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AI Assist Guide

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AI Assist: Improve Response

Conversation Assist

Deliver impactful coaching and simplify performance evaluations.

Available Now!

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

> 3. What specifically could they work on or improve to increase their impact next time?
>
> You did a great job on managing projects this year but definitely missed the mark on a couple of things. You could have delivered on projects on time had you worked cross functionally. Hopefully you can wrap them up this week.
>
> ✦ AI Assist: Improve Feedback ⌃ ⓘ
>
> Your performance in managing projects this year was impressive. However, there were a few areas where you could have improved. To ensure timely delivery of projects, it would be beneficial to work collaboratively with other teams. Best of luck in wrapping up any outstanding projects this week.
>
> ⟳ REGENERATE   ✓ APPLY
>
> Why apply this suggestion?
>
> The language used was direct and could be perceived as harsh. It has been rephrased to sound more constructive and encouraging.
>
> 👍 👎

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

Bryan Singer
HR Director, Zilliant

AI Assist: Improve Response

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

Step 1 Start entering your responses to the prompts within your **Conversation** requests.

> **3. What specifically could they work on or improve to increase their impact next time?**
>
> You did a great job on managing projects this year but definitely missed the mark on a couple of things. You could have delivered on projects on time had you worked cross functionally. Hopefully you can wrap them up this week.
>
> ✨ AI Assist: Improve Feedback ⌄ ⓘ

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

> ✨ AI Assist: Improve Response ⌃ ⓘ
>
> They could collaborate across teams to minimize redundant tasks and meet deadlines. While their project management skills are improving, there is still potential for growth in this area.
>
> ⟳ REGENERATE   ✓ APPLY
>
> **Why apply this suggestion?**
>
> The language used is too direct. It has been rephrased to sound more professional and inclusive.
>
> 👍 👎

Step 3 Click **Regenerate** to view a different response or click **Apply** to copy the AI generated content into your conversation response. Don't forget to rate the responses using the 👍👎 icons.

AI Assist: Improve Feedback

1. What feedback do you have for this employee on how they can better achieve their development goals?

09/03/2024

They could work cross functionally to reduce duplication of efforts and meet time expectations. Project management skills are getting better but still room for improvement there.

✦ AI Assist: Improve Response ⌃ ⓘ

They could collaborate across teams to minimize redundant tasks and meet deadlines. While their project management skills are improving, there is still potential for growth in this area.

C REGENERATE   ✓ APPLY

Why apply this suggestion?

The language used is too direct. It has been rephrased to sound more professional and inclusive.

Feedback Assist

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

Available Now!

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

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

Jizelle Reguindin
Learning & Development Specialist, West Coast University

AI Assist: Improve Feedback

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

Step 1 Start entering your responses to the prompts within your **Feedback** template.

> **3. What specifically could they work on or improve to increase their impact next time?**
>
> You did a great job on managing projects this year but definitely missed the mark on a couple of things. You could have delivered on projects on time had you worked cross functionally. Hopefully you can wrap them up this week.
>
> ✦ AI Assist: Improve Feedback ⌄ ⓘ

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

> ✦ AI Assist: Improve Response ⌃ ⓘ
>
> They could collaborate across teams to minimize redundant tasks and meet deadlines. While their project management skills are improving, there is still potential for growth in this area.
>
> ↻ REGENERATE   ✓ APPLY
>
> **Why apply this suggestion?**
>
> The language used is too direct. It has been rephrased to sound more professional and inclusive.
>
> 👍 👎

Step 3 Click **Regenerate** to view a different response or click **Apply** to copy the AI generated content into your response. Don't forget to rate the responses using the 👍👎 icons.

AI Assist: Summarize Feedback

Feedback Summary

Deliver impactful coaching and simplify performance evaluations.

Available Now!

Provide a **summary of past feedback**, find recurring themes in strengths and areas for improvement.
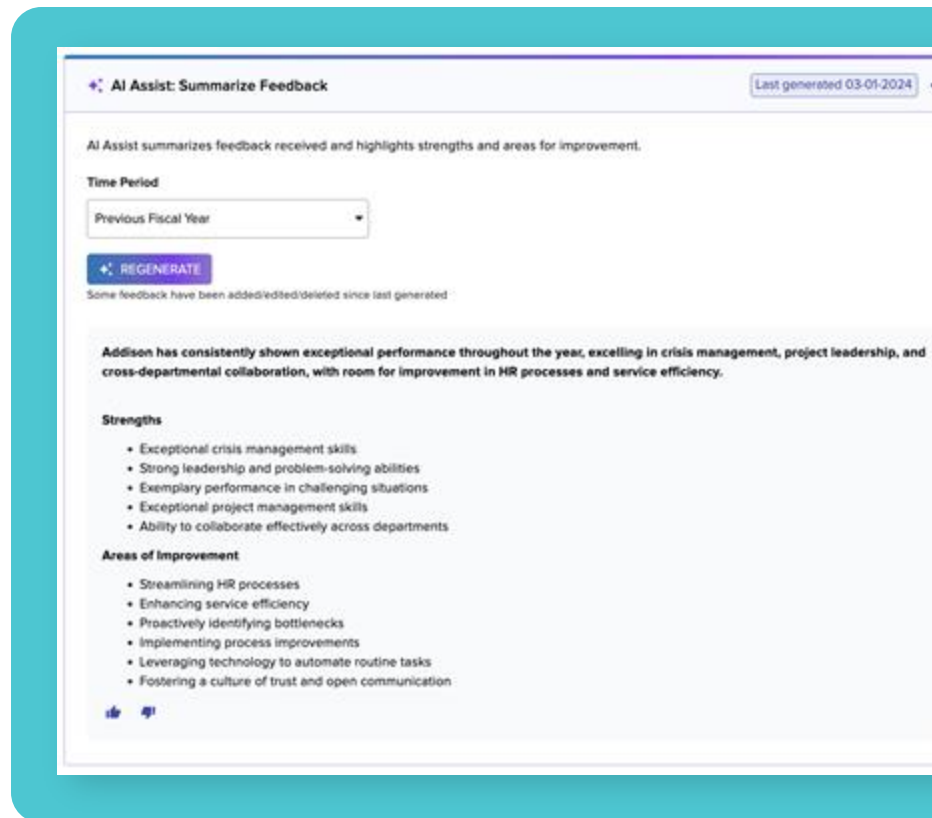
Q: Who can generate a Feedback Summary?

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

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

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

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

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

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

No, a user can generate the summary only once, unless feedback has been added, edited, or deleted. In such cases, re-generation is recommended for an up-to-date summary. The ability to regenerate is greyed out and unavailable if there has been no change to feedback.

AI Assist: Summarize Feedback

Step 1 To generate a **Feedback Summary** for yourself, navigate to the **View** tab in the **Feedback** module.
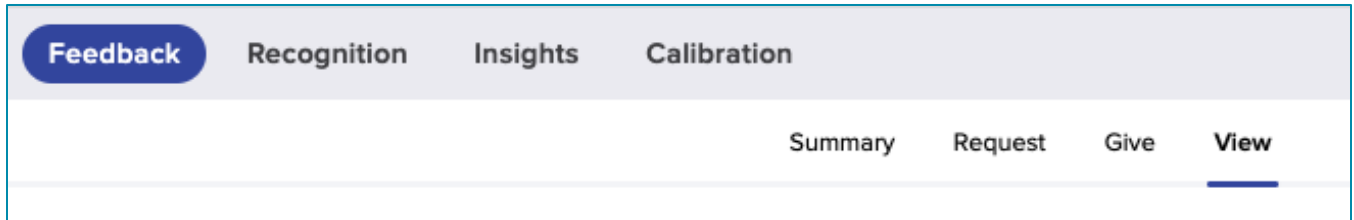
Step 2 Select the time period you would like to view for your Feedback Summary and click **Summarize** to see the results.
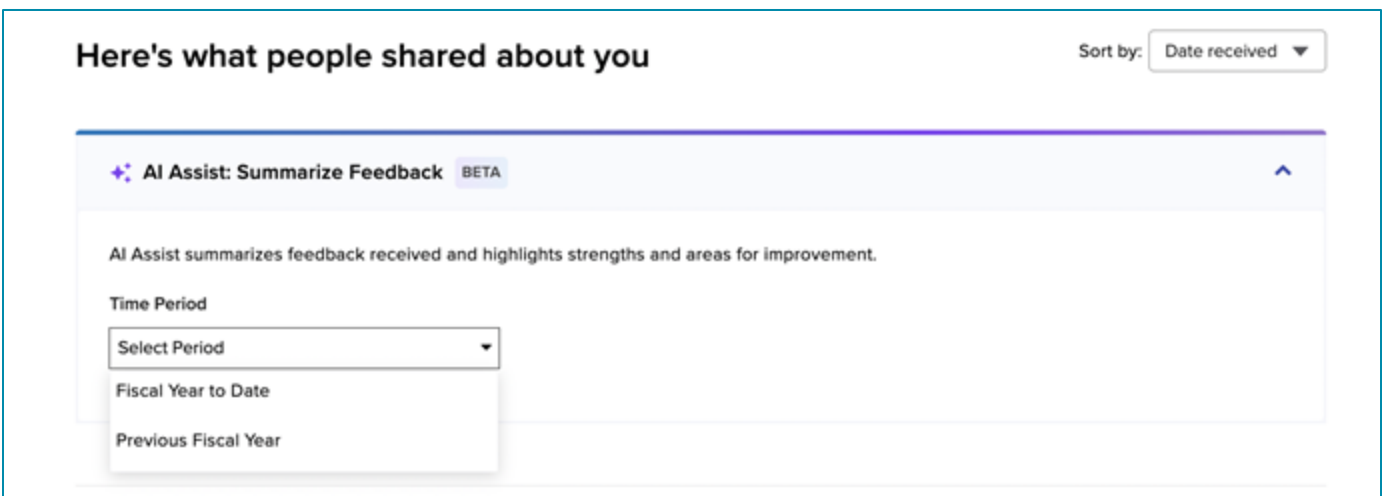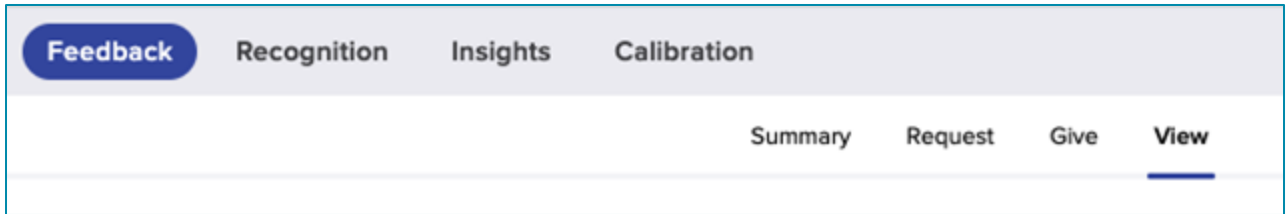

You can provide feedback on the quality of the summary generated by using the 👍👎 icons.

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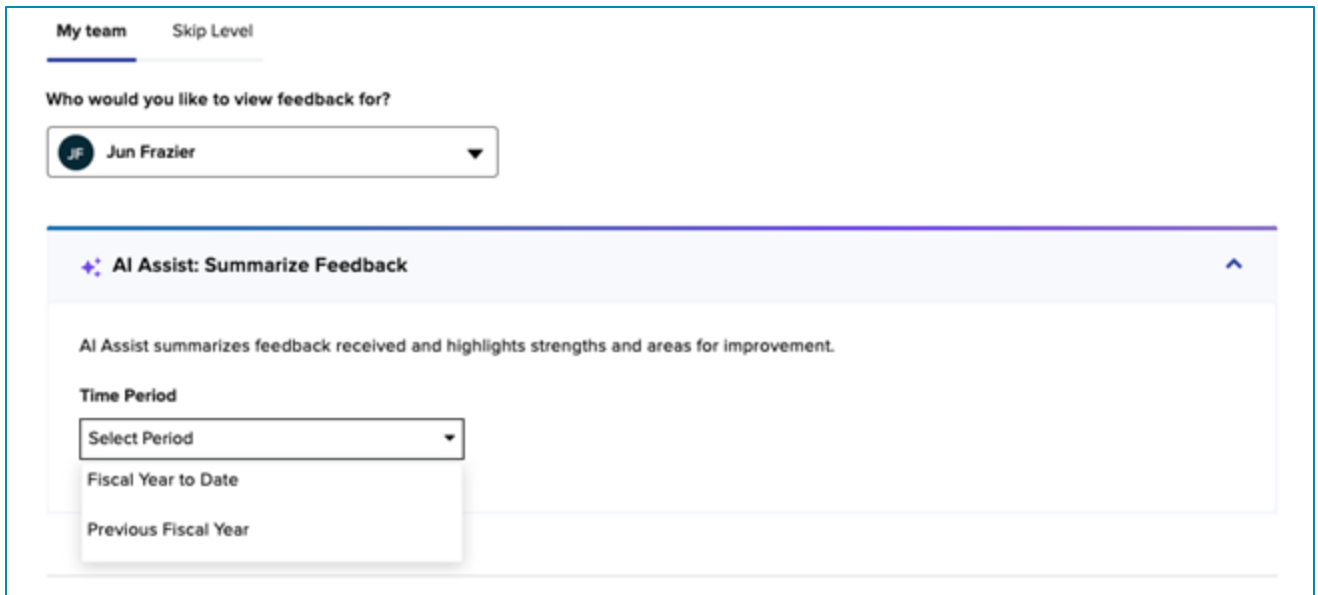
Manager-
AI Assist: Summarize Feedback

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

Feedback	Recognition	Insights	Calibration
		Summary Request Give **View**	

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

My team   Skip Level

Who would you like to view feedback for?

JF Jun Frazier ▾

✦ AI Assist: Summarize Feedback ⌃

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

Time Period

Select Period ▾

Fiscal Year to Date

Previous Fiscal Year

You can provide feedback on the quality of the summary generated by using the 👍👎 icons.

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

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

Step 2 Select the time period from the dropdowns and then click **Summarize** to see the results.

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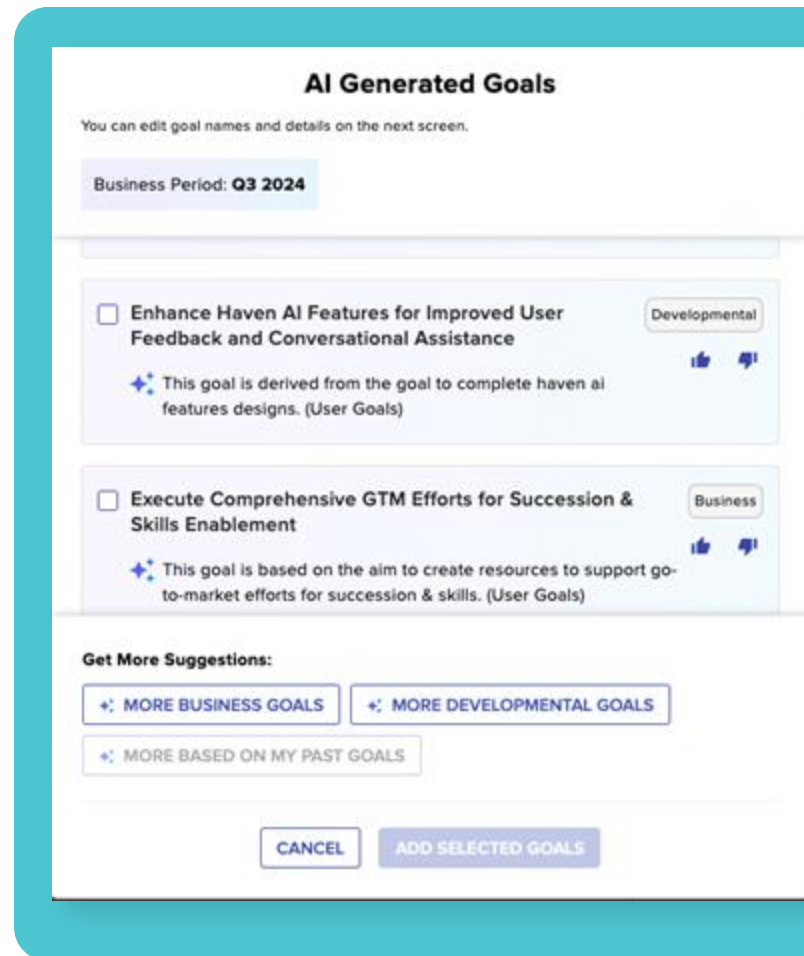
AI Goal Assist

Goal Assist

Always craft goals that are specific, measurable and aligned

Available Now!

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

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

AI Generated Goals

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

Business Period: **Q3 2024**

☐ Enhance Haven AI Features for Improved User Feedback and Conversational Assistance — Developmental

✦ This goal is derived from the goal to complete haven ai features designs. (User Goals)

☐ Execute Comprehensive GTM Efforts for Succession & Skills Enablement — Business

✦ This goal is based on the aim to create resources to support go-to-market efforts for succession & skills. (User Goals)

Get More Suggestions:

✦ MORE BUSINESS GOALS   ✦ MORE DEVELOPMENTAL GOALS

✦ MORE BASED ON MY PAST GOALS

CANCEL   ADD SELECTED GOALS

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

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

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

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

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

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

AI Goal Assist

Step 1 Navigate to the **Goals module** and click **Create Goal.**
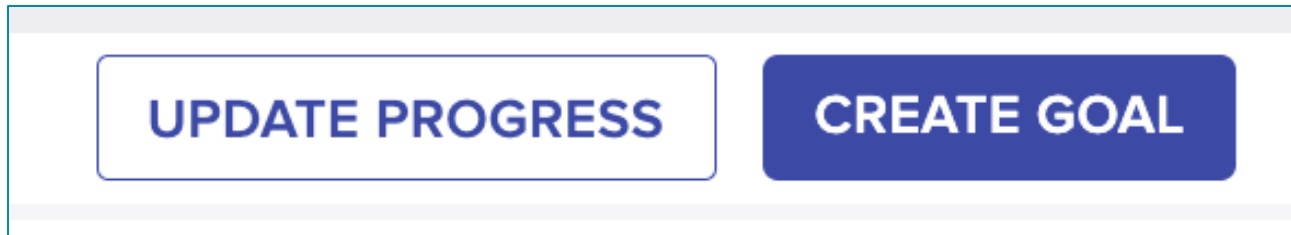
Step 2 Then click **Goal Assist** to launch the AI Assist feature.
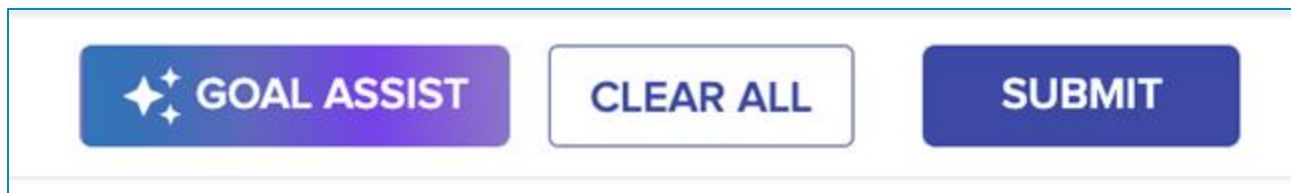
Step 3 Next, define which **business period** you are creating goals for. *This informs the Betterworks system to look back one previous business period to analyze the previous period's data.*

Create with Goal Assist

Goals suggestions are generated for the selected business period, based on data such as past goals, manager goals or feedback received.

Business Period *

FY 2024

CANCEL   GENERATE

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

AI Generated Goals

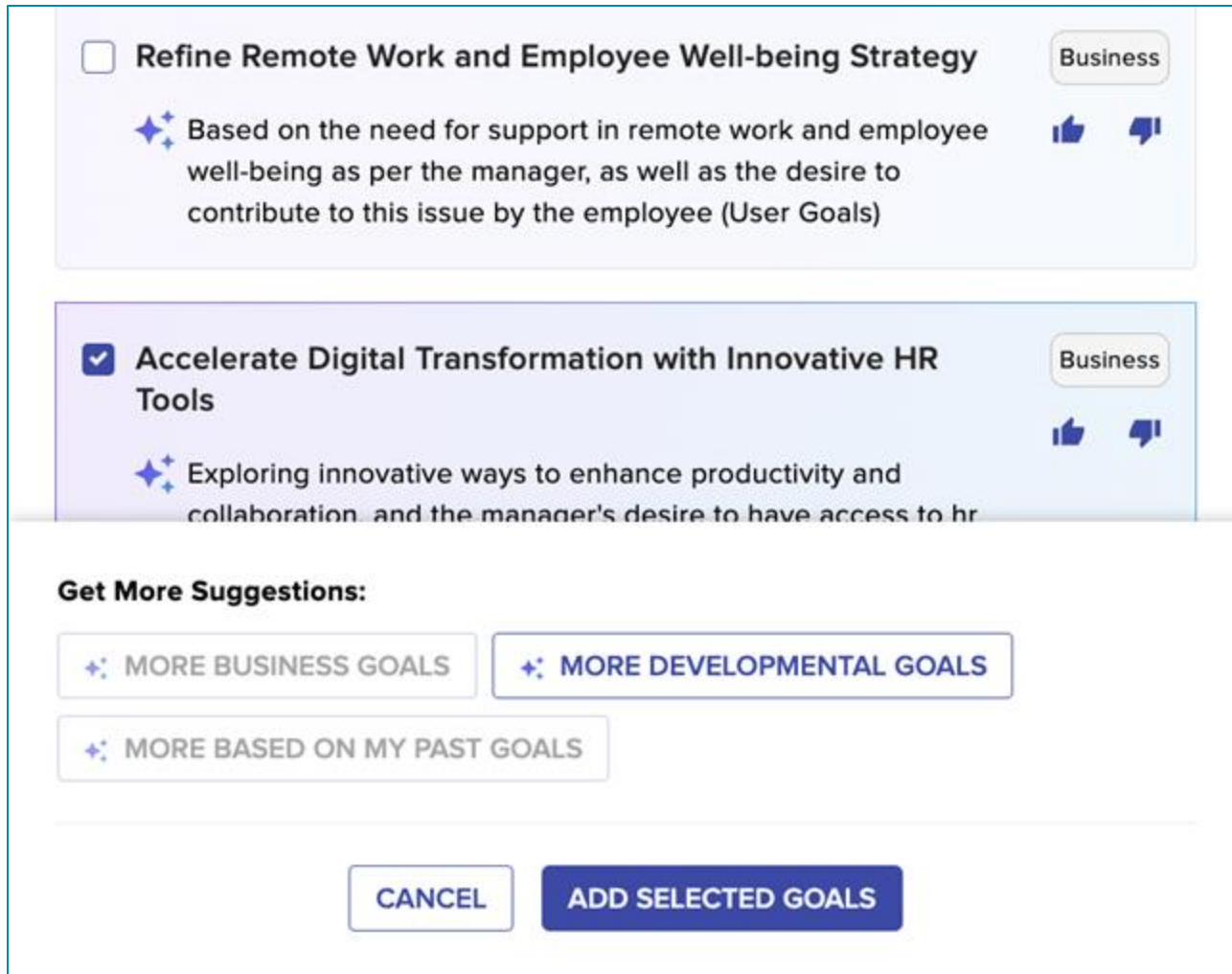You can edit goal names and details on the next screen.

Business Period: **FY 2024**

☐ **Revamp the HR department with a focus on enhancing work-from-home (WFH) amenities and employee well-being**   Business   👍 👎

✨ Suggested based on manager's discussion of supporting remote work and employee well-being (User Goals)

☐ **Lead digital transformation in the HR department to leverage technology tools for streamlining processes**   Business   👍 👎

✨ Suggested based on manager's discussion of embracing digital transformation (Top Company Goals)

Get More Suggestions:

✨ MORE BUSINESS GOALS   ✨ MORE DEVELOPMENTAL GOALS

✨ MORE BASED ON MY PAST GOALS

CANCEL   ADD SELECTED GOALS

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

To get even more AI generated goals, you can select from the given options under **Get More Suggestions**.

Additionally, you can rate the quality of the given goals using the 👍 👎 icons next to each of the goals that are generated. Goals given 👎 will automatically be hidden if you request more goals to be generated.

AI Goal Assist

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

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

Responsible AI

Responsible AI at Betterworks

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

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

Betterworks Builds Trustworthy AI

Purpose Built	**Rich Data**	**Explainable**	**Human-Centric**	**Secure**
Domain-specific, purpose-built use cases lead to accurate results that enhance performance and generate confidence-inspiring results.	Our vast, high-quality dataset fuels our AI, enabling it to deliver accurate, meaningful, and trustworthy results.	Receive transparent explanations for every AI-generated recommendation. Use AI as a co-pilot to eliminate bias, and improve clarity and professionalism.	Your judgment remains pivotal in decision- making, giving you accountability and control.	The protection of your data is built into every innovation. We are transparent about our data practices and never use customer data for model training.

Every Betterworks AI feature includes an on-and-off toggle at the most granular level, providing customers with complete control over what AI features they use. To have AI Assist features enabled for your organization, please reach out to your Betterworks representative.

Do customers need to pay an additional cost for these Generative AI capabilities?

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

Can I enable some AI features and not others?

» Yes. Customers can choose to opt-in to one, many or all AI Assist features depending on the modules available in their Betterworks application.

Can I turn the features on for select users?

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

Can customers test the features out in their preview or test environments?

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

FAQs

Where is our employees' data stored? Is it encrypted both in transit and at rest?

» All employees' data is stored securely within the our cloud solution deployed on Amazon Web Services (AWS) cloud infrastructure. AWS offers a robust suite of security features and adheres to strict compliance standards. All employee data is encrypted at rest using the industry-standard AES-256 encryption algorithm. Encryption keys are managed using AWS KMS. This significantly reduces the risk of unauthorized access to the data, even in the unlikely event of a breach. Data is encrypted in transit using TLS 1.2+ with security certificates leveraging asymmetric encryption & digital signatures (Elliptical Curve & RSA). SHA2 is used for hashing. Betterworks also provides customers with an SFTP for uploading data. This leverages SSH.

What security measures are in place to protect employee data from unauthorized access?

» We employ a multi-layered approach to security, including: strict access controls within our AWS environment based on the principle of least privilege. We also have firewalls and intrusion detection/prevention systems (IDS/IPS) to monitor network traffic and identify and block any suspicious activity that might indicate unauthorized access attempts. We conduct regular penetration testing and vulnerability assessments of our AWS environment to proactively identify and address any potential security weaknesses. These measures are audited and verified by external third-parties under our SOC-2 Compliance and ISO 27001 certification. More can be found here: https://www.betterworks.com/privacy-notice/

Does your solution comply with relevant data privacy regulations (e.g., GDPR, CCPA)?

»Yes, Betterworks is in compliance with the General Data Protection Regulation (GDPR) in the European Union, the California Consumer Privacy Act (CCPA) in the United States, the EU-U.S. Data Privacy Framework (EU-U.S. DPF) program, the UK Extension to the EU-US DPF, and the Swiss-U.S. Data Privacy Framework (Swiss-U.S. DPF) program as set forth by the US Department of Commerce (DOC).

How do you handle data retention and deletion policies, especially concerning generated content?

» We retain employee data for as long as the employee is active with your company and our solution is in use. This allows us to provide the best possible service. The customer has the right to request deletion of employee data at any time. Once you submit a deletion request, we will remove the data from our systems within (30) days. Generated content is treated the same way as all other user data. This means it follows the same retention and deletion policies outlined above.

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Is our employees' data used to train AI models?

» No, your employees' data is never used to train or finetune our generative AI model. We understand the importance of data privacy and take steps to ensure your employees' data is used solely for the purposes of your specific use case with our solution. Feedback given with 👍👎 icons does not train the LLM, it just informs the team if the output is good or not. It will help us improve the prompts that generate outputs.

Are you fine-tuning your generative AI models? If yes, what data sources are used to achieve that?

» Currently, we don't perform fine-tuning on your employee data. However, we are constantly exploring ways to improve the quality and accuracy of our generative AI models. In the future, we plan to leverage synthetic data for fine-tuning.

Are there any steps taken to mitigate bias in the training data and model outputs?

» We leverage prompt engineering to guide our AI models towards generating unbiased outputs. By carefully crafting prompts, we can steer the model away from generating outputs that reflect biases. We also continuously monitor our model's performance to identify potential bias in its outputs. We are introducing more safeguards and guardrails over time to ensure we capture any biases in the inputs or outputs.

How do you ensure the model is not generating outputs that could be discriminatory or offensive?

» Similar to bias prevention we use identical prompt engineering techniques to control inputs and outputs for any kind of misuse. Additionally, we have guardrails in place in case of inappropriate input a user will see the output response- "Your input contains offensive or harmful language. Please rephrase your request." and the reason for it.

How frequently are the models updated and retrained?

» We understand the importance of keeping our models up-to-date to ensure optimal performance and address potential issues. While we don't have a pre-defined schedule for updates, we are committed to forward compatibility. Our system is designed to integrate future model updates seamlessly, minimizing disruption to the user experience.

Can you explain how your generative AI models make decisions or create content?

» At Betterworks we are committed to transparency and explainability. Every use case of generative AI has a section to explain what happened and why. Our aim is to empower our users to not only leverage the power of generative AI but also understand the reasoning behind its outputs.

How do you handle false positives/negatives or errors in AI-generated content?

» Unlike chatbots that answer open ended questions and can potentially provide inaccurate or misleading information, our AI is focused on specific tasks. We tailor it for tasks like summarizing large amounts of data, finding relevant information within a dataset, and generating content based on existing information you provide. This targeted approach helps minimize errors by ensuring the AI is working with well-defined parameters. We also have quality control measures in place to identify and address any potential inaccuracies or misleading outputs before they are shown to the user. Additionally, users are able to provide feedback on the quality of generated content by using the thumbs up or down icons within the AI Assistants.

What are your policies regarding third-party access and subcontractors related to generative AI?

» We restrict access to your employee data to authorized personnel within our company and any subcontractors directly involved in operating the generative AI solution.

Is your generative AI model based on proprietary technology or a third-party vendor (like OpenAI)?

» We initially leveraged OpenAI's GPT models through their Enterprise API for a proven solution. We have now released our proprietary private LLM solution and all AI Assist features are powered by our Private LLM as of Early February 2025.

How do you ensure compliance with industry-specific regulations concerning generative AI?

» While specific regulations for generative AI are still emerging, we prioritize responsible AI use. We work closely with each customer to understand their industry's potential regulations and adapt our practices to align with the latest developments. We focus on transparency, conduct risk assessments, and actively monitor the evolving landscape to ensure responsible AI development alongside our customers.

What legal protections and liabilities are in place if the AI system generates harmful or inappropriate content or if breaches occur?

» While our focus is on empowering you with control over the AI's outputs, we understand potential concerns. Disclaimers in our contract limit our liability for content accuracy, and robust security measures minimize data breach risks. However, you have ultimate control over generated content and we recommend consulting your legal team to understand specific liabilities in your situation. Read more here: https://www.betterworks.com/ai-terms-and-conditions/