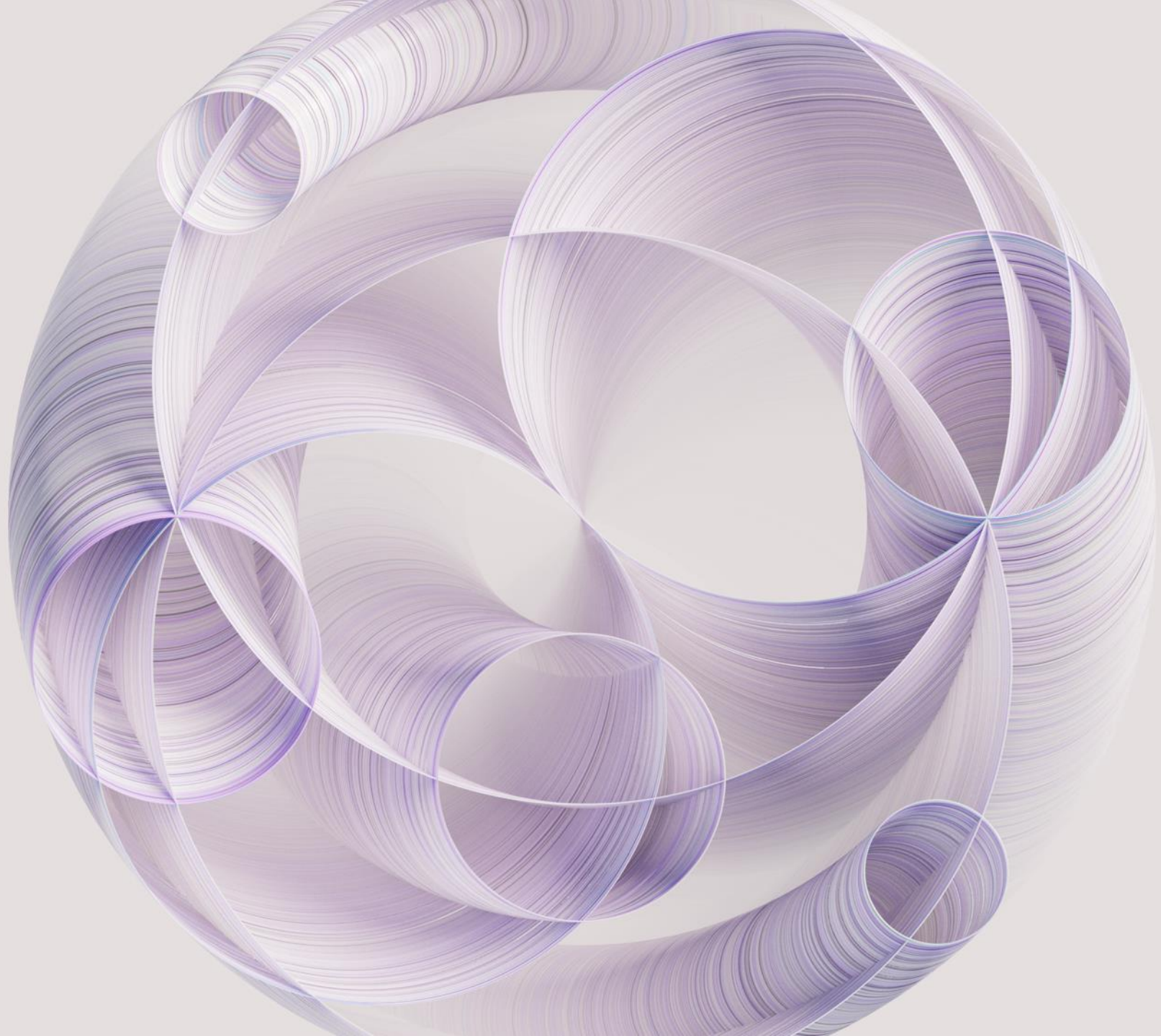


# Client Zero: watsonx for HR Playbook

Steve Moss, Director  
watsonx Client Zero,  
Americas



# Playbook experience walk-through

**01**

**What is the intent?**

*Understanding of the purpose of the playbook*



**02**

**Why pitch watsonx for HR?**

*Understanding of how it fits in IBM strategy and what is the value proposition*



**03**

**What is our strategy and GTM approach?**

*Understanding how we plan to win*



**04**

**What is the campaign and sales plays?**

*Understanding of the campaigns to start with and sales plays*



**05**

**Where to find the sales kit?**

*Understanding of sales kit, including presentations and demos*



**06**

**How do I demo POC to my client?**

*Understanding of no-cost POC environment*



**07**

**How do I solution the deal?**

*Understanding of the elements of a deal, including solutioning and pricing*



**08**

**How to tag the opportunity in ISC?**

*Understanding of correct tagging process*



**09**

**What is the business value for the client?**

*Speaking the language of the client, demonstrating irresistible value*



**10**

**FAQs and competitive rebuttals**

*Know your competition and how to beat them*



**11**

**How can I get trained and certified?**

*Understanding of training / certifications catalogue*



**12**

**Where do I find latest information / contacts?**

*Understanding of resources and contacts*





# 01

## What is the intent?



© IBM 2024



# Purpose of the playbook

Seller, this is a Data and AI Playbook which is a prepackaged sales offering with multiple products and services to help you prospect, identify, progress and win opportunities faster.

Each playbook represents a high-level sales offering that we find is repeatable across industries and markets.

There are four use cases in this deck:

- AskHR for HR policy recall (Employee and Manager services)
- AskHR with HR software transactions enabled (Employee and Manager services)
- Digital Labor for HR (HR professionals)
- Generative AI Assistant for HR (All personas)

We hope you like the playbook and leverage it to drive engagements and campaign.

We appreciate your feedback.





# 02

**Why pitch watsonx  
for HR?**



© IBM 2024

# watsonx for HR Value Proposition

HR leaders and professionals today face increasingly high pressure to produce stellar employee experiences with shrinking budgets and keeping up with changing compliance standards—and they're looking for options to stay on top of it all.

watsonx is an open source, trusted AI with the power to transform the way your employees interact with HR by creating immediate self service—while freeing up HR professionals to focus on higher value strategic work.

## Main Use Cases:

- Transform HR support by deploying a single, digital engagement layer for employees and managers to converse with in natural language
- Improve employee experience by automating core HR processes
- Automate repetitive administrative HR professional tasks like recruiting to enable better, faster decision making

**Bottom Line:** watsonx automates employee service, improving employee experience while saving your teams from hours of manual work and cutting overhead costs.

## Today's HR leaders face several workforce challenges:

### Evolving employee expectations

The past three years have fundamentally changed employee expectations

**51M**

American workers resigned in 2022,<sup>1</sup> with resignations jumping in the UK, Australia and France.

---

**39%**

of global workers will work hybrid by the end of 2023.<sup>2</sup>

Source: 1. [CNBC, February 2023](#)  
Source: 2. [Gartner press release 2023](#)

### Widening skill gaps & labor shortages

Workforce trends curtail business potential across the globe

**10M**

job openings in the US.<sup>3</sup>

---

**1.4%**

was the average annual productivity growth in the last 15 years,<sup>4</sup> despite technological advances.

Source: 3. Bureau of Labor Statistics, May 2023  
Source: 4. The Brookings Institute

### Keeping up with accelerated pace of innovation

Talent market dynamics are rapidly evolving with the implementation of GenAI into every day business tasks

**85M**

jobs could go unfilled by 2030 due to a lack of skilled workers.<sup>5</sup>

---

**17%**

longer cycle time to close a skills gap compared to three years ago.<sup>6</sup>

Source: 5. The Future of Work: The Global Talent Crunch, 2022  
Source: 6. IBM [Institute for Business Value study](#)

Harness the power of automation, traditional and generative AI to deliver better experiences at lower costs



### Improve the employee experience

Provide the consumer-grade experiences that employees demand through highly personal, social, digital and mobile platforms and tailored experiences

50-150

Work years of productivity returned to the business



### Transform the HR operating model

Reengineer, digitize, and orchestrate your end-to-end HR operations to provide the flexibility and scale that will unlock more high-value tasks

83%

Of executives say generative AI will reinvent how their organization works



### Deploy next-gen tools

Leverage next-gen AI, virtual assistants, RPAs, and watsonx to optimize HR operations and enable the experiences and agility your organization requires

53%

Digitization of HR processes using next-gen technologies like automation and GenAI



# Client outcomes improved through HR implementation



ENN Group built a virtual assistant that combined AI and automation to interpret and respond to IT and Financial employee service desk requests.  
↑ 60% increase in employee productivity by automating 2,000 to 3,000 tasks daily.



230k+ employees, 65k+ hires/yr. Watson addresses 125k+ questions per week for performance and onboarding.



243k+ unique users have used Watson to conduct over 1.9M conversations, allowing HR professionals to prioritize strategic activities. With 97% manager adoption, this resulted in a ↓ 61% reduction in tickets raised.



110k+ employees use Watson to get quick answers and serves up responses from unstructured HR documents.



Watson addresses 31+ topics across payroll, compensation, benefits, policies, manager self-service, driving down HR helpdesk call volume.

**03**

**What is our strategy  
and GTM approach?**



© IBM 2024





# Our goals and strategy in 2024

**~\$500M**

Est. SW pull through



## Go-to-Market

- a. GTM PoV, sales motion, market activation
- b. Sales enablement, targeted campaigns, tagging & sales contest
- c. Standard, repeatable PoC template, capabilities and MVPs

## Solutioning

- a. Focused solutioning workflow & governance
- b. Prioritization (scope & products) and phase-wise plan
- c. Unified estimation template for products addressing HR need

## Campaign

- a. Increased marketing and communication efforts
- b. watsonx technology featured on the HR conference circuit

## Scale

- a. Regular internal drumbeat, enablement calls and seller socialization
- b. Monthly communications featuring wins / solutions



# Go-to-Market Approach

---

**01**

Use IBM's client zero story at every client to open doors to the HR and IT teams, focusing on existing and green space clients

**02**

Meet clients where they are at on their AI assistant for HR journey, quickly stepping them through the readiness to Gen AI assistants with watsonx

**03**

Use repeatable and easy to contain PoC templates to build a base with clients and an opportunity to land and expand in HR

**04**

Release the watsonx Gen AI Assistant out of the box option on watsonx Orchestrate in Q4

**05**

Use the HR conference circuit to continue to market and have HR clients get hands on with demos, ready to take information back to decision makers

**06**

Demonstrate value with playbook ROI calculators to ensure client budgets are aligned ready for investment by Y/E or Q1 2025

# Plan to execute our strategy



# Q4 Vision: watsonx AI Assistant for HR

*Out of the box ready on watsonx Orchestrate*

Use Case	EMPLOYEE SUPPORT (AskHR)			ONBOARDING			TALENT AQUISITION		
Metrics	33K hours saved by self-serviced queries <sup>7</sup>	61% reduction in tickets raised <sup>8</sup>	\$5M improvement in productivity <sup>8</sup>	12K hours saved for learning admins <sup>4</sup>	10% decrease in errors from manual work <sup>5</sup>	88% reduction in onboard forms completion <sup>6</sup>	84% decrease in time to hire <sup>1</sup>	30% increase in hires per month <sup>2</sup>	30% decrease in year 1 turnover <sup>3</sup>
Skill Templates	<ul style="list-style-type: none"> <li>Time off management</li> <li>Employee management</li> <li>Profile management</li> <li>Support</li> <li>Employee verification</li> <li>Benefits</li> <li>Compensation</li> </ul>			<ul style="list-style-type: none"> <li>Get employee verification letter</li> <li>View compensation details</li> <li>Get designated holiday list</li> <li>Update home phone number</li> <li>View benefit plan on Workday</li> <li>Get salary statement</li> </ul>			<ul style="list-style-type: none"> <li>Create job requisition</li> <li>Find candidates for job requisition</li> <li>Schedule interview for a candidate</li> <li>Interview transcript summarization</li> <li>Email rejection letter to candidate</li> </ul>		

Pre-built Application Integrations



# 04

**What are the  
campaigns and sales  
plays to drive  
strategy?**





# AI Assistant for HR Launching Q4 2024

*Out of the box on  
watsonx Orchestrate*

## AskHR for Policy Recall

*Technology Used:* **watsonx Assistant**

Value: 61% reduction in tickets raised (IBM HR)

Useful for: Clients taking their initial step into HR services transformation and do not have a roadmap or enterprise perspective on generative AI

Talking point: In 2017, IBM HR used a simple assistant interface and a corpus of policy answers to manage the initial step toward the AskHR that is used today.

## AskHR with Transactions

*Technology Used:* **watsonx Assistant**

Value: 100% completion (no human error), 75% quicker than actions taken in HR information systems (IBM HR)

Useful for: Clients looking to upgrade from a simple policy recall chatbot, to an assistant that unifies HR software and completes actions for employees and managers

Talking point: In 2020, IBM HR utilized open APIs from Workday to connect to wxA and

## Digital Labor for HR

*Technology Used:* **watsonx Orchestrate**

Value: 50,000 manager productivity hours and 85% of time returned to HR in one process (Promotions – IBM HR)

Useful for: Clients interested in increasing productivity and reducing manual work within their HR teams across an HR program (Promotion Cycle, Recruitment, Onboarding)

Talking point: In 2024, IBM HR have deployed 12 Digital Labor 'digis' on wxO, handling processes end-to-end in promotions, learning, expense fraud management, performance manager, M&A

## Generative AI Assistant for HR

*Technology Used:* **watsonx Orchestrate and watsonx.ai**

Value: All value stated to the left, including 85% of the knowledge base ingested into LLMs (IBM HR), retaining trust and security in a high compliance domain, ease of content management and increased personalization.

Useful for: Clients who have done the groundwork around HR services chatbots and are ready to step into the future of the HR function. Three personas are serviced by this solution: Managers, employees and HR; all using a single digital AI front-end to recall policy (GenAI), complete transactions (AI automation) and manage HR programs end to end (Digital Labor).

Talking point: In 2023, IBM HR ran two generative AI pilots in Careers and Skills and Benefits. Findings: Not all HR domains are suitable for Gen AI responses, concluding that a hybrid approach (85% Gen AI and 15% Traditional AI) is currently best for HR

On January 1 2025, IBM HR will port to the newest version of AskHR, a fully onboarded Generative AI Assistant for HR that will:

- Respond to employee and manager queries with Generative AI
- Transact across 100+ HR applications
- Manage 20+ HR programs from the promotion cycle to performance management

# 4.1

## AskHR for policy recall

Employees and managers are struggling in an era where information is overloading them. Managers are facing a trade off between their time and the cost and value of where to invest it. Since the pandemic, they have been bombarded with new requirements to manage their people, with little assistance and guidance to do so.

Let’s consider a large FSS company with over 10,000 employees and 2,000 managers.

They are required to:

- 1. Manage employees as well as their day to day tasks and activities
- 2. Keep the company compliant by managing employees with relevant HR policy
- 3. Navigate complex internal websites to find what they need

In this document, you will find ways to reach out to companies to help provide a digital assistant for HR that delivers policy answers using watsonx Assistant.

### Prepare

#### Define the Opportunity

- Net new opportunity positioning HR chatbot/digital assistant with policy/ information recall for employees and managers
- Upsell to existing watsonx Assistant customers

#### Target Customers

By role..

- Chief Human Resources Officer
- Vice President, HR Technology
- Vice President, Total Rewards
- Vice President, HR Services
- Vice President, HR Partner

By account..

- If Net New.. Target all mid to large companies with a sizeable (5,000+) employee base and HR department
- If Upsell.. Target large companies that have objectives to reduce costs and improve their cashflow.

#### Understand Customer Challenges

- Many HR policies held in a hivemind of information sources, requiring access to information quickly
- Overworked and underdelivering managers who are struggling with stress and employee engagement
- HR teams staffed to answer policy questions and in a call center model

### Progress

#### Prospecting Questions:

- How many policy pages do you currently have for HR?
- What does it look like today when and employee or manager needs to find benefit information?
- Do your managers complain about having to work on HR process, distracting them from their day roles?
- What are your current employee CSAT scores?
- What is your current HR services set up for employee information?

#### 30-second Pitch

Managing at a large organization is becoming a difficult task. Front line and middle managers are responsible for delivering company objectives, while keeping their employees engaged, compliant and growing. HR teams have struggled to meet managers and employees where they are at, often providing telephone lines, email services or contact centers to manage difficult queries. IBM’s watsonx Assistant solution has an answer: maintaining a core set of responses to the most burning HR questions and responding in natural language, managers and employees can get in and out of their HR digital assistant and refocused on delivering value where the company needs it most.

### Deliver

#### Best in class HR services result in:

- 61% reduction in HR tickets
- 4x improvement in response times to queries
- 2x improvement in employee CSAT scores
- Improvement in engagement scores, specifically around bureaucracy and navigating the organization

#### Deep Dive into the Technology

- *Coming soon*

#### Demo

- *Coming soon*

#### Top Links to Bookmark:

*Coming soon*

*Coming soon*

*Coming soon*





# 4.2

## AskHR with transactions

Employees and managers are expected to work in an average of 130 applications at companies across their tenure, resulting in capability crossover, wasted productivity, additional learning and upkeep requirements. These challenges damage workplace morale, speed and effectiveness. The HR function has followed a trend since 2018 to overlay a number of software vendors on top of HRIS systems, each with a website/app instance billed as a ‘system of engagement’ that is often disconnected to the many other tools and applications in use.

Let’s consider a large FSS company with over 10,000 employees and 2,000 managers.

Managers and employees are required to:

1. Toggle between hundreds of different HR software applications to get things done
2. Learn the vernacular and special requirements for each application
3. Input the same information into multiple systems that often do not speak to the HR system of record

In this document, you will find ways to reach out to companies to help provide a digital assistant for HR that completes HR actions and transactions using watsonx Assistant.

### Prepare

#### Define the Opportunity

- Net new opportunity positioning HR chatbot/digital assistant that completes transactions in a digital engagement layer for HR
- Upsell to existing watsonx Assistant customers

#### Target Customers

By role..

- Chief Human Resources Officer
- Vice President, HR Technology
- Vice President, Total Rewards
- Vice President, HR Services
- Vice President, HR Partner

By account..

- If Net New.. Target all mid to large companies with a sizeable (5,000+) employee base and HR department
- If Upsell.. Target large companies that have objectives to reduce costs and improve their cashflow.

#### Understand Customer Challenges

- Many HR technology leaders have overlayed many HR vendors on top of the HRIS systems that they have already deployed
- This has impacted the manager and employee experience, forcing them to learn multiple systems
- Leads to slow HR actions and dissatisfied employees

### Progress

#### Prospecting Questions:

- How many HR software applications do you currently have?
- How would moving to a self-service culture impact your HR team?
- Are there any vendors you are paying to complete HR transactions on behalf of your employees?
- Do your managers complain about having to work on HR process, distracting them from their day roles?
- What are your current employee CSAT scores?

#### 30-second Pitch

Many companies have followed a consistent trend when it comes to HR software. Most have deployed a large HRIS system, realized that ‘other services’ such as performance management, learning, compensation and reward systems are needed on top; now managing a multitude of vendor relationships and software packages. An unlock for the HR department, managers and employees happens when those applications speak to each other and in one place. IBM’s watsonx Assistant solution has an answer: providing a digital engagement layer that unifies the existing HR applications, turning them from systems of engagement to systems of record that speak to the engagement layer bidirectionally.

### Deliver

#### Best in class HR services result in:

- 90% reduction in HR software and software front end required
- 100% completion of transactions with zero errors
- 75% quicker to transact than within the HRIS
- Improvement in engagement scores, specifically around bureaucracy and navigating the organization

#### Deep Dive into the Technology

- *Coming soon*

#### Demo

- *Coming soon*

#### Top Links to Bookmark:

*Coming soon*

*Coming soon*

*Coming soon*



# 4.3 Digital Labor for HR

HR professionals have been promised for years that they deserve a ‘seat at the table’ at the leadership level within every business, but cannot shake expectations of manual work and the ‘human glue’ within HR processes to move their work toward a more strategic direction.

Let’s consider HR professionals in a large consumer goods company with over 10,000 employees and 2,000 managers.

They are required to:

- 1. Design and deploy talent programs such as promotion cycles, learning classes and talent reviews
- 2. Manage employee planning cycles such as compensation and performance management
- 3. Often manage these processes manually via spreadsheets and disconnected HR systems

In this document, you will find ways to reach out to companies to help provide a digital assistant to HR professionals that increases their value and strategic work with watsonx Orchestrate.

## Prepare

### Define the Opportunity

- Net new opportunity positioning digital labor to increase HR professional productivity
- Upsell to existing watsonx Assistant and Orchestrate customers

### Target Customers

By role..

- Chief Human Resources Officer
- Vice President, HR Technology
- Vice President, Total Rewards
- Vice President, HR Services
- Vice President, HR Partner
- Vice President, Talent
- Vice President, Recruitment (Talent Acquisition)

By account..

- If Net New.. Target all mid to large companies with a sizeable (5,000+) employee base and HR department
- If Upsell.. Target large companies that have objectives to reduce costs and improve their cashflow.

### Understand Customer Challenges

- HR professionals are overworked and underdelivering, managing HR programs end to end with manual tools
- Programs such as promotion cycles, recruitment, total reward cycles and learning management are made up of component parts that are managed across many HR systems in a dysfunctional way

## Progress

### Prospecting Questions:

- What would you say is your most inefficient HR process today?
- Are your HR employees engaged at work and completely manual-work free?
- What is the average cycle time to hire, pay, promote or delivery learning for your employees?
- How many tools are your HR employees expected to learn and operate in on average in their daily work tasks?

### 30-second Pitch

It’s time to reimagine work. With Digital Labor, you can harness the power of AI and automation, to free up individuals from the drudgery of work: copy and pasting or editing data in applications, clicking from system to system, chasing after work and people. Individuals no longer need to build expert knowledge of how to run software applications, execute business processes, or adhere to enterprise policies. Rather, your HR teams can stay focused on the higher-level work that we all dream about.

HR leaders are now able to work with a ‘digital twin’ within their organizations to run programs end to end and elevate their work to advisory and strategic advisors with watsonx Orchestrate.

## Deliver

### Best in class Digital Labor for HR result in:

- 85% time returned to HR professionals across a yearly process
- Digital Labor use cases: Promotion cycle management, learning class management, performance management, mergers and acquisitions, skills taxonomy updates, wage compliance, expense fraud detection and more...
- Time to value: Average ‘digi’ stand up time of 6-8 weeks
- Average increase of 2 band levels over four years (indicative of higher value work)

### Deep Dive into the Technology

- *Coming soon*

### Demo

- *Coming soon*

### Top Links to Bookmark:

*Coming soon*

*Coming soon*

*Coming soon*



# 4.4

## Generative AI Assistant for HR

Employees, managers and HR professionals are overwhelmed with HR software applications, dispersed information and manual work required to manage an organizations most valuable asset: It's people.

Let's consider a large telecom company with over 10,000 employees and 2,000 managers.

They are required to:

- 1. Managers: Required to complete employee actions across a number of HR systems
- 2. Employees: Navigate internal websites for information and HR software to complete tasks
- 3. HR: Use manual work to complete HR programs end to end

In this document, you will find ways to reach out to companies to help provide an AI assistant for HR that reacts and responds to NLP to get work done for employees, managers and HR professionals.

### Prepare

#### Define the Opportunity

- Net new opportunity positioning HR chatbot/digital assistant with policy/information recall for employees and managers and Digital Labor for HR
- Upsell to existing watsonx Assistant and watsonx Orchestrate customers

#### Target Customers

By role..

- Chief Human Resources Officer
- Vice President, HR Technology
- Vice President, Total Rewards
- Vice President, HR Services
- Vice President, HR Partner

By account..

- If Net New.. Target all mid to large companies with a sizeable (5,000+) employee base and HR department
- If Upsell.. Target large companies that have objectives to reduce costs and improve their cashflow.

#### Understand Customer Challenges

- Many HR policies held in a hivemind of information sources, requiring access to information quickly
- Overworked and underdelivering managers who are struggling with stress and employee engagement
- HR teams staffed to answer policy questions and in a call center model
- HR teams bogged down with manual work

### Progress

#### Prospecting Questions:

- How many policy pages do you currently have for HR?
- Where are you currently using Generative AI in HR today?
- What steps have you taken to asses your generative AI readiness in HR?
- What does it look like today when and employee or manager needs to find policy information?
- Do your managers complain about having to work on HR process, distracting them from day job?
- Is the HR function strategic here?

#### 30-second Pitch

As an HR leader, you're constantly seeking ways to streamline processes, reduce costs, and improve employee experiences for your business and your own teams. watsonx AI Assistant for HR can help you achieve these goals by leveraging the power of AI to automate routine tasks, provide data-driven insights, and enhance employee engagement.

By implementing watsonx AI Assistant for HR, you'll not only increase efficiency and reduce costs, but also improve the overall employee experience and drive business success. It's the perfect solution for HR leaders looking to future-proof their department with Gen AI.

### Deliver

#### Best in class HR services result in:

- 61% reduction in HR tickets
- 4x improvement in response times to queries
- 2x improvement in employee CSAT scores
- Improvement in engagement scores, specifically around bureaucracy and navigating the organization
- 85% time savings returned to the HR organization for reprioritizing into strategic work

#### Deep Dive into the Technology

- *Coming soon*

#### Demo

- *Coming soon*

#### Top Links to Bookmark:

*Coming soon*

*Coming soon*

*Coming soon*





Day 1	Steps 1 & 2 Research & Email/InMail
Day 3	Steps 3 & 4 Call & Social
Day 6	Step 5 Email/InMail
Day 7	Steps 6 & 7 Call & Social
Day 11	Step 8 Email/InMail
Day 15	Step 9 Email/InMail

## Day 1, Step 1

### Research & Connect

*If you have not already connected with your prospects on LinkedIn:*

- See if there are any mutual connections that can provide a warm introduction.
- Search if there have been any posts about HR Automation or Generative AI
- If you don't have any mutual connections, send a personalized connection request using the messaging below:

Hi {name},

As HR leaders like yourself navigate the new normal of work, one thing is clear: employee expectations have fundamentally changed. The pandemic has reshaped how we work and accelerated the pace of change within organizations. At the same time, generative AI has changed how we work almost overnight. As a result, you likely have asked questions such as:

- How do I deliver outstanding employee experiences with limited resources and a rapidly evolving organizational climate?
- What will generative AI mean for the HR profession?

At IBM, we've experienced these challenges firsthand. That's why we developed AskHR, an HR digital assistant that drives a seamless experience for employees and empowers HR professionals to focus on higher-value tasks. With AskHR, we've achieved remarkable results internally, including 94% of employee inquiries handled automatically, a 40% reduction in HR operating budget, and a 55-point increase in our HR NPS score. With such an amazing transformation, we started thinking about how others could benefit from it—and we've already seen similar results with our clients.

I'd love to explore how AskHR can help [Company Name] achieve similar results. Would you have 30 minutes [next week] to discuss how IBM can help [Company Name] transform your HR experience and unlock new value for your employees and business?

Best regards,  
[Your Name]

--

Hi [Name],

I noticed you lead HR technology at [company].

With increasing focus on generative AI, I'm guessing you're thinking about ways to automate your processes.

Would you like to learn more about a new approach to employee self-service?

Best,  
[Your Name]

## Day 1, Step 2

### Email or LinkedIn InMail

Subject: IBM Generative AI

Hi {first name},

Imagine cutting down your HR operating budget and seamlessly staying on top of global compliance needs, all while enhancing employee satisfaction and upskilling your HR team—sounds too good to be true, right? It would have been a few years ago, but AskHR is changing the game. This state-of-the-art tool is a central resource for common employee questions, streamlining HR support and enabling professionals to concentrate on high-value tasks instead of getting swamped by repetitive queries. Here's why AskHR is different from other chatbots:

- Seamless Employee Experiences:** AskHR handles common employee queries efficiently, enabling your HR department to concentrate on strategic initiatives instead of routine requests.
- Cost Optimization:** Organizations utilizing AskHR have reported reduction in HR operating budget thanks to increased process efficiencies and improved allocation of HR personnel.
- Improved Employee Satisfaction:** Implementing AskHR leads to better handling of employee concerns, reflected in boosted Net Promoter Score (NPS), rising from +19 to +74 in typical deployments.
- Enhanced Decision Making:** Access accurate insights derived from consolidated HR analytics made easily accessible by AskHR, fostering informed decision-making.

Our solution automates employee support, with competitive pricing, training data that's owned by you, and a thoughtful approach to ethical use of AI. Plus, our internal story of success at IBM will provide valuable insights and expertise to help you get started quickly.

Let's connect and discuss how generative AI can transform {Company}. Your success starts here.

Best regards,  
[Your Name] [Your Position]

Make note on your Lead List, ISC, etc. that you have completed these steps

Day 1

Steps 1 & 2  
Research &  
Email/InMail

Day 3

Steps 3 & 4  
Call & Social

Day 6

Step 5  
Email/InMail

Day 7

Steps 6 & 7  
Call & Social

Day 11

Step 8  
Email/InMail

Day 15

Step 9  
Email/InMail

### Day 3, Step 3

#### Phone/Voicemail

Hello,

This is {your name} from IBM - following up on my email regarding IBM's AskHR solution, a chatbot that answers all your employees' questions so you don't have to.

I checked out your (Website or LinkedIn) and found {insert finding}. I'm curious to learn if your organization is planning to or already leveraging an HR chatbot to facilitate your employee experience?

EY, one of the big four audit firms, adopted AskHR and quickly saw it addressing over 125K questions a week around performance and onboarding—and that's just for one use case.

<insert client story if possible or reiterate IBM's transformation>

At IBM, our goal is to help clients improve business productivity and employee efficiency with access to high-quality, trusted, pre-trained models using IBM's proprietary foundation models.

Please give me a call back when you have 15 mins.

[Leave your contact information]

IF YOU GET THEM LIVE:

Questions to ask to start the conversation:

1. Is your HR team meeting time-to-fill, DEI, and other key human capital metrics?
2. Do you already employ automation in your HR department? (TA, Onboarding, Learning & Development, Payroll, Employee Management?)
3. What does your HR tech stack currently look like? Where would you improve your stack? What needs aren't being met by your existing solutions? Does your existing technology integrate well?
4. How long does it take for a new HR hire to become productive?
5. How do your employees rate their experience and ease of use with existing technology?
6. How long do you need to train employees in using your existing applications?
7. Is your HR tech delivering the business results you need? Are you able to adapt to new challenges quickly?
8. Thank you for sharing. Based on our conversation, it sounds like there is a great opportunity for us to provide you with actionable resources and even assistance with an introductory call and/or live demo. We can follow up on if, and when, there should be next steps from there. Are you available next Tuesday or Wednesday?

Thank you, I look forward to connecting then {person's name}.

#### Entry points to listen for:

- We have several tools
- I spent most of my time gathering information from different systems which gives me less time to make decisions or action that information.
- We have a mixed bag of technology, some point solutions, homegrown systems, and we still use spreadsheets in some functions.
- We have hundreds of jobs open at a given moment and sometimes candidates get lost in the pipeline or between systems.

#### How to respond

Solution Capabilities:

**Automate time consuming, repetitive tasks:** You didn't hire an HR manager to sift through spreadsheets and dashboards. You hired them to provide real business impact.

**Enable better and faster decisions:** Information should help the decision process, not hinder it. IBM watsonx Orchestrate does the legwork and gathers the data points from different systems so your employees are empowered to make better business decisions when they're needed.

**Employee experience matters:** By improving the HR experience and making HR technology more effective, your HR partners can spend more time focused on business outcomes and improving the employee experience so you can retain talent and drive results.

#### Build HR automations to meet your needs:

Business needs change and so should your digital labor. Watson can adopt new skills and skills can be shared across your organization as needed.

**Get it right every time:** Codify common or complex processes so they are performed accurately and consistently time after time. You can train your digital employee with skills to execute your critical business processes the same way every time – no skipped steps, no risk to compliance.

Set a reminder in ISC that you need to complete this step two days after Steps 1 & 2 completed

Day 1

Steps 1 & 2  
Research &  
Email/InMail

Day 3

Steps 3 & 4  
Call & Social

Day 6

Step 5  
Email/InMail

Day 7

Steps 6 & 7  
Call & Social

Day 11

Step 8  
Email/InMail

Day 15

Step 9  
Email/InMail

## Day 3, Step 4

### Business Social Media Post

Share the latest announcements, third party articles, blogs and any upcoming webinars in your personal LinkedIn & Twitter accounts. Personalize your post by including your own thoughts or commentary. IBMers may have access to EveryoneSocial, which makes personalizing and sharing content as easy as a few clicks.

#### Suggestion:

AI ethics post: [https://www.linkedin.com/posts/ibm-watsonx\\_10-key-questions-to-ask-activity-7211029589555343360-BjoB?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/ibm-watsonx_10-key-questions-to-ask-activity-7211029589555343360-BjoB?utm_source=share&utm_medium=member_desktop)

Myth vs. Fact: [https://www.linkedin.com/posts/ibm-watsonx\\_ai-for-business-myth-vs-fact-activity-7142974381764358144-01qK?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/ibm-watsonx_ai-for-business-myth-vs-fact-activity-7142974381764358144-01qK?utm_source=share&utm_medium=member_desktop)

AI Assistant on wxO: [https://www.linkedin.com/posts/ibm-watsonx\\_ai-watsonx-ibm-activity-7202362335410151424-75u0?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/ibm-watsonx_ai-watsonx-ibm-activity-7202362335410151424-75u0?utm_source=share&utm_medium=member_desktop)

HR as driver for genAI: <https://www.ibm.com/thought-leadership/institute-business-value/en-us/report/hr-generative-ai>

Video on AI for Talent (8 minutes): <https://www.youtube.com/watch?v=MZmJTnjJd7Y>

Set a reminder in ISC that you need to complete this step two days after Steps 1 & 2 completed

Day 1

Steps 1 & 2  
Research &  
Email/InMail

Day 3

Steps 3 & 4  
Call & Social

Day 6

Step 5  
Email/InMail

Day 7

Steps 6 & 7  
Call & Social

Day 11

Step 8  
Email/InMail

Day 15

Step 9  
Email/InMail

## Day 6, Step 5

### Email or LinkedIn InMail

Subject: Re: [original subject line]

Hi {First name},

What if I told you we could create the first use case for your very own AskHR chatbot in [minutes](#), not months? Start focusing on what matters most, not answering the same question for the...700<sup>th</sup>? 701<sup>st</sup> time?

Built with IBM watsonx Orchestrate with trusted, open data models, AskHR makes employee self-service a breeze.

<insert another client story>

(Company) will be able to offer top-speed service, freeing up HR professionals to do the higher-value work and leaving employees happier with their HR experience.

Are you available next week to discuss how [Company] might be able to leverage this solution?

Learn more by visiting the IBM watsonx <is there a web page for AskHR? Can we set one up?> [AskHR Case Study](#)  
Standard timeline to get AskHR MVP up and running?

Pro Tip\*: Consider these response rates for email subject lines:

“Re:” = 92%

“Re: follow up” = 90%

“Re: update” = 89%

“Re: introduction” = 88%

“Re: checking in” = 87%



Day 1

Steps 1 & 2  
Research &  
Email/InMail

Day 3

Steps 3 & 4  
Call & Social

Day 6

Step 5  
Email/InMail

Day 7

Steps 6 & 7  
Call & Social

Day 11

Step 8  
Email/InMail

Day 15

Step 9  
Email/InMail

## Day 7, Step 6

### Phone w/o Voicemail

IF YOU GET THEM LIVE:

Questions to ask to start the conversation:

1. How are you currently leveraging AI and automation to deliver your employee experience?
2. What strategies have you explored to simplify your service model to employees?
3. Have you explored a chatbot solution?
4. Do you take full advantage of automations to assist in reducing cost and time to deliver on employee questions?
5. What challenges do you experience around automation and chatbots for your HR services?
6. Thank you for sharing. Based on our conversation, it sounds like there is a great opportunity for us to provide you with actionable resources and even assistance with an introductory call. We can follow up on if, and when, there should be next steps from there. Are you available next Tuesday or Wednesday?

For this play, focus on the following topics: generative AI, automation, HR processes, employee experience, HR service model

## Day 7, Step 7

### Social Post

Share the latest announcements, third party articles, blogs and any upcoming webinars in your personal LinkedIn & Twitter accounts. Personalize your post by including your own thoughts or commentary. IBMers may have access to EveryoneSocial, which makes personalizing and sharing content as easy as a few clicks.

**Check Seismic for the latest information:**

<https://ibm.seismic.com/Link/Content/DCbHf2RCFTPf3G9Cc2PBGgJWfGV>

Day 1

Steps 1 & 2  
Research &  
Email/InMail

Day 3

Steps 3 & 4  
Call & Social

Day 6

Step 5  
Email/InMail

Day 7

Steps 6 & 7  
Call & Social

Day 11

Step 8  
Email/InMail

Day 15

Step 9  
Email/InMail

## Day 15, Step 9

### Final Email/InMail

Subject: {Company} and IBM

Hello {First name},

It seems like right now might not be the best time to talk about your generative AI strategy, but I look forward to that conversation when you are ready.

As you work on what's next at {Company}, I thought you might find this [community blog](#) discussing IBM's HR transformation journey to be informative. If the opportunity arises, we would be thrilled to build a POX to demonstrate how IBM is uniquely positioned to help {Company} in your transformation to build your next-level employee experience.

**Check Seismic for the latest information:**

<https://ibm.seismic.com/Link/Content/DCbHf2RCFTPf3G9Cc2PBGggJWfGV>

<https://ibm.seismic.com/Link/Content/DCdffWXgVRTWQ87TChGdj7cf46RP>

Day 1

Steps 1 & 2  
Research &  
Email/InMail

Day 3

Steps 3 & 4  
Call & Social

Day 6

Step 5  
Email/InMail

Day 7

Steps 6 & 7  
Call & Social

Day 11

Step 8  
Email/InMail

Day 15

Step 9  
Email/InMail

## Links + Stats to Use to Personalize

[IBM watsonx Orchestrate Product Page](#): Great link to put into prospecting emails as you can highlight videos, trials, request and demo and engage in other ways that we can track via client interests!

Show your potential client how other companies have been successful.

[Case Study – IBM HR](#)

[Case Study – Example](#)

[Case Study – Example](#)

[IBM's perspective on ethical AI](#)

- Key findings on the use of genAI in HR are:
  - Use cases of genAI adoption in HR technology solutions include support and assistance to the workforce, analytics, and onboarding
  - 32% of global HR leaders want to implement genAI with their existing provider at no cost, and 24% with a new service provider. Another 24% want to do it by building their own solutions, and 24% of them think of including it in their roadmap or as a future purchasing criterion
  - HR leaders are concerned about the data privacy and security, bias and discrimination, and compliance issues based on legal provisions.
  - 15% of HR leaders don't intend to use genAI in HR at all
- Primary goal of generative AI for HR processes shows:
  - 63% of global HR leaders looking to improve efficiency
  - 52% to improve employee experience
  - 37% to reduce costs
  - 28% to support learning and development
  - 25% to increase accuracy
  - 21% to enhance decision-making
- <https://www.gartner.com/document/4468099?ref=XMLDELV>

[NYT Article with Watson Assistant story](#)



## Step 1, Option A

### Email

Dear [Name],  
I hope this email finds you well. I wanted to touch base with you to see how [IBM Solution] has been working for you. How have you found the experience so far? Are there any areas where you think we could improve or provide additional support?

I'd also like to share with you an exciting opportunity to further automate and streamline your HR processes. I recently had the chance to test AskHR, a digital assistant designed to provide rapid answers to employee questions, and I think it could be a great fit for [your organization]. With AskHR, you can expect to see significant time savings, improved employee satisfaction, and enhanced HR productivity.

In fact, as Client Zero IBM has already achieved remarkable results with AskHR, and some of our clients have seen a reduction in HR queries by up to 30% in as little as 8 weeks. I'd love to schedule a call to discuss how AskHR can help you achieve similar benefits.

Would you be available for a call in the next few weeks to learn more about AskHR and how it can support your HR operations?

Best regards,  
[Your Name]  
IBM Technology Seller

## Step 1, Option B

### Conversation

I'm glad IBM has been able to help with the issues you're facing in [area]. Have you given any thought to how you could similarly automate your HR processes?

I'd love to set up a meeting to talk about this opportunity in more detail. Is there anyone, particularly from your HR team, who you would like to invite?



# 05

## Where to find Sales kits



© IBM 2024

HOLD FOR Sales Kits  
and Enablement  
Content



# 06

**How do I demo a  
PoC or first-of-a-  
kind solution to my  
client?**











Hi! I'm AskHR, your digital HR assistant. How can I help you today?

Type something...

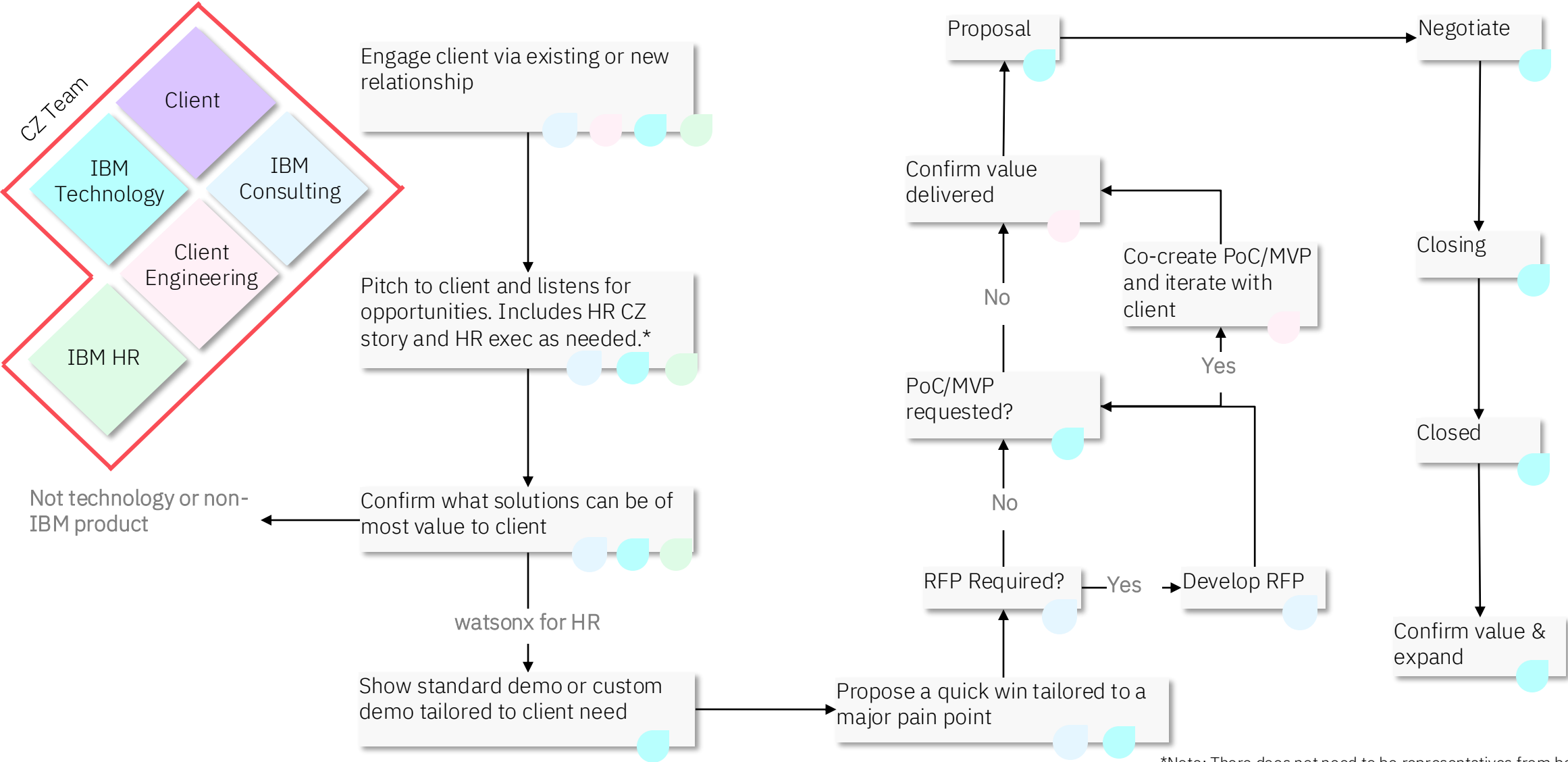


**07**

**How do I solution the deal?**

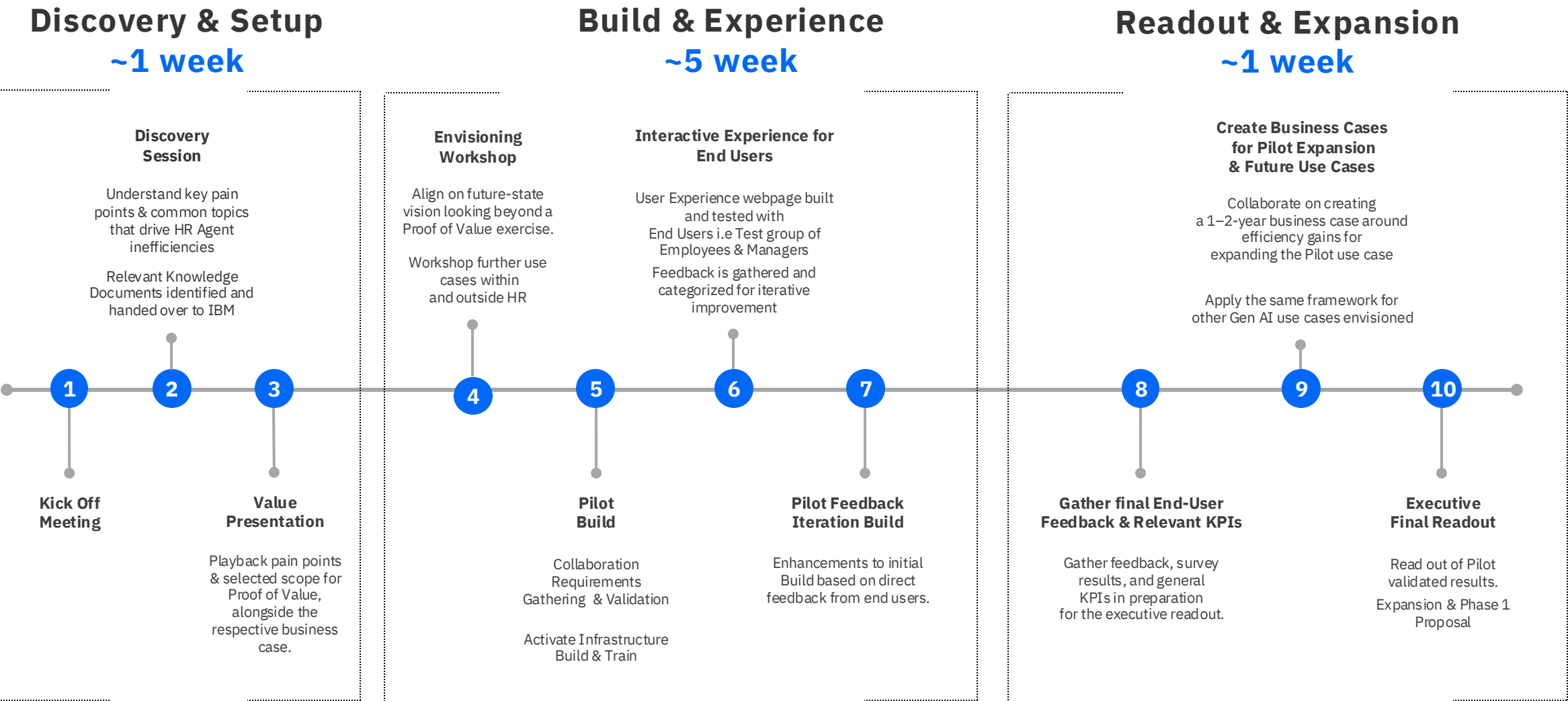


# watsonx for HR Sales Process



\*Note: There does not need to be representatives from both Technology and Consulting on every call, but there should be at least one person present with deep knowledge of the technology, HR needs, and Consulting's offerings.

# watsonx for HR: Example IBM PoC Setup Approach





# PoC Quick Win Areas to Propose

Assessment criteria: 1. High volume transactions 2. Moments that matter 3. Current processes with negative feedback 4. Opportunities for positive ROI

## Employment Verification Letter

Employment verification letters are a great way to start the building blocks of a full AskHR experience. Most companies are paying a vendor to outsource letter creation, or have teams set up in house to do the same. This is often a frustrating employee experience, with a standard 48 hour SLA period for information that is needed right away.

Suggest to the client that watsonx Orchestrate can provide a verification letter in a matter of seconds by connecting HRIS systems with PDF and password creation skills. The client will have an opportunity to reduce vendor spend and self fund the next AskHR use case.

## Employee Transfer

Employee transfers can be problematic within organizations. Most HRIS systems provide a challenging multi-step interface and process that can end in human error and malfunction.

Suggest to the client that a short PoC with watsonx Orchestrate can drastically improve the employee experience with a 100% accuracy rate when engaging with an assistant that can complete employee transfers on behalf of managers.

## Create Job Requisition

Of all the HR specialties, recruitment requires the most manual work today. Recruiters are spending time toggling between a number of systems and spreadsheets to create requisitions that are ultimately posted externally for candidates to apply.

Suggest to the client that you can showcase the orchestration ability of watsonx by creating, editing and posting job requisitions from one single interface in natural language. Demonstrate to the client that this use case can scale to other areas such as using LLMs to create job descriptions, and update skills taxonomies.

IBM to assist [Client] in enabling the Employment Verification Letter functionality of IBM AskHR (MVP Engagement as Investment from IBM with zero cost to [Client])

We are pleased to confirm that you are participating in IBM's Client Engineering experience. The Client Engineering experience is not conventional consulting work. Rather it is our intention to work with you to demonstrate how technology can improve your business. This is not a long-term commitment by either of us, and either of us can terminate at any time. We provide the experience on a no-charge, AS-IS basis.

You may provide IBM with access to information to allow us to demonstrate our capabilities to you. We will treat any information you provide to us as confidential, and we will only use it for the purposes of this engagement. If you provide IBM with access to personal data in connection with the engagement, your existing Client Relationship Agreement with IBM will apply. Otherwise, IBM's standard terms will apply (found at [here](#)). At the end of the experience, we will discuss potential use cases and opportunities for your business, including the terms under which you can put our demonstration into production. We look forward to working with you.

**NOTICE:** As part of [Client's] goal to adopt the total capabilities of IBM AskHR, this MVP plan will require time with [Client] associates to ensure the MVP scope, goals, and objectives align with overall [Client] business objective.

# MVP Scope and Objectives

## Objective

The POC is part of the testing and adoption of Watsonx Orchestrate (WxO) for [Company's] version of IBM's AskHR. Since [Company] previously built out their HR/Workday integration in Watsonx Assistant (WxA), this will include in part the transition and consolidation from WxA to WxO.

## Environment

The POC will be performed using a watsonx Orchestrate instance that is dedicated for [Company] that is a multi-tenant, cloud-native, fully managed SaaS solution that runs on AWS Cloud.

## Scope

The POC will include:

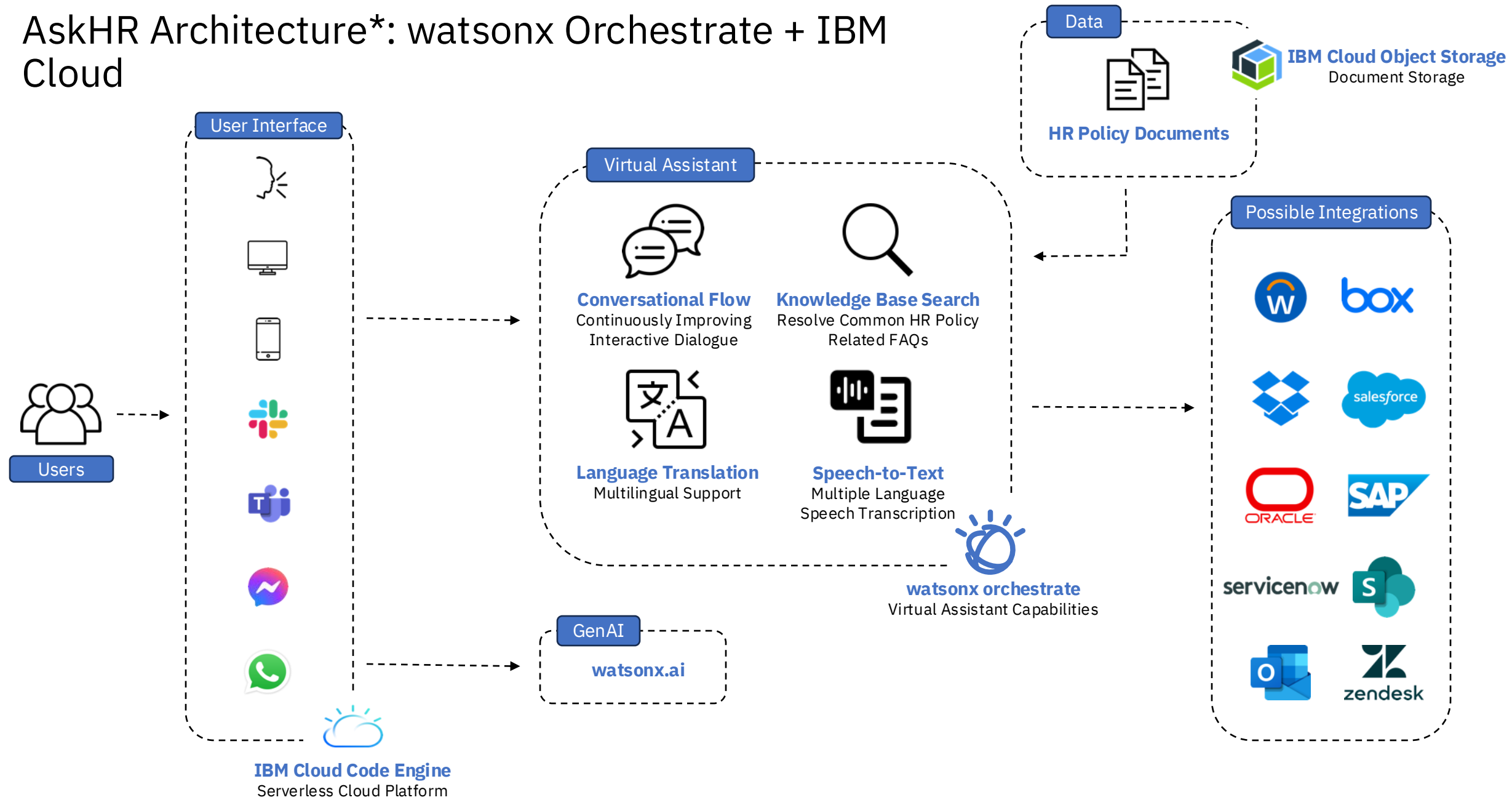
- Provide watsonx Orchestrate skills to enable [Company] to perform [HRIS] API functions for the "Employee Verification Letter" usecase
- Timeline: 2-6 weeks
- Data: selective data provided by [Company] HR [HRIS] instance
- Potential transfer of custom extensions built by [Company] watsonx Assistant instance

# Execution Plan

Date	Work Segment	Input Required	Lead	Output
	[Company] to identify useful [HRIS] API functionalities for HR	Assessment of the [HRIS] API's <i>Workday example:</i> <a href="https://community.workday.com/sites/default/files/file-hosting/restapi/index.html">https://community.workday.com/sites/default/files/file-hosting/restapi/index.html</a>	[Client]	A list of [HRIS] API's that could be useful for [Client] HR
	IBM to identify [HRIS] API's functionalities used by the askHR platform	Assessment of the IBM askHR project	IBM	A list of [HRIS] API's that were used by askHR
	IBM to build an OpenAPI json file that can be ingested by watsonx Orchestrate as an "application" containing the set of [HRIS] skills	The lists of [HRIS] APIs	IBM	watsonx Orchestrate [HRIS] skills
	IBM to implement "Employee Verification Letter" process leveraging the watsonx Orchestrate skills in AI-Assistant	The lists of [HRIS] APIs	IBM	"Employee Verification Letter" process demonstration
Future	IBM to offer all identified [HRIS] skills as "OOTB" in future releases of Orchestrate	Updates to watsonx Orchestrate A JSON file that contains all required [HRIS] skills	IBM	watsonx Orchestrate [HRIS] skills ootb
Future	Ability to leverage [HRIS] skills from Orchestrate into AI-Assistant (Workday, Salesforce, SAP, etc)	Updates to watsonx Orchestrate	IBM	Successful implementation of Skill-Based Actions in AI-Assistant from watsonx Orchestrate



# AskHR Architecture\*: watsonx Orchestrate + IBM Cloud



*\*The same solution can be implemented on other cloud platforms (ie. Azure, AWS, etc)*



# 08

## How to tag the opportunity in ISC?



© IBM 2024

# Step by step guidance

## Tag AskHR opportunities

<p><b>Step 1</b></p> <p>Click on your opportunity. On the right side, click “Activity.”</p>	<p><b>Step 2</b></p> <p>Click on “New Task”</p>	<p><b>Step 3</b></p> <p>Ensure the Subject is “Client Zero”</p>
<p><b>Step 4</b></p> <p>Add comments describing the client interaction, including that this is an HR engagement. Include the names of any IBM HR professionals who participated and topics discussed.</p>	<p><b>Step 5</b></p> <p>Add the client contact’s name as necessary and mark “Completed.” Save the task.</p>	

# How to add Client Zero tag: Step 1-2

**Who Can Add a Client Zero tag:**

The user involved should tag the opportunity as Client Zero and indicate that this is an HR use case in the title of the engagement.

**Step 1 :** Click on “**Activity**” on the right side of the opportunity.

**Step 2:** Click on the green “New Task” button.

IBM Sales Cloud

Search...

Sales

Home

Opportunities

Accounts

Contacts

Leads

Tasks

Reports

Opportunity

GenAI Use Cases Implementation

+ Follow

Seller Search

Assign to BP

Quote

Opportunity Name

GenAI Use Cases Implementation

Account Name

HJ HEINZ CO-US

Stage

Propose

Account Detail

KRAFT HEINZ FOODS CO

Opportunity Curren-  
cy

USD - U.S. Dollar

Close Date

6/28/2024

FLM Forecast  
Judgement

Amount

USD 920,000.00

Restricted

Annual Amount

USD 920,000.00

Restricted Detail

Opportunity Number

0063h00000MBmi2AAD

Win Reason

Loss Category

Loss Reason

Next Step

Products (2)

Opportunity Team (6)

Competitors (1)

Resource Requests (0)

Opportunity Offering  
Features (9)

Contact Roles (0)

Quotes (0)

Financing  
Opportunities (0)

Show All (14)

Chatter

Activity

Roadblock

TechSales

Filters: All time • All activities • All types

Refresh • Expand All • View All

Additional Information



# How to add Client Zero tag: Step 3-5

- Step 3:** Ensure the Subject is Client Zero.
- Step 4:** Enter comments as needed, including topics discussed and people present. Indicate that this is an HR engagement. Add the date this conversation occurred.
- Step 5:** Enter the client contact’s name and mark the task as “Completed”

New Task

Subject

--None--

Executive Advocate

Expert Labs

Follow-Up Call

Send a Quote

Send an Email

Client Zero

Other

Related To

Save

# 09

**What is the business value to your client?**

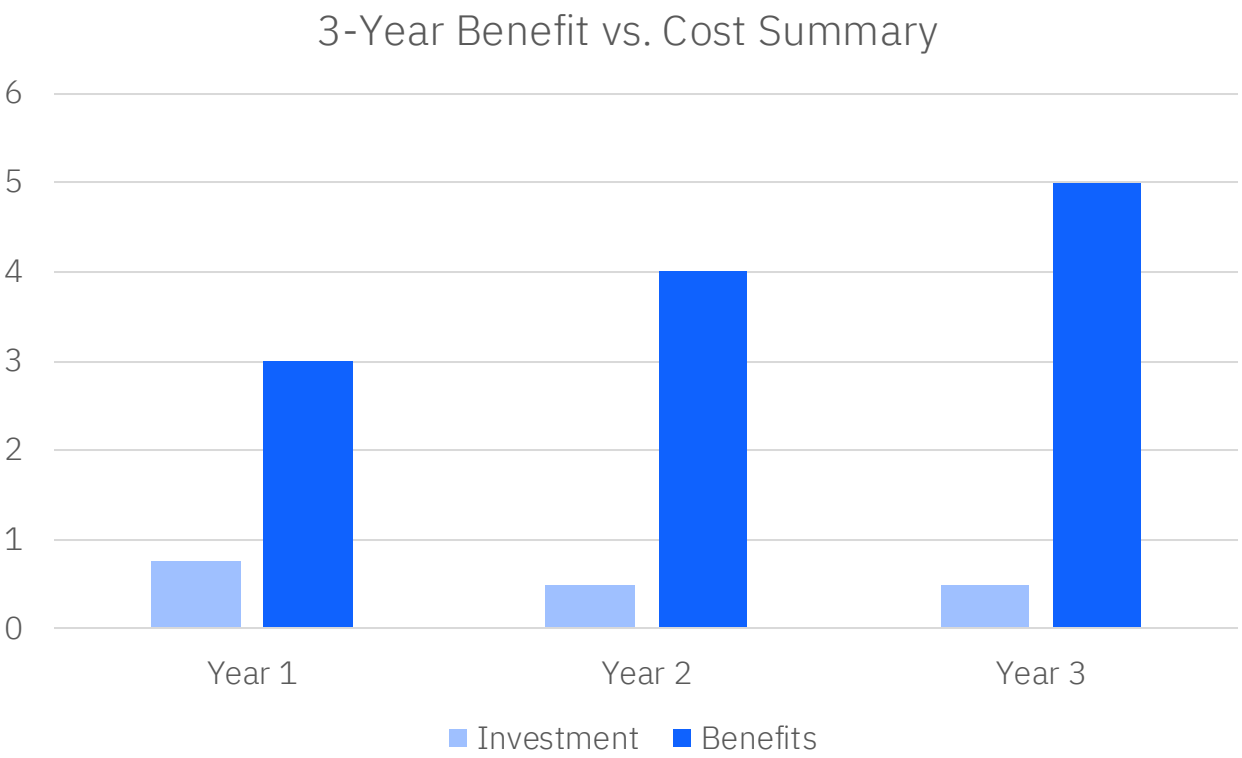


© IBM 2024



# Net Value Proposition

Investment of **\$30M** with watsonx for HR



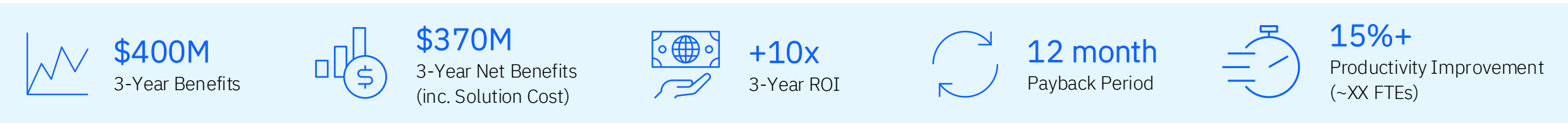
**40%** Drive 40% HR budget reduction in 3-Year net benefits

**6-8 weeks** Time to Value/Return on initial investment in 2 months

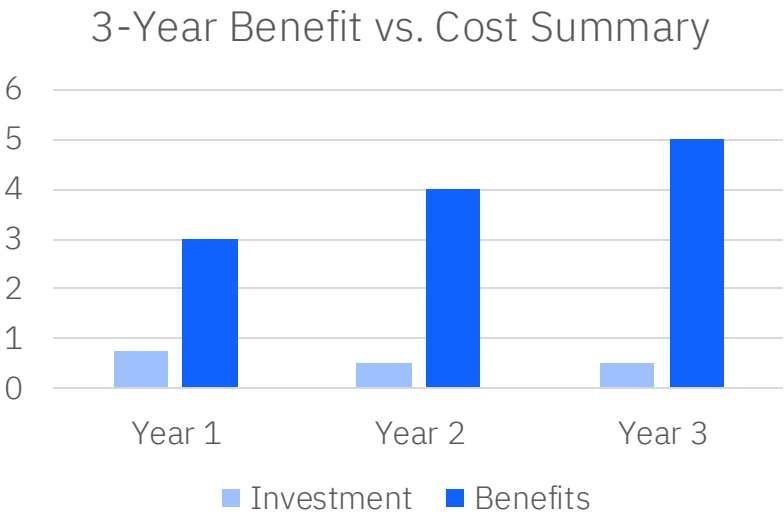
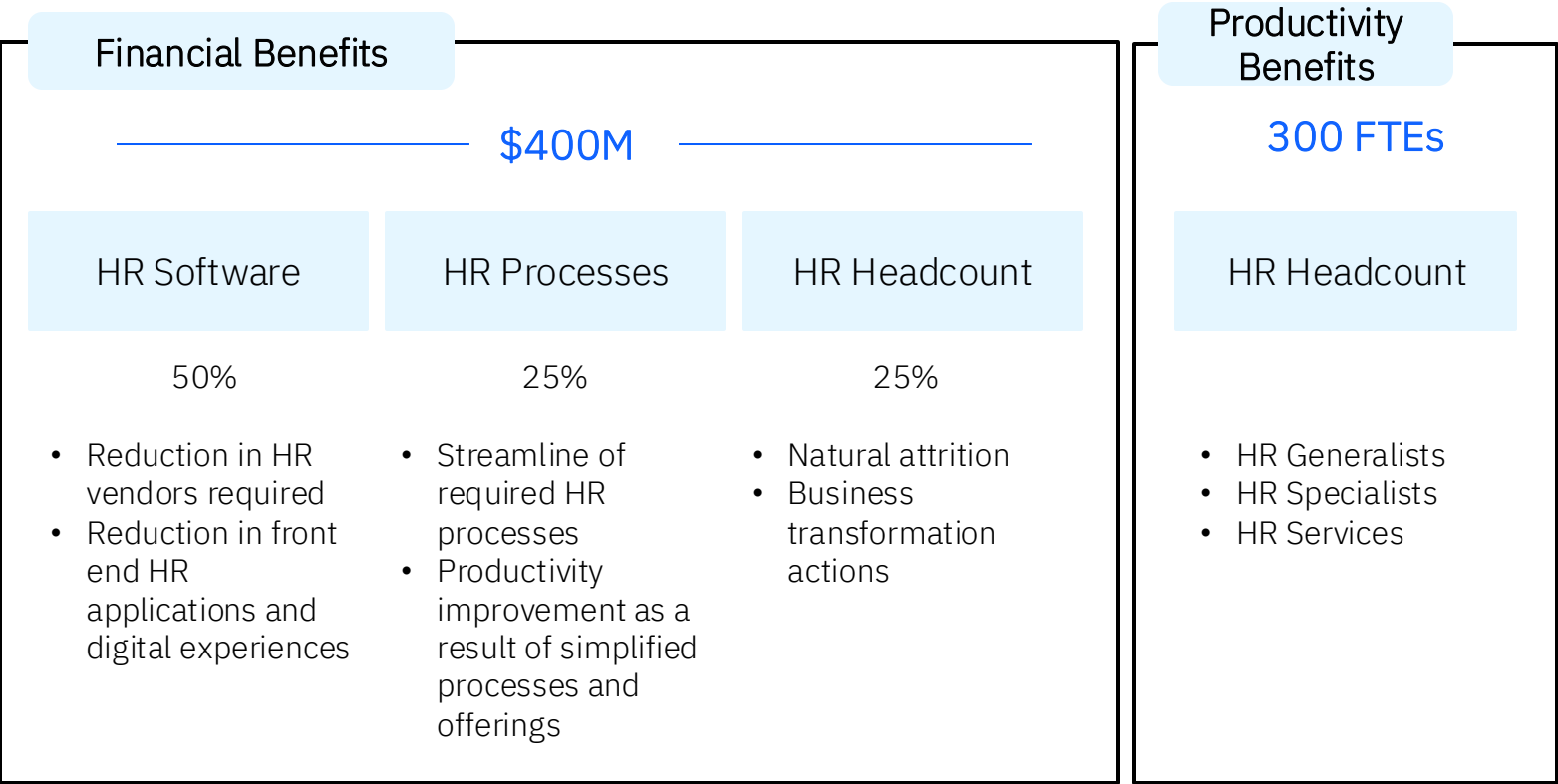
**+10x** Realize +10x investment 3-Year ROI

# watsonx Assistant for HR: Estimated 3-Year ROI Impact Summary

- **Financial Benefits:** The 3-year net benefits are estimated at \$400M with an ROI of 10x and payback of 12 months
- **Productivity Benefits:** Annual productivity benefits of 300 FTEs<sup>(1)</sup> at steady state



## 3-Year Benefits<sup>(2)</sup>



1) Incremental, annual resource capacity, measured in Full Time Equivalents (FTE), resulting from increased productivity  
2) Including value realization timing, considering initial solution implementation time and wave-based site and capability roll-out

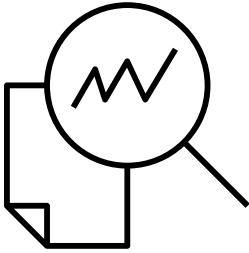




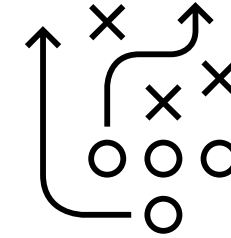
# 10

**FAQs and  
competitive rebuttals**

## Key Market Info



Rapidly growing market with huge white space – IBM has a huge opportunity



Many new entrants, both established tech companies (Microsoft, Amazon, Workday, etc.) and startups

## Major Players

Microsoft

Workday

SAP

Oracle

AWS

# The three types of competitors

## Conversational AI Vendors

Kore.ai, Amelia, Cognigy

Traditional conversational AI providers, focused on NLU and UX, less so business automation. Limited automation capabilities that require developer-centric connectors to APIs and third-party RPA vendors, expanding into Automation



## Automation Vendors

UiPath, Workato, Pega

Traditional RPA attended bot technology providers, expanding into the CAI space through partnerships and integrations with CAI vendors (e.g. UiPath + Amelia).



*Third category emerged in 2022-2023*






## Hyperscalers

Google, Microsoft, AWS

Cloud computing companies with new contact center platforms consolidating their various automation products (RPA, process mining, workflow) into one platform with conversational AI



# How does IBM win? Why AskHR?

	 watsonx™ Orchestrator	 Microsoft Copilot		 eightfold.ai	 servicenow
AI Ethics	<p>Open, Trusted, Targeted, Empowering interface designed to keep enterprise information secure.</p> <p>AI empowers human decision-making.</p>	<p>OpenAI GPT models lacks transparency and explainability</p>	<p>Takes a transparent, human-centric approach</p>	<p>AI substitutes for human decision-making, leaving space for bias and incorrect information influencing major decisions.</p>	<p>Offers guidance for AI governance; no clear built-in guideposts</p>
HR Stack Orchestration	<p>Orchestrates across entire HR tech stack with single interface for all workflows.</p> <p>Employee self-service AND simplifies HR professionals' workflows</p>	<p>Built primarily to coordinate with other Microsoft Office products; mainly useful to HR professionals</p>	<p>Limited to queries within the HCM; mainly useful to employees</p>	<p>N/A: value of eightfold.ai is in its skills matching solution – a different value prop from AskHR</p>	<p>Basic integrations available; requires intermediary custom-built connections to perform similar functionality to AskHR</p>
Cost	<p>Pricing update coming soon</p>	<p>~\$30/user/month</p>	<p>Included with HCM subscription</p>	<p>Unknown</p>	<p>Unknown</p>
Operational-izing	<p>IBM Consulting brings expert knowledge in both HR &amp; Talent Transformation and the latest technologies ready to deliver the best solution for your business.</p>	<p>FastTrack service</p>	<p>Customer service available to support implementation</p>	<p>Professional solutions team</p>	<p>Services team</p>
More info	<p><a href="#">wxO Competitive Overview</a></p> <p>IBM HR co-created product; by HR professionals for HR professionals</p>	<p><a href="#">CoPilot Deep Dive</a></p> <p><a href="#">CoPilot Battle Card</a></p>	<p><a href="#">Oracle Battle Card</a></p>	<p><a href="#">ServiceNow Battle Card</a></p>	

# How does IBM win? Why watsonx Orchestrate?



1	Native + Integrated Build Experience	<b>ONE central interface</b> for building enterprise-ready AI Assistants, packed with power across the Skills Catalog, Automation Builder, and AI Assistant Builder	Microsoft Copilot Studio <b>lacks native automation building</b> capabilities. Developers must build automations in Power Automate first; requires multiple licenses; fragmented solution	<b>Multiple components required</b> for complete solution: AWS Q, Lex, etc.  No native decision building or document processing workflows; <b>custom integration required</b>	<b>No native conversational AI capabilities.</b> Recent partnership and native integration with Amelia, but still requires users to build in separate platforms and pay for both services.
2	Business-User Persona Focus	<b>Low-code</b> Automation Builder allows non-technical users to model Automations comprised of Data, Decisions, Workflows, and AI Skills graphically and in natural language	Building automations and optimizing workflows and decisions in Power Automate requires <b>developer knowledge and expertise</b>	<40 skills available out of the box and <b>lacks support for common enterprise</b> systems. No way to add custom skills	<b>Lacks decision automation and management capabilities</b> leaving a large gap in the intelligent automation workflows that AI Assistants can fulfill to automate enterprise activities
3	Enterprise Readiness	<b>Flexible</b> on deployment options; no vendor lock-in  <b>Holistic governance</b> with openness and transparency into the data used to train and how the models were trained	<b>No hybrid or multi-cloud capability</b> ; only available on Azure  OpenAI GPT models <b>lacks transparency</b> and explainability	<b>No hybrid or multi-cloud capability</b> ; only available on AWS  <b>Lacks model governance</b> capability for transparency of training data and model lineage, access and change history	<b>Lacks model governance</b> capability for transparency of training data and model lineage, access and change history



# Objections

Objection	Response
<i>How do I know my data is being handled sensitively and how do I avoid mistakes from the tool?</i>	Data security is essential to your business and you want to be able to trust your tools. The data you will access to deliver results is protected by the industry standard for verification, two-factor authentication, so you can trust that what happens behind the scenes, behind a firewall, stays there.
<i>There are limited use cases outside of HR.</i>	IBM watsonx Orchestrate software development kit (SDK) is the tool to develop custom skills within Orchestrate. The SDK provides the tools, documentation, and code samples to create skills. Builders can import skills for any use case in addition to those already built out.
<i>We would need this solution to accommodate corporate genAI initiatives, this doesn't seem to be supported?</i>	Orchestrate is built on top of watsonx, which is a genAI platform that allows the user to access multiple foundation models. In addition, Orchestrate is agnostic and can connect to or integrate with any corporate genAI platform that you need it to.
<i>Your Enterprise solution includes IBM RPA, but we already have an RPA solution (uiPath, BluePrism, AA...), do I have to pay for a product that I have no intentions of using?</i>	watsonx Orchestrate is not meant to “rip and replace”. Orchestrate integrates with you current RPA tools and can ingest their automations as individual skills within the platform.
<i>There isn't a datacenter in my Country / Region, and this is a showstopper for us.</i>	IBM is currently prioritizing our AWS deployment model. We are happy to work with you on a plan that could work for you
<i>We're interested, but the solution would need to support one additional language that does not seem to be in your roadmap, how fast could I get the language support needed if I signed up?</i>	Great, thank you for sharing. What additional language do you need to be supported? Because WO is SaaS on AWS we can make adjustments to the roadmap where it makes sense. Is this something that you would need right away at deployment?
<i>I need more monitoring features (Storage usage, Metrics etc...).</i>	What are the monitoring features you need? We are adding additional support weekly. This is supported with the new UX that has already been released.
<i>Why would I consider WO when other tools have their own digital assistants embedded? (Oracle digital assistant, for example)</i>	Watsonx Orchestrate operates cross-platform and is agnostic. Meaning, the automations are not limited to a specific application, such as Oracle. Additionally, other assistant tools don't provide for comprehensive workflow sequencing.

# Frequently Asked Questions

Question	Answer
<i>How long should our HR transformation journey take?</i>	Although IBM has been on a seven-year journey, you shouldn't expect to take the same timeframe. Our client engineering and consulting teams will work with you to develop a customized plan to install and operationalize AskHR in as little as 8 weeks.
<i>How many people are working on AskHR internally? Would we need to mirror that setup?</i>	Within IBM HR, a small team of 10 are working on setting the vision and regular deployment of AskHR. They partner closely with the CIO and internal transformation team to prioritize use cases and consider feasibility. The small team of 10 are career HR professionals, showing that the technology's low/no code approach is easy to manage. As a lesson learned, a team prioritizing use cases that has business and technical expertise can help deliver value faster than a scatter-gun approach.
<i>Is data clean-up required before embarking on an AI journey for HR?</i>	Clean data and processes make the process of embarking on an AI journey much easier, but it is not an essential requirement for getting started. Ringfencing smaller areas in pilots and PoCs allows quick and focused clean-up and feedback response; as well as a mantra of keeping humans in the loop changes perspectives that 'somewhat perfect' is better than nothing at all. Time to value in this space comes from just getting started and iterating over time.
<i>What IBM products would we need to build AskHR at our company?</i>	AskHR within IBM HR is currently deployed on watsonx Assistant. Our team is hard at work on our roadmap for watsonx Orchestrate, and will migrate to Orchestrate on January 1, 2025.
<i>Where should we get started? What are the use cases that are most impactful for IBM?</i>	At IBM, we've found that some of the most impactful use cases have been in generating employment verification letters and employee transfers, among many others. Both of these generate significant value for both theIBMer and the company's business. Either of these can be a great way to start as a quick win, but we would also like to learn more about your biggest pain points and would be happy to co-create something.
<i>Where are you using Generative AI in your AskHR experience?</i>	AskHR will begin to incorporate Generative AI in our release coming on January 1, 2025. However, you don't necessarily need genAI to have an effective solution – and one of the areas we've focused on over the last year or so is matching the right skill to the right ask.
<i>Was the 40% budget reduction that you achieved through labor?</i>	No; much of this budget reduction occurred through eliminating vendor costs. Some budget reduction occurred as a result of natural attrition; we determined there was not a need to backfill certain positions as people left.

# Questions & Responses

Question	Answer
<b>Translation Capability:</b> Does the chatbot possess translation functionality? For instance, can it translate questions asked in language A to language B if the reference document is in language B?	Our solution leverages watsonx.ai powered by Large Language Model (LLM) translation capabilities to support a range of languages.
	When a customer inquiry is posed in a language that differs from the language of the knowledge base articles, IBM's watsonx identifies the language mismatch and seamlessly translates the customer inquiry to match the knowledge base language. watsonx then generates a conversational response and translates it back into the customer's native language, ensuring a natural and personalized experience.
	From a technical perspective, our solution can integrate with a language translation service provided by your preferred cloud vendor, enabling efficient and accurate translations to and from the required languages.
<b>Workflow Automation:</b> Could you elaborate on the chatbot's automation capabilities, particularly in streamlining workflows?	The watsonx platform empowers organizations to automate complex business decisions through decision models, rule-flow models, or prediction models. Our watsonx based solution brings together automation, machine learning, and generative AI capabilities to optimize workflow invoking Orchestrate skills, automations, skill workflows, and integrations. Additionally, our solution can streamline workflows in areas that require improvement.
	The watsonx platform offers over 1,000 prebuilt skills across various vendor HR products, including Workday. Additionally, watsonx Orchestrate enables the discovery of existing RPA (Robotic Process Automation) and the training of new skills from existing automations.
	The watsonx platform enables the application of generative AI skills to drive further automation, such as: <ul style="list-style-type: none"><li>• Generating additional customer information when creating a quotation</li><li>• Providing explanations for specific terms and conditions added to a quotation</li><li>• Crafting personalized email text with the right tone and information.</li></ul>
	Ultimately, a watsonx workflow can combine user tasks, workflows, automations, skills, decisions, and assignments to automate existing workflows through a conversational AI interface.
	This interface can be deployed standalone or embedded into existing productivity tools, such as MS Teams, Slack, and across various channels, including web, mobile app, telephony, SMS, WhatsApp, and more.

# Questions & Responses

Question	Answer
<b>Selective Data Reference:</b> Can the chatbot be configured to reference a specific set of documents based on predefined rules from a knowledge base or repository?	<p>IBM's conversational search leverages generative AI to provide accurate responses grounded in a predefined set of knowledge base or repository documents. These documents can be ingested from multiple formats such as PDF, CSV, DOC, and DOCX, and from various data sources, including Box and SharePoint.</p> <p>During ingestion, the documents are enriched with metadata from their content and document metadata, including source and permission information. As users interact with conversational search, the watsonx solution applies filters to restrict the presented content based on specific queries, user roles, processes, and more.</p> <p>Content-Grounded Answering: In content-grounded answering, the Large Language Model (LLM) responds to customer queries using preloaded content from the search integration. To utilize content-grounded answering, you must configure search integration and enable conversational search. If you enable both general-purpose answering and content-grounded answering, the latter takes precedence over the former.</p>
<b>Single Sign-On and Authentication:</b> Does the application support single sign-on (SSO), and are there multi-factor authentication options for non-SSO channels?	<p>Our AskHR solution for enterprises is designed to support seamless authentication, including Single Sign-On (SSO) and multi-factor authentication (MFA) if required. This ensures a secure and convenient experience for users.</p> <p>In addition, our Watson Orchestrate tenants are compatible with SSO and MFA, eliminating any potential product-related issues.</p> <p>As an internet-accessible application any configuration requirements for SSO and MFA would be dependent on your corporate network environment.</p>
<b>Data Management and Personalization:</b> How does the system handle and store personalized data gathered from conversations, and does it have mechanisms in place to delete such data when necessary?	<p>watsonx enables personalized customer interactions by leveraging data from user profiles, conversation history, and additional metadata. This data is then used to customize the interaction through business rules, workflows, or generative AI capabilities.</p> <p>All user data collected during chatbot conversations is temporarily stored in watsonx Orchestrate, allowing users to view their chat history and responses. This data is securely stored in a database within the watsonx application, whether SaaS or on-premise, and can be displayed to authorized users through a custom dashboard. We respect user privacy and provide the option to delete data upon request.</p> <p>At IBM, we are committed to delivering innovative data privacy, security, and governance solutions to our clients and partners. Our watsonx solution is GDPR-compliant and adheres to other regulations, ensuring that user data is protected and can be deleted upon request.</p>

Question	Answer
<b>Implementation Approach:</b> Could you outline your approach, from defining requirements to actual implementation, highlighting key steps and considerations?	We implement conversational AI solutions using an agile approach, focusing on rapid value delivery. We start with discovery to identify high-volume use cases, building an MVP and scaling up. Through collaborative design workshops with HR, IT, and Operations stakeholders, we define the user experience and solution requirements. Leveraging our own IBM experience and accelerators, we expedite implementation and get your Virtual Agent up and running quickly. Our agile project execution ensures a pace driven by team collaboration, timelines, and outcomes. Reference Page: 14-19
<b>Experience in Multiphase Implementation:</b> Please share your experience with multiphase implementation, detailing the different phases involved and how they are executed.	IBM's agile implementation approach delivered across phases which build upon each other, increasing in complexity over time, and enabling a gradual user adoption and reduction in HR support teams. Each phase provides incremental value realization, ensuring a successful and sustainable implementation.
<b>Timeline for different phase implementation:</b> Upon reviewing the scope of work for each phase, we would like know if you are aligned with the same and if not, appreciate a feedback on how realistic the timelines are for executing and implementing different phases.	Upon reviewing the scope of work outlined in the Excel spreadsheet, we believe that our technical expertise and accelerators can help accelerate your project timeline. To ensure a successful implementation, we must also consider several key factors that may impact the timeline, including: <ul style="list-style-type: none"> <li>• Business availability and priorities</li> <li>• Adoption of the solution by HR and end-users</li> <li>• Accuracy and currentness of existing policies and processes</li> </ul> By taking these factors into account, we can work together to develop a realistic project timeline that meets your needs and ensures a successful outcome. Reference Page: Excel Sheet
<b>Use cases or Scope of work that cannot be executed</b> – Also go through the use cases listed and highlight the ones which you feel may not / cannot be executed in your application	After reviewing the proposed scope of work outlined in your Excel spreadsheet, our technical and consulting teams at IBM are confident that we can successfully execute all aspects of the project using our application. We did not identify any items that would prevent us from delivering the required solution. We would like to meet to reorder some of the items based on complexity and available accelerators and have indicated these in the included excel spreadsheet. Reference Page: Excel Sheet
<b>Cost Details:</b> Could you provide a detailed breakdown of your Pricing structure – including detail associated costs(e.g., implementation costs, ongoing support & maintenance cost and scalability options)	In the attached excel, we have included additional questions that will assist us with scoping for cost. We would like to meet with you to determine the scope (quality and size of processes and documentation), availability of [company] resources, available APIs, impact to operating model/service delivery model, employee adoption, etc.



# 11

**How can I get trained and certified?**



# We are here to help!

## Client Zero Team



Steve Moss, Director, watsonx Americas, Client Zero Go-to-Market  
Email: [stevemoss@ibm.com](mailto:stevemoss@ibm.com)



Akshay Arora, Technical Specialist, Data & AI, IBM Technology, US National Market – Midwest Region  
Email: [akshay.arora@ibm.com](mailto:akshay.arora@ibm.com)



Joe Cosenza, Technology Engineer, IBM Technology, US Financial Services Market  
Email: [jcosenz@us.ibm.com](mailto:jcosenz@us.ibm.com)

