
Boosting sales productivity with watsonx Orchestrate

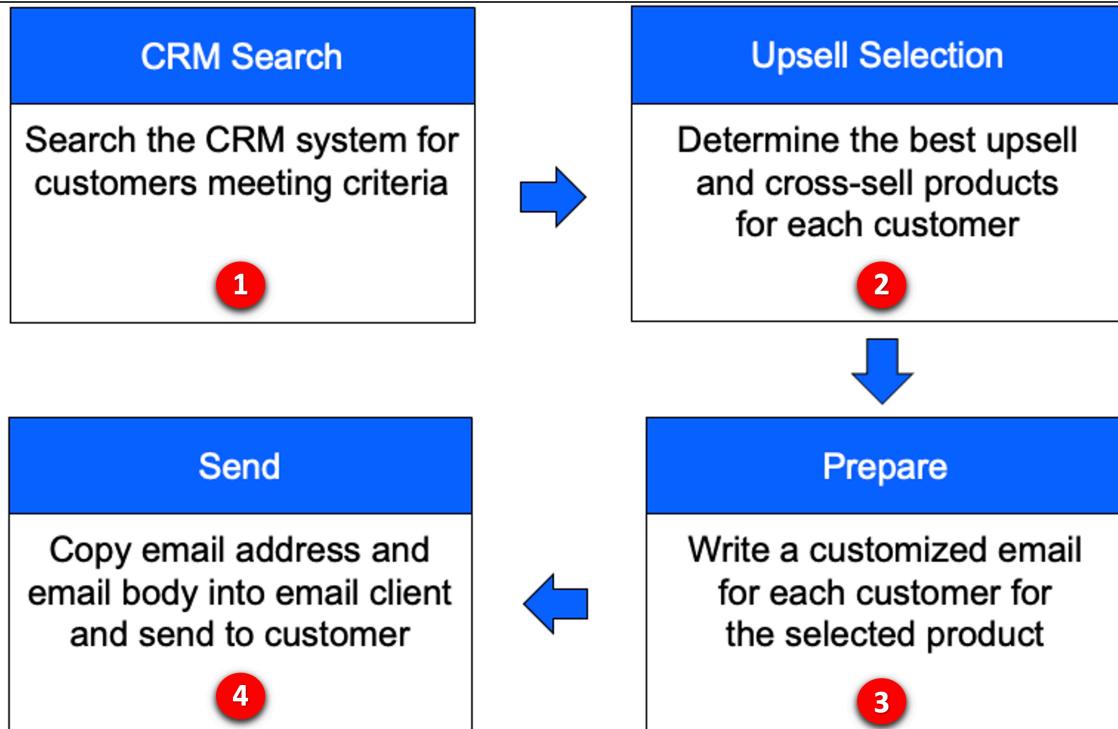
▼ 1 – Introduction

This lab shows you watsonx Orchestrate's core capabilities and its value proposition using a business scenario set in an insurance sales office. You'll see how individual skills are used, take a brief look at decision automation, then implement an upsell process for a hypothetical insurance brokerage by combining skills together into a sequence called a skill flow.

In this hypothetical insurance brokerage, sales agents spend their time across many tasks while constantly context switching between multiple applications to do their jobs. A large part of any successful insurance seller's time should be spent servicing existing clients, but an important part of being a great sales agent is finding new business and building pipeline.

Prior to watsonx Orchestrate, agents in this insurance office dedicated a few hours per week to sending prospecting emails for upsell and cross-sell opportunities, as well as building pipeline. To do this, a typical insurance seller would:

1. Search the customer relationship management (CRM) system for customers that meet certain cross-sell criteria.
2. Determine the best cross-sell products to offer each customer.
3. Write a customized email from a template.



Unfortunately, agents in this office are facing several challenges that prevent them from performing at their best:

- Effectively searching their CRM system for sales opportunities is time consuming and requires a lot of skill... skills that not everyone on the team possesses, especially new hires who need to be trained.
- Matching customer circumstances to the most optimal and competitive products is time consuming and requires expert product knowledge. The information about products, customers, and policies is spread over multiple systems and spreadsheets.
- Multiple systems and applications are used to perform customer outreach (a CRM search, Outlook, and so on). It takes time to switch between these applications to find the required information. Data is copied and pasted between applications and inevitably errors are made.
- Multiple systems and applications are used to perform customer outreach (a CRM search, Outlook, and so on). It takes time to switch between these applications to find the required information. Data is copied and pasted between applications and inevitably errors are made.
- There isn't time to create a personalized email for each customer. Instead, sellers use templates...but they know that the emails that are produced this way are often ignored by their customers because they are not engaging.

This demo shows how the prospecting work in this scenario can be done more effectively with Watsonx Orchestrate by creating a sequence of skills that perform the multiple steps of the upsell process using a skill flow. A skill flow is a sequence of skills where the inputs and outputs of individual skills are wired together to reduce data entry.

Here is what this demonstration highlights:

- First, data is extracted from a system that leverages a pre-configured search to find customers with recent life events.
- Then, these customers are matched to the most suitable and competitive products by using an AI-infused automation that represents the digitized business knowledge of a product expert.
- Finally, instead of using an email template, a built-in skill that uses the IBM Granite generative AI model is used to create a marketing email. This model is designed for the enterprise and trained on trusted enterprise data, so it can be trusted to produce content suitable for business use cases.

Let's get started.

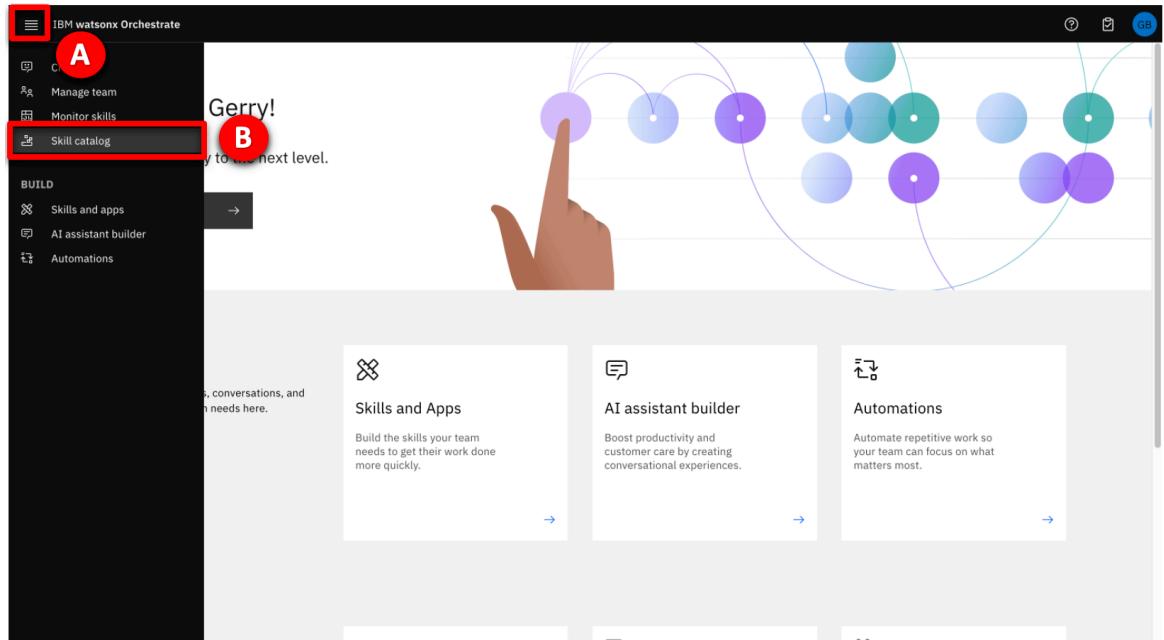
▼ 2 – Review individual skills

Narration

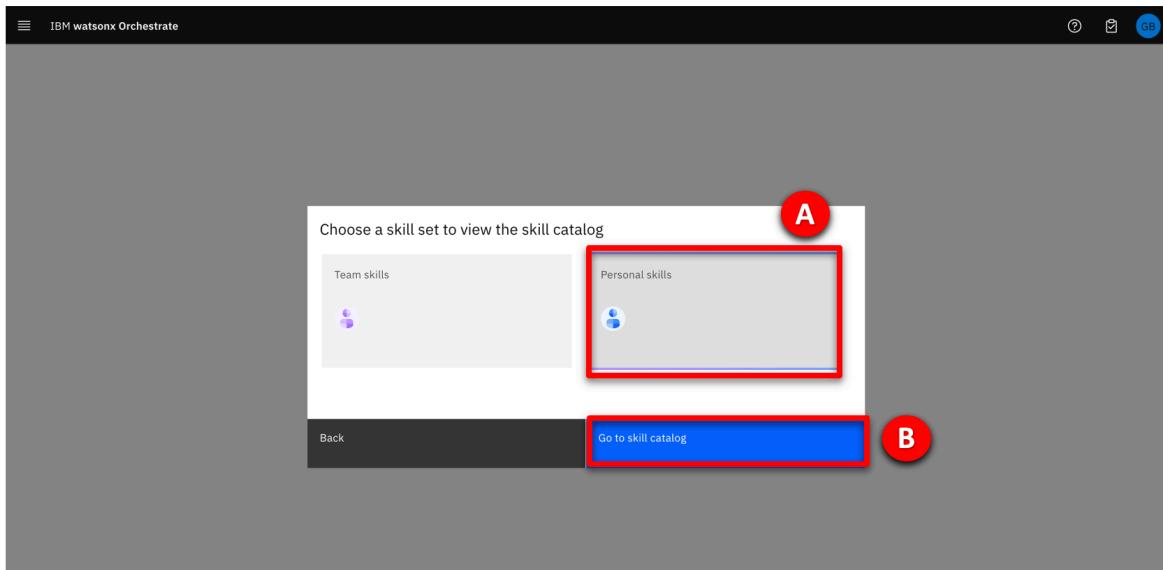
IBM Watsonx Orchestrate comes with a catalog of out-of-the-box skills, such as Workday, Monday, Outlook, etc. Additional skills can be added to the catalog that work with existing services using OpenAPI or run on IBM Cloud Pak for Business

Action 2.0.1

Click the navigation hamburger menu icon (A), then select **Skill catalog** (B) from the left menu.

**Action 2.0.2**

When the **Choose a skill set to view skill catalog** window opens, select the **Personal skills** tile (A), then click **Go to skill catalog** (B).

**Narration**

Skills are grouped by application, such as Microsoft Teams or Salesforce. New skills are added to the watsonx Orchestrate catalog with each release.

When an out-of-the-box skill is not available, builders can create new skills from several sources, including:

1. **Open APIs:** Skills are generated from OpenAPI specifications.
2. **Embedded Automations:** Decision and workflow skills are created by using the built-in automation builder.
3. **IBM Cloud Pak for Business Automation/RPA:** Skills are generated for automation services and robotic process automation (RPA) bots.
4. **Composite skill flows:** Individual skills are combined into a sequence.

OpenAPI is a specification for documenting and standardizing the design and behavior of web APIs. An OpenAPI file provides the detailed outline of how a particular API works, including its operations, endpoints, data types, request and response formats and authentication methods.

2.1

Customer search

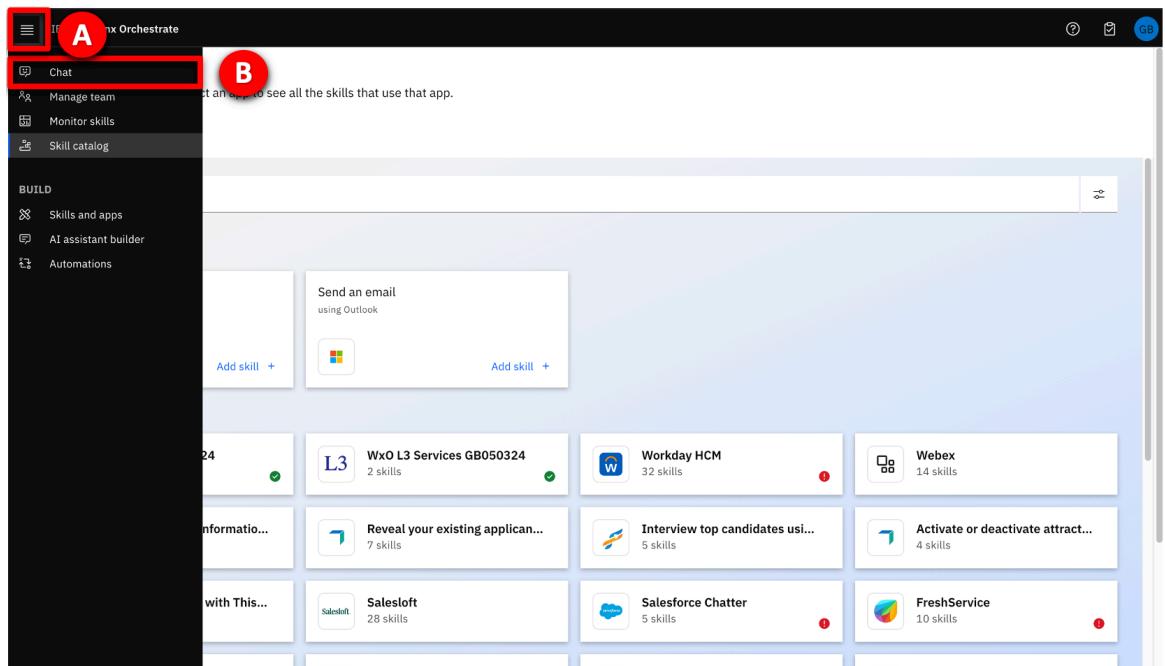
Narration

The first task in the upsell process is to perform a predefined search against the customer system to find customers that have recent life events. This functionality is provided to users through the **Get a list of customers** skill.

Let's open the chat window to run this skill.

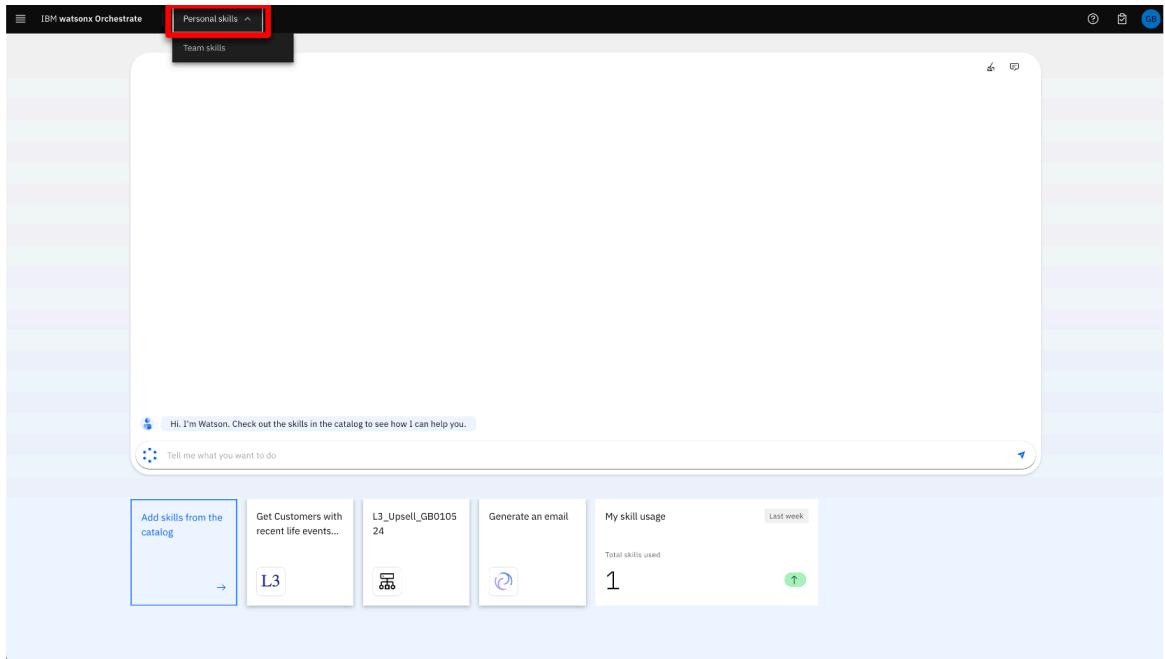
Action 2.1.1

Click the **hamburger navigation** menu icon (A) and select **Chat** (B) from the left menu.



Action 2.1.2

Click the **Skills** menu and select **Personal skills** if not already selected.

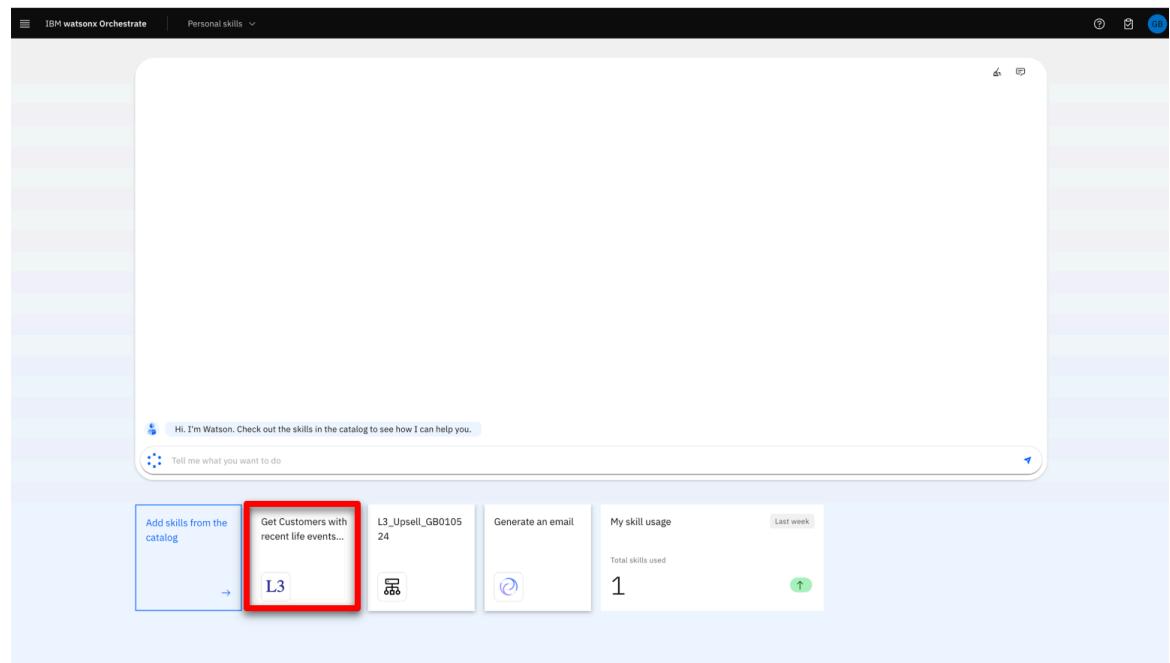


Narration

In Watsonx Orchestrate, skills are organized into apps. Users can click on their app tiles to run the skills they contain, or they can type a phrase to run the skill, such as **Write an upsell email for my customers**.

Action 2.1.3

Click on the tile **Get a list of customers with ...** tile to run the skill and fetch customers from the CRM system.



Narration

The results from this skill are shown in a table. All the listed customers have recent life events that could be used for cross-sell and upsell purposes. This skill has used a predefined search against the CRM system and provides an insurance seller with a list of potential upsell opportunities. This took just a few seconds and was done without having to use the CRM system directly or require CRM expertise. This skill is already useful as a standalone skill, but as we will soon see, combining its output with other skills can make it far more useful and powerful.

The screenshot shows the results of the 'Get Customers with recent life events' skill. A modal window titled 'L3 Get Customers with recent life events GB010524' is displayed, showing a table of customer records. The table has columns: Name, Age, Id, AccountId, Email, Recent Change, and Current Products. The data is as follows:

Name	Age	Id	AccountId	Email	Recent Change	Current Products
John Collins	42	172652	A43212	johncollins@xyzcompany.com	Child recently turned 25	[]
Janet Thomas	64	119273	A23454	janethomas@gmail.com	Recently turned 64	[]
Oliver Paul	42	161492	A43321	oliverpaul@gmail.com	Purchased new vehicle	[]
Mary Green	46	118624	A27629	marygreen@abcinsurance.com	Recently moved to new home	[]
Sam Anthony	42	192675	A85279	samanthony@xyzcompany.com	Dental coverage upgraded	[]

Below the table, there are buttons for 'Items per page' (set to 5) and a navigation bar with '1 of 1' items. The main dashboard below the modal shows the skill tile 'Get Customers with recent life events...' with 'L3' written below it, and the 'My skill usage' tile showing 'Last week' and 'Total skills used'.

2.2

Product upsell automation

Narration

The next skill is the upsell skill. This skill uses an embedded decision automation engine to match customers to upsell and cross-sell offers.

This skill is run by clicking on its corresponding tile or by entering a prompt such as "upsell" into the chat window.

Action 2.2.1

Enter “upsell” into the chat prompt and press **Enter** key (**A**). Alternatively click on the tile associated with the skill (**B**).

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there's a navigation bar with 'IBM Watsonx Orchestrate' and 'Personal skills'. Below the navigation is a search bar with the query 'Get Customers with recent life events GB010524'. A table titled 'Records' displays five customer entries with columns for Name, Age, Id, AccountId, Email, Recent Change, and Current Products. Below the table are buttons for 'Items per page' and '1 - 5 of 5 items'. A red box labeled 'A' highlights the 'upsell' button. Another red box labeled 'B' highlights the 'L3_Upsell_GB0105 24' tile.

Narration

To use this skill, the user must enter details about a customer, such as a recent life event, their age, and any current products they have purchased. In this example, just the name is provided so that a default response is returned.

Action 2.2.2

Enter a person's name into the **name** field (**A**), then click the **Apply** button (**B**).

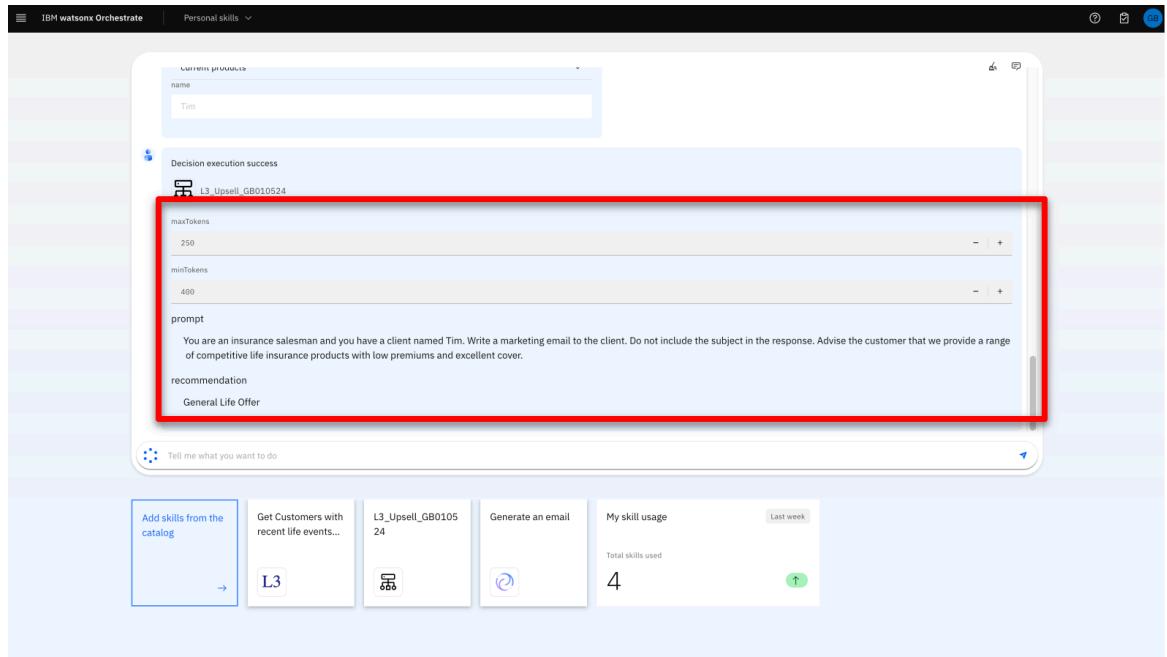
This screenshot shows the 'upsell' skill form. The top part of the form has fields for 'Sam Anthony', '42', '192675', 'A85279', 'samanthony@xyzcompany.com', and 'Dental coverage upgraded'. Below this is a message: 'You just need to complete this form first.' A red box labeled 'A' highlights the 'name' input field containing 'Tim'. A red box labeled 'B' highlights the 'Apply' button. At the bottom of the form is a placeholder 'Tell me what you want to do'.

Narration

The results from the ‘Product Upsell’ automation are displayed. These results contain a product recommendation for the selected customer and were provided almost instantly. This is another huge time saving for the sales agent; but in addition to the product recommendation the results also contain a prompt that can be used by a foundation model such as IBM Granite, to generate a personalized marketing email.

Just like the customer search skill, the value of this skill is obvious, because manual data entry is time consuming and can introduce errors, the full value of this skill isn't realized... but watsonx Orchestrate can autofill this information once the skill is

part of a skill flow.



2.3

Email generation

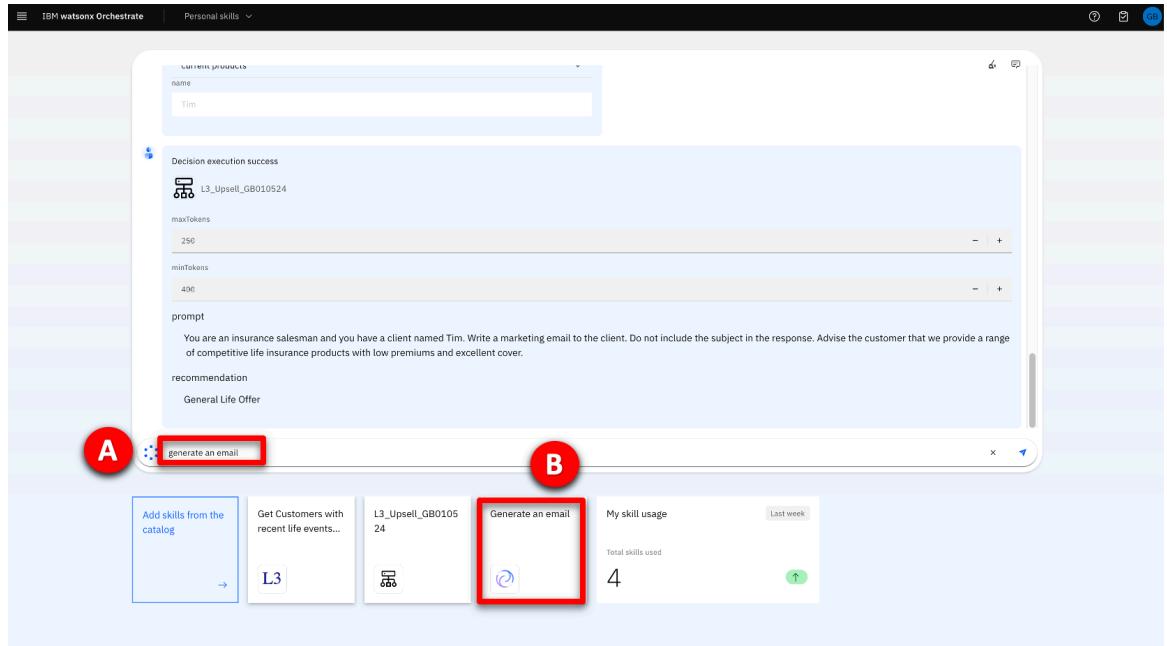
Narration

The last individual skill is **Generate an email**. This skill uses the IBM Granite foundation model to generate an email based on a prompt.

This skill is run by clicking on its corresponding tile or by entering a prompt such as “**generate an email**” into the chat window.

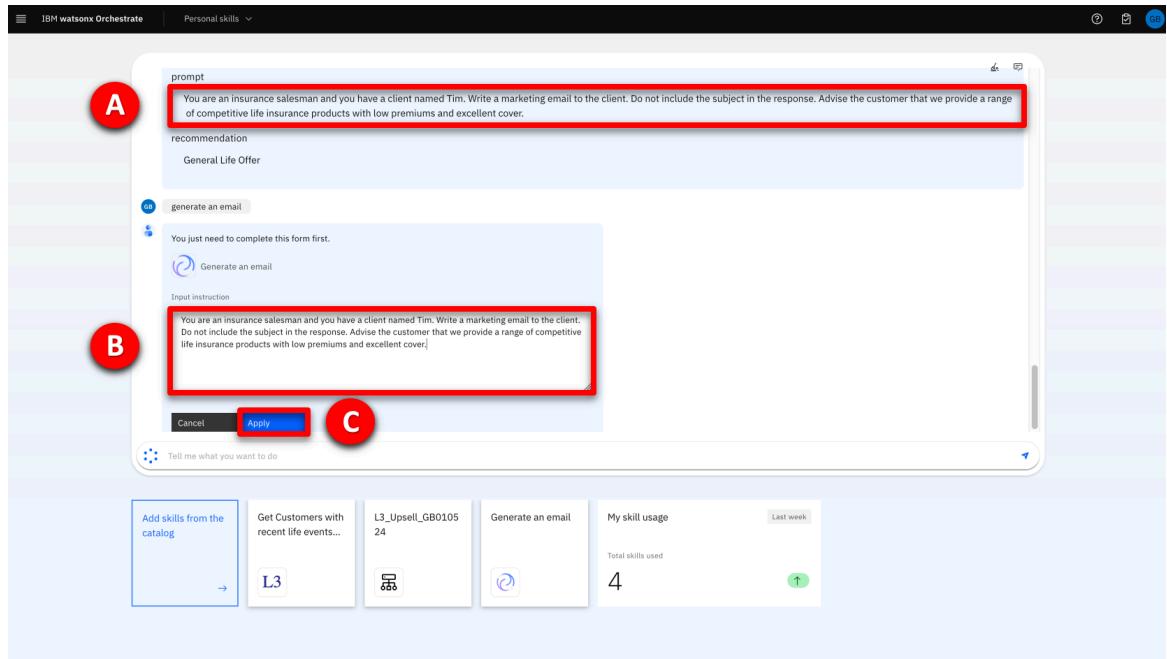
Action 2.3.1

Enter “**generate an email**” into the chat prompt and press **Enter** key (A). Alternatively click on the tile associated with the skill (B).

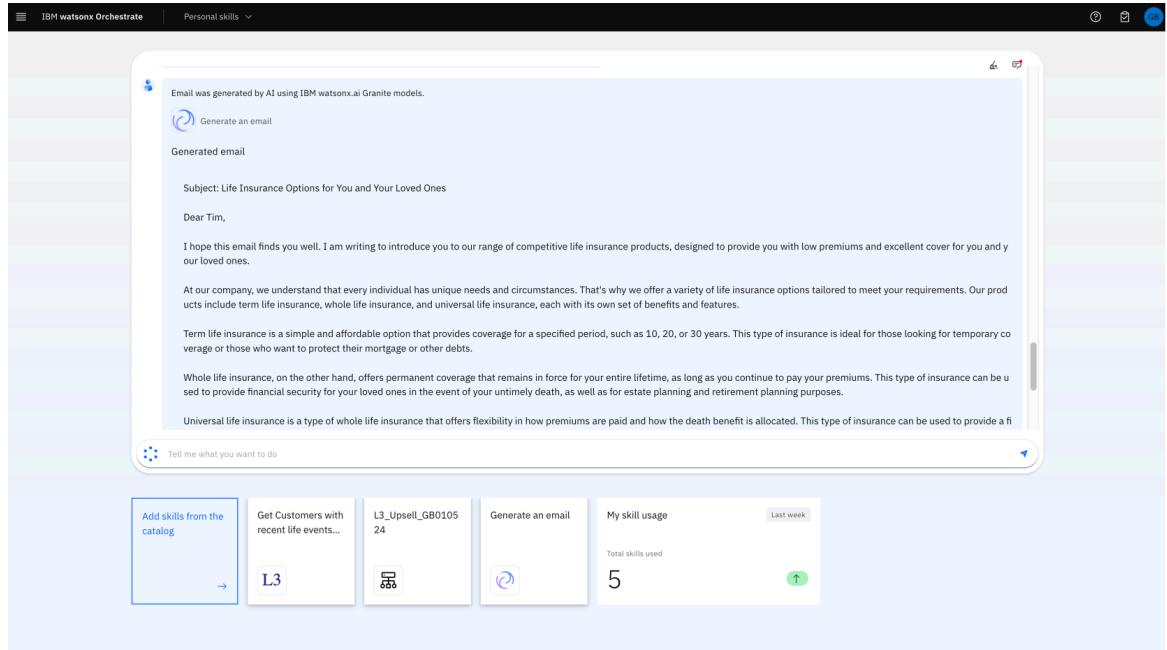


Action 2.3.2

Copy the **prompt** text produced by the **L3_Upsell** skill (A) and paste it into the **Input instruction** panel (B), then click **Apply** (C).

**Narration**

Content generation will take approximately 30 seconds. IBM watsonx Granite is used to generate the email body. This model is trained on trusted enterprise data, with additional layers of protection, so you can be certain it will not produce harmful or inappropriate content. The generated email is displayed, and also confirmation that it came from the IBM Granite model.

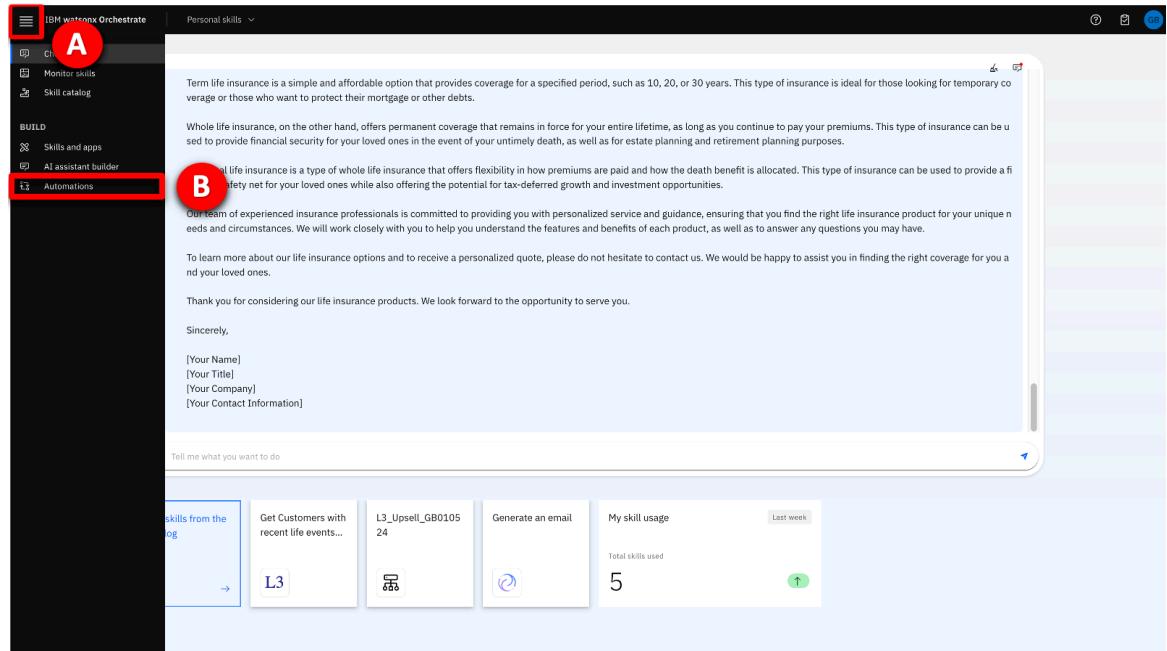
**▼ 3 – Explore decision automation**

into a decision model. Within the decision model, the product upsell logic is represented in natural language and decision tables that ensures that the logic remains clear and simple to non-technical users. Furthermore, the no-code tools in Watsonx Orchestrate Automation Builder enable non-technical users to create, test and maintain the decision logic to adapt to changing circumstances.

Let's see how this skill's business logic is managed with Watsonx Orchestrate's Automation Builder.

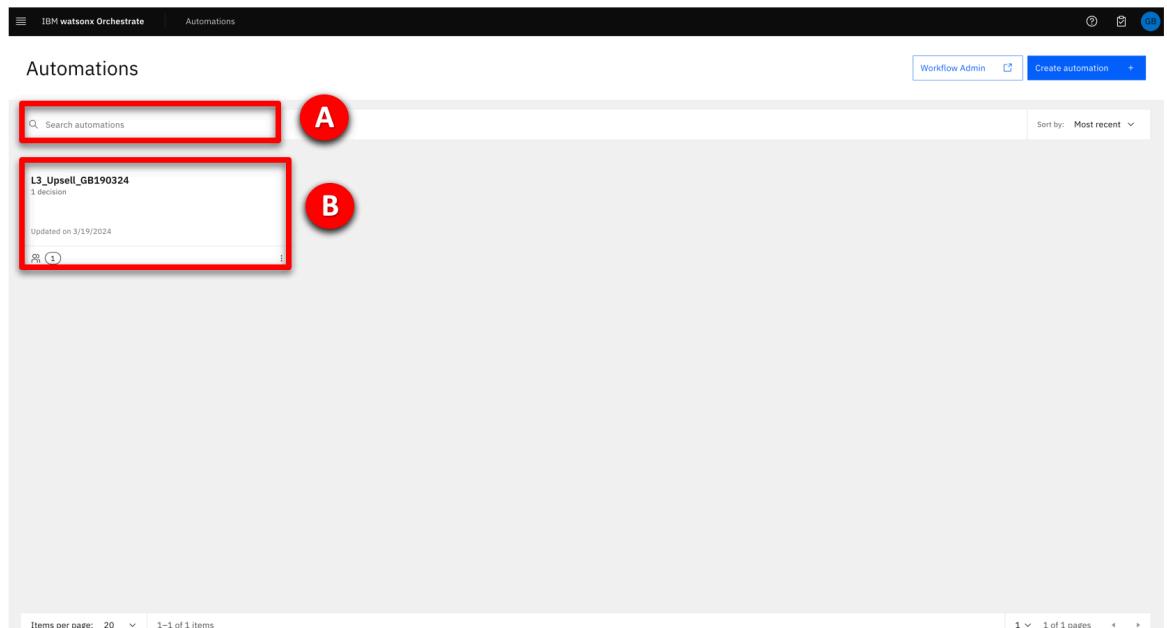
Action 3.1

Click the hamburger navigation menu icon (A), then select **Automations** (B) from the left menu.



Action 3.2

Enter the unique reference “**XXddmmyy**” that corresponds to your decision model in the **search field (A)** and press **Enter**, then click on the tile that corresponds to your automation (B).



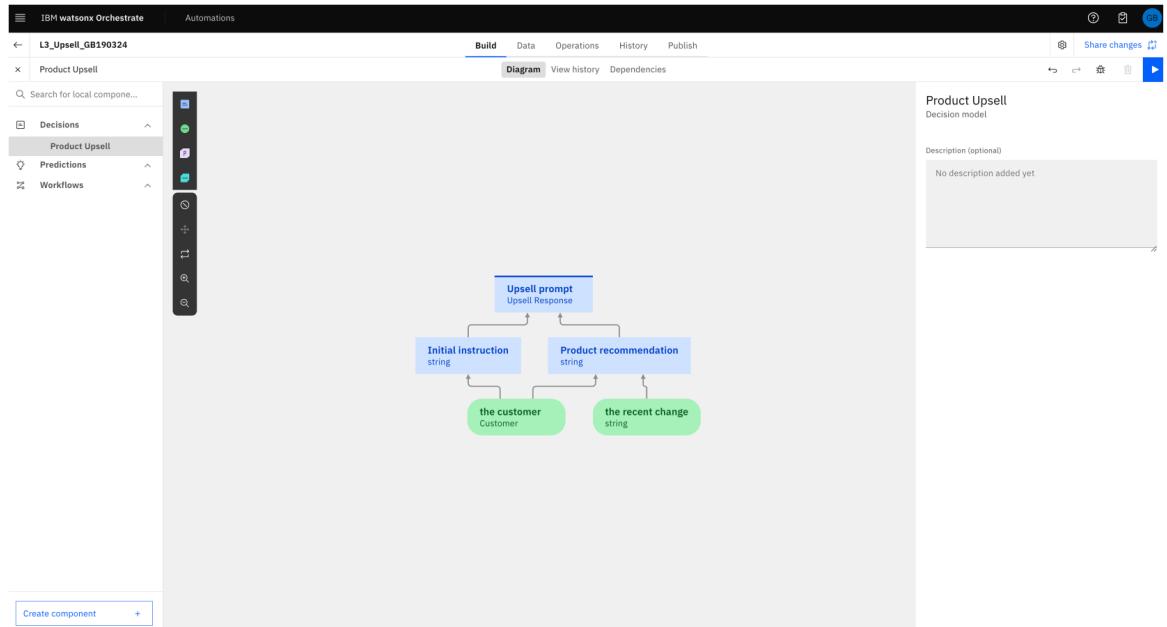
Narration

This decision model shows the structure of the decision-making process. Data feeding the model is shown at the bottom of the diagram and represented by the green input nodes. In this example, the input data is the customer record and the recent change. This data passes through intermediate decision nodes that incrementally infer new information by using business rules. The output decision node is shown with a dark blue line and produces the decision result.

In this example, the decision model determines the best product for the selected customer and produces a GenAI prompt along

The decision nodes contain the business logic that performs the logic to build the prompt. The initial instruction node uses the customer's name to form the instructions that are passed to the generative model such as 'You are an insurance salesman, write a marketing email for your customer John Collins'. The Product Recommendation node determines the most appropriate product to recommend to the customer based on their age, recent life events and existing products they hold.

The output from these intermediate decision nodes is brought together in the top node called **Upsell prompt**. This node produces the final output from the decision model based on the intermediate results.



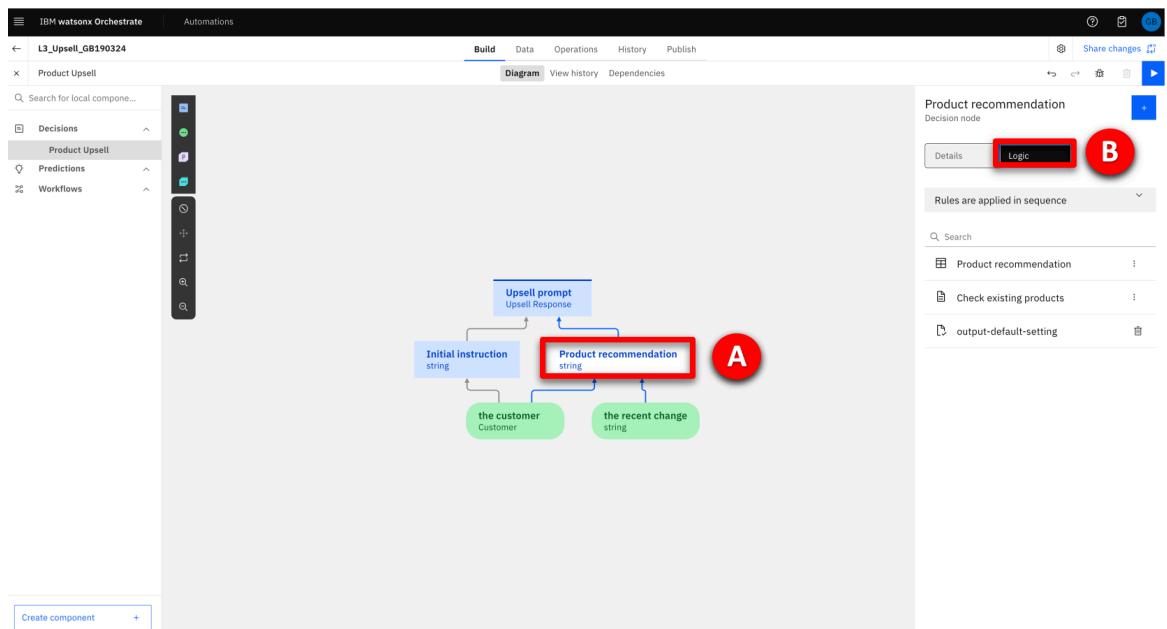
The palette on the left of the canvas is used to add additional nodes to the model. These can be additional decisions and inputs. They can also include predictive models enabling you to blend prescriptive business rules and predictive models together, for example the predictive model could use a regression model to predict a best price, but then prescriptive business rules could be used as guardrails to ensure the price stayed within a certain range.

Decision models can also include nested models, and you can also include generative AI.

Let's take a closer look at the product recommendation logic.

Action 3.3

Click the **Product recommendation** node (A) then select the **Logic** tab (B) in the **Product recommendation** section that appears on the right.



products already held, and a default rule that will apply if no other product recommendations can be made.

Let's take a closer look at the product recommendation decision table.

Action 3.4

Click the **Product recommendation** decision table.

The screenshot shows the IBM Watsonx Orchestrate interface with the 'Automations' tab selected. In the left sidebar, under 'Decisions', 'Product Upsell' is selected. The main area displays a decision table titled 'Product recommendation'. The table has three columns: 'the recent change', 'age' (with 'min' and 'max' headers), and 'Product recommendation'. The rows show various customer events and their corresponding product recommendations based on age. A red box highlights the 'Product recommendation' column header. On the right side of the screen, there is a sidebar with sections for 'Details' and 'Logic', and a search bar containing 'Product recommendation'.

the recent change	age min	max	Product recommendation
1 Recently turned 64			Silver Travel Insurance
2 Purchased new vehicle	18	50	4+ Vehicle Warranty
3 Purchased new vehicle	50	70	5+ Vehicle Warranty
4 Purchased new vehicle		> 70	Total Vehicle Warranty
5 Recently moved to new home			Gold Home Insurance
6 Recently moved to new home	45	65	Platinum Home Insurance
7 Dental coverage upgraded			Bronze Critical Illness Cover
8 Child recently turned 25			Silver-level Marketplace Plan
9			
10			
11			
12			

Narration

Decision tables are useful when many rules will share the same structure and it is helpful to view them together. In this example, every row in the table represents a rule that reasons over the customers recent change, along with their age, to determine a product recommendation. In this example, the recent change and customer age are both used as condition columns and shown on the left. The column on the right is the action column and provides the product recommendation.

Decision tables can contain more condition columns and multiple action columns to represent complex logic, but the logic will remain clear and maintainable. Many decision tables can work together to implement very complex logic, whilst keeping the logic clear and readable to non-technical users.

IBM Watsonx Orchestrate's Automation builder also includes a preview capability to test the results produced by the decision model. Clicking the Play icon in the top-right corner opens the preview window.

The screenshot shows the IBM Watsonx Orchestrate interface. On the left, there's a sidebar with 'Decisions', 'Predictions', and 'Workflows'. The main area is titled 'Product recommendation' and contains a table:

the recent change	age min	max	Product recommendation
1 Recently turned 64			Silver Travel Insurance
2 Purchased new vehicle	18	50	4+ Vehicle Warranty
3 Purchased new vehicle	50	70	5+ Vehicle Warranty
4 Purchased new vehicle		> 70	Total Vehicle Warranty
5 Recently moved to new home			Gold Home Insurance
6 Recently moved to new home	45	65	Platinum Home Insurance
7 Dental coverage upgraded			Bronze Critical Illness Cover
8 Child recently turned 25			Silver-level Marketplace Plan
9			
10			
11			
12			

On the right, there's a sidebar for 'Product recommendation' with sections for 'Details' and 'Logic'. A note says 'Rules are applied in sequence'. Below that are search fields and a list of components: 'Product recommendation', 'Check existing products', and 'output-default-setting'. A red box highlights the 'Preview' button in the top right corner of the main interface.

Narration

Run a test scenario.

Action 3.6

Click the Preview button.

The screenshot shows the 'Override Travel' test data set in the IBM Watsonx Orchestrate interface. The 'Preview' button is highlighted with a red box. The preview pane displays the following information:

Want to try out your decision?
Preview your decision model to ensure you have it set up correctly.

The input data shown in the preview pane is:

- theCustomer:
 - age: 64
 - listOfCurrentProducts:
 - #0: Silver Travel Insurance
 - name: Violet Truman
- theRecentChange: Recently turned 64

Narration

The rules are run, and the results are displayed. At the top is the final output, but below this we can also see all the intermediate results as the data passed through the decision model. By clicking the show more link, we can expand the final output and see the complete information returned from the decision. This contains the product recommendation, the GenAI prompt and the min/max tokens that control the content length.

The screenshot shows the IBM Watsonx Orchestrate interface with the 'Build' tab selected. A test scenario named 'Override Travel' is running. In the 'Result' section, a JSON object is displayed, and a 'Show more' button is highlighted with a red box.

Narration

Many test scenarios can be created, these are run by selecting them and pressing preview.

Action 3.8

Click the drop-down arrow (A) in the **Test data** section and select another scenario, then click the **Preview** button (B).

The screenshot shows the IBM Watsonx Orchestrate interface with the 'Build' tab selected. A test scenario named 'Simple Home Insurance' is running. A red circle labeled 'A' highlights the dropdown arrow in the 'Test data' section. A red circle labeled 'B' highlights the 'Preview' button.

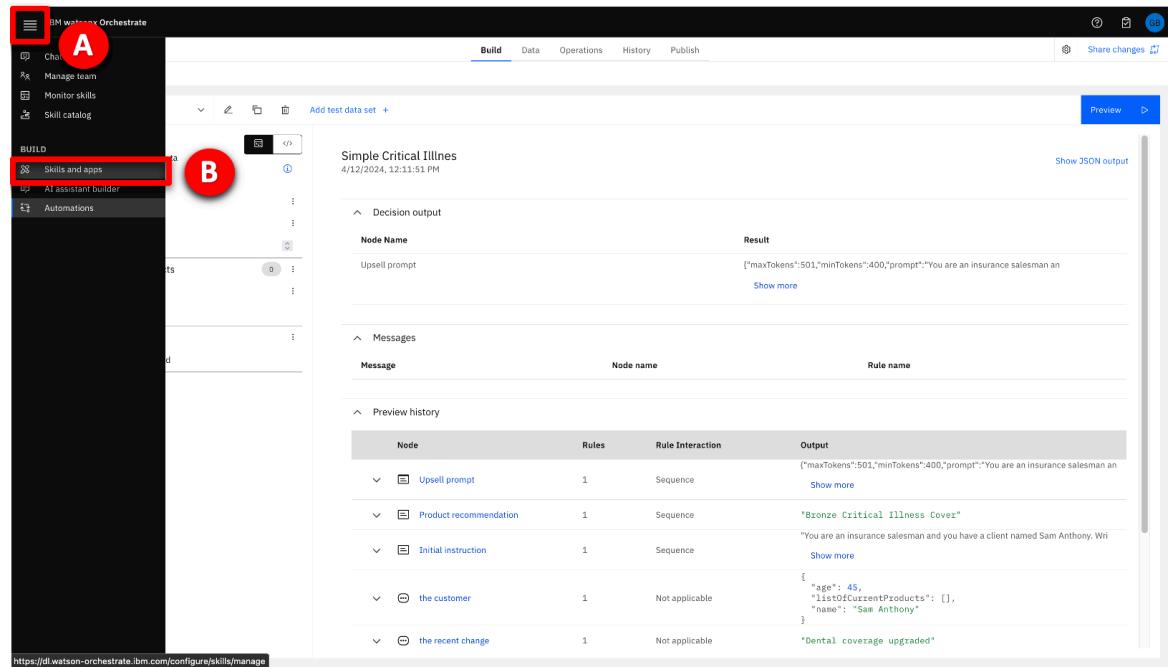
Narration

Once the business logic is ready, it is deployed as a skill that can be invoked from the chat window directly, or it can be combined with other skills in a skill flow.

▼ 4 – Combining skills into skill flows

Action 4.1

Click the **hamburger navigation** menu icon (**A**) and select **Skills and apps** (**B**) from the left menu.



Narration

IBM Watsonx Orchestrate provides access to a broad range of skills that help users perform their daily tasks. It comes with a collection of out-of-the-box, ready-to-use skills that range from working with productivity tools to providing deep analytical insights.

IBM Watsonx Orchestrate developers, called ‘Builders,’ can create customized skills like the customer search and product upsell skills described earlier. As individual skills they are useful on their own, but combining them together can save an insurance sellers time, avoid errors, and produce better results.

Skill flows connect multiple skills together by using a low-code flow editor. In this example, a skill flow is created to combine the customer search skill with the product upsell decision and then generate a marketing email for a selected customer.

Let's create the skill flow now.

Skills and apps
Add new skills, train them to be more effective, and publish them to the catalog so your team can benefit from them quickly.

Apps **Skills**

Search app

Select an app to configure the settings for all the app's skills.

Name	Description	Configuration status
Interview top candidates using FloCareer	FloCareer Schedule Interview skill	⚠ Required
Get compensation information from WageScape	WageScape skills	⚠ Required
Salesloft		⚠ Required
Webex		⚠ Required
Adobe Workfront		⚠ Required
Reveal your existing applicants and candidates with ThisWay Global	ThisWay Global Reveal skills	⚠ Required
Activate or deactivate attracting candidates using ThisWay Global	Attract	⚠ Required
Salesforce Chatter	in salesforce chatter	⚠ Required
Cognos	in Cognos	⚠ Required
FreshService	in Freshservice	⚠ Required

Items per page: 10 | 1–10 of 14 items

Narration The skill flow requires a unique name.

Action 4.3 Click the **Pencil** icon (A) and when the **Edit Skill flow details** section opens on the right, enter a name for the skill flow using the template **Upsell XXddmmyy** (B). Now click the **Save** button (C).

Skills and apps / Create a Flow

Untitled

Start — + — End

Edit Skill flow details

Preview

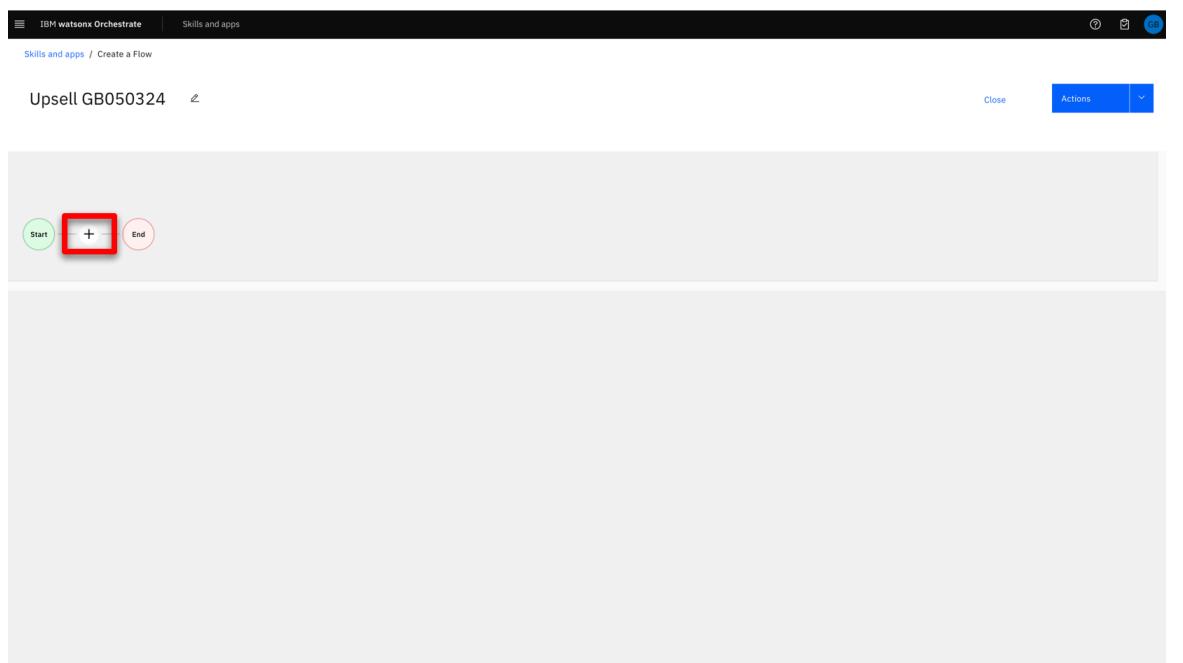
Upsell GB010524

Name* **Upsell GB010524**

Description 0/100

Cancel **Save**

Narration To add a skill, click the plus icon.



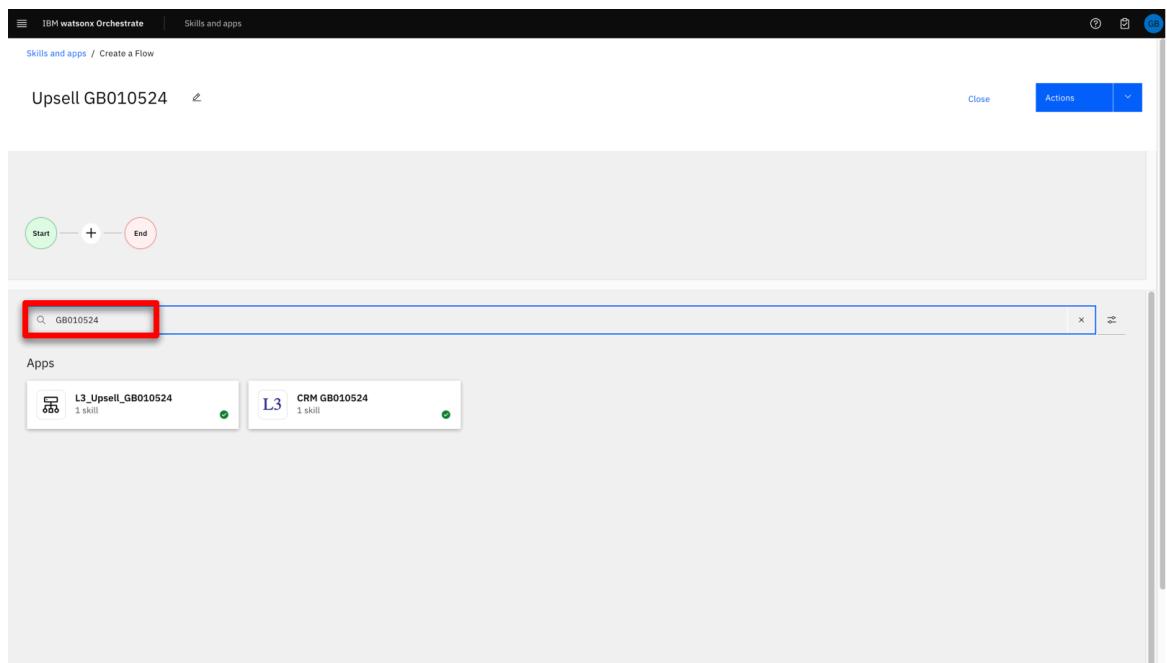
Tip You are using a shared demo tenant. Use the unique reference added to your skill names to find them in the catalog. It's a good idea to keep this reference in your clipboard history so it can be pasted into the skill search panel.

Narration

On demo tenants a unique reference is used to locate the demo skills in the catalog. (This is only necessary on demo tenants, ordinarily these skills would be found by using just their name.)

Action 4.5

Enter the unique reference for your skills (**XXddmmyy**) into the **filter** panel and press **Enter** to filter the results.

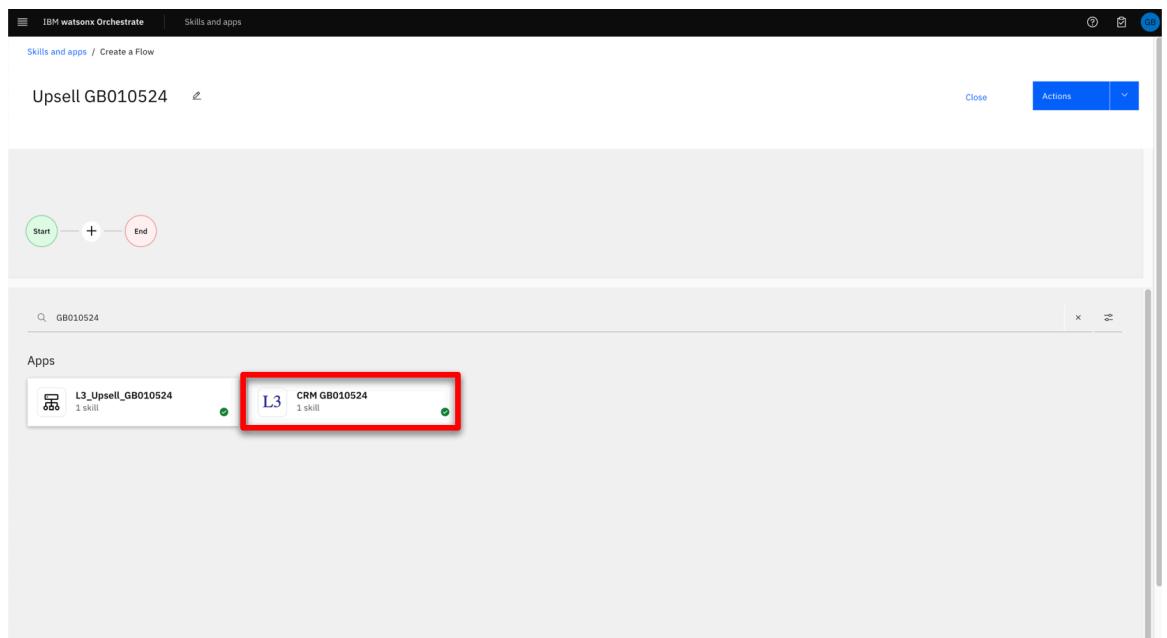


Narration

The first skill we need performs a customer search and it's contained in the **CRM** tile.

Action 4.6

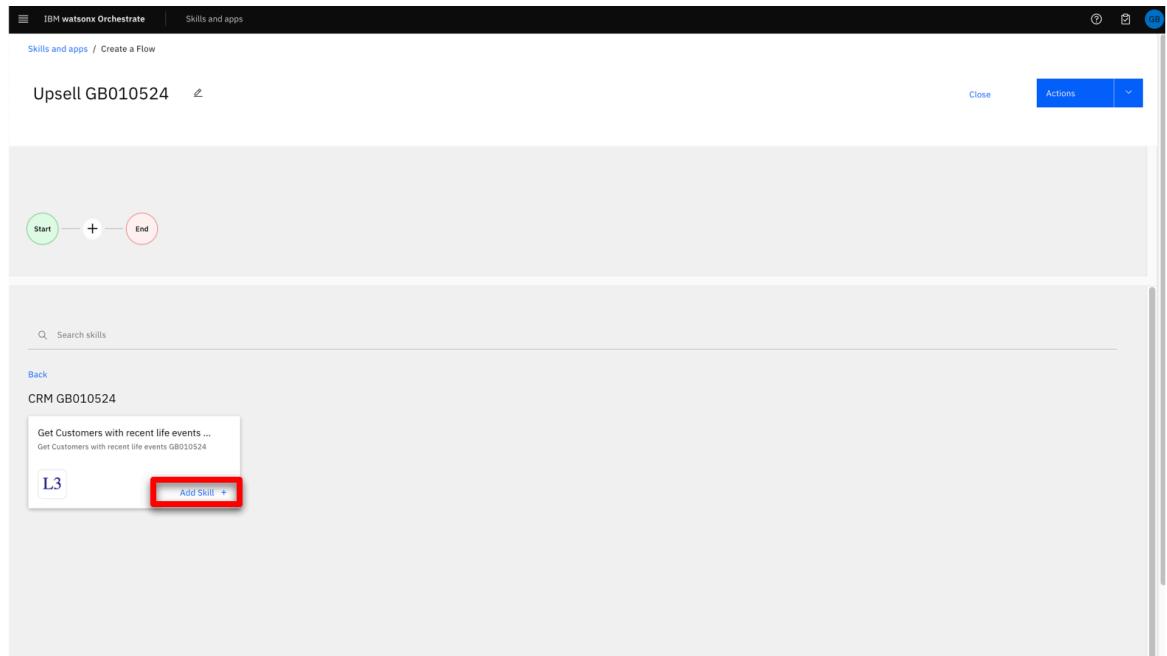
Click the CRM tile.



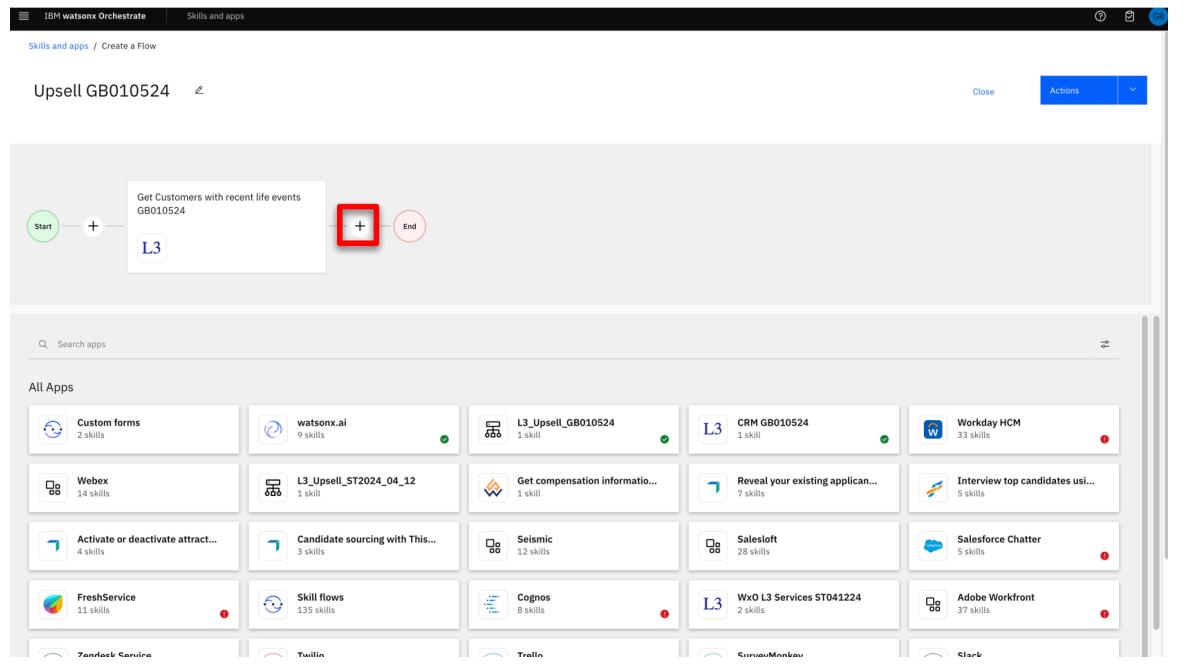
This skill collection contains one skills; Get Customers with recent life events ... that performs the customer search.

Narration

Add the skill.

Action 4.7Click Add Skill within the **Get Customers with recent life events ...** tile.**Narration**Add the next skill by clicking the **Plus** icon again, searching with the unique reference, then adding the skill.

Screenshot of the IBM Watsonx Orchestrate interface showing a flow named "Upsell GB010524". The flow consists of a "Start" node, a "Get Customers with recent life events GB010524" action node (highlighted with a red box), and an "End" node. Below the flow, a search bar labeled "Search apps" is present, followed by a grid of "All Apps" with various service icons and names.



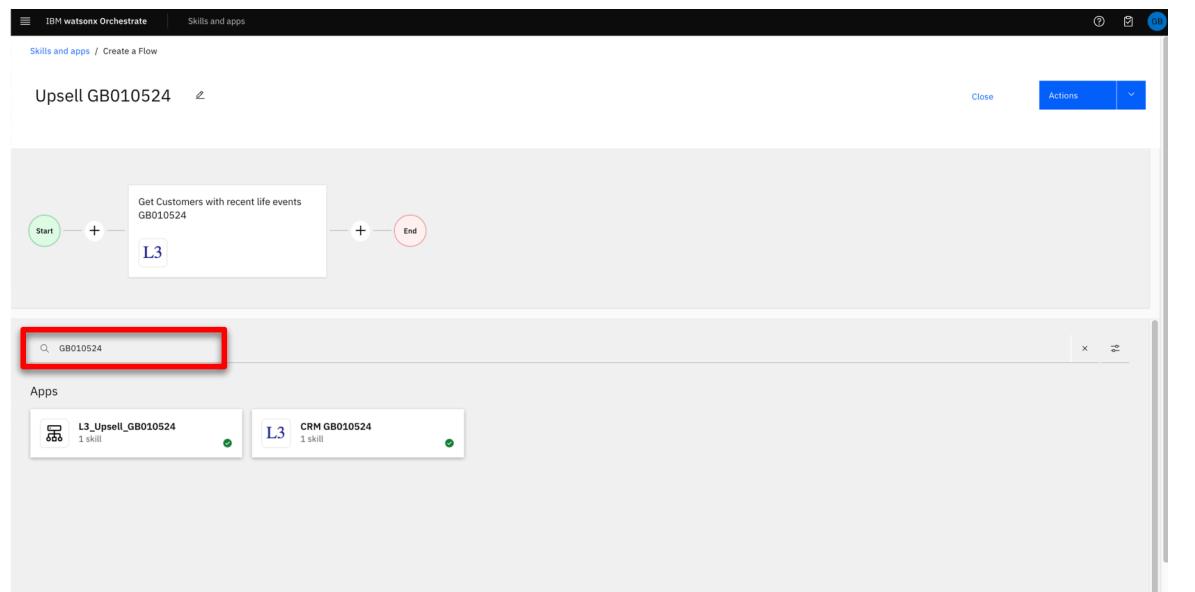
```
graph LR; Start((Start)) --> Get[Get Customers with recent life events  
GB010524]; Get --> End((End));
```

All Apps				
Custom forms	watsonx.ai	L3_Upsell_GB010524	CRM GB010524	Workday HCM
Webex	L3_Upsell_ST2024_04_12	Get compensation informatio...	Reveal your existing applican...	Interview top candidates usi...
Activate or deactivate attract...	Candidate sourcing with This...	Seismic	Salesloft	Salesforce Chatter
FreshService	Skill flows	Cognos	WxD L3 Services ST041224	Adobe Workfront
Tandem Service	Tuults	Train	CurauMonkey	Clark

Action 4.9

Enter the unique identifier for your skills (**XXddmmyy**) and press **Enter** to filter the results.

Screenshot of the IBM Watsonx Orchestrate interface showing a flow named "Upsell GB010524". The flow consists of a "Start" node, a "Get Customers with recent life events GB010524" action node, and an "End" node. Below the flow, a search bar contains the text "GB010524" (highlighted with a red box). A filtered list of apps is shown below the search bar, with two items visible: "L3_Upsell_GB010524" and "CRM GB010524".



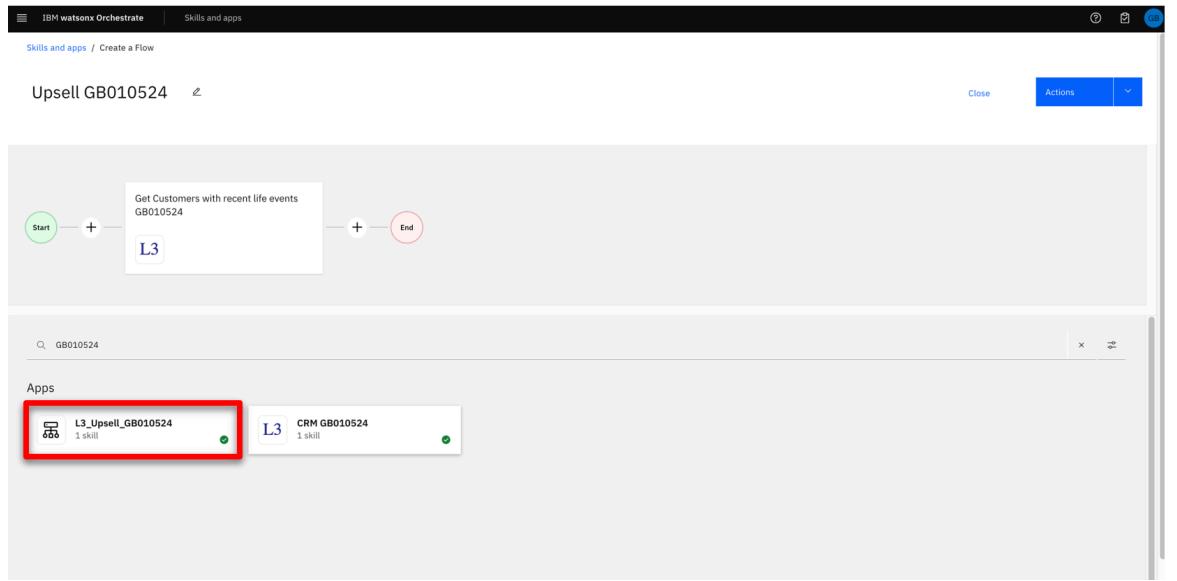
```
graph LR; Start((Start)) --> Get[Get Customers with recent life events  
GB010524]; Get --> End((End));
```

Search bar: GB010524

Apps	
L3_Upsell_GB010524	CRM GB010524

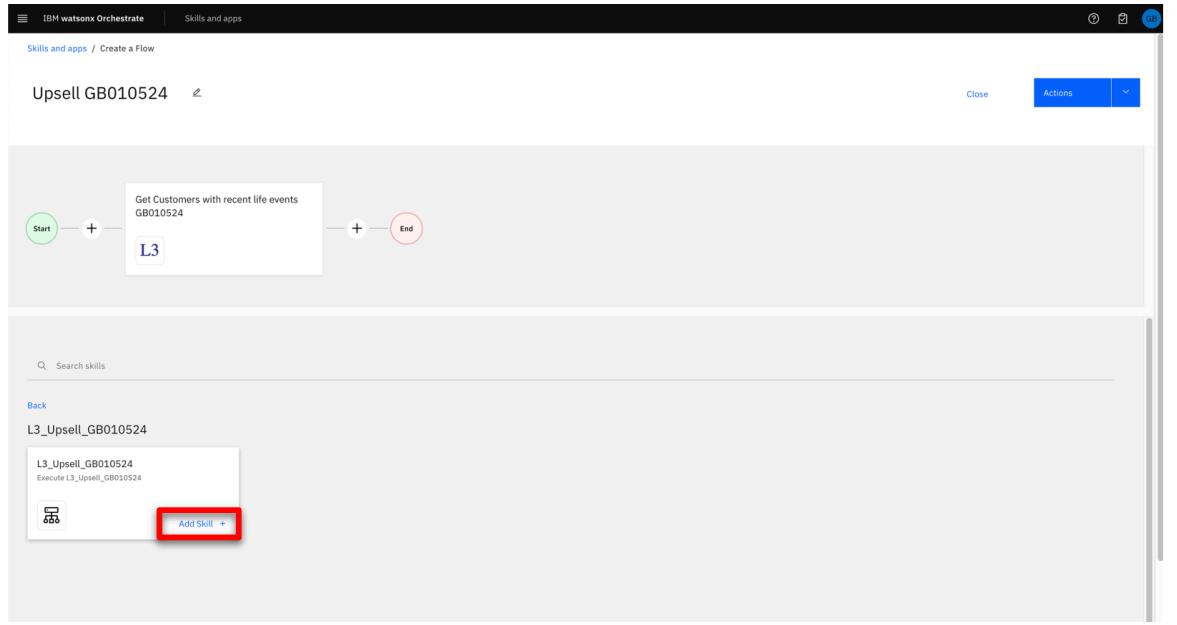
Narration

Add the upsell skill.



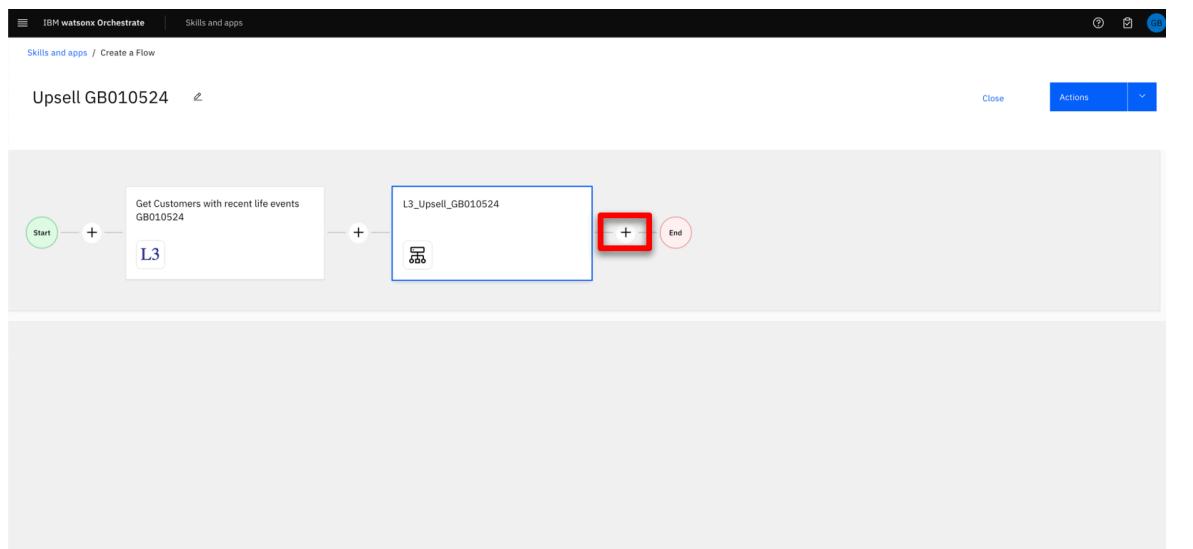
Action 4.11

On the L3_Upsell_XXddmmyy tile, click Add skill.



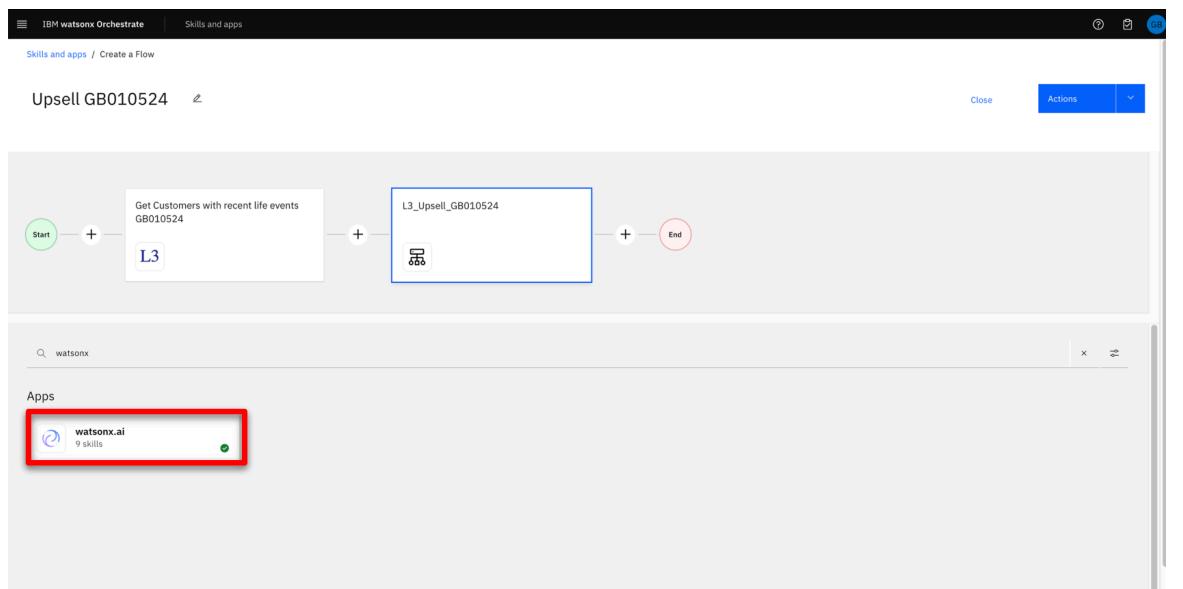
Narration

Add the third skill by clicking the Plus icon again.



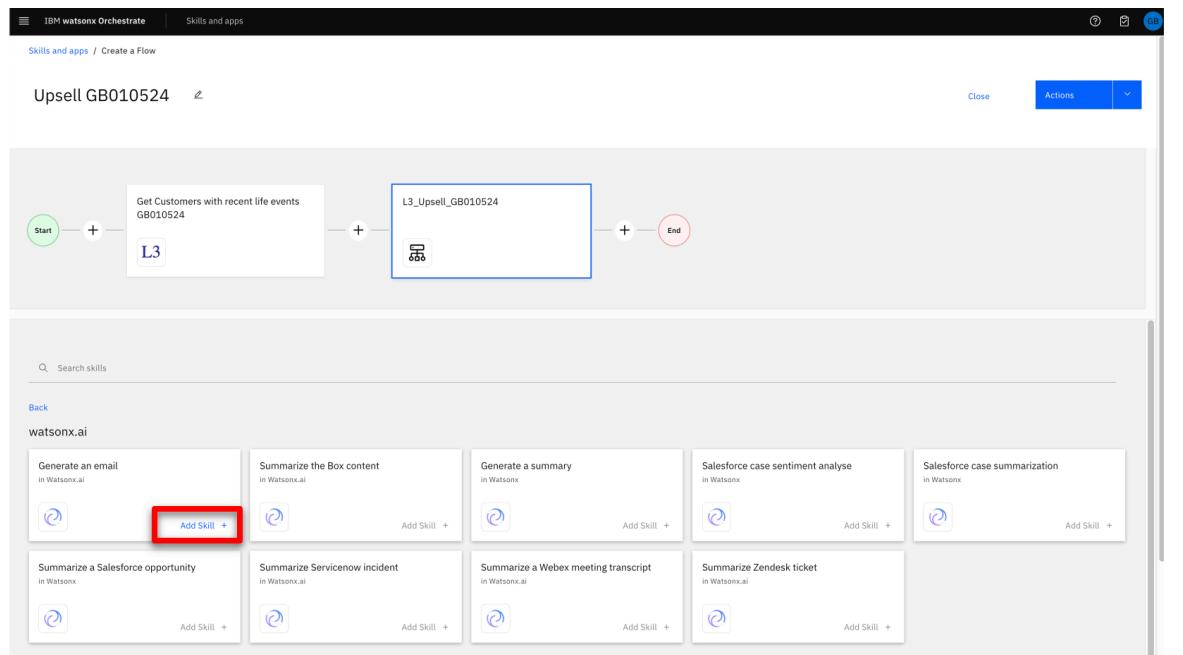
Action 4.13

Enter “watsonx” into the **Search** field and press **Enter** to filter the results.



Narration Add the third skill.

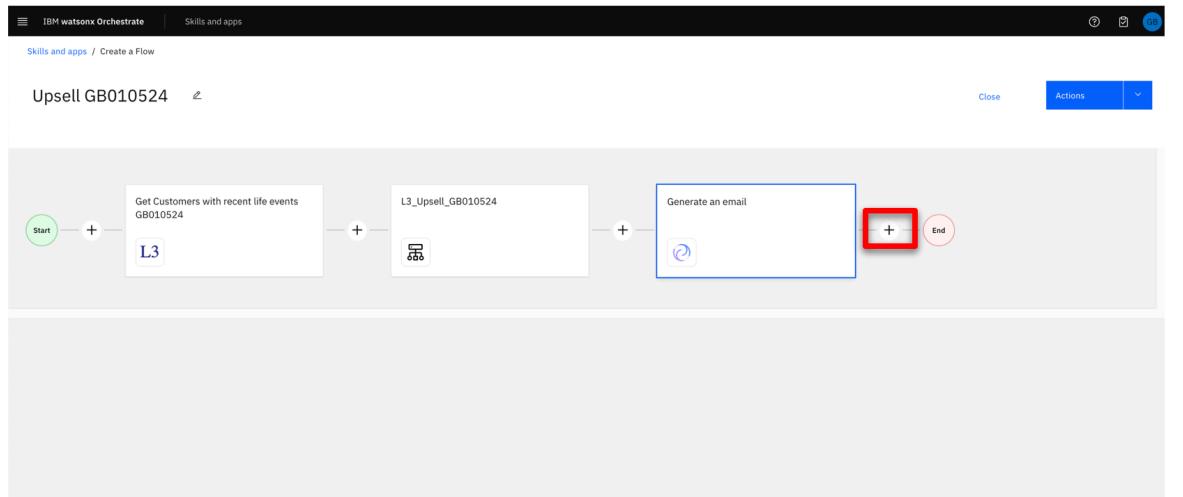
Action 4.15 Click **Add Skill** within the **Generate an email** tile.



Narration

In this demo, an input form is used instead of one of the built-in email skills. This is done to avoid some additional setup, but from the user's perspective the results are the same. The input form contains the same fields as the built-in email skill and allow us to map the various skill outputs together to build the final output.

Let's add the custom form.

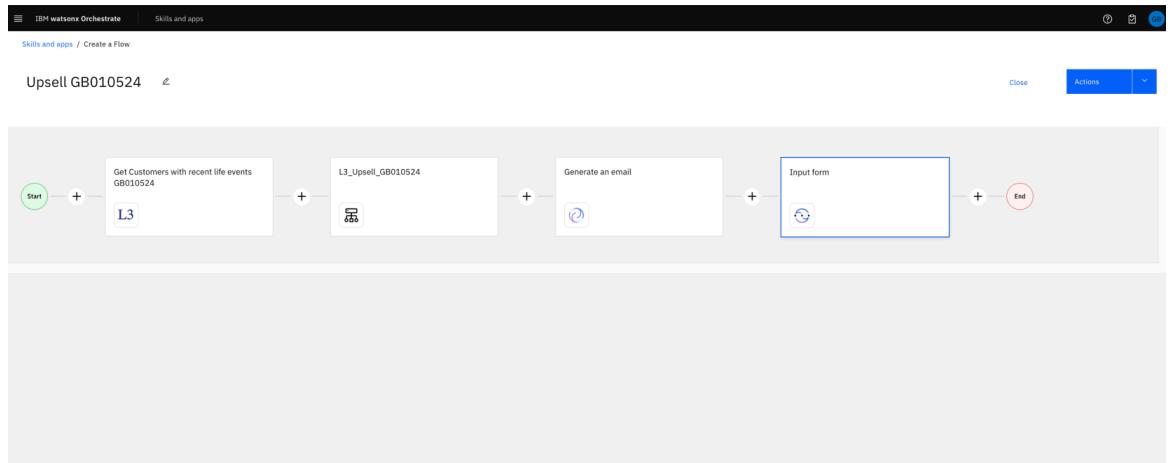


Action 4.17

Type “**forms**” and press **Enter** to filter the results (A), click **Custom forms** (B).

Action 4.18

Click **Add skill** within the **Input form** tile.



Narration

Each skill can have one or more inputs and outputs. The skill flow editor allows builders to easily map the output from one skill into another. The first skill in this skill flow (**Get a list of customers with recent life events**) doesn't require any configuration. But, the **L3_Upsell** skill needs to be configured to map the output from the **Get a list of customers** skill into its appropriate inputs.

Narration

The input form for this skill will also be hidden.

Action 4.19

Configure the input form for **L3_Upsell_XXddmmyy** skill by performing the following steps:

- Select the **L3_Upsell_XXddmmyy** tile.
- Click **Input** to select the input form.
- Turn on the **Hide this input form from the user** option.

A

B

C

theCustomer.age

theCustomer.name

theCustomer.listOfCurrentProducts

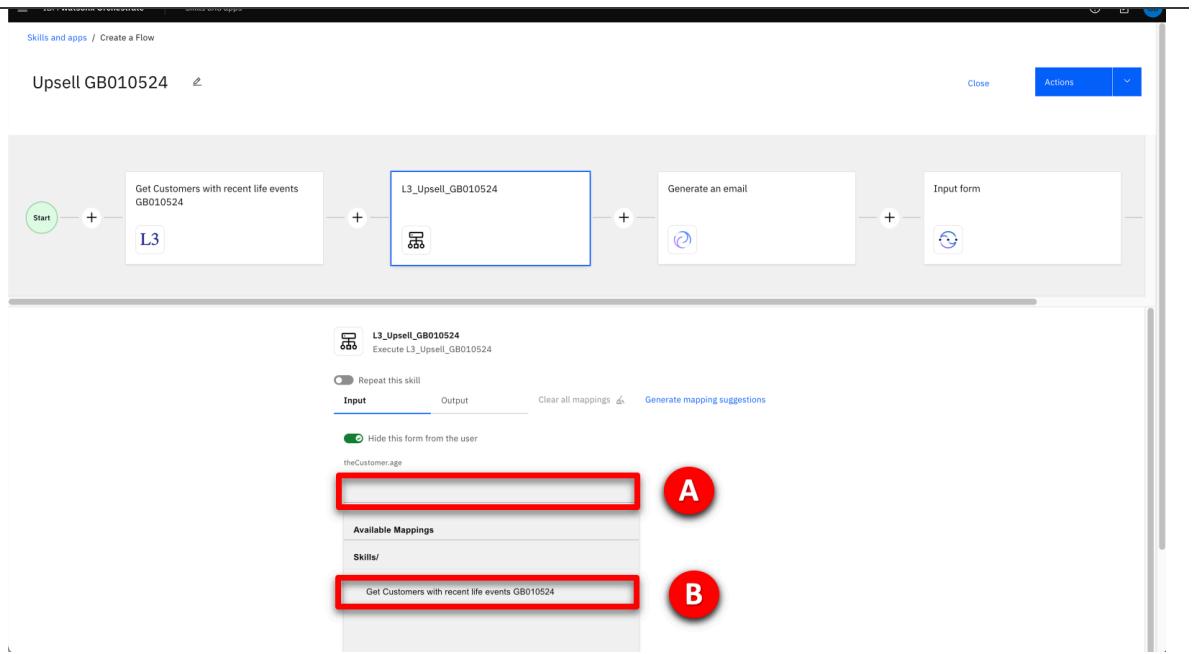
Narration

Now the data can be mapped, starting with the customer's age.

Action 4.20

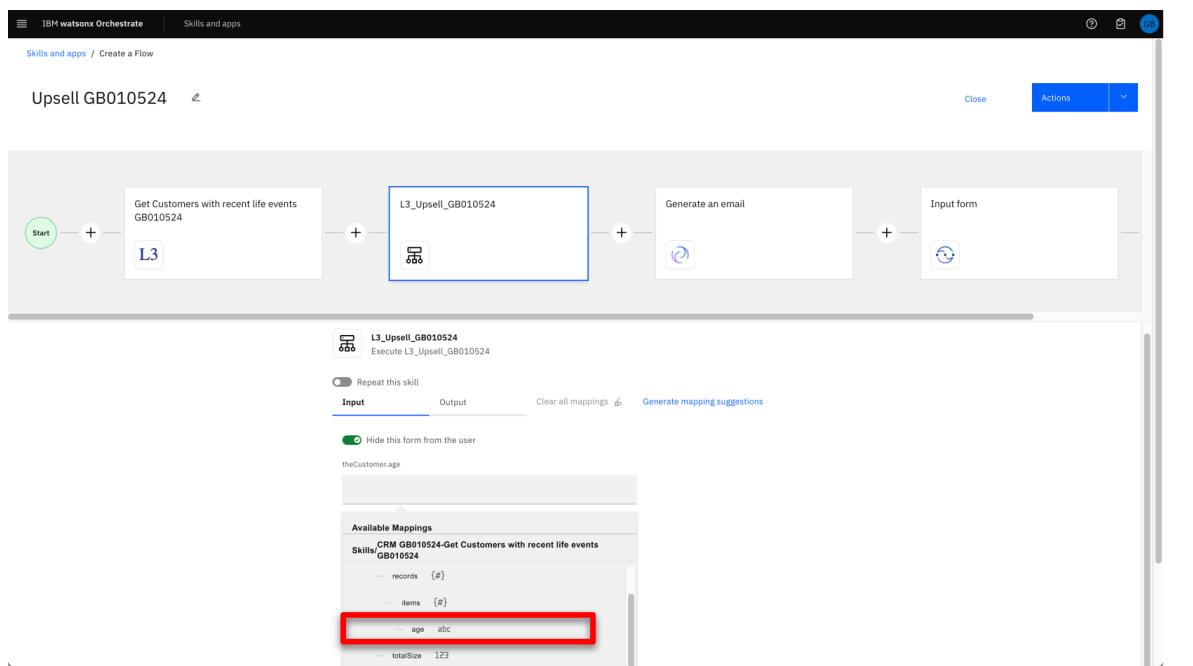
Map the customer age input field of the skill by performing the following steps:

- Click the field **theCustomer.age**.



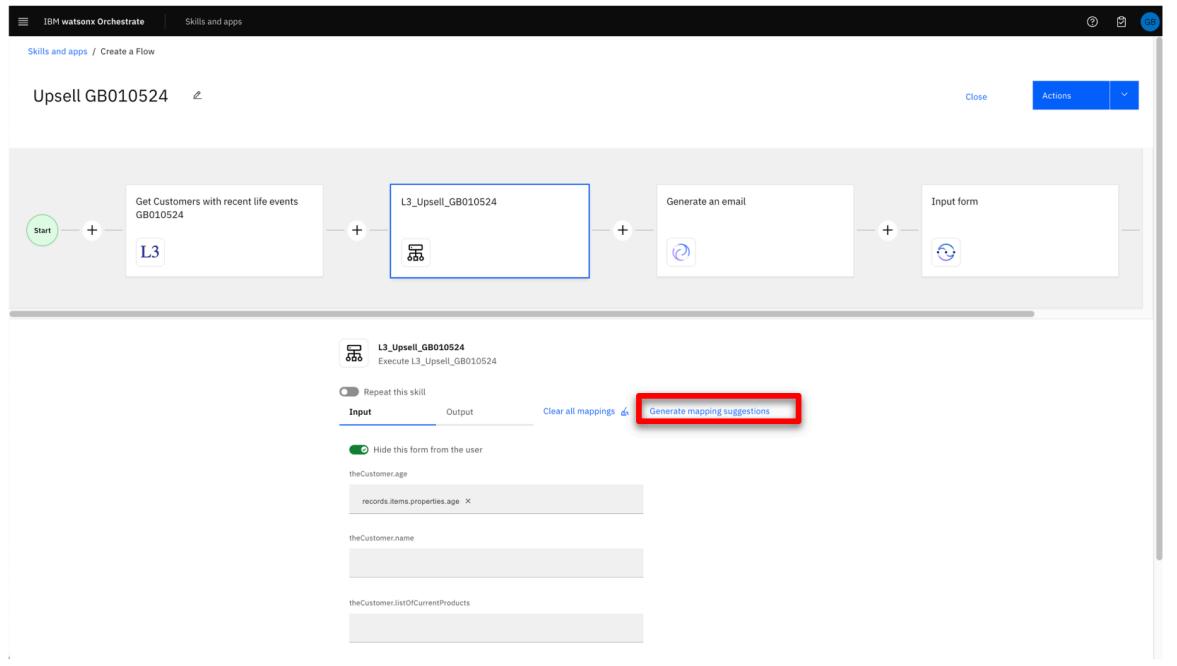
Action 4.21

Scroll down and select **age**.



Narration

Mapping data can be done manually, but in some cases it's easier to let the skill flow editor generate mapping suggestions for you.



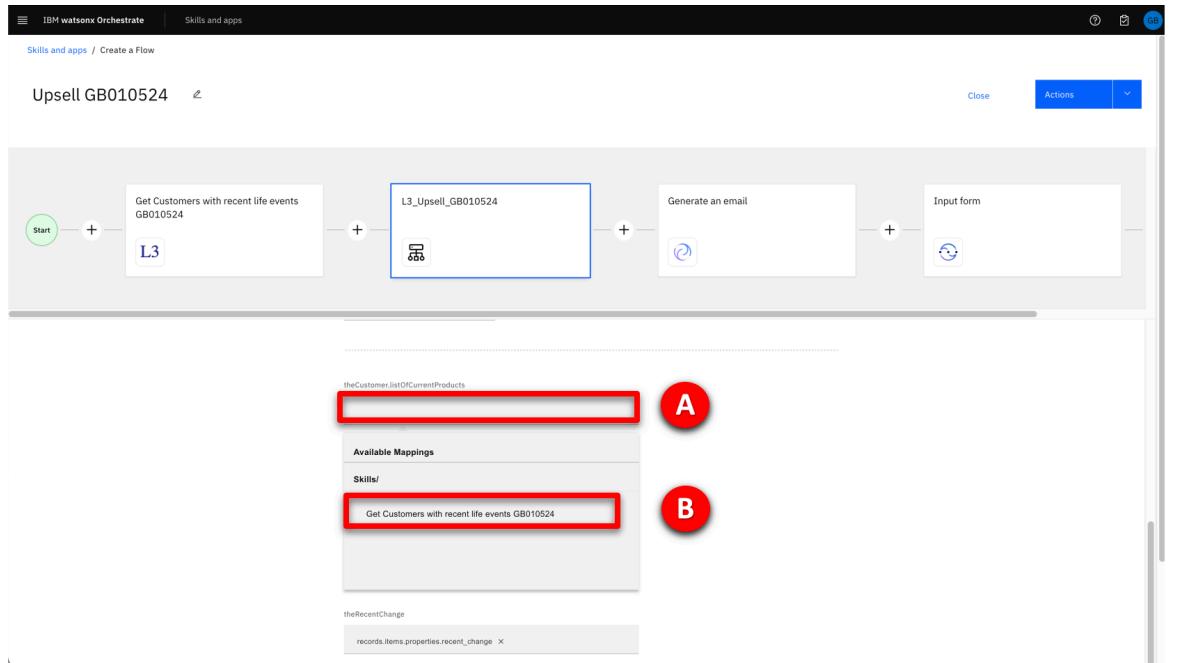
Narration

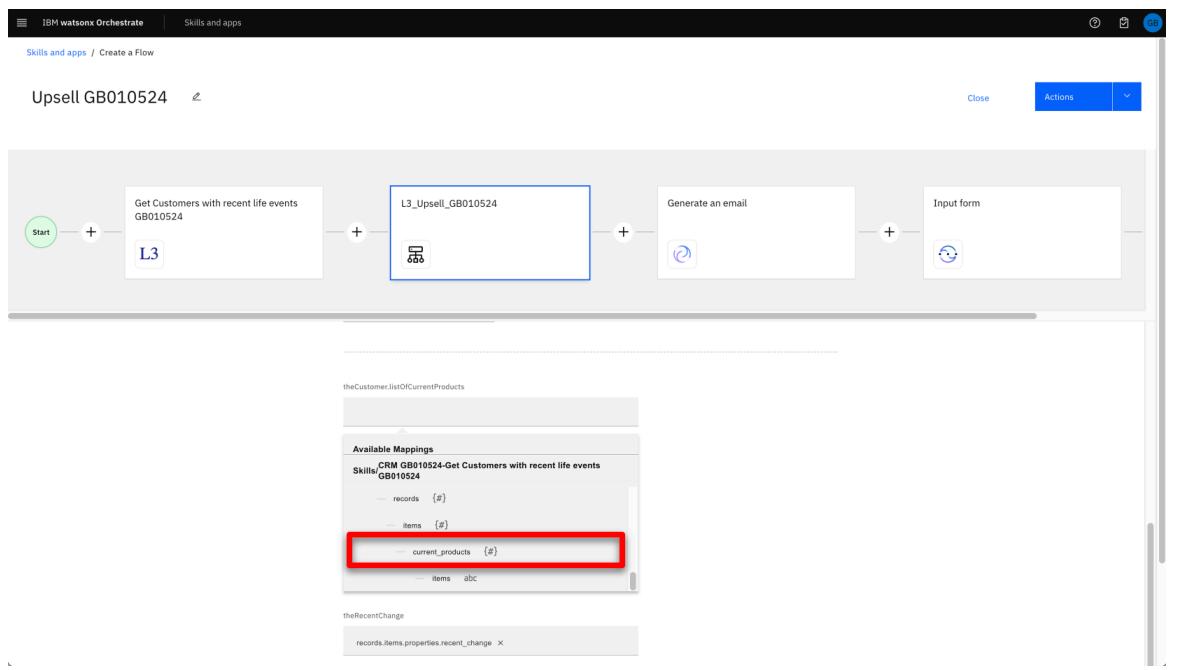
Not all mappings can be generated. Later in the skill flow there will be multiple options, and as such, manual mapping will be required.

Let's complete the final mapping for this skill and map the list of current products.

Action 4.23

Map the remaining field. Scroll down and click **theCustomer.listOfCurrentProducts (A)**, then select **Get a list of customers with recent life events (B)**.





Narration

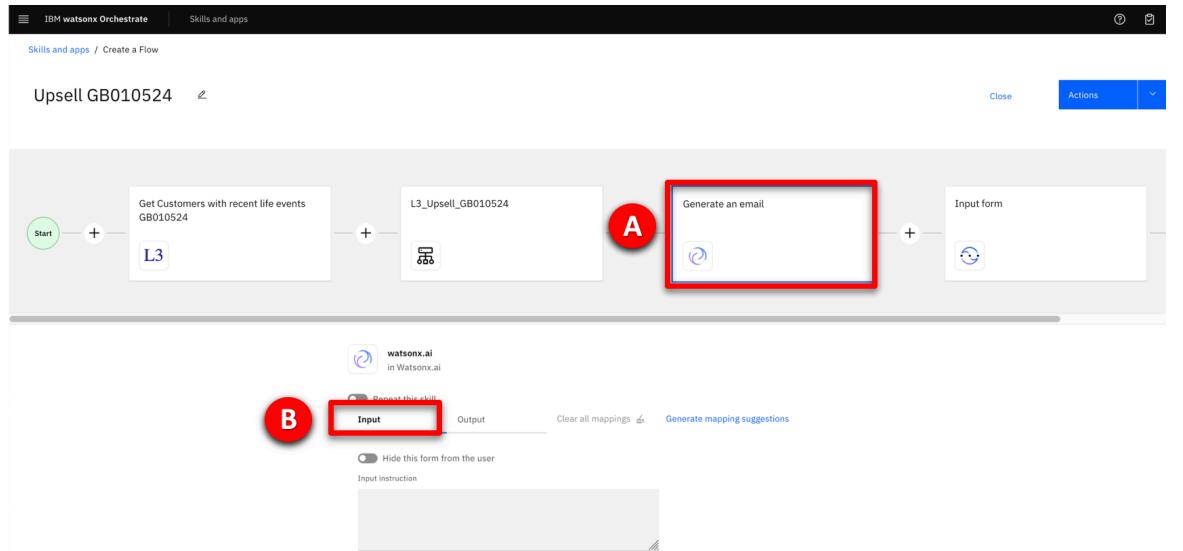
The output form for the **L3_Upsell** skill requires no configuration, but typically this output would be hidden as the user doesn't need to see or edit the results. It will be left visible in this demo so that when the skill flow runs the output will be available for review.

The **Generate an email** skill creates the email body from the prompt received from the **L3_Upsell** decision skill.

Action 4.25

Configure the input form for **Generate an email** by performing the following steps:

- Select the **Generate an email** tile in the skill flow.
- Select the **Input** tab.



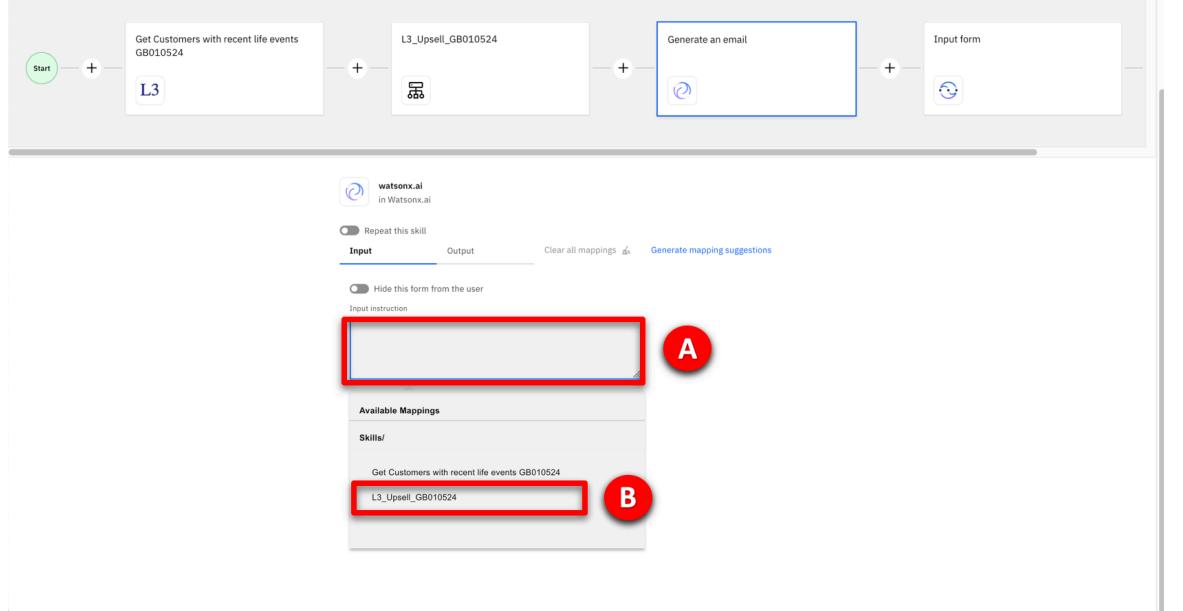
Narration

Map the input field to take the prompt from the **L3_Upsell** skill.

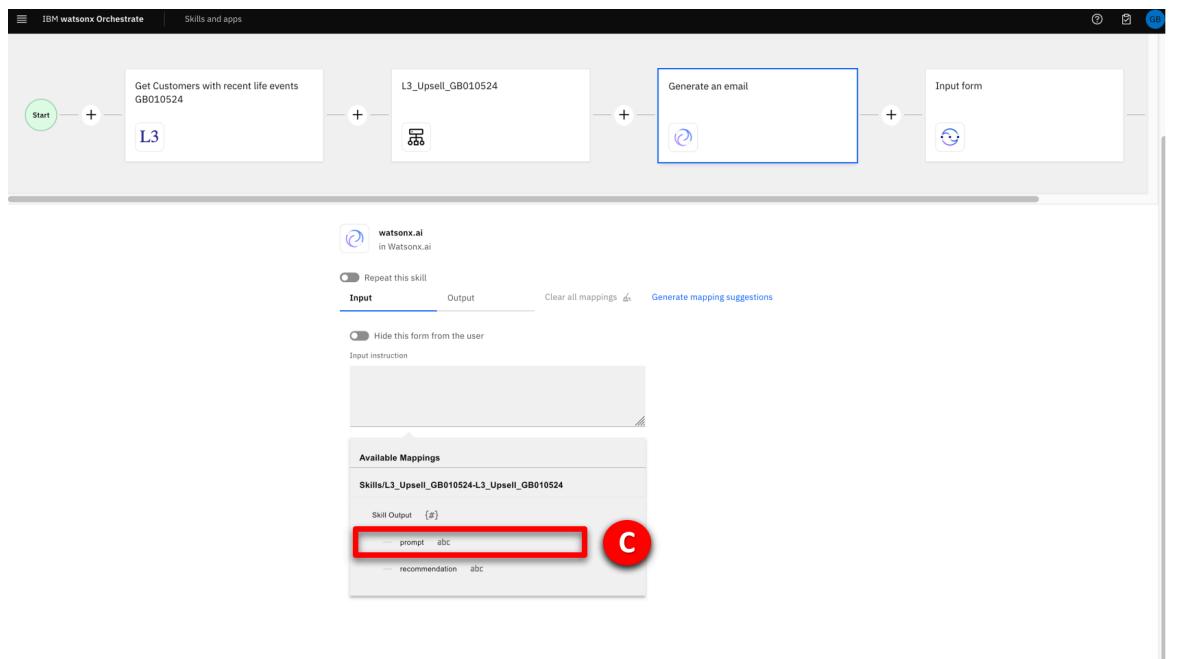
Action 4.26

Map the **Input instruction** field by performing the following steps:

- Click on the **Input instruction** field.
- From **Available Mappings Skills** select the **L3_Upsell_XXddmmyy** skill.



C. Select prompt.



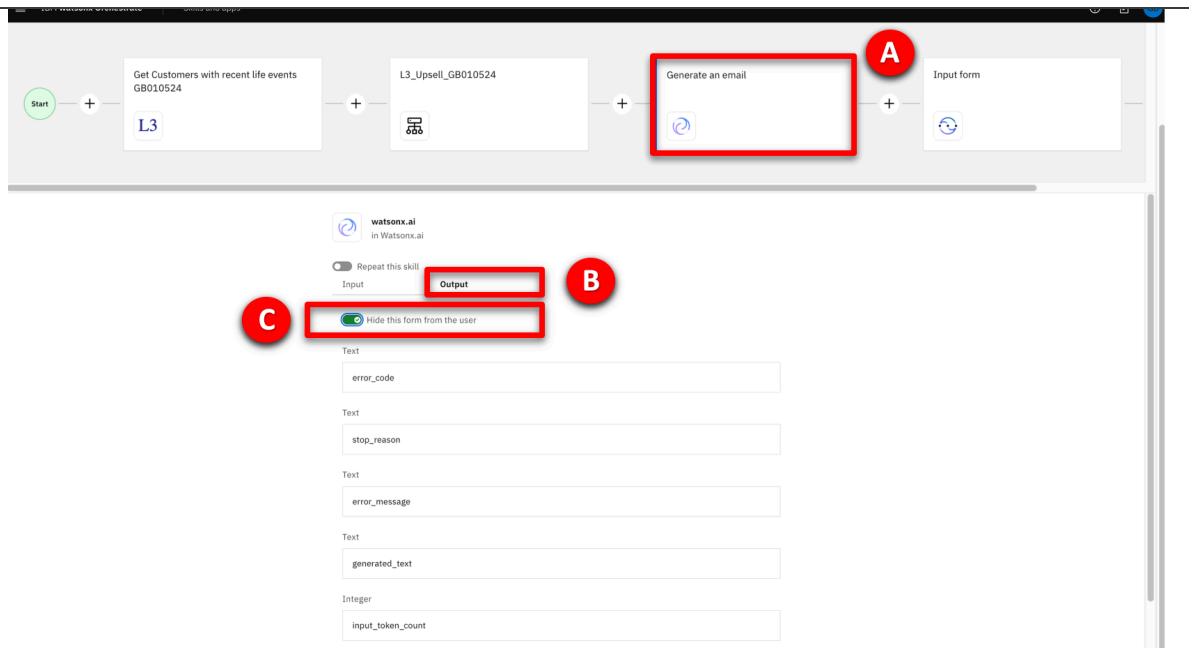
Narration

The **Generate an email** output form can be hidden as the output will be available to view in the next skill.

Action 4.27

Configure the **Generate an email** output form by performing the following steps:

- Click the **Generate an email** tile.
- Select the **Output** tab to select the output form.



Narration

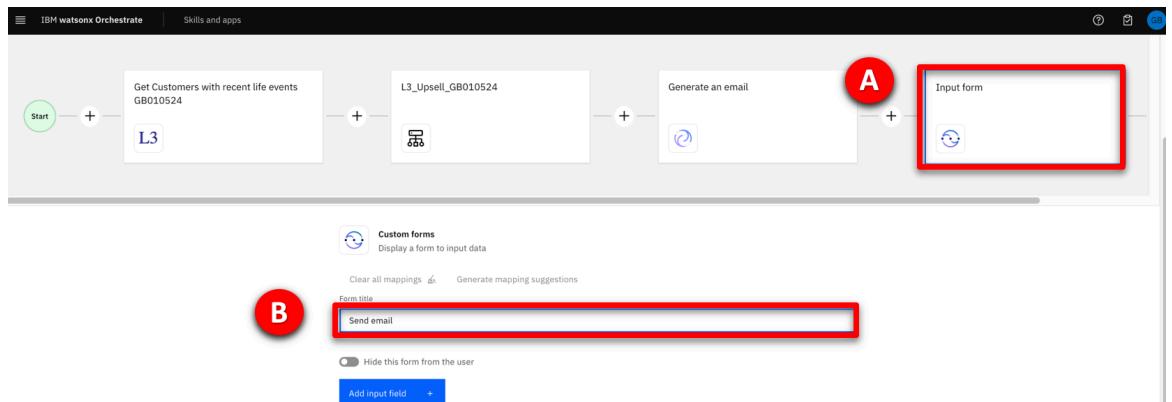
Following email content generation, an input form will be used to display the output and allow the sales agent to check the output for accuracy. The agent can also make any modifications before the response is sent to their customer.

The form is built by repeatedly adding input fields.

Action 4.28

Configure the input form by performing the following steps:

- Select the **Input form** tile from the skill flow at the top of the screen.
- Enter a title for the form in the **Form title** field, for example “**Send email**”.



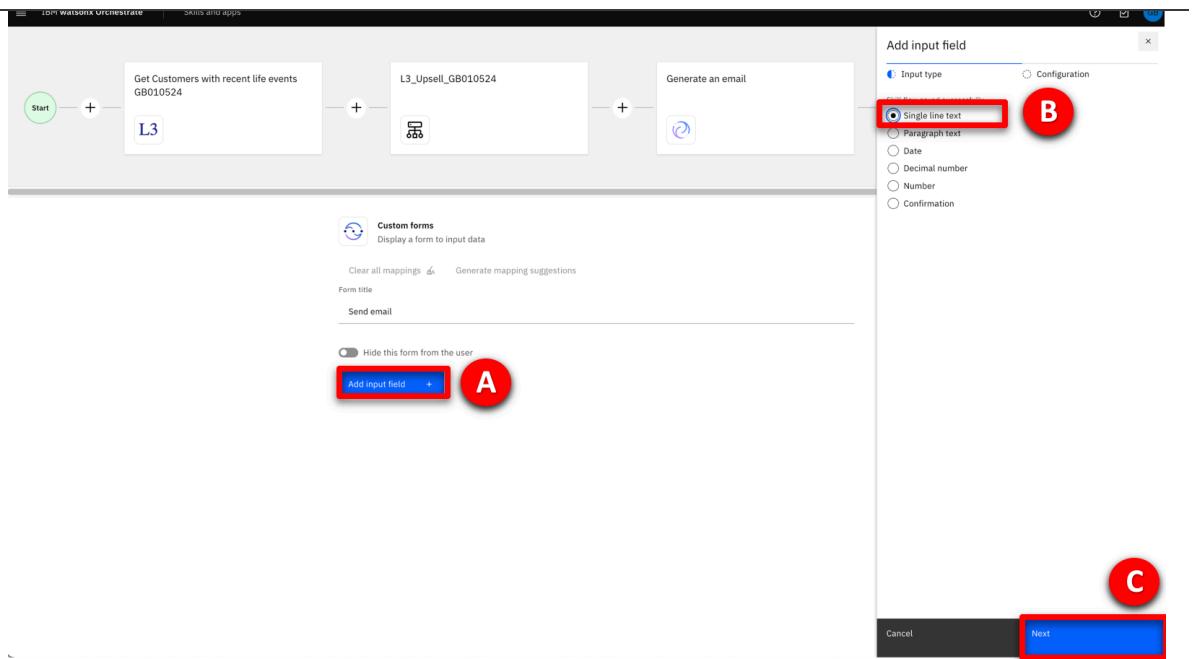
Narration

The form is built by repeatedly adding input fields.

Action 4.29

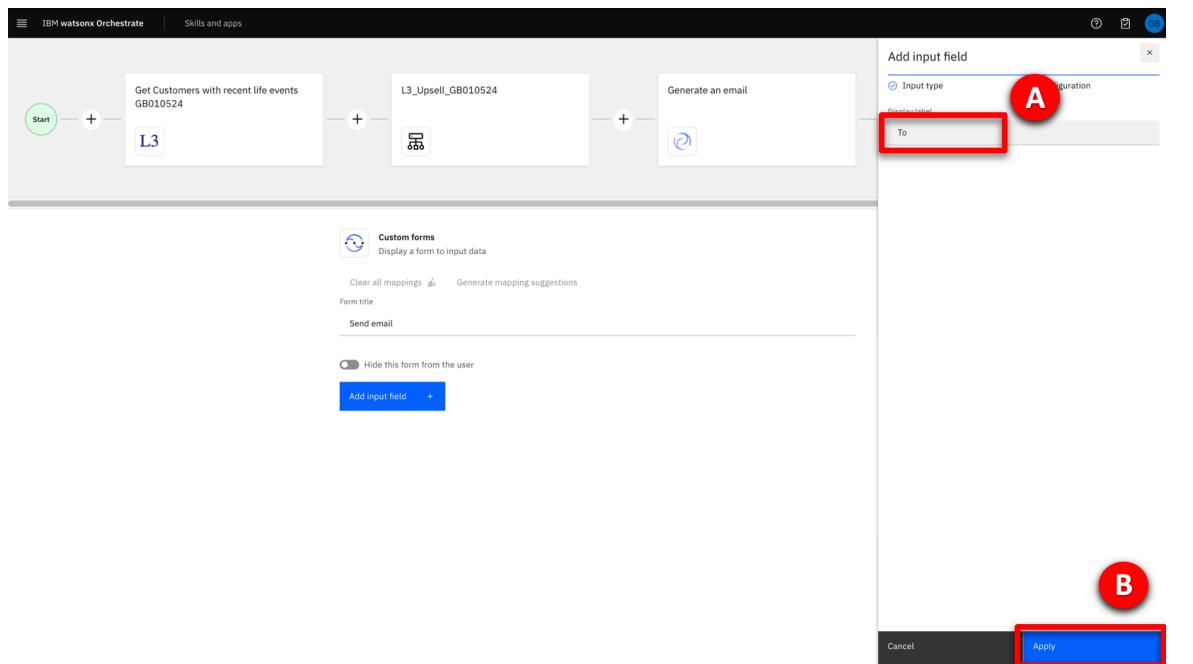
Add a field to the form by performing the following steps:

- Click **Add input field**.
- Select the **Single line text** radio button under the **Add input field** section that appears on the right side of the screen.



Narration The new input field will receive the email address of the selected customer.

Action 4.30 A. Enter the value “To” into the **Display text** field in the **Add input field** section on the right side of the screen.
B. Click the **Apply** button.

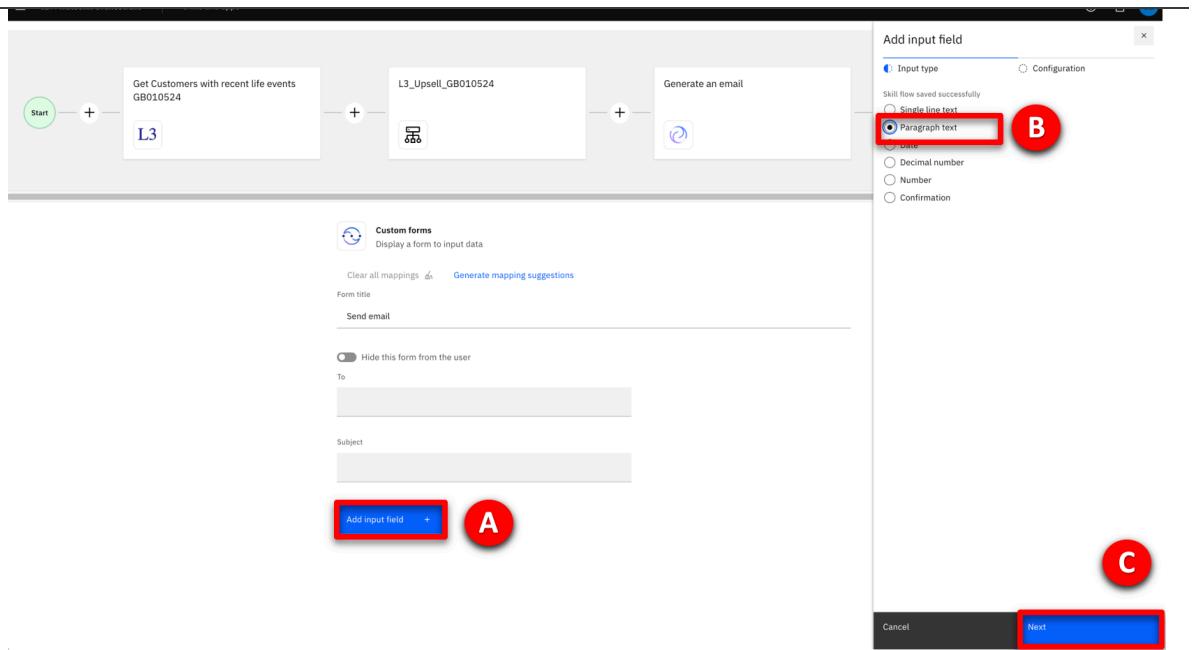


Narration The subject field can now be added to the form by repeating the same steps.

Action 4.31 A. Repeat steps **4.29** and **4.30** to create a **Subject** field.

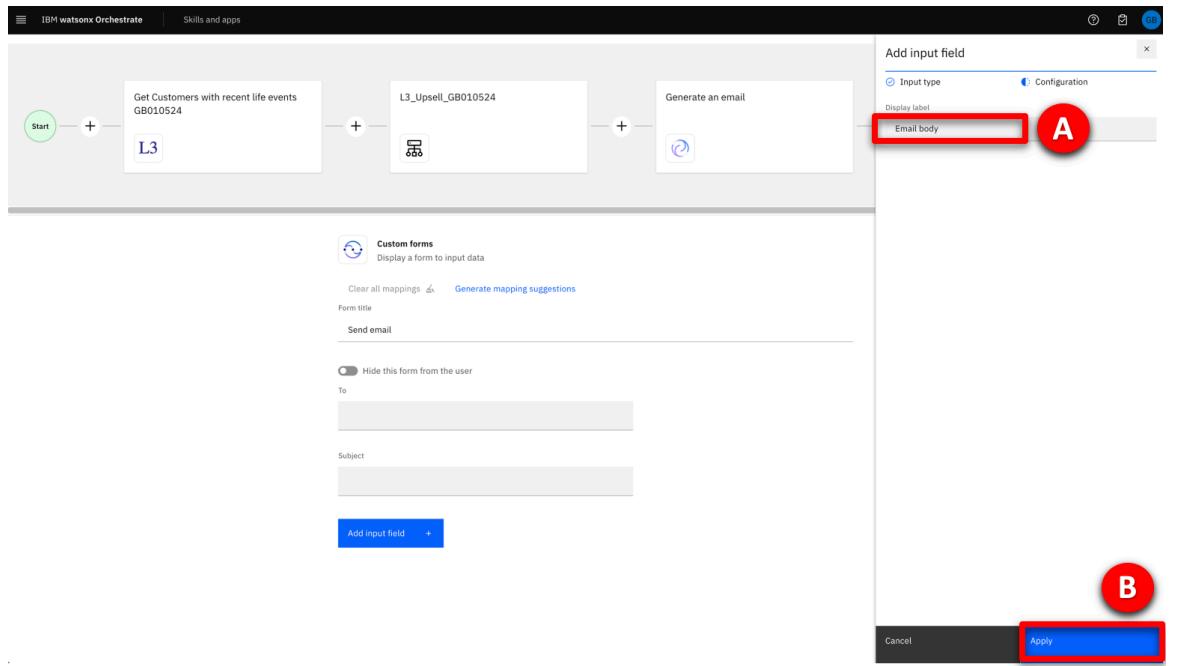
Narration Next, a field for the email body is added to the form, this field will be a **Paragraph text** field.

Action 4.32 Add a field to the form by performing the following steps:
A. Click **Add input field**.
B. Select the **Paragraph text** radio button in the **Add input field** section on the right side of the screen.

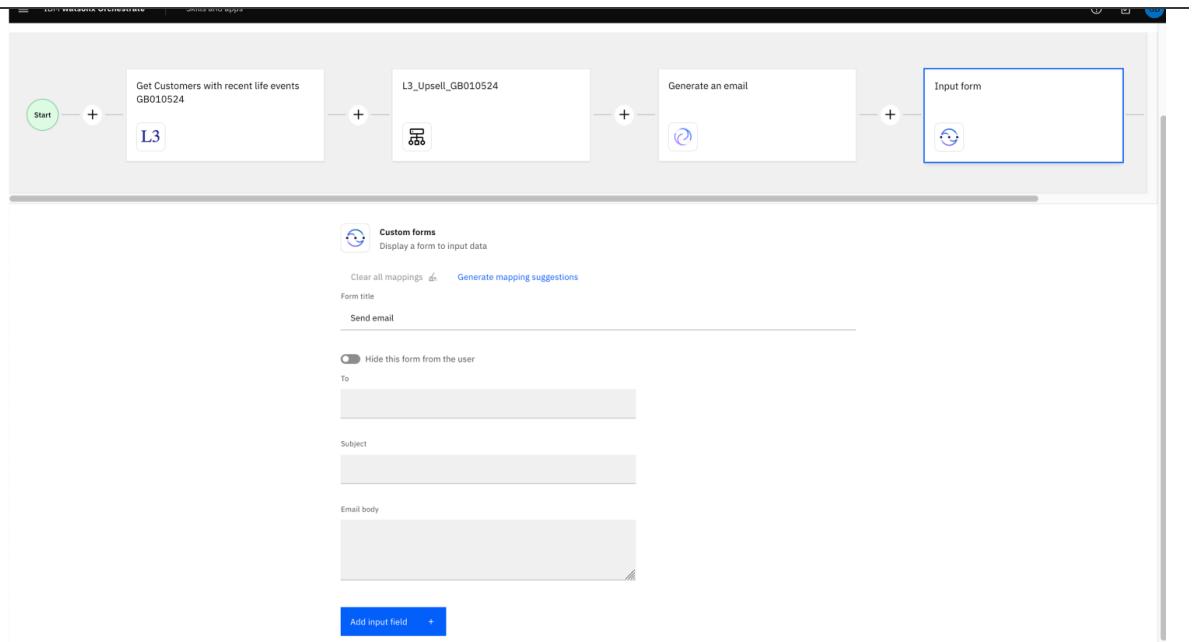


Narration This input field will receive the email body generated by watsonx.ai.

Action 4.33 Label the input field by performing the following steps:
 A. Enter the value “Email body” into the **Display text** field.
 B. Click the **Apply** button.



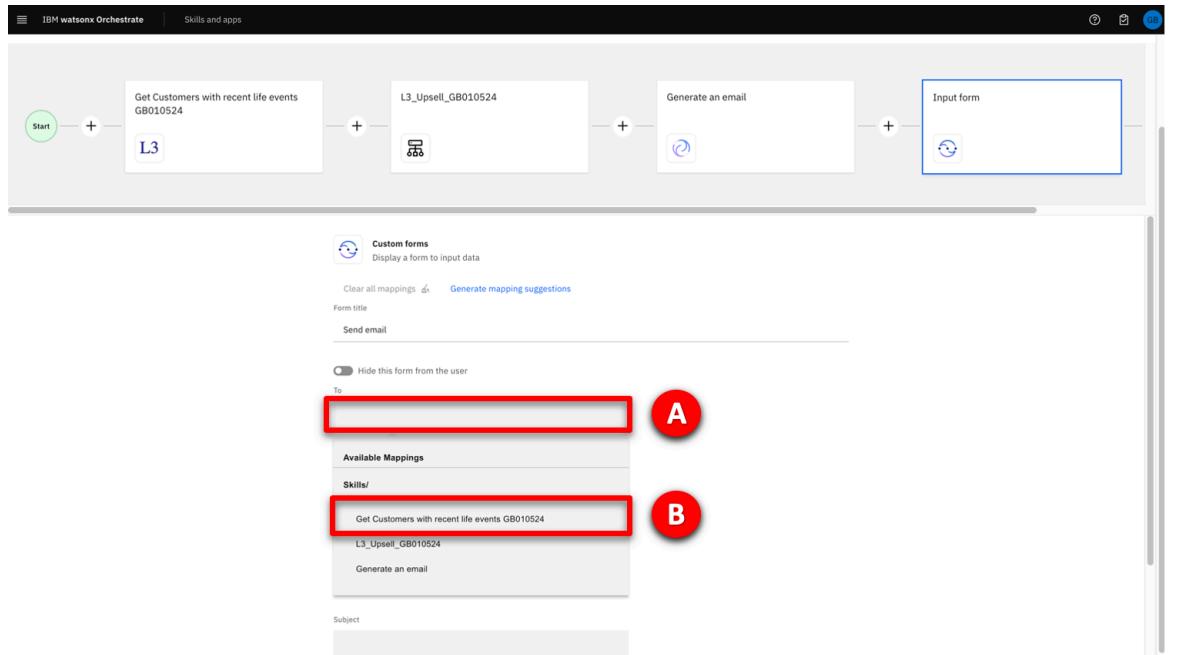
i Your form should now resemble the example below with **To**, **Subject** and **Email body** fields.

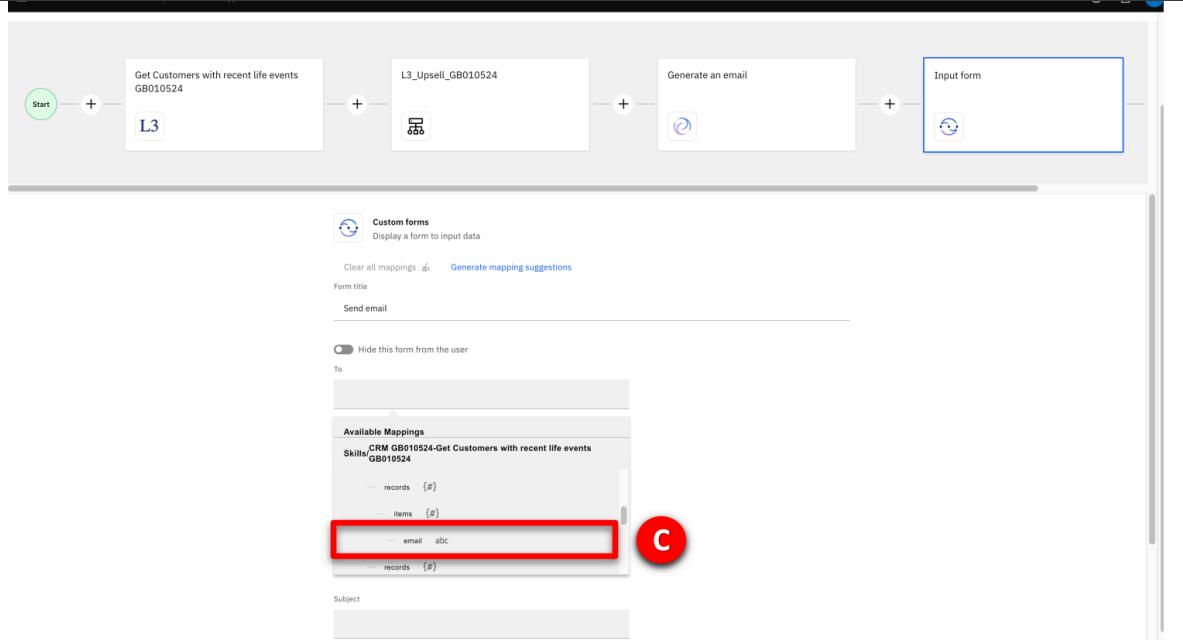


Narration To complete the form the mappings must be added.

Action 4.34 Configure the mappings for the input form by performing the following steps:

- Click the **To** field.
- From **Available Mappings**, select **Get a list of customers with recent life events XXddmmyy**.



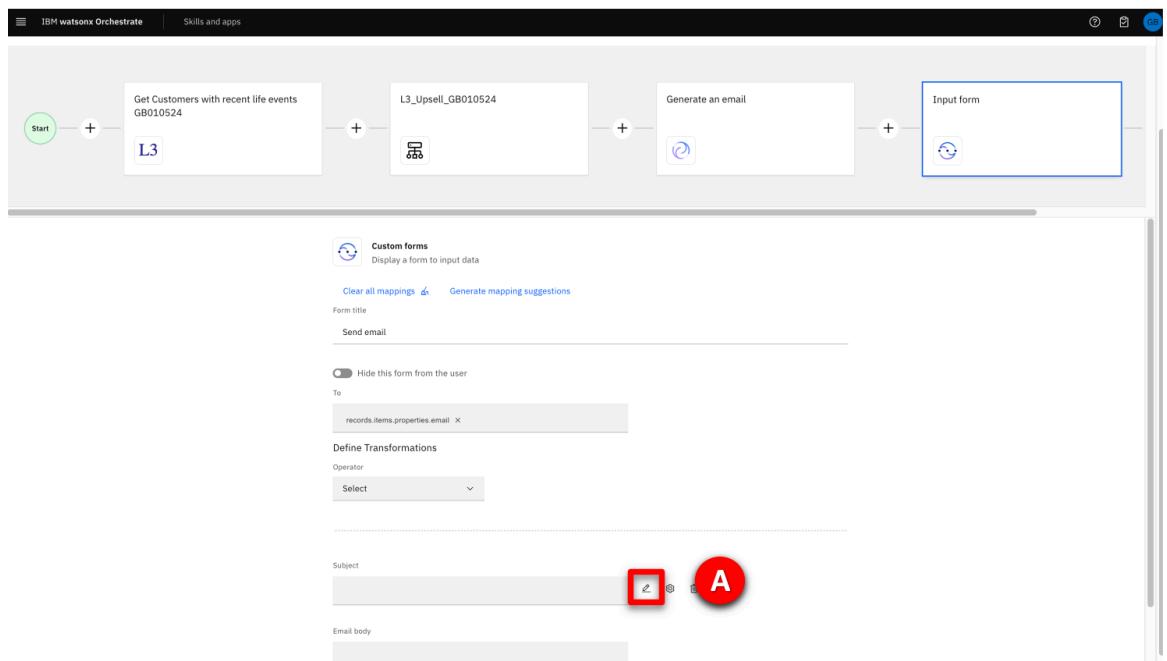


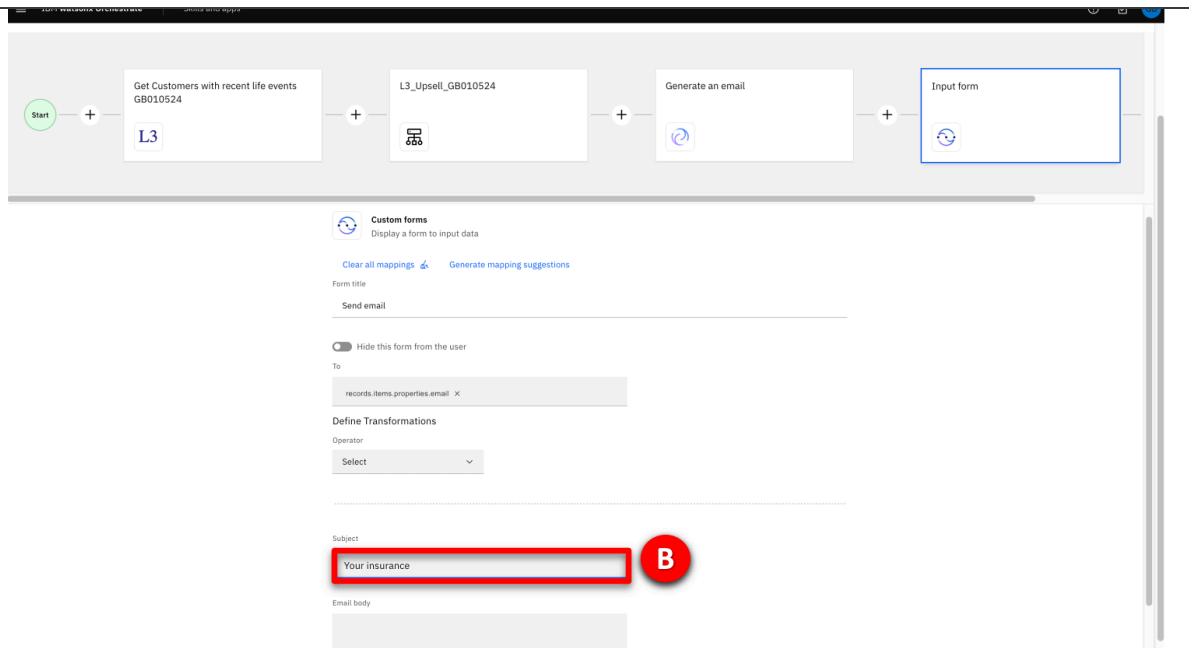
Narration A default value will be used to populate the **Subject** field.

Action 4.35

Provide a default value for the **Subject** field by performing the following steps:

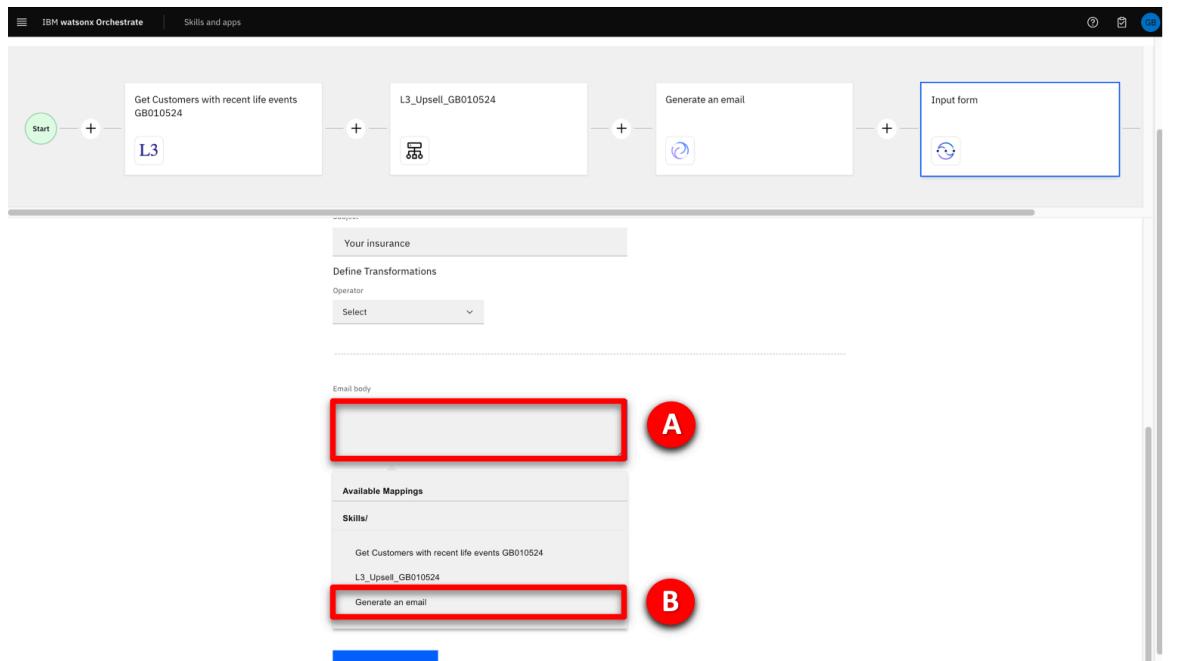
- Hover over the **Subject** field and click the corresponding **Pencil** icon when it appears.

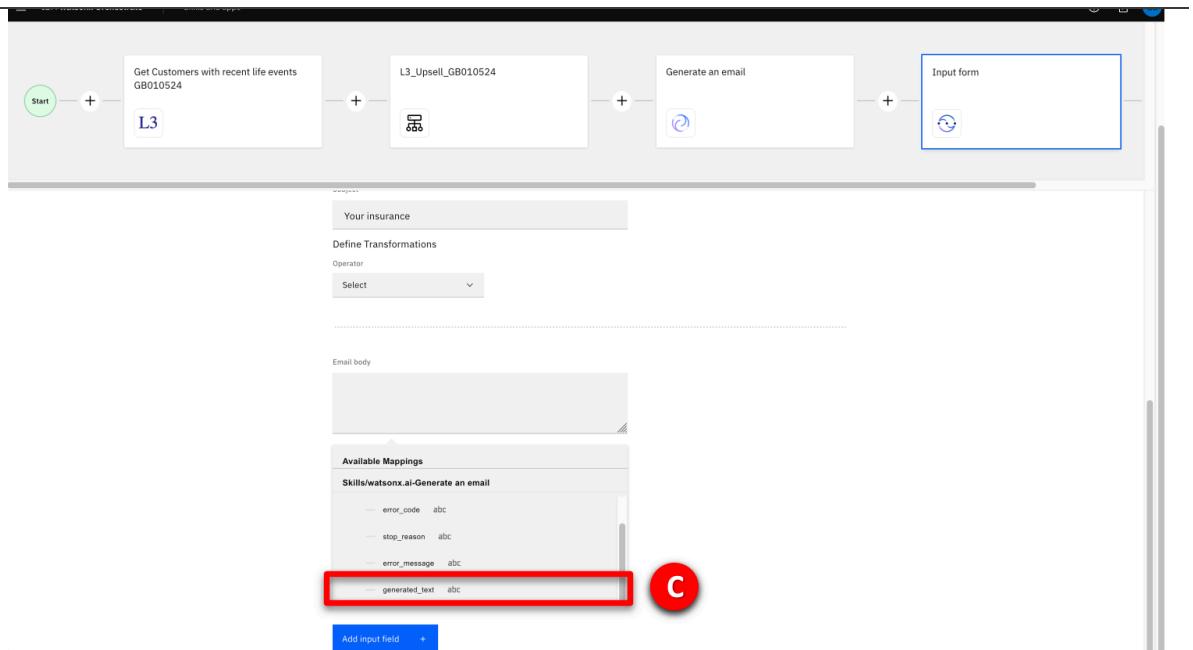




Narration The text produced from the Generate an email skill will be used to populate the **Email body** field.

Action 4.36 Map the value for the Email body by performing the following steps:>
A. Scroll down and click on the **Email body** field.
B. In the **Available mappings** section, select **Generate an email**.





Narration

This completes the skill flow creation. In the next section, you will save this skill flow and then publish it, so it is available for use by any seller at the insurance company.

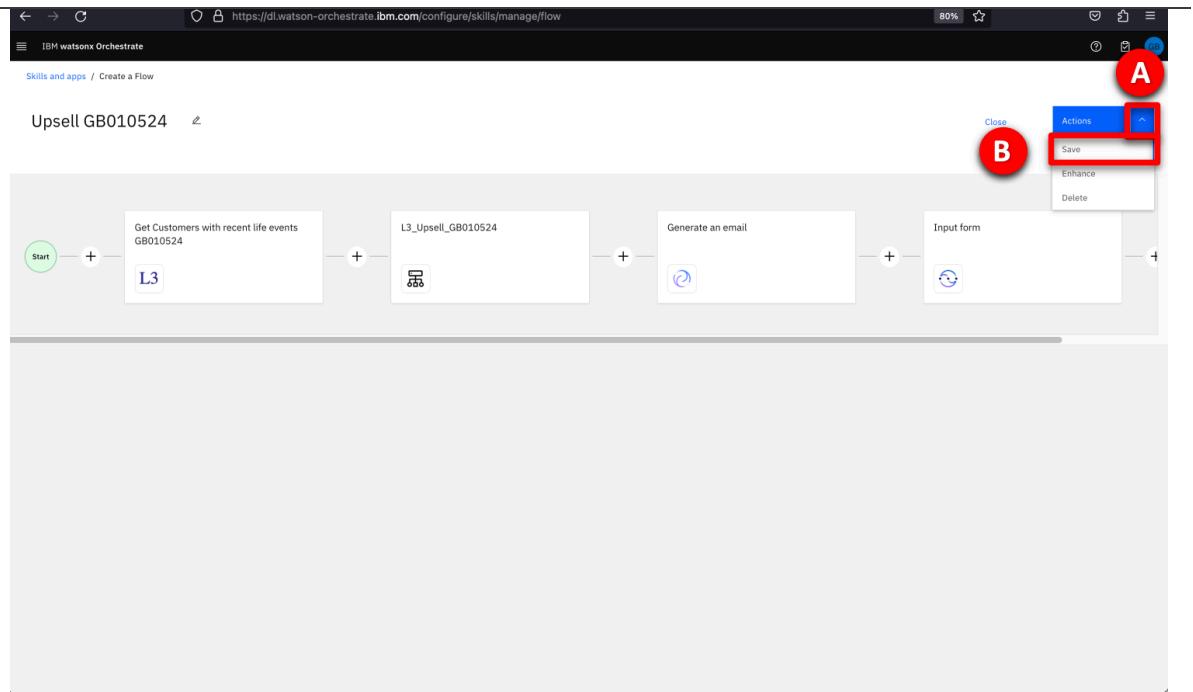
▼ 5 – Saving and publishing the skill flow

Narration

Before the new skill flow can be used, it must be enhanced and published. Enhancement allows you to fine-tune how the skill is presented and train the conversational interface to recognize when the skill should be used. First, save the skill flow.

Action 5.1

- Scroll to the top of the page and click on the **Actions** button drop down.
- Select **Save** or **Save as draft**.



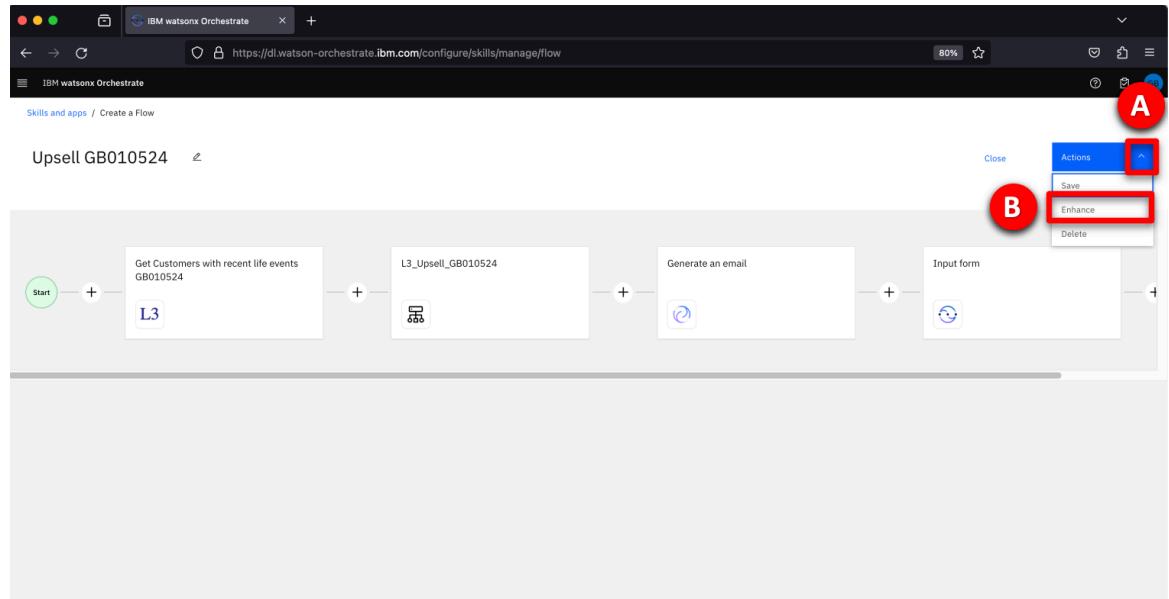
Narration

Next use the **Enhance** window to enter training phrases and publish the skill flow.

Action 5.2

Open the Enhance window by performing the following steps:

- Click the **Actions** button drop down.
- Select **Enhance**.



Narration

Using the **Enhance** window, phrases are entered that are used to train the conversational interface to recognize when the skill should be used. Multiple phrases can be entered to train the conversational interface. In a real project, several alternative phrases would be used to train the AI to ensure the skill is activated.

Action 5.3

Enter a training phrase by performing the following steps:>

- Select the **Phrases** tab.

Skills and apps / Enhance this skill

Enhance the "Upsell GB010524" skill

Add details that will make people want to use this skill.

A

Name	Phrases	Next best skills
Upsell GB010524		
Description	Enter the description	0/100
API version*	1.0.0	X
Categories	Add categories	
App	Skill flows	

Preview

The skill will look like this in the catalog.

Upsell GB010524

The skill will look like this in the skill set.

Upsell GB010524

Buttons: Cancel, Publish, Save as draft

B. Enter a phrase to trigger the skill flow, for example: “**write an upsell email to my customers**”, then click **Publish (C)**.

IBM Watsonx Orchestrate

Skills and apps / Enhance this skill

Enhance the "Upsell GB010524" skill

Add details that will make people want to use this skill.

B

Name	Phrases	Next best skills
Upsell GB010524	write an upsell email to my customers	
Enter new train phrase		

C

Buttons: Cancel, Publish, Save as draft

Narration

Before the skill flow can be run, it must be added into your personal skill set from the skill catalog.

The screenshot shows the IBM Watsonx Orchestrate interface. In the top left, there's a navigation bar with icons for Chat, Manage team, Monitor skills, and Skill catalog. The 'Skill catalog' icon is highlighted with a red box and a red circle labeled 'B'. The main content area is titled 'Skills and apps' and contains a section for 'Skill catalog'. It says, 'Find your skills and publish them to the catalog so your team can benefit from them quickly.' Below this is a table with columns for 'Description' and 'Configuration status'. The table lists several skills, each with a yellow warning icon and the word 'Required'. At the bottom of the table, it says '10 of 14 items'. In the top right corner, there's a green notification box that says 'Published successful Published skill Upsell GB050324' with a timestamp '13:27:01'.

Narration

The unique reference used to name the skill flow can be used to find it in the skill catalog.

Action 5.5

Find the skill flow by performing the following steps:

- Enter your unique skill reference (**XXddmmyy**) in the **Search** panel and press **Enter**.
- Click the **Skill flows** tile in the **Apps** section.

The screenshot shows the 'Skill catalog' page. At the top, there's a search bar with the text 'GB010524' and a magnifying glass icon. Below the search bar, there's a heading 'Apps' and three cards: 'L3_Upsell_GB010524' (1 skill), 'CRM GB010524' (1 skill), and 'Skill flows' (1 skill). The 'Skill flows' card is highlighted with a red box and a red circle labeled 'B'. The background is light blue with some blurred text and icons.

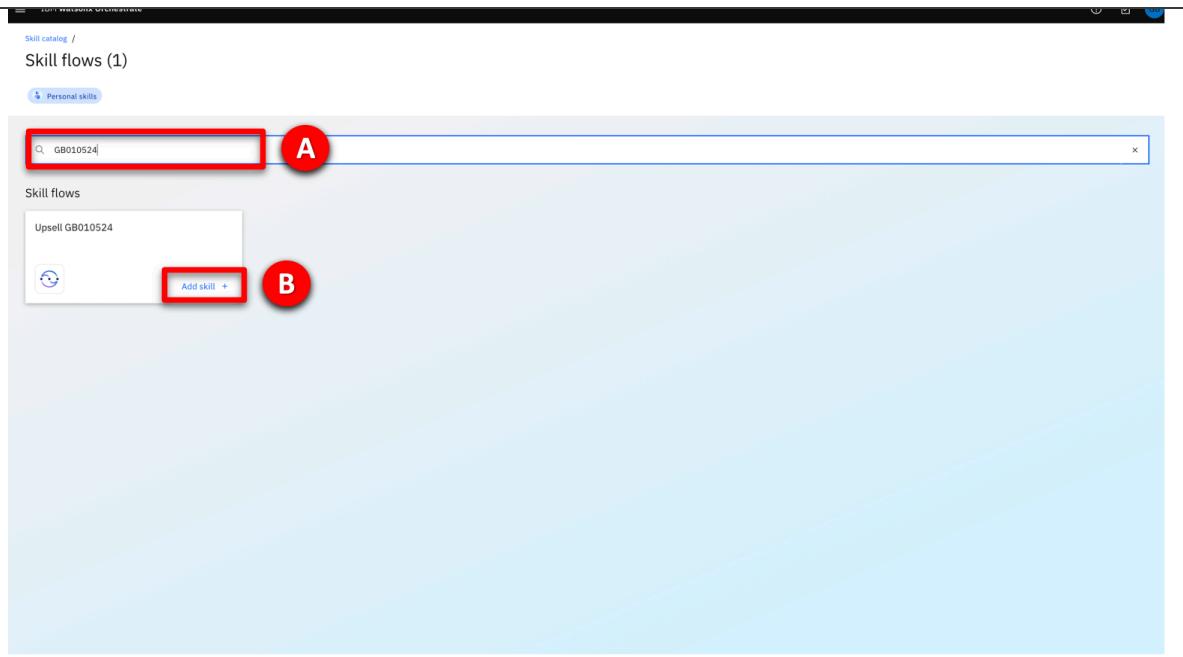
Narration

When the catalog entry for skill flows is displayed, the unique reference can be used again.

Action 5.6

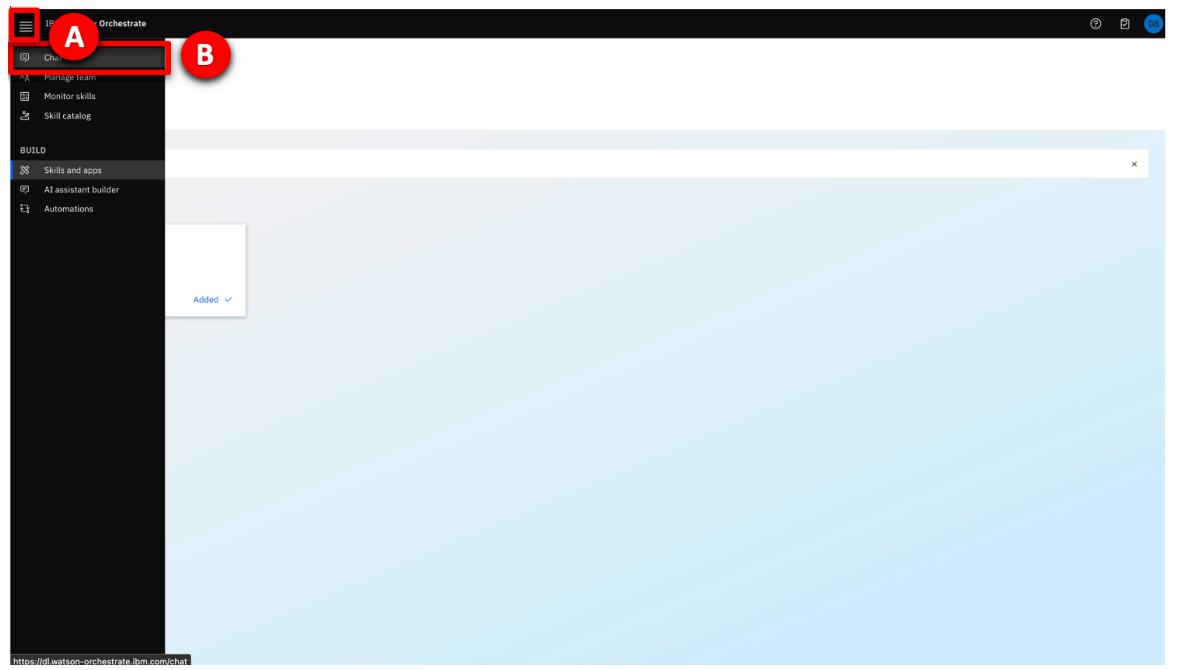
Add the skill flow by performing the following steps:

- Enter your unique skill reference (**XXddmmyy**) in the **Search** panel again and press **Enter**.

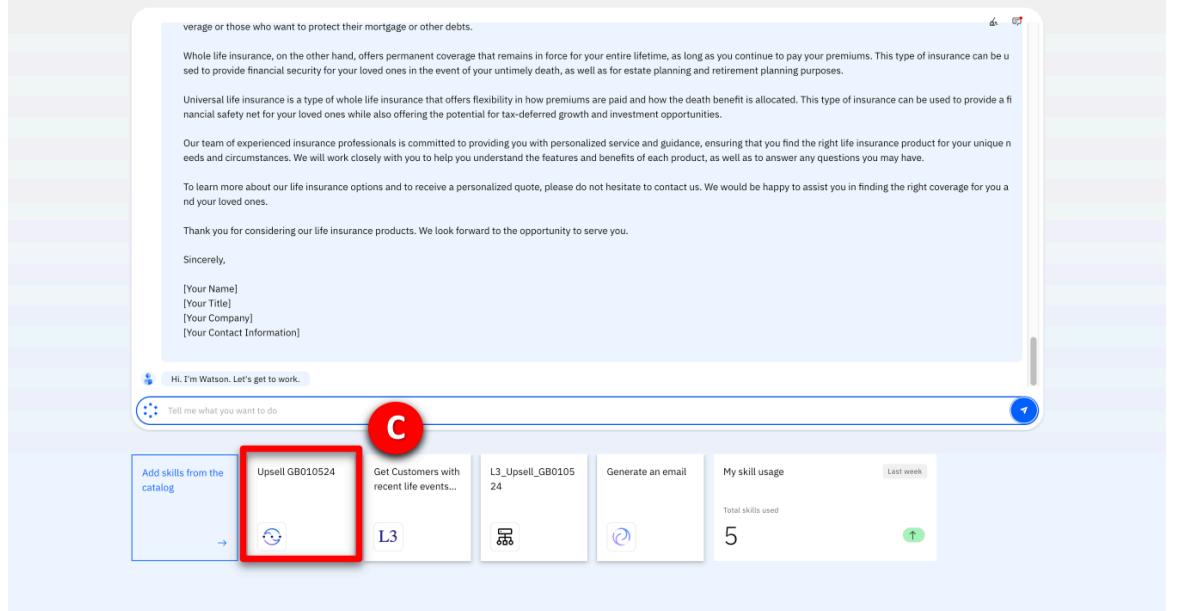


Narration The skill flow has been added to the personal skills collection and should be available in the main chat window.

Action 5.7 Return to the Chat window by performing the following steps:>
A. Click the **hamburger navigation** menu icon from the left menu.
B. Select **Chat**.



C. Confirm that a tile representing your skill flow has been added



If you have created more than one skill flow, the new skill flow will be grouped with other skill flows in a parent Skill Flow tile.

▼ 6 – Using the skill flow

Narration

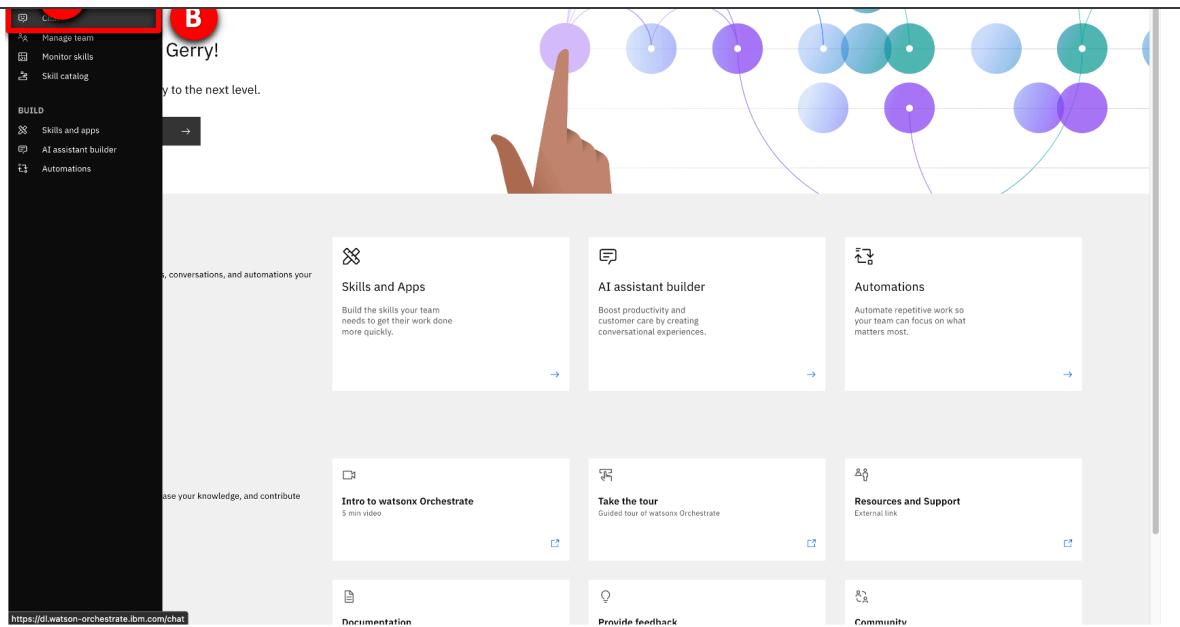
Before you run the new skill flow let's summarize what you've seen so far:

- Individual skills performing useful but isolated functions, such as customer search and product upsell.
- A brief look into decision automation, and how business logic can be represented with a decision model.
- Implemented a simple workflow using skill flows to connect skills together.

The skill flow is complete and published for sales agents to use. Now let's assume the persona of an insurance seller to see how the upsell process has been transformed with WatsonX Orchestrate.

Action 6.1

Open the Chat window (if not already open) by clicking the **hamburger navigation** menu icon (A) and select **Chat** (B) from the left menu.



Action 6.2

Perform the following steps:

- Type the command “**write an upsell email to my customers**”.
- Click the **Send** arrow.

i You can also click the skill tile that corresponds to the skill flow you created to invoke this skill.

The screenshot shows a chat interface within the IBM Watsonx Orchestrate platform. The message history includes a message from 'Hi. I'm Watson. Let's get to work.' followed by a user input box containing the command 'write an upsell email to my customers' (highlighted with a red box and labeled 'A'). Below the input box is a send button (highlighted with a red box and labeled 'B'). At the bottom, there's a navigation bar with buttons for 'Add skills from the catalog', 'Upsell GBO10524', 'Get Customers with recent life events...', 'L3_Upsell_GBO10524', 'Generate an email', 'My skill usage' (showing 5 total skills used last week), and a help icon.

Narration

IBM Watsonx Orchestrate runs the skill flow, retrieving a list of customers with recent life events. The retrieved customer data is neatly displayed in a table within the chat interface.

The agent reviews the list of customers and pursues a cross-sell opportunity with **Janet Thomas**, who has recently turned 64, as depicted in the **Recent Change** field.

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there's a navigation bar with the text "IBM Watsonx Orchestrate" and "Personal skills". Below the navigation bar is a search bar with placeholder text "Tell me what you want to do". The main area displays a table titled "Records" with columns: Name, Age, Id, AccountId, Email, Recent Change, and Current Products. There are five rows of data. The first row (John Collins) has a blue circular icon next to it. The second row (Janet Thomas) has a red circular icon with the letter "A" over it, indicating the user needs to click the "Apply" button for this record. The third row (Oliver Paul) has a blue circular icon. The fourth row (Mary Green) has a blue circular icon. The fifth row (Sam Anthony) has a blue circular icon. At the bottom of the table, there are buttons for "Cancel" and "Apply". Below the table, there are several cards: "Add skills from the catalog" (with a right-pointing arrow), "Upsell GB010524" (with a blue circular icon), "Get Customers with recent life events..." (with a blue circular icon), "L3_Upsell_GB010524" (with a blue circular icon), "Generate an email" (with a blue circular icon), and "My skill usage" (with a green circular icon showing the number 5). The "My skill usage" card also includes a "Last week" link.

Narration

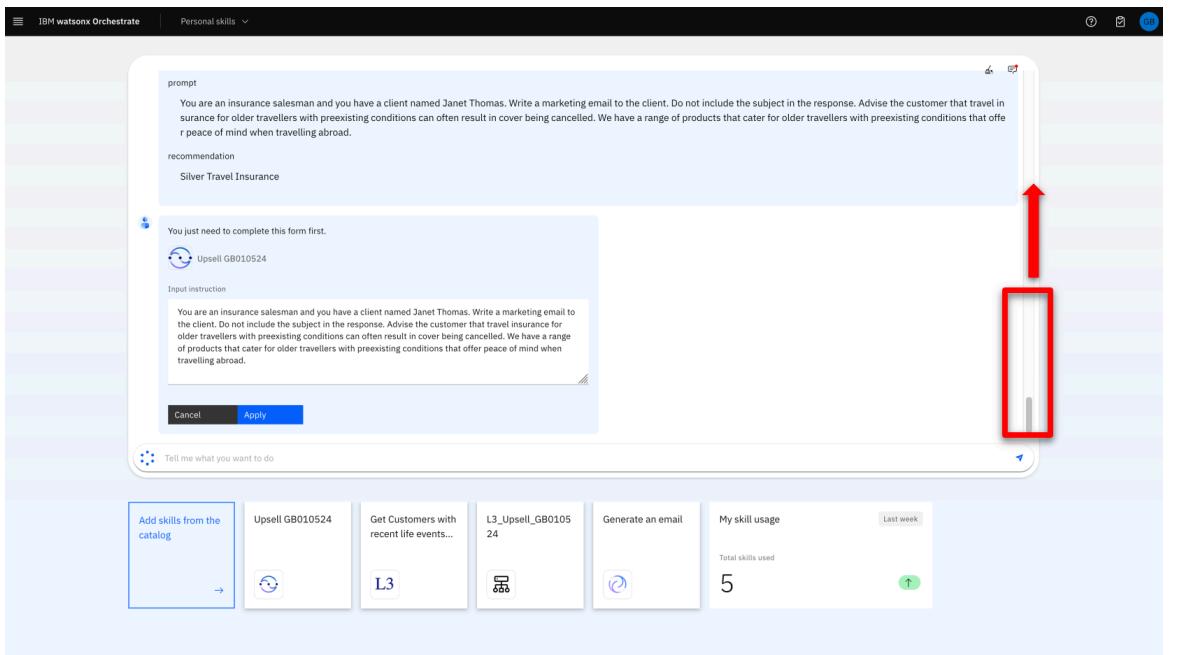
Next, the agent needs to determine which products to recommend for Janet based on her circumstances and recent life event.

The customer details from the CRM system are automatically submitted into watsonx Orchestrate's built-in decision engine and the upsell recommendations are displayed. Behind the scenes, the decision engine applies business logic that considers many different attributes specific to this customer (Janet Thomas), such as age, life event, and current coverage to determine the best product that the insurance agent should suggest to this customer.

Action 6.4

Click the **Apply** button.

This screenshot is identical to the one above, but the "Apply" button at the bottom of the "Records" table is now highlighted with a red box, indicating the user should click it to proceed.

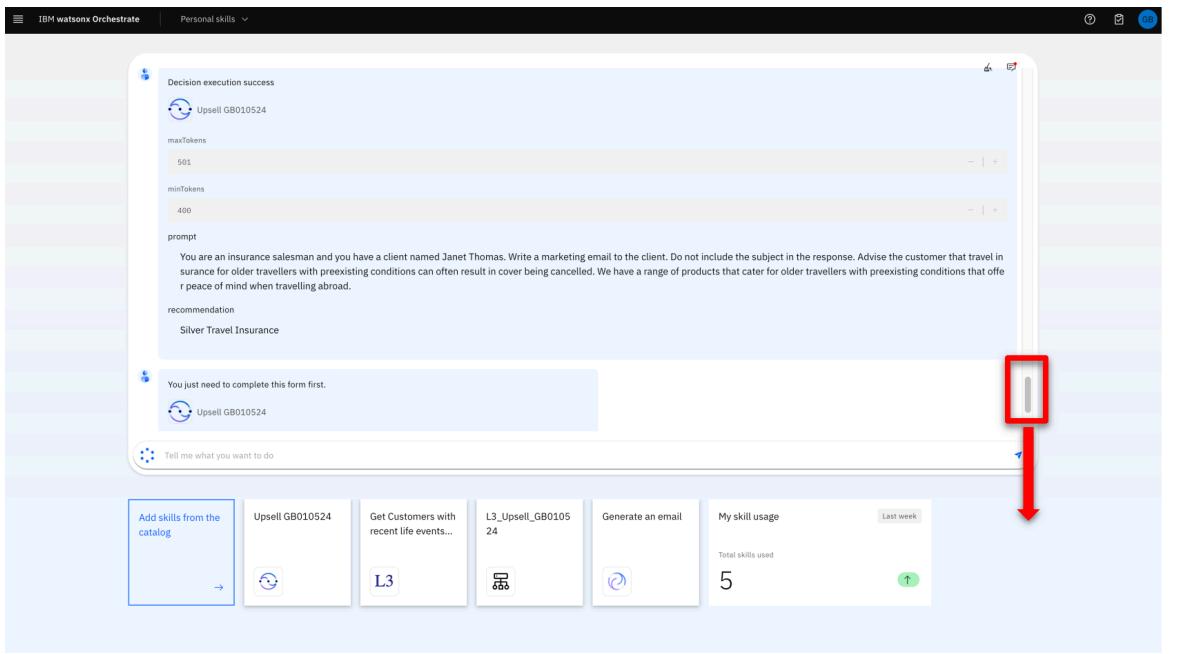


Narration

In this case, the decision engine recommended the **Silver Travel Insurance Plan**, and based on this, it has also created a prompt for a generative AI model to create the marketing upsell email.

Action 6.6

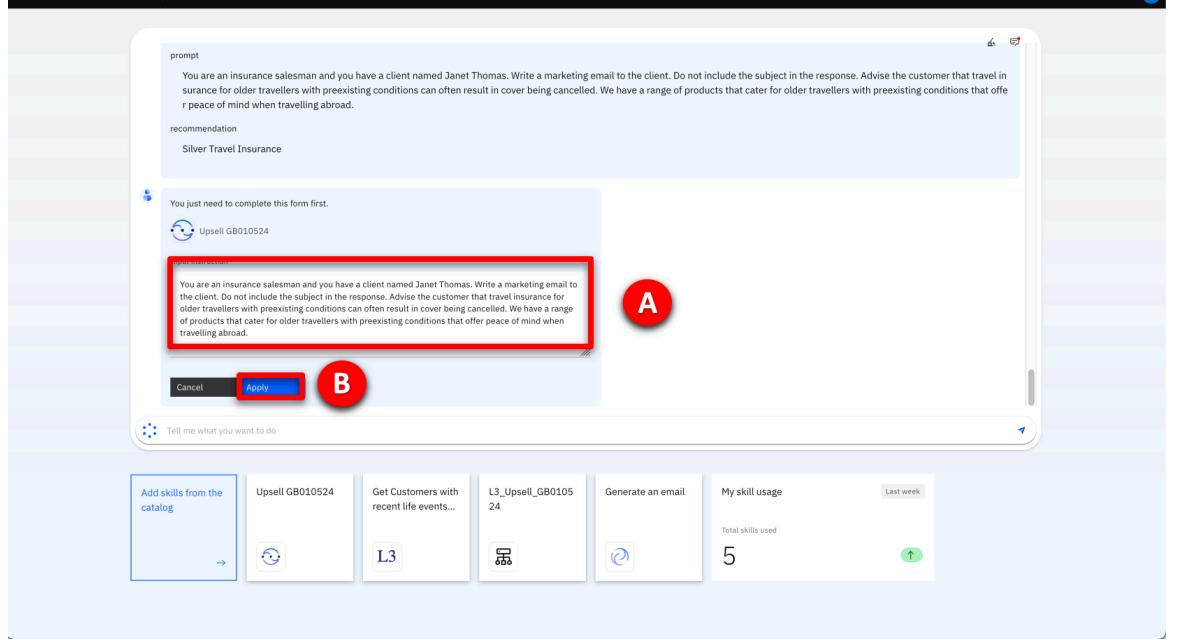
Review the prompt then scroll to the bottom of the chat window to review the input for the generative AI model.



Action 6.7

Perform the following steps:

- Review the prompt created for the customer (**Janet Thomas**).



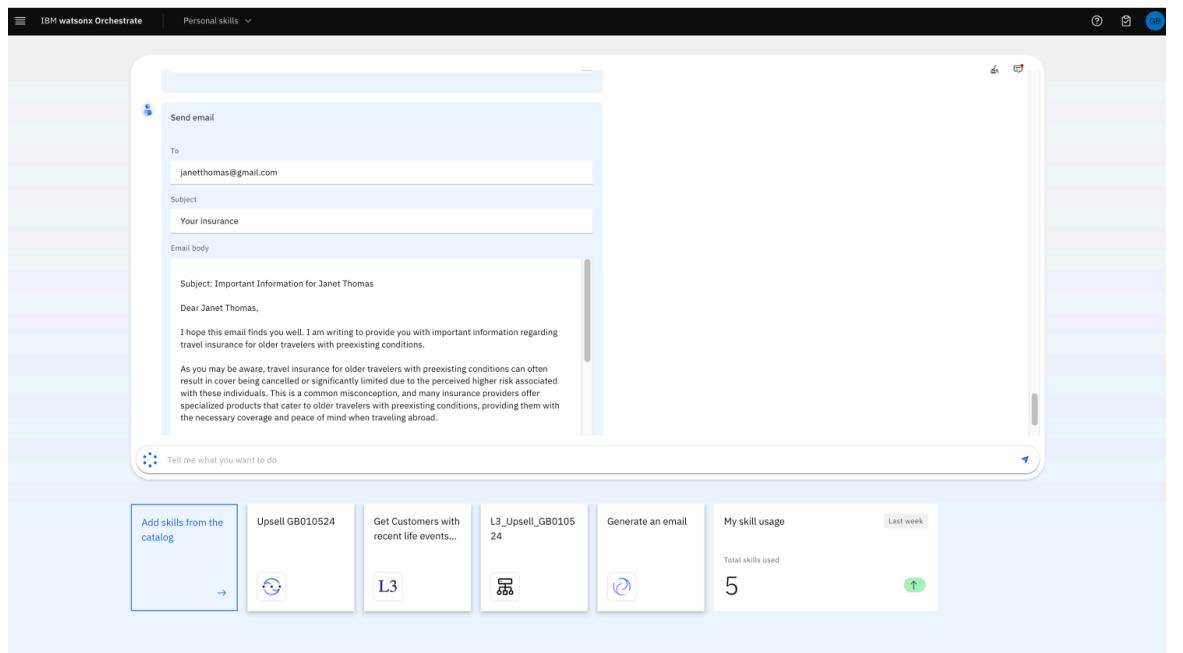
Narration

Clicking **Apply**, submits the prompt into the Generate an email skill, and this will take approximately thirty seconds to complete. For this particular skill, Watsonx Orchestrate is working asynchronously, it's not blocking and waiting for a response that may otherwise time-out. Instead, it is notified by the long running activity when the work is finished and then resumes the skillflow. During this waiting time, the user is able to do other work, and can jump back to this task once the response is received.

The response created for the customer (Janet Thomas) is returned and displayed. The customer email address, subject and email body are pre-filled, allowing the user to review the generated content for accuracy and add any further information to ensure the proposal is relevant to the customer.

Action 6.8

Review the generated email.



7 – Summary

Using an upsell/cross-sell example, this lab showed how WatsonX Orchestrate provides a conversational interface for insurance sales AI Agents perform daily repetitive tasks and reduce the time it takes to complete common business tasks, such as searching through CRM reports for sales opportunities.

A pre-configured CRM search saved time and helped agents find upsell opportunities. Product expertise was used to create a WatsonX Orchestrate automation that provides optimal product recommendations based on client circumstances. It then combined these recommendations with client details into a prompt that was submitted into an IBM generative AI model. The result is a client proposal derived from accurate client data, expert product knowledge and a trusted foundation model trained on enterprise data, ready for the agent for review
