Presentation by :

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How to Evaluate AI Tools for Employee Support

ScreenSteps

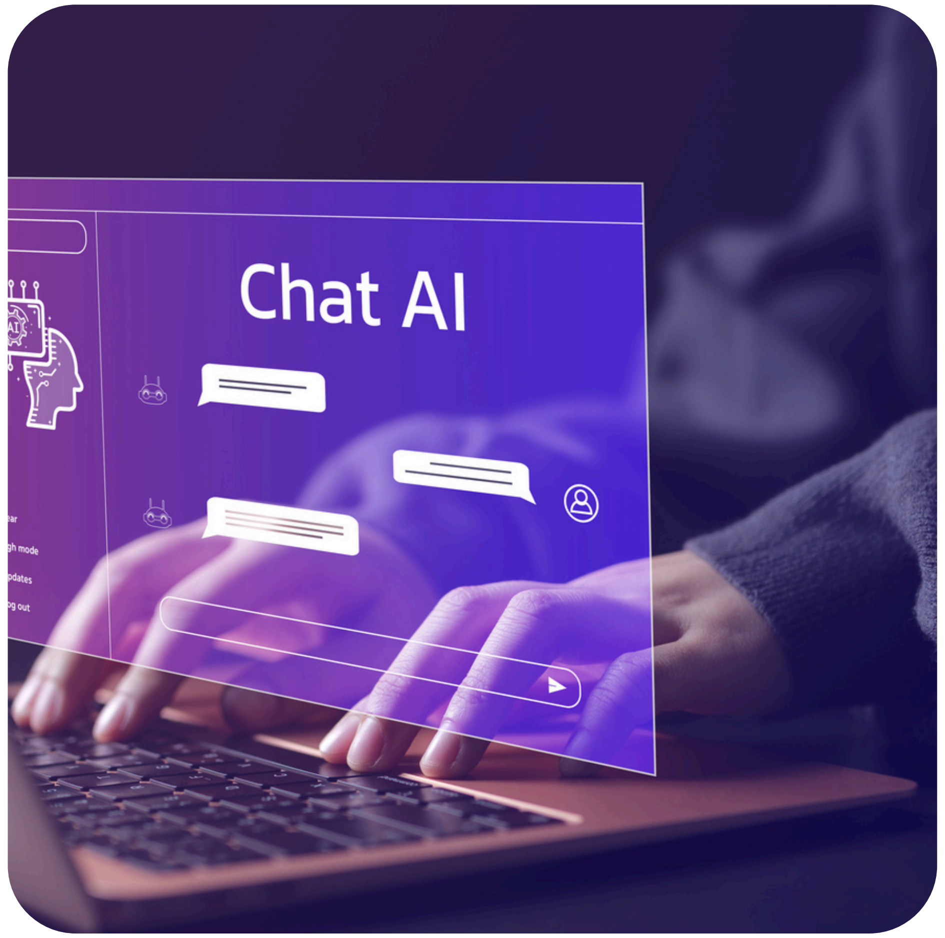
The Role of AI in Employee Support

1. Answering questions

2. Guiding through tasks

3. Solving problems

Understanding How AI Works

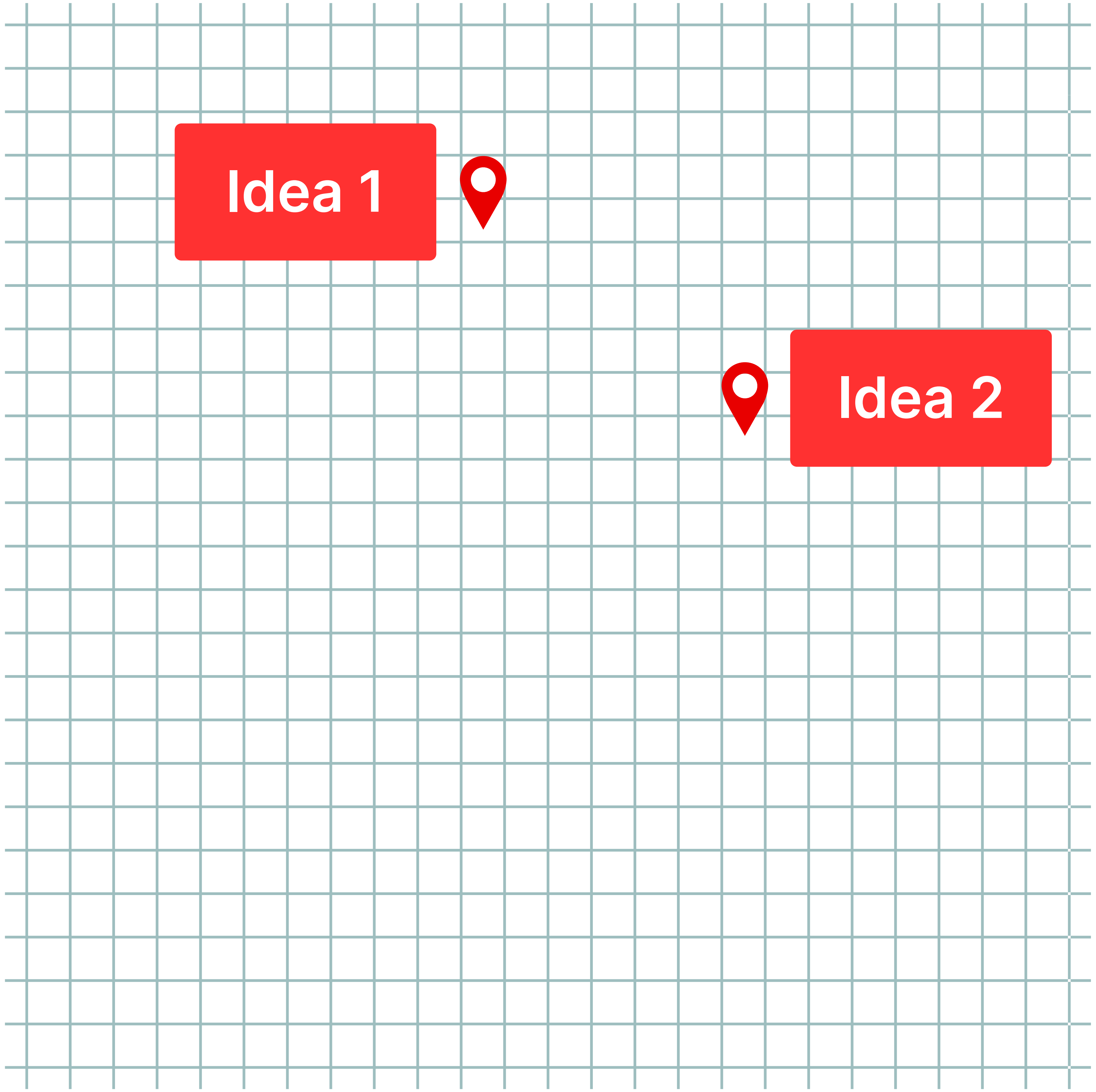


Pulling Back the Curtain on AI

- Understand intent
- Understand context
- Use a vector database to perform a search
- Generate a response using the LLM

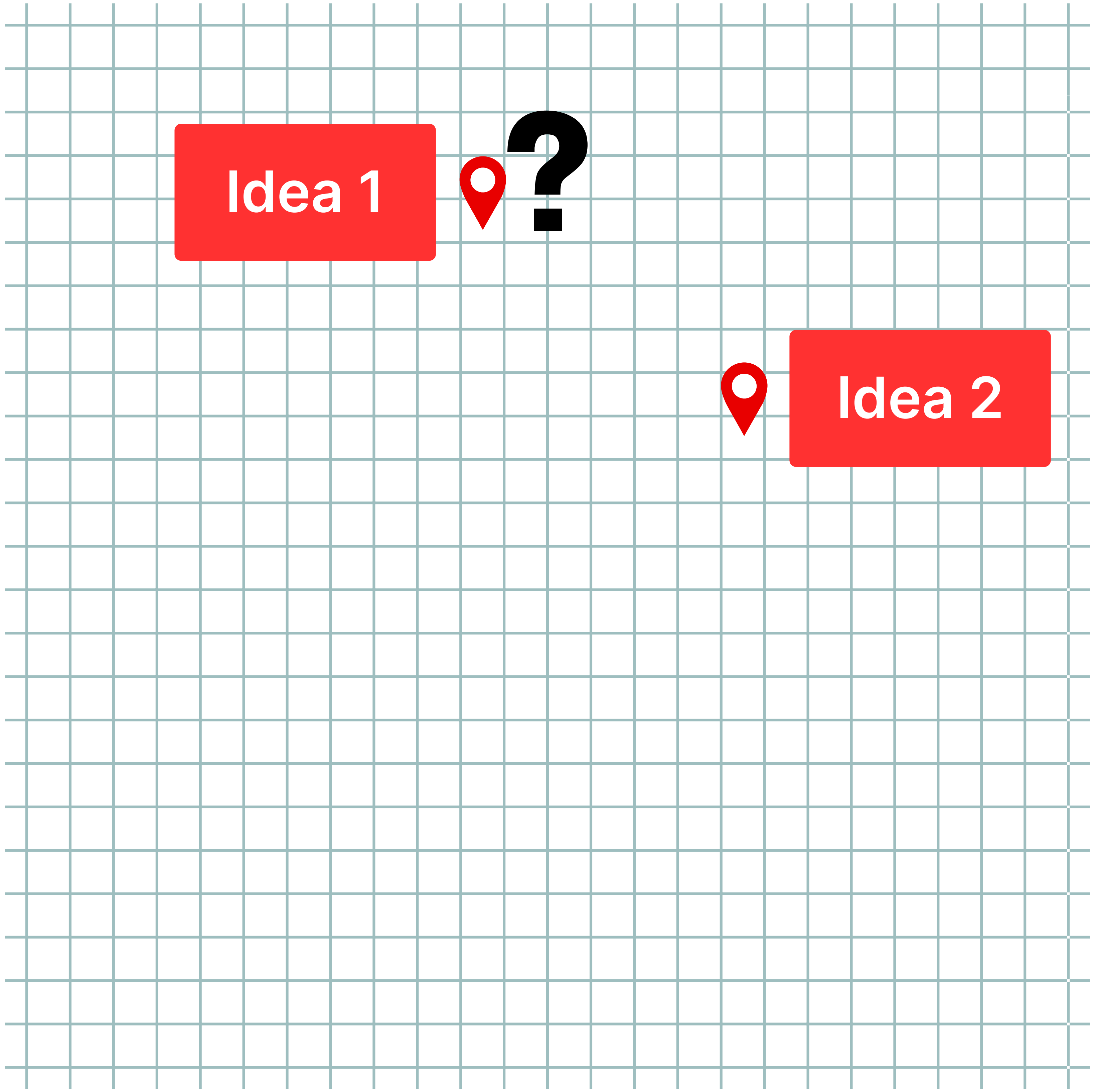
What is a Vector DB?

- Turns content into numbers
- Builds a map of ideas
- Finds nearest matches



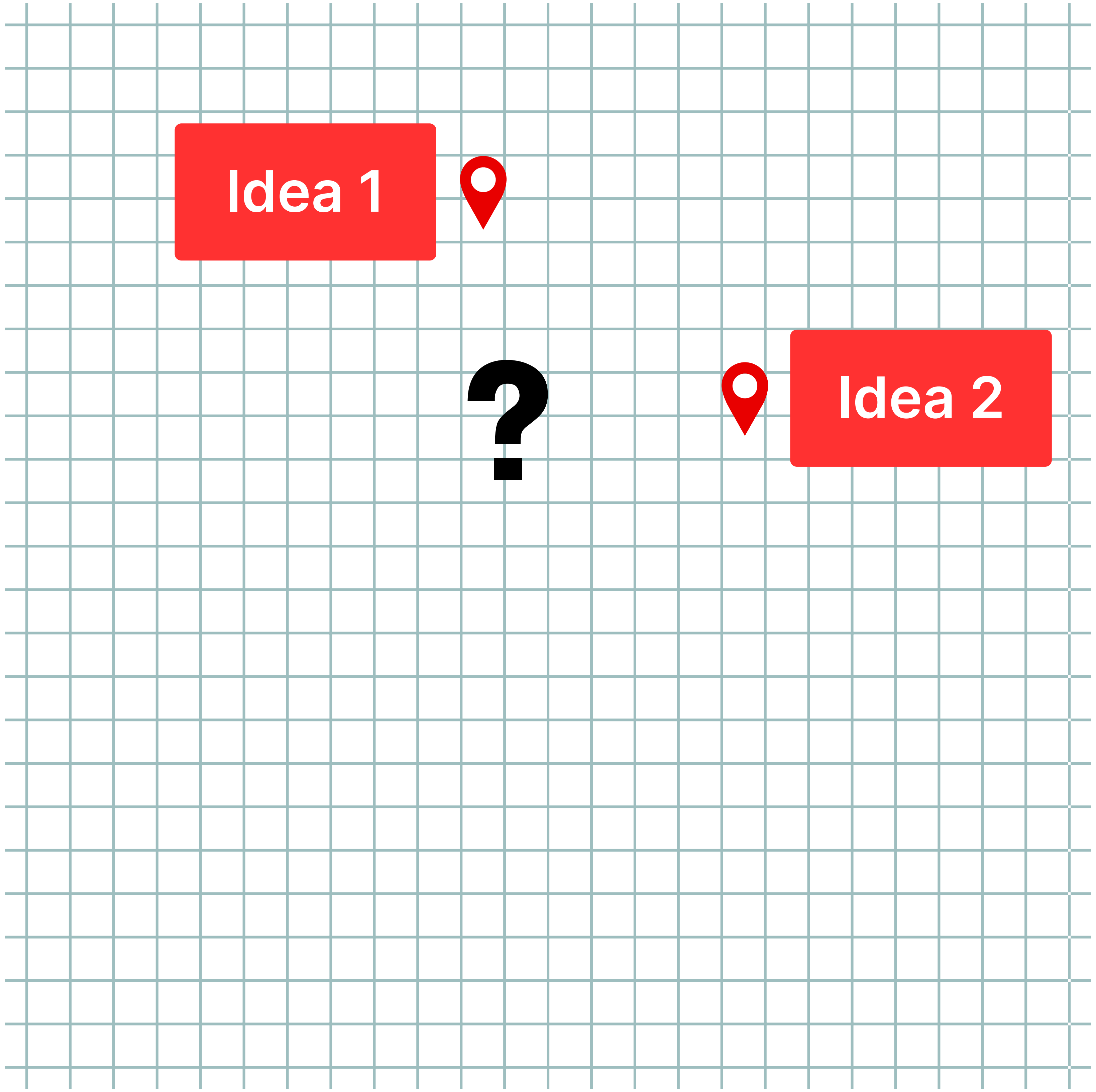
Querying

- Queries are turned into vectors
- Ideas that are closely related to the query are returned



What happens when there isn't an exact match?

- Halucinations



Why do hallucinations happen?

- Vectors return “close enough” matches
- LLM fills in the gaps
- You get confident but incorrect answers

AI is all about the data

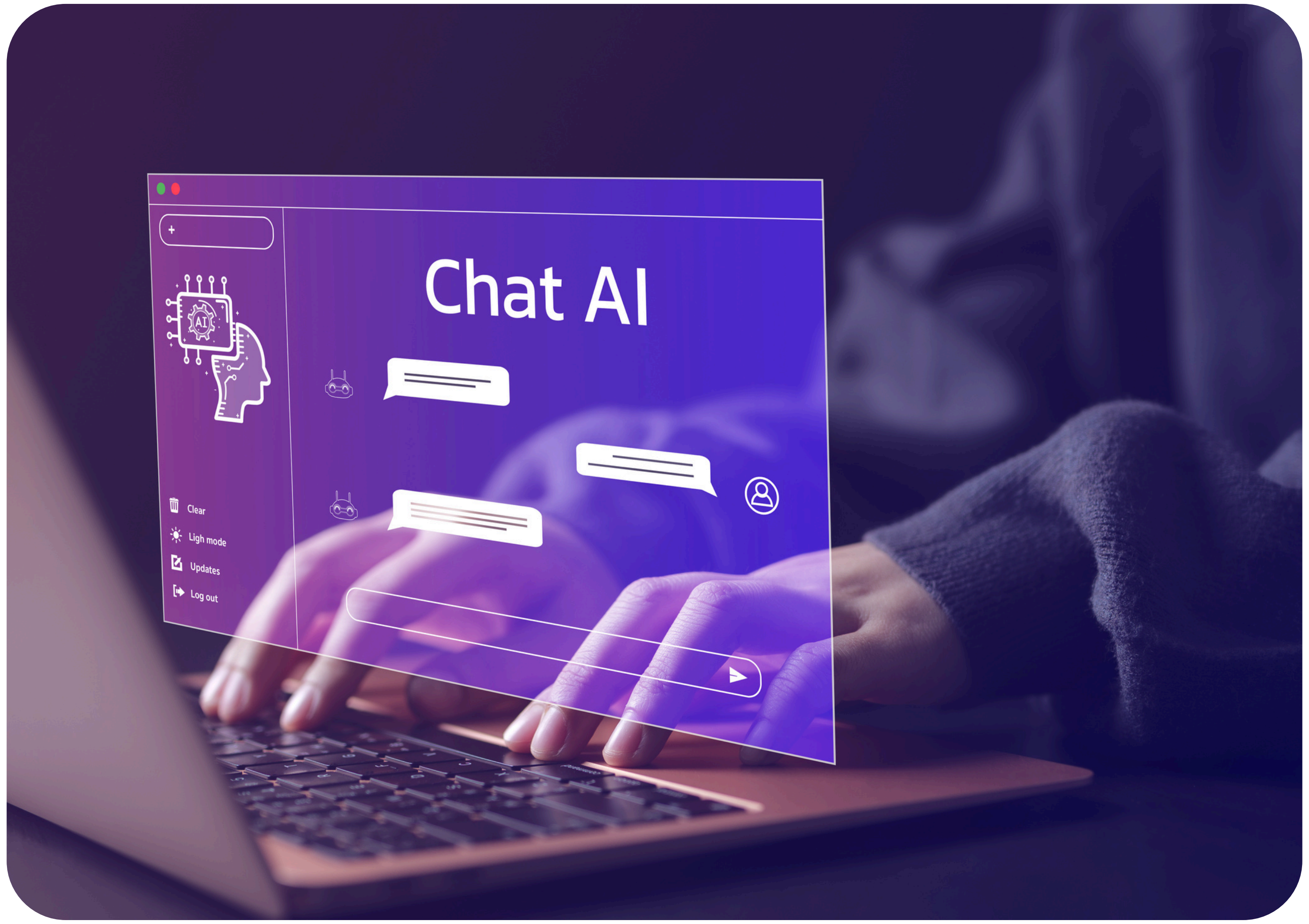
Garbage in → Garbage out

Two Possible Strategies

Option 1: Junk Drawer + Train Strategy

Give AI our Junk-drawer of knowledge

Evaluate text-based responses and train

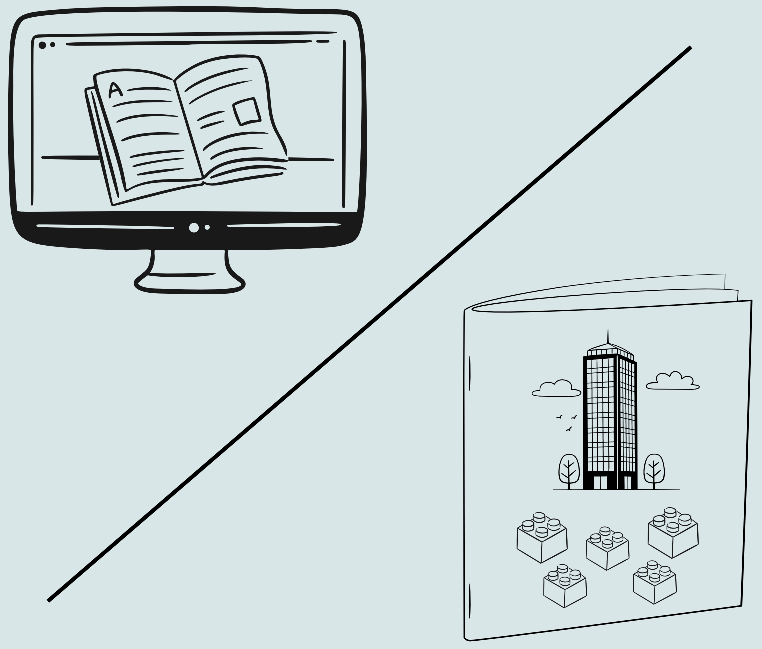


It’s a game of wack-a-mole

Option 2

Use AI to generate Human Approved Recipes that Humans can Follow

Use AI to Create the Find & Follow Program



FIND

FOLLOW

TRUST

1

Separate Foundational and Actionable Knowledge

2

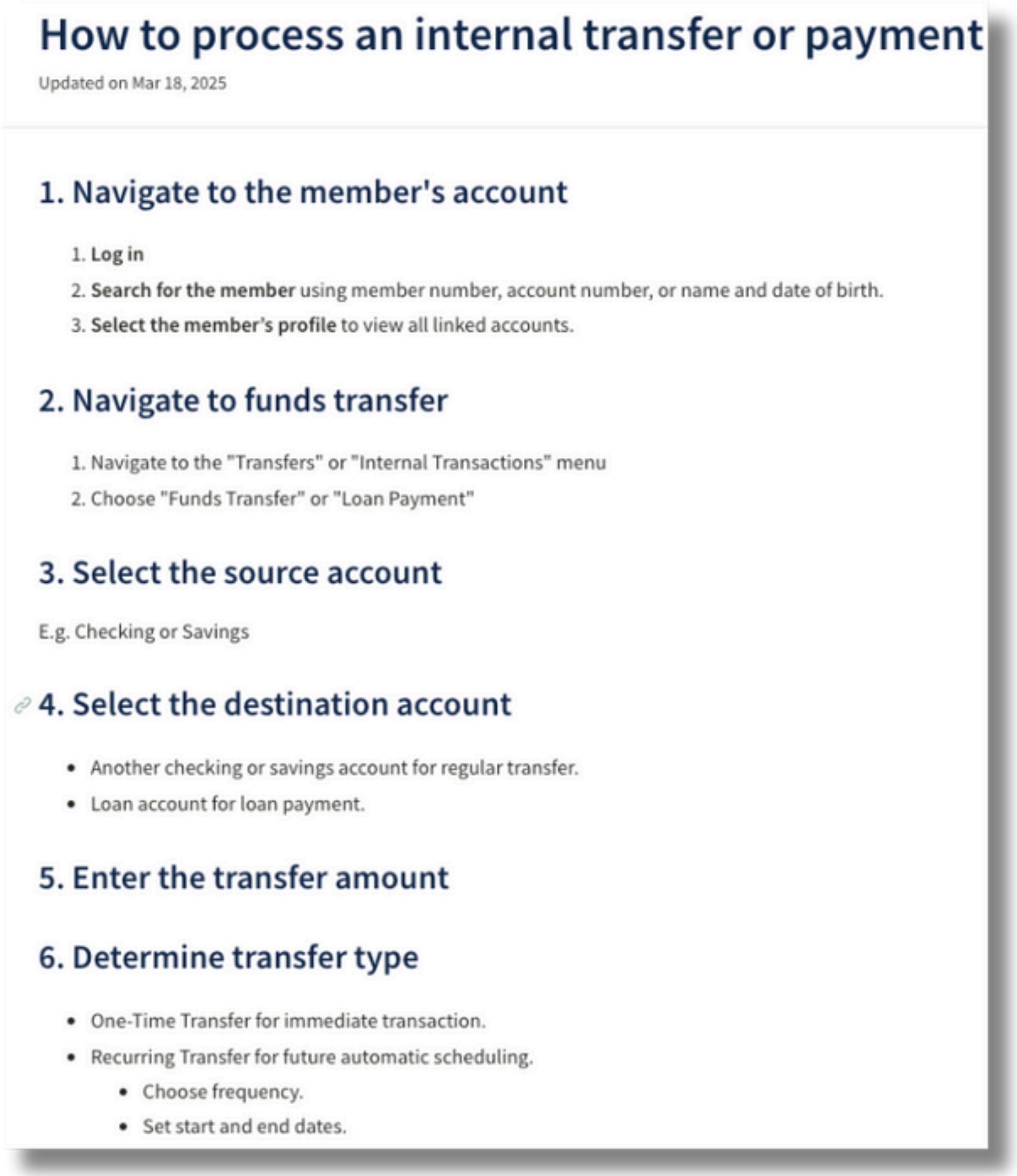
Optimize the content—make it findable, followable, and accurate

3

Teach Foundational, Practice Finding & Following

How We Help You Get There

Convert Information Into Recipes


How to process an internal transfer or payment

Updated on Mar 18, 2025

1. Navigate to the member's account

1. **Log in**
2. **Search for the member** using member number, account number, or name and date of birth.
3. **Select the member's profile** to view all linked accounts.

2. Navigate to funds transfer

1. Navigate to the "Transfers" or "Internal Transactions" menu
2. Choose "Funds Transfer" or "Loan Payment"

3. Select the source account

E.g. Checking or Savings

4. Select the destination account

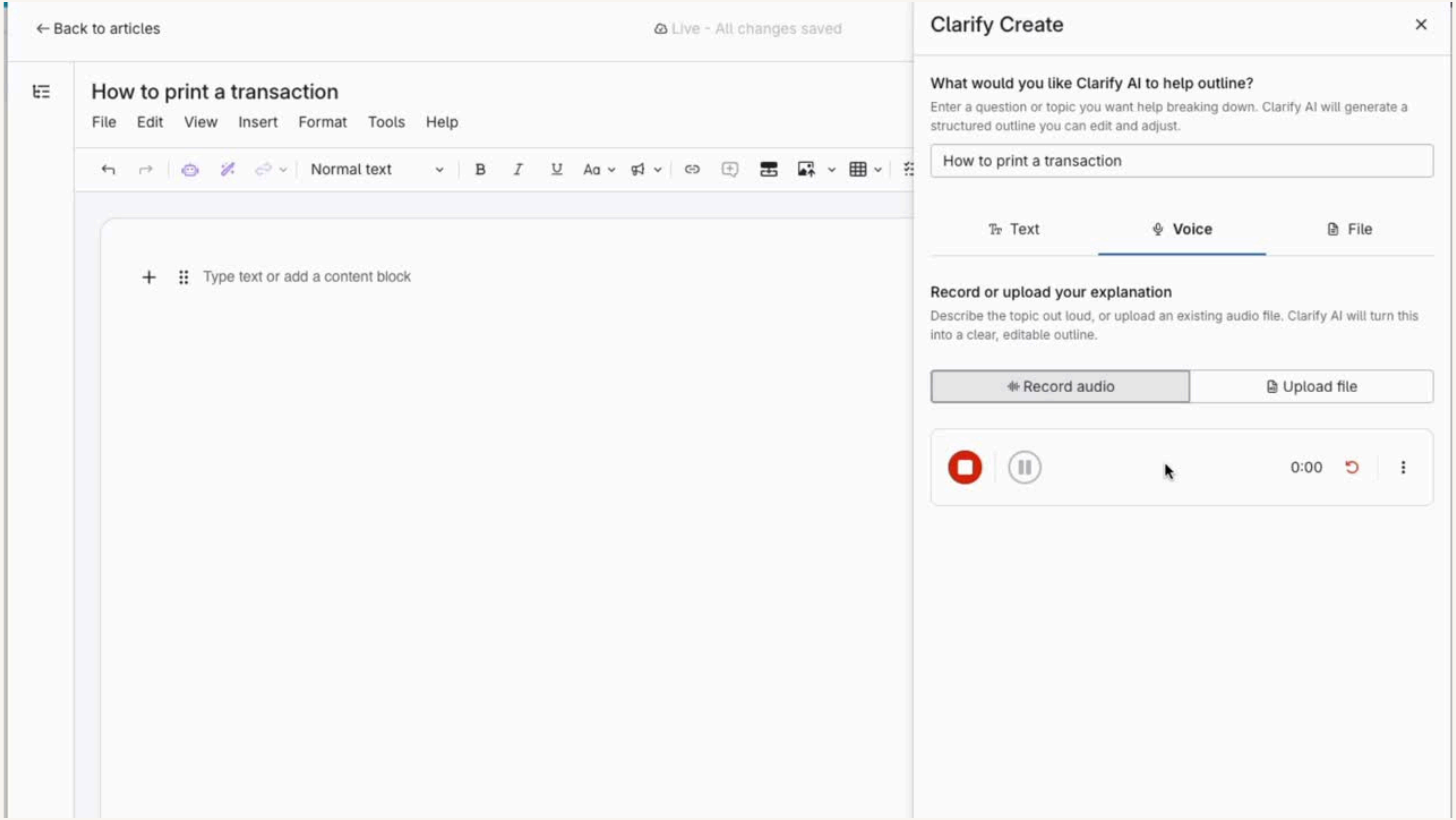
- Another checking or savings account for regular transfer.
- Loan account for loan payment.

5. Enter the transfer amount

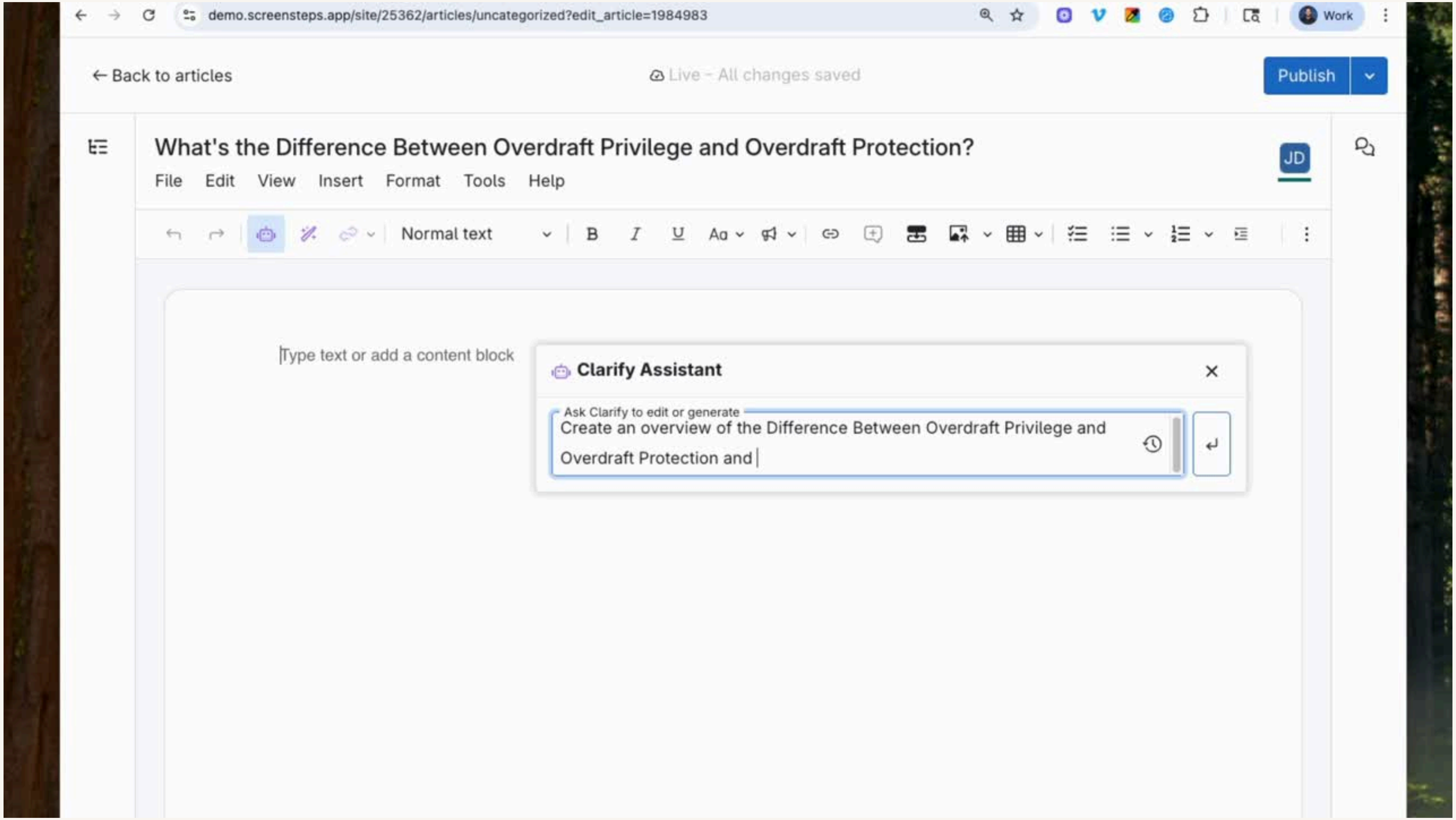
6. Determine transfer type

- One-Time Transfer for immediate transaction.
- Recurring Transfer for future automatic scheduling.
  - Choose frequency.
  - Set start and end dates.

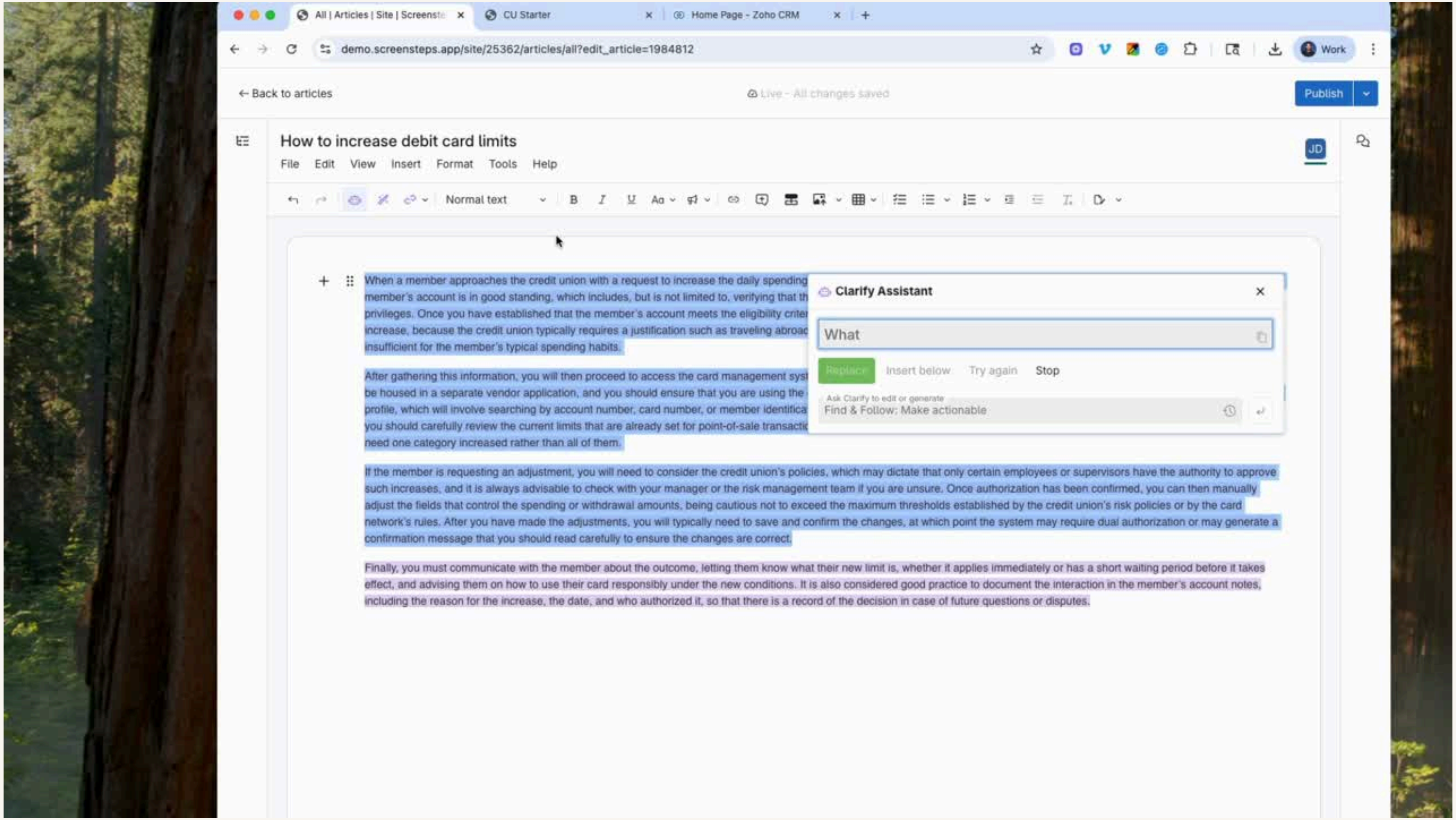
Document from Audio and Format for Performance



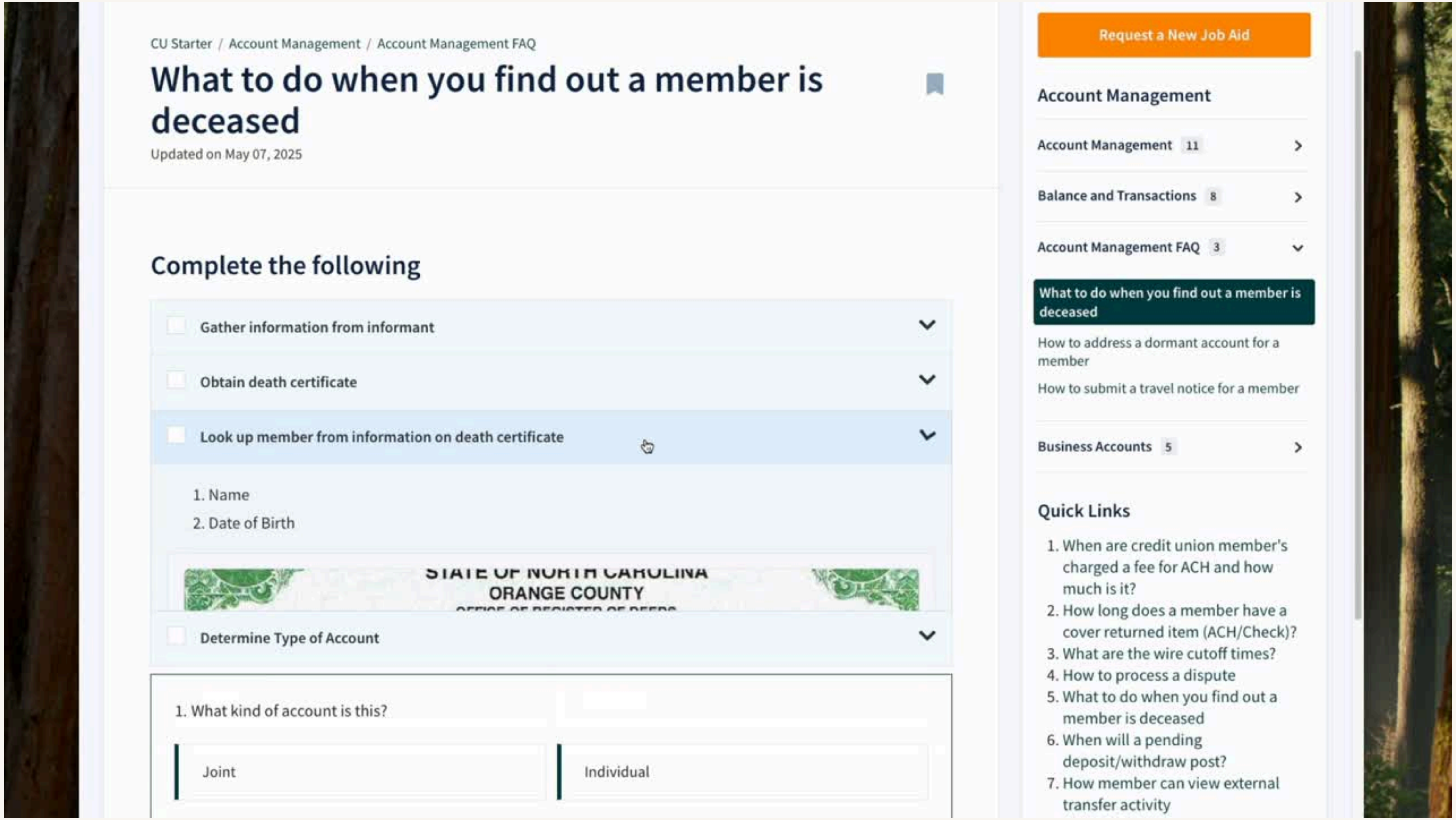
Create from Nothing



Convert Existing Content to a Format for Performance



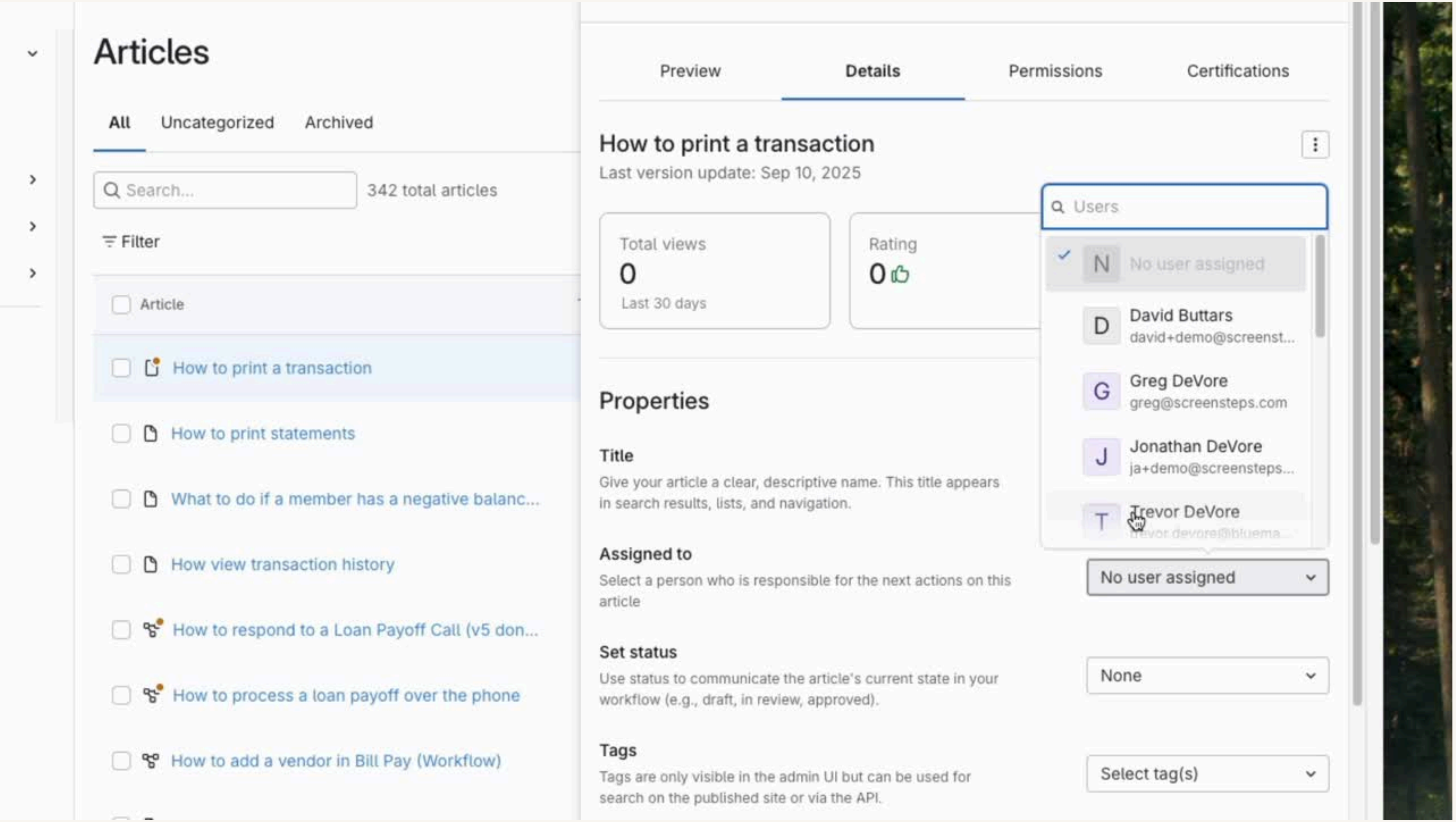
Even Those Complex Procedures with Decision Trees



How do you get there with ScreenSteps?

- [x] Document Procedures in Minutes (so it actually gets done)
- [x] Format for Performance (With Automated Options)
- [x] Validate Answers and Process Feedback from Employees
- [ ] Enable Employees to Perform With Answers They Can Trust

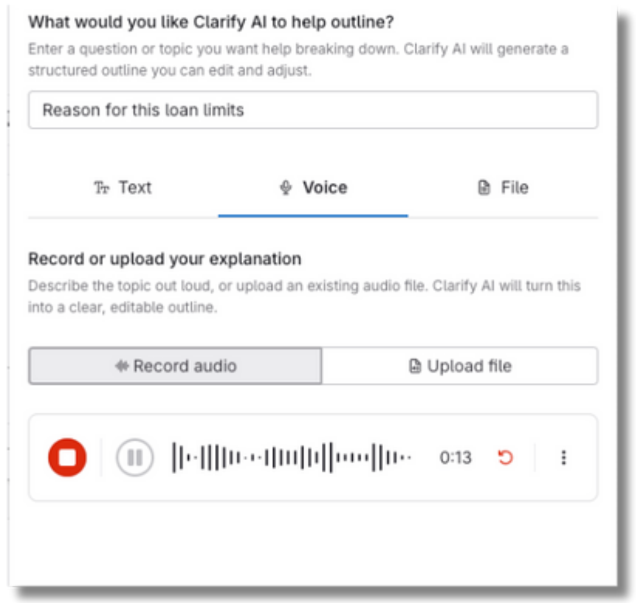
Approve and Certify Content



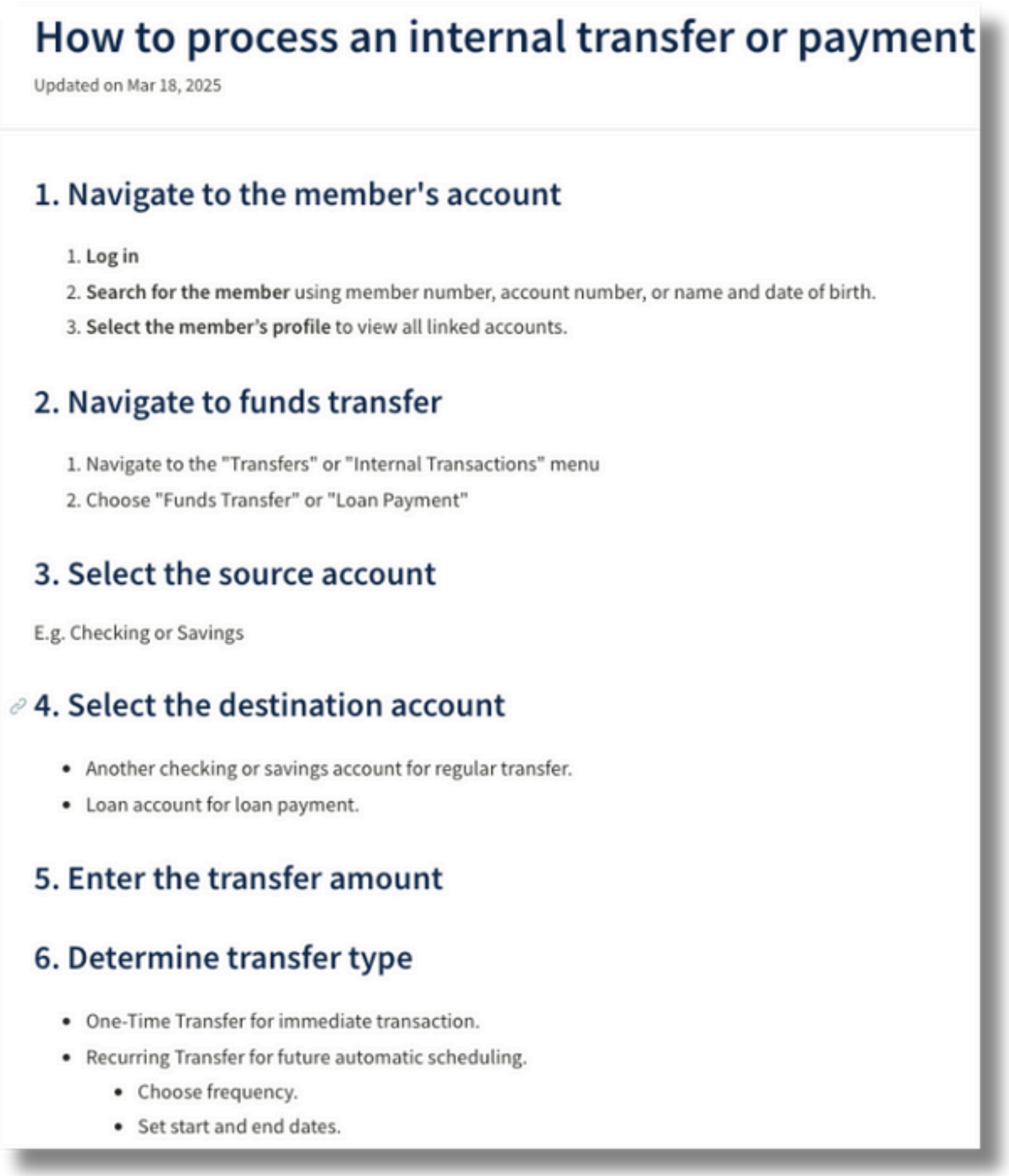
How We Help You Get There

Convert Information Into Recipes

One Work Day



One Work Week



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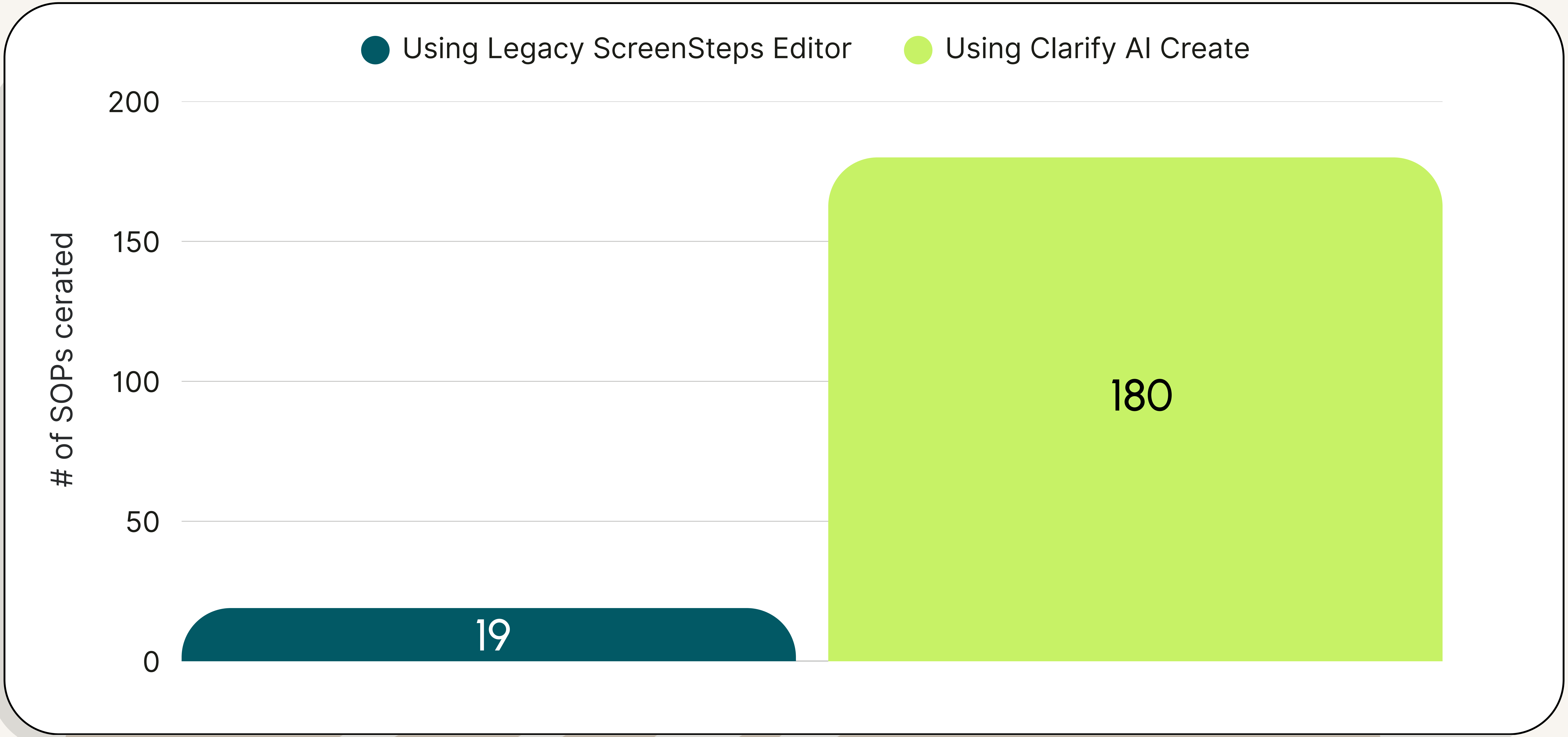
ScreenSteps Clarify AI Create



“It used to take us months of undivided one-on-one time to train new hires.

With ScreenSteps, new hires are up and running in just a day or two.”

Kaylee Schiffelbein
High Plains Farm Credit
Operations Manager

High Plains Farm Credit

Try the ScreenSteps AI tools for yourself

Get a Free Trial Account:

screensteps.com/trial