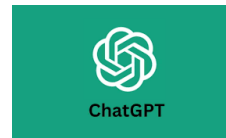




# HOW CAN AI HELP YOU IDENTIFY BUSINESS OBJECTS AND ACCELERATE YOUR BUSINESS PROCESS CREATION?

## USE CASE





# PLAN

1. INTRODUCTION.
2. KEY CONCEPTS TO KNOW BEFORE.
3. SECURITY AND RESPONSIBLE AI.
4. HOW AI HELPS IDENTIFY BUSINESS OBJECTS.
5. HOW AI ACCELERATES BUSINESS PROCESS CREATION.
6. Q&A.
7. AI NEWS.

# INTRODUCTION (1/3)



## Common Business Challenges:

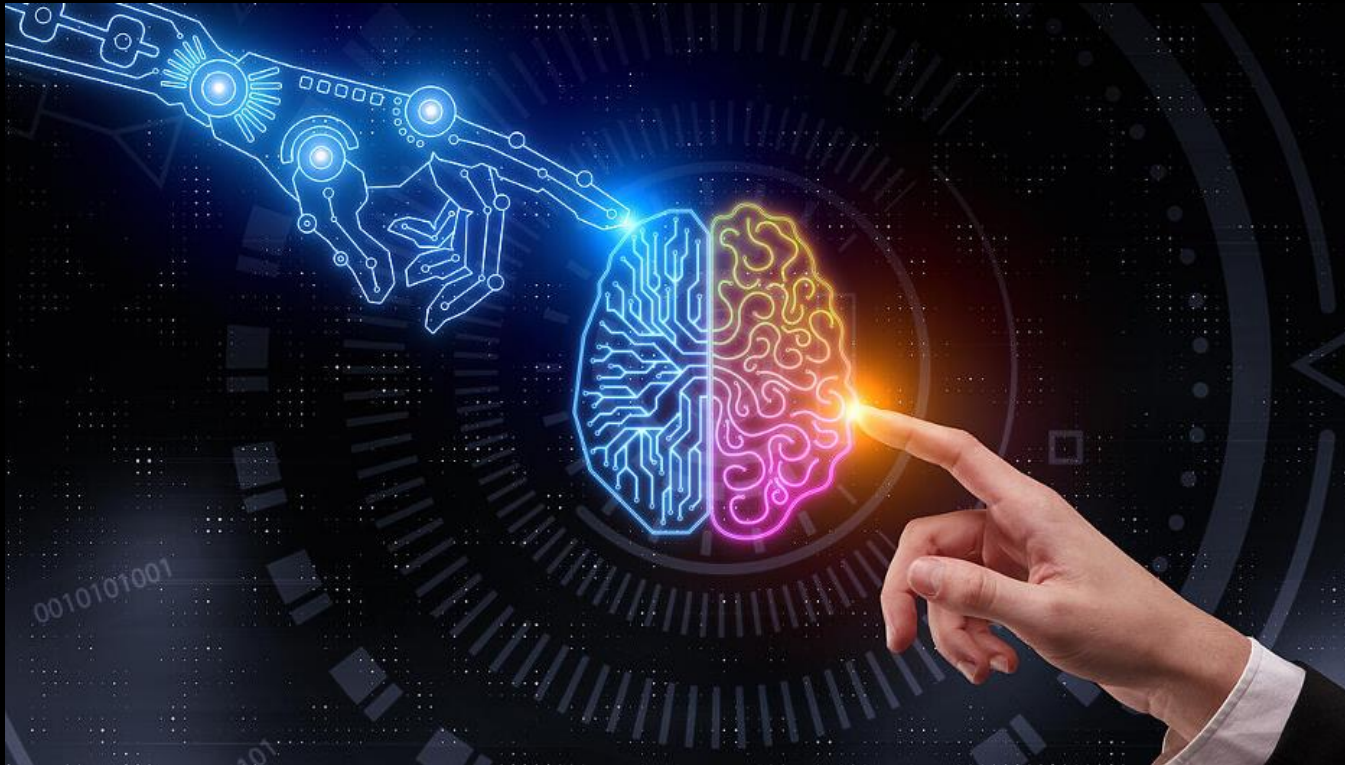
- Many businesses struggle to clearly identify the key business objects of their business.
- Without well-defined business objects, controlling and scaling operations becomes difficult.

## Pain Points:

- Inefficiency.
- Poor business process.
- Lack of clarity in process management.
- Slow response times to market changes.
- Team misunderstanding and frustration.

# INTRODUCTION (2/3)

## The AI Solution



*AI tools like ChatGPT, can assist business team in quickly identifying critical business objects and help structure efficient business processes in minutes.*

## Goal for the Session:

By the end, you will have a clear understanding of how to leverage AI to improve both business object identification and business process structuring within your organization.

## Why AI?:

AI accelerates the identification of business objects by rapidly processing large volumes of enterprise data, assisting businesses in drafting accurate and efficient business processes.

# INTRODUCTION (3/3)

## AI AND HUMAN COLLABORATION

### ➤ **AI as a Partner, Not a Replacement:**

AI supports humans by augmenting their ability to identify key business objects and streamline processes, but it does not replace human decision-making or creativity.

### ➤ **Mindset for Effective Collaboration:**

- ❑ **Critical Thinking:** AI helps analyze large datasets, but humans apply context, judgment, and creativity to refine results.
- ❑ **Iterative Process Creation:** AI accelerates process mapping, while humans ensure/confirm the alignment with business goals and company culture.

### ➤ **Collaborative Results:**

Together, AI and humans create more accurate and scalable business object and business process outcomes by combining automation (AI) with strategic thinking (humans).

# CONCEPTS YOU SHOULD KNOW BEFORE (1/8)

**Business Object**

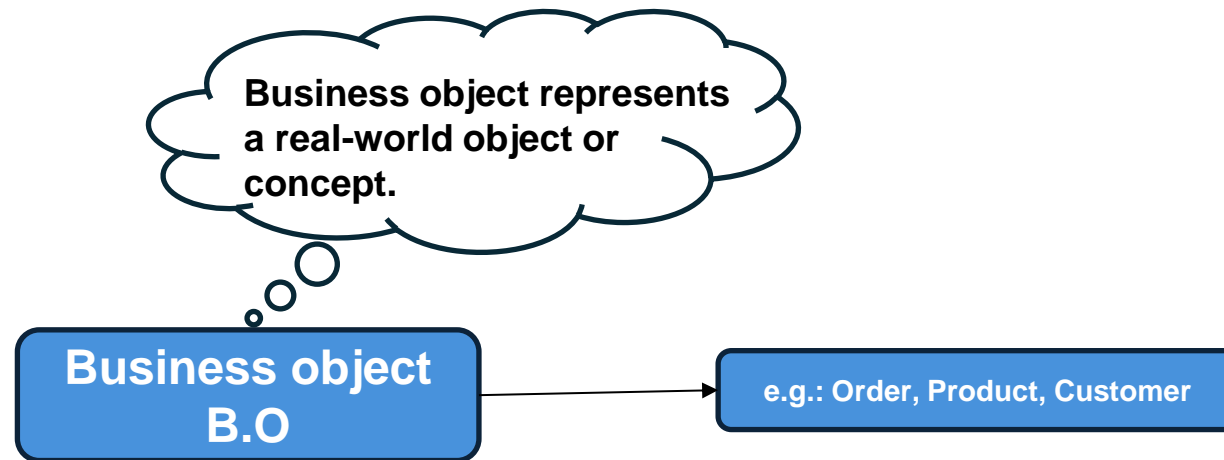
**Business Process**

**Enterprise Data**

**Enterprise Knowledge**

**AI assistants creation**

# CONCEPTS YOU SHOULD KNOW BEFORE (2/8)



**Importance:** Identifying the right business objects allows for better management, tracking, and optimizing operations.

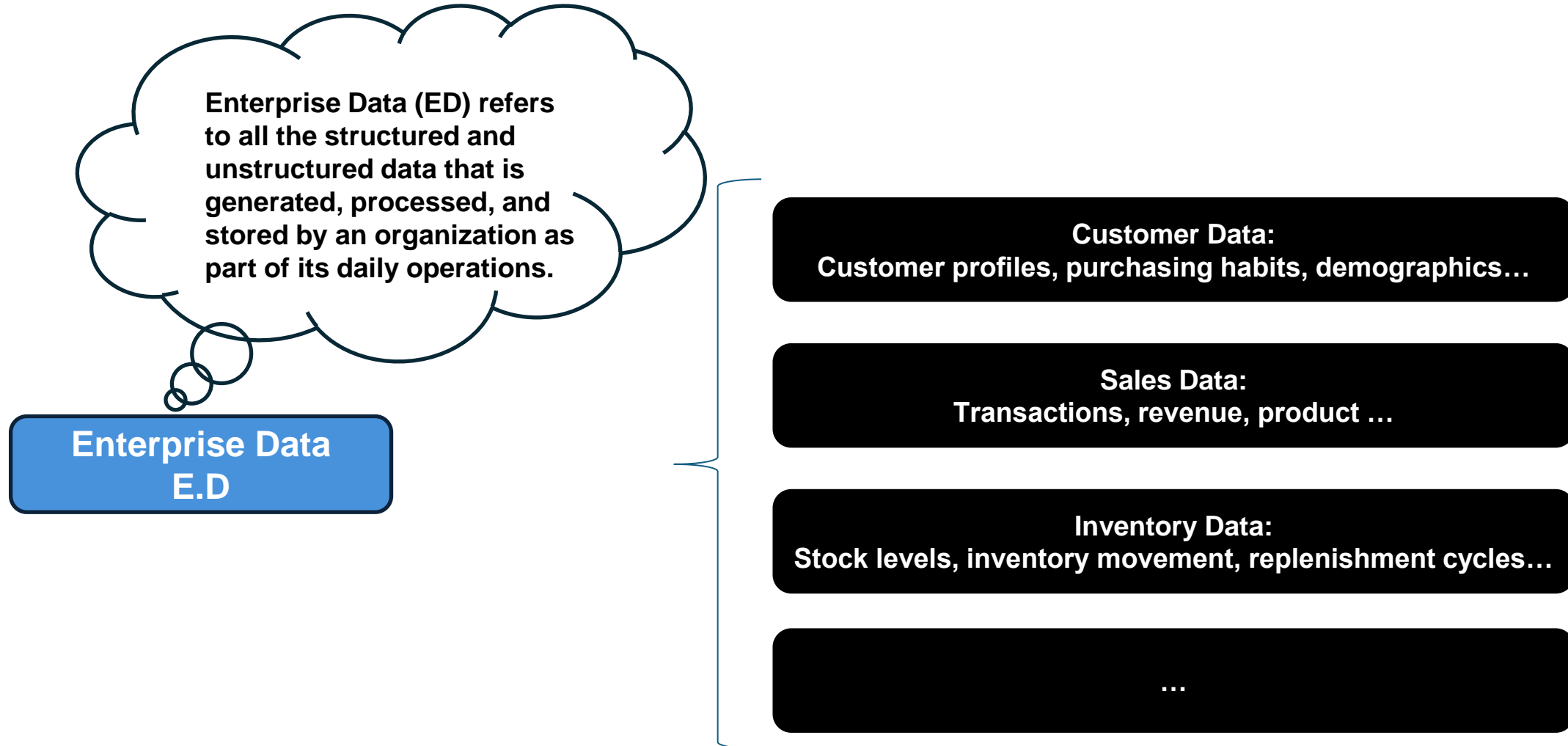
# CONCEPTS YOU SHOULD KNOW BEFORE (3/8)



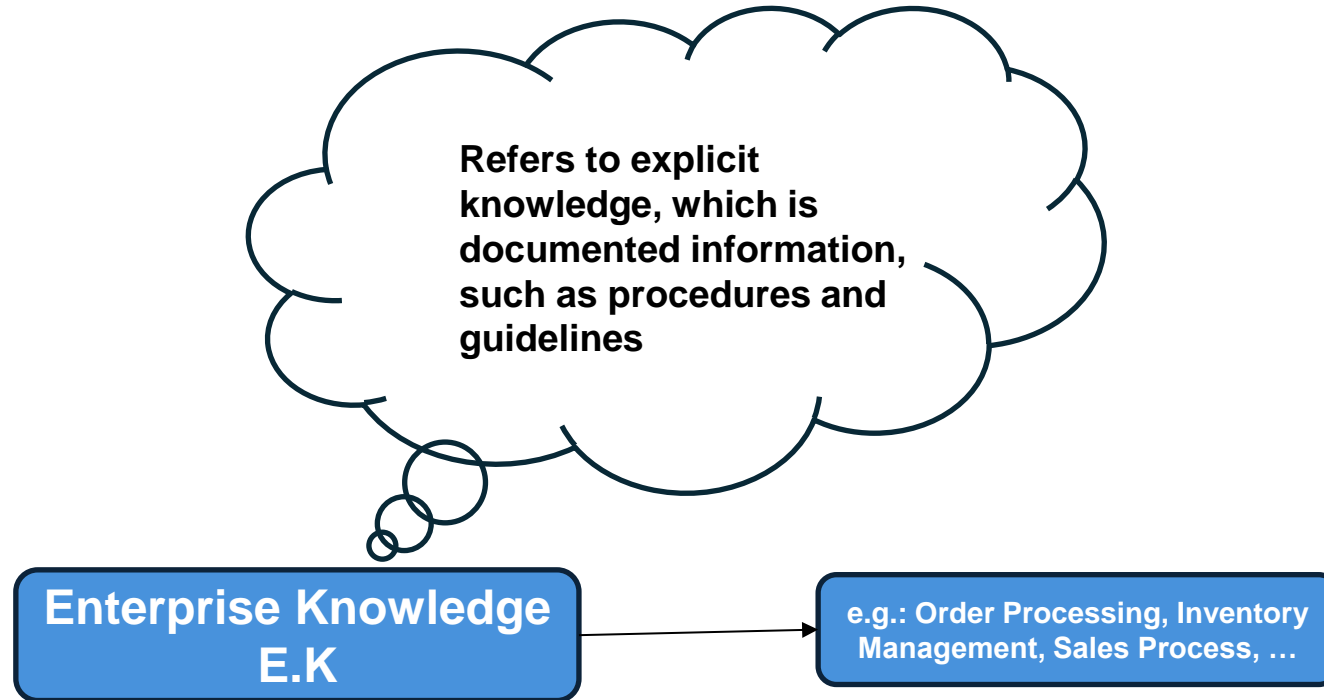
**Key Point:** Well-defined processes improve efficiency, reduce errors, and ensure scalability.



# CONCEPTS YOU SHOULD KNOW BEFORE (4/8)



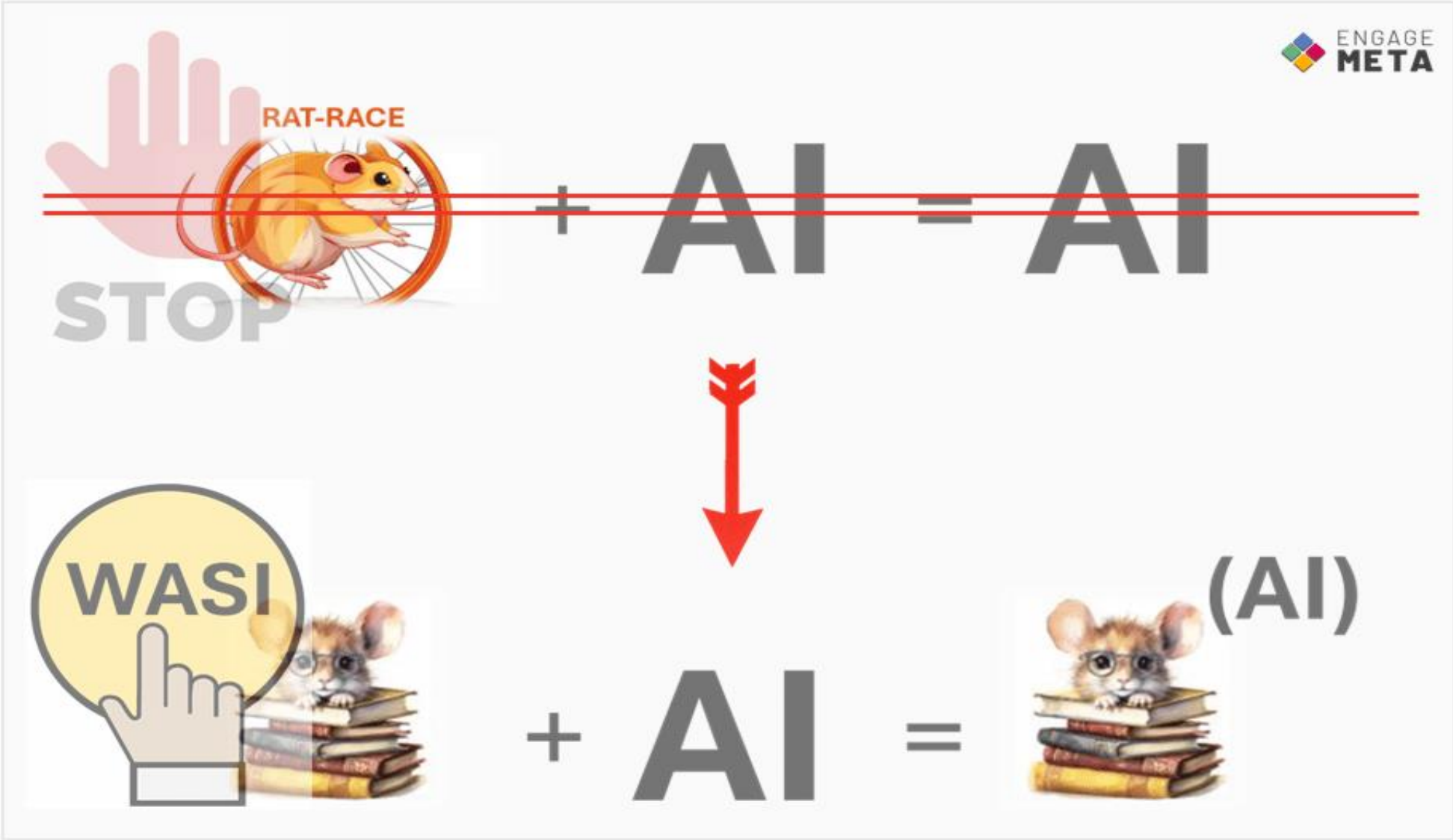
# CONCEPTS YOU SHOULD KNOW BEFORE (5/8)



**Key Point:** Explicit knowledge is essential for AI in business object identification and process creation as it provides structured, consistent information for accurate analysis. It helps AI efficiently draft processes, ensures alignment with business guidelines.

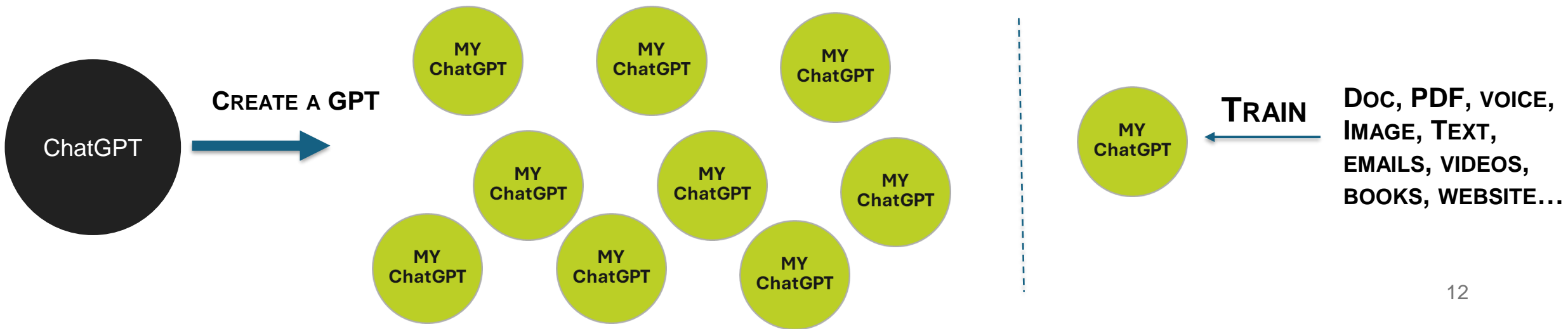
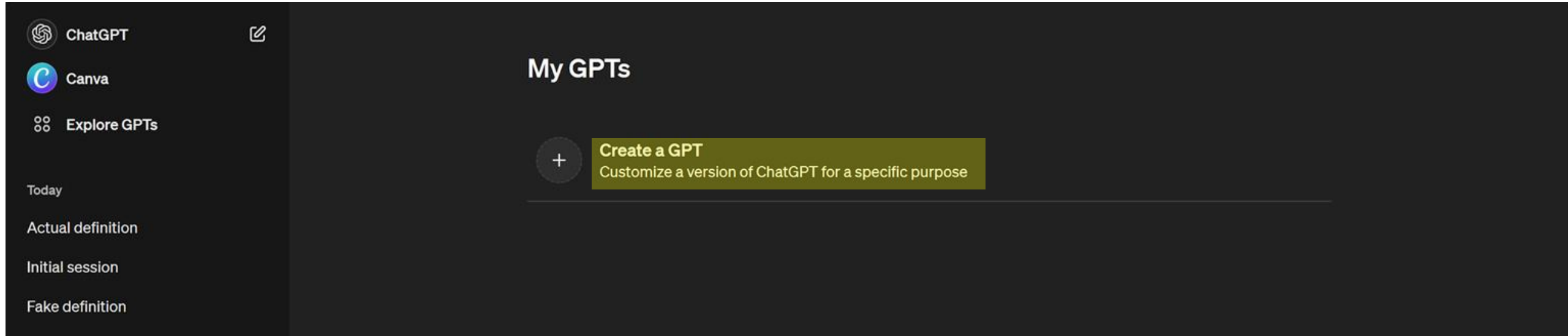
# CONCEPTS YOU SHOULD KNOW BEFORE (6/8)

## KNOWLEDGE MANAGEMENT TO POWER AI



# CONCEPTS YOU SHOULD KNOW BEFORE (7/8)

## KNOWLEDGE MANAGEMENT TO POWER AI



# CONCEPTS YOU SHOULD KNOW BEFORE (8/8)

## PROMPT TO POWER AI

### 1 Role

Define a specific role for the AI to set the context for the interaction. For example, "You are a marketing strategist."

### 2 Tasks

Clearly outline what you want the AI to accomplish. Be specific to avoid ambiguity. For example, "Generate a marketing plan for a new eco-friendly product."

### 3 Requirements

Provide detailed requirements to ensure clarity. Specify the format, length, or focus areas. For instance, "Outline the plan in bullet points, including target audience and key messaging."

### 4 Instructions

Detail how the AI should approach the task. Include step-by-step guidance or examples. For example, "Identify three marketing channels and explain why they are suitable for this product."

### 5 Context

Include relevant background information to enhance understanding. For example, "The product is aimed at environmentally conscious consumers aged 25-40."

### 6 Format

Specify the desired output format to enhance usability. For instance, "Present the information in a table format."

### 7 Open-Ended Questions

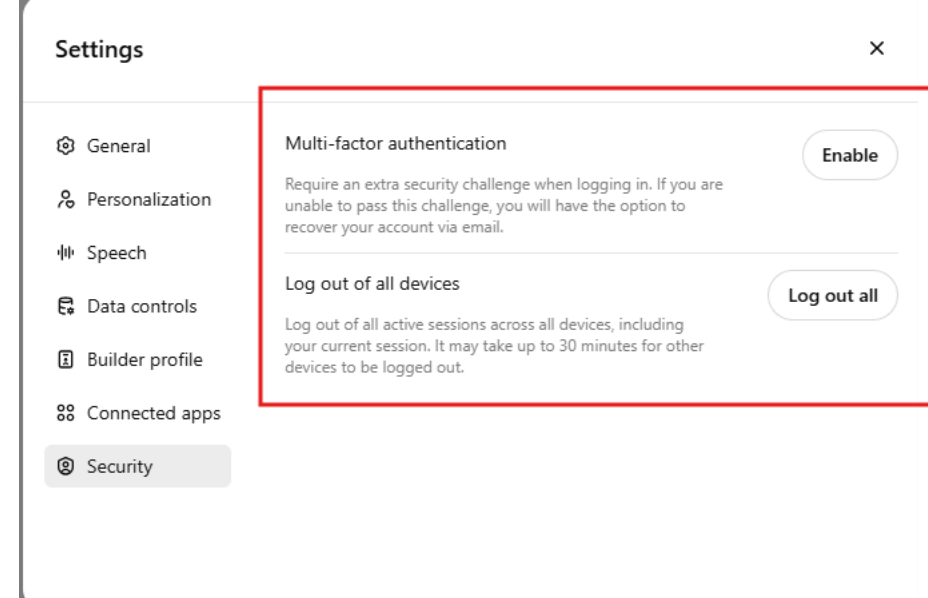
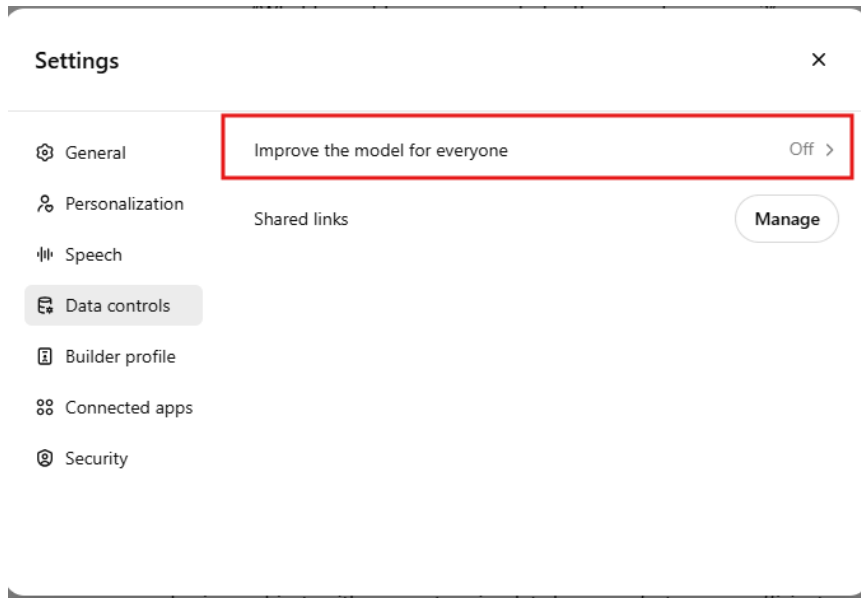
Use open-ended questions to encourage deeper, more creative responses. For example, "What innovative strategies could engage our target audience?"

# SECURITY AND RESPONSIBLE AI (1/2)

## SECURITY



**Utilization of ChatGPT 4o:** Make sure to use an AI license and create AI assistants that ensure optimal data protection, with “OpenAI's training improvement” option disabled (Improve the model for everyone = **Off**).



# SECURITY AND RESPONSIBLE AI (2/2)

## RESPONSIBLE AI

Responsible AI



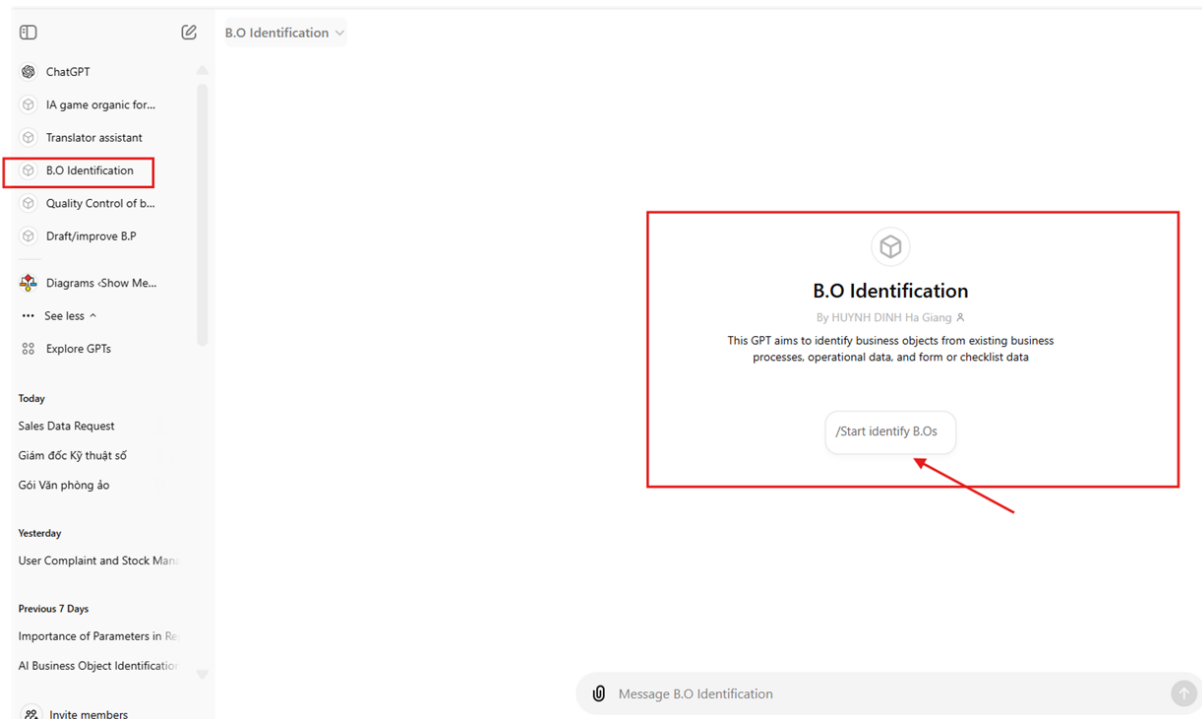
### The Importance of Responsible AI Use

- Ethical guidelines.
- Implementing clear data usage policies to sensitive information.
- Formalizing business and technical alignment.
- Capitalizing knowledge of actors to train AI systems.

# How AI HELPS IDENTIFY BUSINESS OBJECTS (1/4)

## Tasks

- Create GPTs – Your AI assistant.
- Prepare your prompts.
- Prepare input data. In our case we have:  
=> **Enterprise data: Sales data (Orders).**
- Interact with your AI assistant.





# HOW AI HELPS IDENTIFY BUSINESS OBJECTS (2/4)

## Prompt Explanation

### 1. Role

"Act as a Business Analyst with 20 years of experience."

### 2. Tasks

"Your task is to identify business objects based on my input data provided. From these business objects, distinguish between key valued and non-key valued business objects, focusing on 10 key valued business objects."

### 3. Requirements

"We consider a business object as an object that has a set of attributes and values, operations, and relationships to other business objects. Each business object should be represented by a single word or two words such as 'Order,' 'Product requirement.' If additional suggestions arise during your analysis, please include them."

### 4. Instructions:

"Start immediately upon receiving this prompt."

### 5. Context:

"This analysis is intended to refine and optimize the identification and management of business objects within our organization, ensuring that our data modeling aligns with best practices. The focus is on accurately classifying business objects to improve operational efficiency and decision-making processes, particularly by distinguishing key valued business objects that are critical to our business operations."

### 6. Format:

"Present the final results in a structured table with the following columns:

- No - A sequential number used to uniquely identify each entry.
- Business Object (B.O) - The name of the business object (e.g., Customer, Order, Product).
- Business Object Attributes - Lists the key attributes or properties of the business object.
- Business Object ID - Guidelines for creating and managing unique identifiers.
- B.O ID Definition Rule - The unique identifier for a business object.
- Glossary (Definition) - A clear and precise definition of the business object.
- Relationship - Describes the relationship between this business object and others.
- Data Owner - The person, organization, or department that owns the business object.
- Data User - The person, organization, or department that uses the business object.
- Is Master Data or Transaction Data? - Identifies whether the business object is master or transaction data.
- Key Valued Business Object? (Yes/No) - Indicate if the object is a key valued business object, with a comment justifying your decision."

### 7. Open-Ended Questions:

"Before starting the analysis, please ask me to provide the following input data:

- Existing business processes.
- Data operational details.
- Forms or checklist data."

# How AI HELPS IDENTIFY BUSINESS OBJECTS (3/4)

## Enterprise data: Sales data (Orders)

Order ID	Customer	Customer	Order Date	Product ID	Product Name	Quantity	Unit Price	Total Order	Order Status	Payment Method	Payment Status	Shipping Address	Shipping Date	Delivery Date	Shipping Method	Sales Rep	Discount	Taxes	Order Note
Order001	CUST001	Customer	9/1/2024	PRD002	Product 2	1	5	10											
Order002	CUST002	Customer	9/2/2024	PRD003	Product 3	2	10	30											
Order003	CUST003	Customer	9/3/2024	PRD004	Product 4	3	15	22.5											
Order004	CUST004	Customer	9/4/2024	PRD005	Product 5	4	7.5	38											
Order005	CUST005	Customer	9/5/2024	PRD001	Product 1	5	9.5	25											
Order006	CUST006	Customer	9/6/2024	PRD002	Product 2	6	5	60											
Order007	CUST007	Customer	9/7/2024	PRD003	Product 3	7	10	105											
Order008	CUST008	Customer	9/8/2024	PRD004	Product 4	8	15	60											
Order009	CUST009	Customer	9/9/2024	PRD005	Product 5	9	20	180	Shipped	Credit Card	Paid	101 Elm St	9/2/2024	9/5/2024	Standard	Rep 2	0	0.05	Note 1
Order010	CUST010	Customer	9/10/2024	PRD001	Product 1	10	3	30	Pending	PayPal	Pending	102 Elm St	9/3/2024	9/6/2024	Express	Rep 3	5	0.1	Note 2
Order011	CUST011	Customer	9/11/2024	PRD002	Product 2	11	2	22	Delivered	Bank Tran	Failed	103 Elm St	9/4/2024	9/7/2024	Same Day	Rep 4	2	0.15	Note 3
Order012	CUST012	Customer	9/12/2024	PRD003	Product 3	12	1.5	18	Cancelled	Cash	Paid	104 Elm St	9/5/2024	9/8/2024	Standard	Rep 5	0	0.2	Note 4
Order013	CUST013	Customer	9/13/2024	PRD004	Product 4	13	1.5	19.5	Shipped	Credit Card	Paid	105 Elm St	9/6/2024	9/9/2024	Express	Rep 1	3	0.25	Note 5
Order014	CUST014	Customer	9/14/2024	PRD005	Product 5	14	2.5	35	Shipped	Credit Card	Paid	106 Elm St	9/7/2024	9/10/2024	Standard	Rep 2	0	0.3	Note 6
Order015	CUST015	Customer	9/15/2024	PRD001	Product 1	15	2.5	37.5	Pending	PayPal	Pending	107 Elm St	9/8/2024	9/11/2024	Express	Rep 3	5	0.35	Note 7
Order016	CUST016	Customer	9/16/2024	PRD002	Product 2	16	2.5	40	Delivered	Bank Tran	Failed	108 Elm St	9/9/2024	9/12/2024	Same Day	Rep 4	2	0.4	Note 8
Order017	CUST017	Customer	9/17/2024	PRD003	Product 3	17	2.5	42.5	Cancelled	Cash	Paid	109 Elm St	9/10/2024	9/13/2024	Standard	Rep 5	0	0.45	Note 9
Order018	CUST018	Customer	9/18/2024	PRD004	Product 4	18	2.5	45	Shipped	Credit Card	Paid	110 Elm St	9/11/2024	9/14/2024	Express	Rep 1	3	0.5	Note 10
Order019	CUST019	Customer	9/19/2024	PRD005	Product 5	19	2.5	47.5	Shipped	Credit Card	Paid	111 Elm St	9/12/2024	9/15/2024	Standard	Rep 2	0	0.55	Note 11
									Pending	PayPal	Pending	112 Elm St	9/13/2024	9/16/2024	Express	Rep 3	5	0.6	Note 12
									Delivered	Bank Tran	Failed	113 Elm St	9/14/2024	9/17/2024	Same Day	Rep 4	2	0.65	Note 13
									Cancelled	Cash	Paid	114 Elm St	9/15/2024	9/18/2024	Standard	Rep 5	0	0.7	Note 14
									Shipped	Credit Card	Paid	115 Elm St	9/16/2024	9/19/2024	Express	Rep 1	3	0.75	Note 15
									Shipped	Credit Card	Paid	116 Elm St	9/17/2024	9/20/2024	Standard	Rep 2	0	0.8	Note 16
									Pending	PayPal	Pending	117 Elm St	9/18/2024	9/21/2024	Express	Rep 3	5	0.85	Note 17
									Delivered	Bank Tran	Failed	118 Elm St	9/19/2024	9/22/2024	Same Day	Rep 4	2	0.9	Note 18
									Cancelled	Cash	Paid	119 Elm St	9/20/2024	9/23/2024	Standard	Rep 5	0	0.95	Note 19

# HOW AI HELPS IDENTIFY BUSINESS OBJECTS (4/4)

## Outputs

### Identified Business Objects:

1. Order
2. Customer
3. Product
4. Payment
5. Shipping
6. Sales Representative

### Explanation:

- **Key Valued Business Objects** include **Order, Customer, Product, Payment, Shipping, Inventory, and Delivery** as they directly impact core business operations, including revenue generation, customer satisfaction, and order fulfillment.
- **Non-Key Valued Business Objects**, such as **Sales Representative and Discount**, are important but not central to the fundamental operations of transaction management.

This analysis optimizes the identification and management of business objects, ensuring that the key valued ones are distinguished for focused operational efficiency and decision-making processes. Let me know if you would like any adjustments or further details. [\[-\]](#)

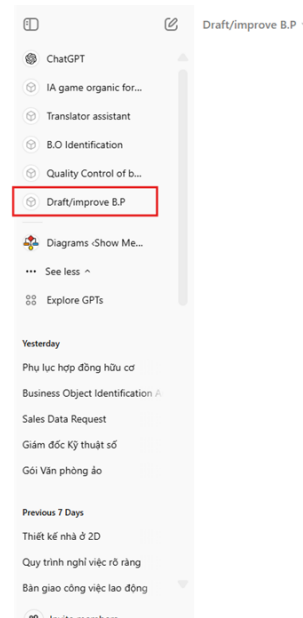
### Structured Table:

No	Business Object (B.O)	Business Object Attributes	Business Object ID	B.O ID Definition Rule	Glossary (Definition)	Relationship	Data Owner	Data User	Is Master Data or Transaction Data?	Key Valued Business Object? (Yes/No)	Justification for Key Valued B.O
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# HOW AI ACCELERATES BUSINESS PROCESS CREATION (1/7)

## Tasks

- Create GPTs – Your AI assistant.
- Prepare your prompts.
- Prepare input data. In our case we have:  
=> **Enterprise data: Sales data (Orders)**  
=> **Business Objects**
- Interact with your AI assistant.



Message Draft/improve B.P

# HOW AI ACCELERATES BUSINESS PROCESS CREATION (2/7)

## Prompt Explanation

### 1. Role:

"Act as an experienced business manager with high business analytics skills."

### 2. Tasks:

"Your task is to draft a business process from scratch or optimize an existing business process."

### 3. Requirements:

"The result should be presented in a table with the following structure:

- Process Stage: Identifies the major phase within the overall business process.
- Process Step No: A sequential identifier for each process step.
- Process Step: A concise title for each task or action within the process.
- Process Step Details: A detailed description of the process step, including specific actions, conditions, or objectives.
- Data Owner (Department): Specifies the department responsible for the data at this stage.
- Data User (Department): Indicates the department that utilizes the data in this process step.
- Digital Tools/Channels Used: Lists the digital tools, software, or channels involved.
- Key Performance Indicators (KPIs): Metrics used to measure success or efficiency.
- Process Step Rules: Defines the rules or conditions for this process step.
- Documents: Lists any relevant documents associated with this step.
- Business Object List: Lists the specific business objects involved or impacted.

The process must follow a well-known business process standard (e.g., RACI method) and provide suggestions for improvement where necessary."

### 4. Instructions:

"Please answer the initial questions to provide more context so that we can create a detailed and accurate business process for your company. Your responses will help us tailor the process to your specific needs and ensure it aligns with your company's goals and requirements."

### 5. Context:

"My company is new in writing business processes for each department. We need a comprehensive business process."

### 6. Format:

"The result should be presented in a table with the specified structure."

### 7. Open-Ended Questions:

"Before drafting or optimizing the business process, please ask me the following initial questions:

- What is the specific department or function for which you need the business process?
- What is the primary goal of this business process?
- Are there any existing processes or templates that you currently use, or is this entirely new?
- Who are the key stakeholders involved in this process?
- What are the key valued business objects that need to be managed through this process?
- Are there any specific regulations or compliance requirements that must be adhered to?
- Who will be responsible for maintaining and updating this process once it is established?
- What are the current challenges or pain points in operations or strategy that this business process should address?
- What are the key performance indicators (KPIs) or metrics that will be used to measure the success of this process?
- What digital tools or systems are currently in use that this process should integrate with or leverage?"

# How AI ACCELERATES BUSINESS PROCESS CREATION (3/7)

## Enterprise data: Sales data (Orders)

Order ID	Customer	Customer	Order Date	Product ID	Product Name	Quantity	Unit Price	Total Order	Order Status	Payment Method	Payment Status	Shipping Address	Shipping Date	Delivery Date	Shipping Method	Sales Rep	Discount	Taxes	Order Notes
Order001	CUST001	Customer	9/1/2024	PRD002	Product 2	1	5	10											
Order002	CUST002	Customer	9/2/2024	PRD003	Product 3	2	10	30											
Order003	CUST003	Customer	9/3/2024	PRD004	Product 4	3	15	22.5											
Order004	CUST004	Customer	9/4/2024	PRD005	Product 5	4	7.5	38											
Order005	CUST005	Customer	9/5/2024	PRD001	Product 1	5	9.5	25											
Order006	CUST006	Customer	9/6/2024	PRD002	Product 2	6	5	60											
Order007	CUST007	Customer	9/7/2024	PRD003	Product 3	7	10	105											
Order008	CUST008	Customer	9/8/2024	PRD004	Product 4	8	15	60											
Order009	CUST009	Customer	9/9/2024	PRD005	Product 5	9	10	90	Shipped	Credit Car	Paid	101 Elm St	9/2/2024	9/5/2024	Standard	Rep 2	0	0.05	Note 1
Order010	CUST010	Customer	9/10/2024	PRD001	Product 1	10	10	100	Pending	PayPal	Pending	102 Elm St	9/3/2024	9/6/2024	Express	Rep 3	5	0.1	Note 2
Order011	CUST011	Customer	9/11/2024	PRD002	Product 2	11	10	110	Delivered	Bank Tran	Failed	103 Elm St	9/4/2024	9/7/2024	Same Day	Rep 4	2	0.15	Note 3
Order012	CUST012	Customer	9/12/2024	PRD003	Product 3	12	10	120	Cancelled	Cash	Paid	104 Elm St	9/5/2024	9/8/2024	Standard	Rep 5	0	0.2	Note 4
Order013	CUST013	Customer	9/13/2024	PRD004	Product 4	13	10	130	Shipped	Credit Car	Paid	105 Elm St	9/6/2024	9/9/2024	Express	Rep 1	3	0.25	Note 5
Order014	CUST014	Customer	9/14/2024	PRD005	Product 5	14	10	140	Shipped	Credit Car	Paid	106 Elm St	9/7/2024	9/10/2024	Standard	Rep 2	0	0.3	Note 6
Order015	CUST015	Customer	9/15/2024	PRD001	Product 1	15	10	150	Pending	PayPal	Pending	107 Elm St	9/8/2024	9/11/2024	Express	Rep 3	5	0.35	Note 7
Order016	CUST016	Customer	9/16/2024	PRD002	Product 2	16	10	160	Delivered	Bank Tran	Failed	108 Elm St	9/9/2024	9/12/2024	Same Day	Rep 4	2	0.4	Note 8
Order017	CUST017	Customer	9/17/2024	PRD003	Product 3	17	10	170	Cancelled	Cash	Paid	109 Elm St	9/10/2024	9/13/2024	Standard	Rep 5	0	0.45	Note 9
Order018	CUST018	Customer	9/18/2024	PRD004	Product 4	18	10	180	Shipped	Credit Car	Paid	110 Elm St	9/11/2024	9/14/2024	Express	Rep 1	3	0.5	Note 10
Order019	CUST019	Customer	9/19/2024	PRD005	Product 5	19	10	190	Shipped	Credit Car	Paid	111 Elm St	9/12/2024	9/15/2024	Standard	Rep 2	0	0.55	Note 11
									Pending	PayPal	Pending	112 Elm St	9/13/2024	9/16/2024	Express	Rep 3	5	0.6	Note 12
									Delivered	Bank Tran	Failed	113 Elm St	9/14/2024	9/17/2024	Same Day	Rep 4	2	0.65	Note 13
									Cancelled	Cash	Paid	114 Elm St	9/15/2024	9/18/2024	Standard	Rep 5	0	0.7	Note 14
									Shipped	Credit Car	Paid	115 Elm St	9/16/2024	9/19/2024	Express	Rep 1	3	0.75	Note 15
									Shipped	Credit Car	Paid	116 Elm St	9/17/2024	9/20/2024	Standard	Rep 2	0	0.8	Note 16
									Pending	PayPal	Pending	117 Elm St	9/18/2024	9/21/2024	Express	Rep 3	5	0.85	Note 17
									Delivered	Bank Tran	Failed	118 Elm St	9/19/2024	9/22/2024	Same Day	Rep 4	2	0.9	Note 18
									Cancelled	Cash	Paid	119 Elm St	9/20/2024	9/23/2024	Standard	Rep 5	0	0.95	Note 19

# HOW AI ACCELERATES BUSINESS PROCESS CREATION (4/7)

## Business Objects

1. Order
2. Customer
3. Product
4. Payment
5. Shipping
6. Sales Representative

# HOW AI ACCELERATES BUSINESS PROCESS CREATION (5/7)

## Open ended questions and answers

ChatGPT 4o

Let's start by addressing the initial questions so I can help you draft or optimize the business process effectively:

1. What is the specific department or function for which you need the business process?
2. What is the primary goal of this business process?
3. Are there any existing processes or templates that you currently use, or is this entirely new?
4. Who are the key stakeholders involved in this process?
5. What are the key valued business objects that need to be managed through this process?
6. Are there any specific regulations or compliance requirements that must be adhered to?
7. Who will be responsible for maintaining and updating this process once it is established?
8. What are the current challenges or pain points in operations or strategy that this business process should address?
9. What are the key performance indicators (KPIs) or metrics that will be used to measure the success of this process?
10. What digital tools or systems are currently in use that this process should integrate with or leverage?

Please provide your answers, and I'll begin crafting a detailed business process tailored to your company's needs.

🔊 📄 ↻

🗉 Message ChatGPT

### Answers

1. Sales.
2. Ensuring accuracy consistency, and efficiency in Order Processing and Fulfillment.
3. This is entirely new
4. Sales Representative.
5. Order, Customer, Product, Payment, Shipping, Sales Representative.
6. Data Privacy Regulations, Product Safety and Labeling Standards, Logistics and Shipping Compliance, ...
7. Sales admin
8. Data Inaccuracy and Inconsistency, Manual and Time-Consuming Processes, Poor Order, Inventory and Shipping Management, Delayed Order Fulfillment
9. Order Management KPIs, Customer Management KPIs, Financial KPIs, Shipping and Logistics KPIs, Operational Efficiency KPIs, IT and Data Management KPIs. ...
10. Knack, Make and Simplebackup



# How AI ACCELERATES BUSINESS PROCESS CREATION (6/7)

## Outputs



Thank you for providing your answers and the operational details file. Based on the information you've shared, I will create a draft business process for the **Sales department** with a focus on **Order Processing and Fulfillment**. I will present the business process using the table structure you provided and incorporate the necessary improvements to address the identified challenges.

Let me first review the data in the uploaded file to ensure it aligns with the process. Then, I will proceed with drafting the business process.

Please give me a moment.

### Sales Department - Order Processing And Fulfillment Process

Process Stage	Process Step No	Process Step	Process Step Details	Data Owner (Departm	Data User (Departmen	Digital Tools/Channels	Key Performance Indic	Process Step Rules	Documents	Business Object List
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# How AI ACCELERATES BUSINESS PROCESS CREATION (7/7)

## Outputs

Sales Department - Order Processing And Fulfillment Process											
Process Stage	Process Step No	Process Step	Process Step Details	Data Owner (Department)	Data User (Department)	Digital Tools/Channels	Key Performance Indicator	Process Step Rules	Documents	Business Object List	
1	Order Creation	1	Receive Customer Order	Sales representative receives the customer order via digital platform (Knack).	Sales	Sales	Knack	Number of Orders Received	Order must include all mandatory customer and product details.	Order Form	Order, Customer, Product
2	Order Validation	2	Verify Order Details	Validate order details including product selection, quantity, customer details, and	Sales	Sales	Knack	Order Validation Accuracy	Verify customer details and order items before processing.	Order Confirmation	Order, Customer, Product
3	Inventory Check	3	Check Inventory Availability	Verify if the required product quantity is available in inventory. Update inventory status.	Inventory	Inventory	Knack	Inventory Accuracy Rate	Ensure sufficient inventory is available before proceeding.	Inventory Report	Inventory, Product
4	Payment Processing	4	Process Payment	Process the payment based on the selected payment method (e.g., Credit Card,	Finance	Finance	Payment Gateway	Payment Success Rate	Payment must be confirmed before order is packed.	Payment Receipt	Order, Payment
5	Order Fulfillment	5	Pack Order	Pack the items according to the order and prepare for shipping.	Warehouse	Warehouse	Knack, Inventory Management	Packing Time per Order	All items must be packed correctly based on the order details.	Packing Slip	Order, Product, Packaging
6	Shipping Preparation	6	Prepare Shipment	Prepare the shipping label and coordinate with the shipping provider for dispatch.	Warehouse	Logistics	Shipping Tool, Knack	Shipment Preparation Time	Shipment label must be generated and matched to the correct order.	Shipping Label	Shipping, Order, Product
7	Shipment Dispatch	7	Dispatch Shipment	Hand over the order to the shipping carrier and update shipment tracking details.	Logistics	Logistics	Shipping Tool	On-Time Delivery Rate	Track order until it is handed to the shipping carrier.	Shipping Confirmation	Shipping, Order
8	Order Completion	8	Confirm Delivery & Close Order	Confirm the delivery status with the customer and close the order.	Sales	Sales	Knack	Order Closure Time	Verify delivery confirmation with the customer before closing the order.	Delivery Confirmation	Order, Customer, Delivery
9	Data Backup	9	Backup Data	Backup the order data to ensure compliance and data integrity (using	IT	IT	Simplebackup	Data Backup Frequency & Success Rate	Backup must be scheduled daily after processing all orders.	Backup Log	Order, Backup



In conclusion, the AI we've used here is not meant to replace human decision-making or creativity.

Instead, it acts as a powerful tool to accelerate your business processes, helping you work smarter and more efficiently.

By automating repetitive tasks, identifying patterns in data, and streamlining process creation, AI gives you more time to focus on strategic decisions and driving business growth.

***Remember, the true value comes from the collaboration between AI and human expertise—together, they create processes that are both accurate and scalable.***

# Q & A



# AI NEWS



# TRAIDA

KNOWLEDGE REPOSITORY WITH  
AN EDUCATIONAL PURPOSE ON AI  
AND DATA SOLUTIONS

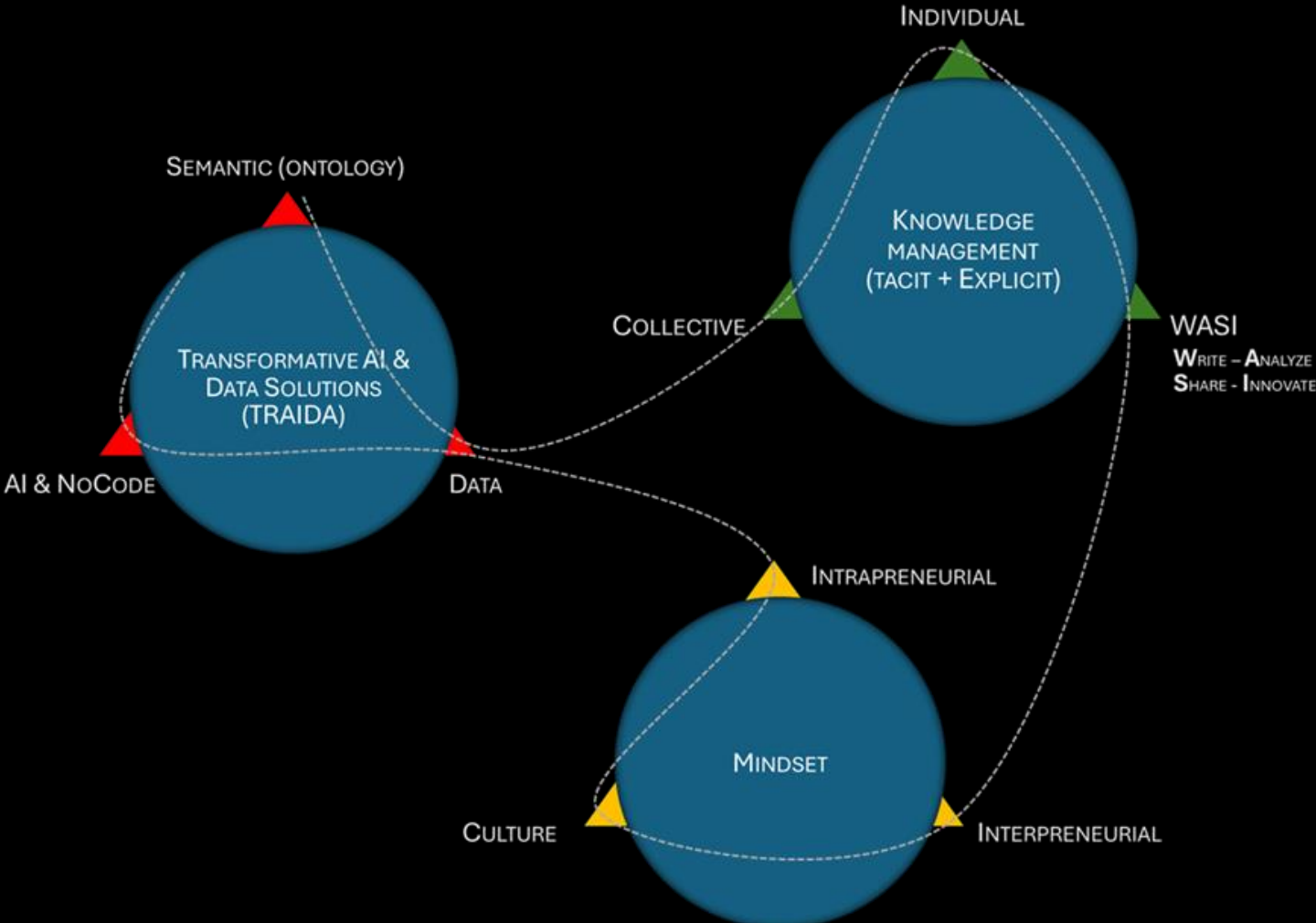
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# AI STRATEGY



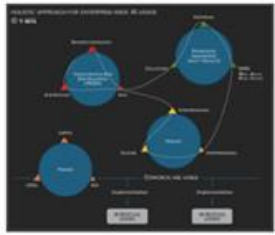
## ENGAGE-META COMMUNITY

Accumulating knowledge to achieve sustainable success with AI



### Open-source think tank focused on AI at scale

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The Engage-Meta approach to organizing practices for the successful deployment of AI and data solutions at scale within an enterprise revolves around three strategic spheres:

- **TRAIDA** – IT architecture for the implementation of AI systems, NoCode, and data solutions based on the TRAIDA framework (Transformative AI and Data Solutions).
- **AI KNOWLEDGE** – Knowledge management for training AI systems.
- **MINDSET** – Promotes the positive use of AI systems.

A fourth sphere complements the system to address financial aspects. The practices of these spheres are universal and adapt according to the company's context.

Subscribe to our social media



Pierre Bonnet, the founder of the community

With over 30 years of experience in the computer industry as an expert in Enterprise Architecture and data governance, Pierre Bonnet is the founder of Engage-Meta.

Since 2022, he has been working with AI experts based in Vietnam (POF). He is the engineer and principal author of the TRAIDA framework for Transformative AI and Data Solutions. He is also an experienced entrepreneur in the tech and beverage industries. He has formalized an innovative approach to accumulating knowledge through a framework called META, which stands for Method, Engagement, Treasury, and Assurance. This framework includes an additional process named WASI, which stands for Write, Analyze, Share, and Innovate. This process is important for formalizing the knowledge needed to train AI systems.

To contact me: [www.bonnet@pof.com.vn](mailto:www.bonnet@pof.com.vn) – My [PROFESSIONAL PROFILE \(PDF\)](#).

If you want to [PARTNER WITH US](#)



Using the **TRAIDA** framework (Transformative AI and Data Solutions) to build your minimum viable technical architecture for scaling AI systems, NoCode, and data management. More information [HERE](#).

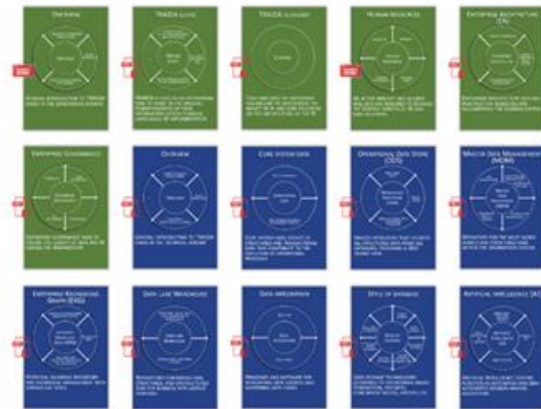
Using the **WASI** process (Write, Analyze, Share, Innovate) to transform tacit knowledge (both individual and collective) into explicit knowledge across the organization and to better train AIs. More information [HERE](#).

Using the **META** framework (Method, Engagement, Treasury, Assurance) in conjunction with the WASI process to cultivate a positive mindset at work and increase value creation with AI. More information [HERE](#).

## TRAIDA AI & Data Solutions



In this sphere, you will find best practices for building your minimum viable technical architecture to scale AI. You will need to clarify your data management systems, study using knowledge graph technology and possibly a NoCode database depending on the complexity of your business. To analyze needs and conduct a gradual transformation, we have defined the TRAIDA framework (Transformative AI and Data Solutions) which contains essential knowledge both technically and in terms of governance. Download the PDF for each TRAIDA card below. The content is free to use (open source, creative commons). You are free to utilize it for your needs, including in commercial activities, provided that you please cite the original source [engage-meta.com](http://engage-meta.com).



Click [HERE](#) or on the image to download the PDF of the global map. The TRAIDA framework consists of 20 cards and 65 topics to address AI and the associated data solutions. Here you will find 9 technical cards (30 topics), 6 governance cards (17 topics) and 5+ business cards (18 topics). Each TRAIDA card is accompanied by a concise documentation that explains its importance in improving data quality and the use of AI on a large scale within the company. With its 20 cards and 65 topics, it offers a comprehensive view of enterprise architecture approached through the lens of data management and AI.



## AI KNOWLEDGE Accumulation



In this sphere, you will find practices that promote the transformation of tacit knowledge into explicit knowledge. This transformation is strategic for being able to train your AI systems with maximum value. It essentially involves documenting the know-how of your operators. This work represents a significant investment, but the return on investment, thanks to AI, is immediate. The more you formalize and accumulate knowledge over time, the more you can create AI assistants that are available on-demand, as well as integrate them into your operational processes to enhance the overall performance of the company.

### Knowledge management to power AI



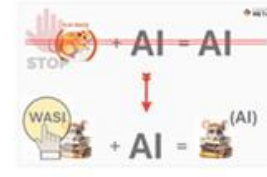
In the company, only about 20% of knowledge is formalized in the form of databases and documents. The remaining 80% to 80% of knowledge remains trapped in the minds of employees. However, all this knowledge is necessary to train AI. Therefore, programs must be initiated to transform tacit knowledge into explicit knowledge and to improve the quality of these information resources. They are strategic for the success of AI and for achieving the expected productivity gains.

Most of the time, the company lacks precise self-awareness. Documentation is scattered across different departments, databases contain only a small portion of the manipulated information, team turnover leads to losses in certain practices, and overall quality is unsatisfactory. However, in the realm of AI, all this knowledge is essential for training. Therefore, it is crucial not only to improve the quality of existing data management but also to extend this management to encompass all tacit knowledge.

**Personal Knowledge:** To level up AI, enhancing knowledge management systems to capture and organize explicit knowledge is crucial. This ensures that information is accessible and up-to-date. Simultaneously, tapping into the rich reservoir of individual tacit know-how can unlock innovative solutions and creative strategies. The motivation to convert personal tacit knowledge into explicit form is twofold: firstly, to assert human expertise in an era increasingly dominated by artificial intelligence, and secondly, to facilitate the systematic accumulation of knowledge. By articulating and sharing personal insights, individuals not only contribute to the collective intelligence but also provide valuable data and knowledge that can be used to train AI systems. This symbiotic relationship between personal knowledge and AI can lead to more sophisticated and intuitive technology that complements human capabilities, fostering a collaborative environment where both can thrive.

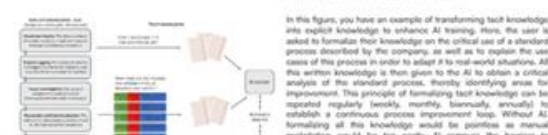
**Collective Knowledge:** Collective knowledge within an organization is a powerful asset, formed by aggregating the explicit and tacit knowledge of individuals within departments and across interdepartmental boundaries. The amalgamation of this knowledge is essential for enterprises as it fosters innovation, efficiency, and competitive advantage. It is estimated that a significant percentage of an organization's knowledge is tacit, residing in the minds of its employees, and remains unexploited. Accumulating this vast reservoir of implicit understanding is vital for organizational growth and adaptability. Artificial intelligence stands as both the conduit and the repository for this knowledge, capable of capturing, analyzing, and storing it. AI systems help transform tacit knowledge into explicit knowledge, making it accessible and actionable, thereby solidifying the foundation of collective intelligence within an enterprise.

**Enterprise Architecture:** At the organizational level, cultivating a mindset that values and facilitates knowledge accumulation is paramount. Enterprise Architecture (EA) serves as the technical scaffold, enabling the scaling of knowledge from individual contributors to the organizational capacity. Together, these elements not only empower AI integration within enterprises but also amplify its application and adoption, ensuring that AI solutions are both innovative and in sync with human expertise.



Soft skills are the backbone of professional development, with critical thinking at the forefront. To build critical thinking, one must focus on enhancing writing skills for clear communication, honing analytical abilities to decipher complex issues, fostering innovation to navigate and create change, and promoting a culture of sharing to disseminate knowledge. In an AI-enabled enterprise, where human and AI co-work, critical thinking and writing skills are even more essential as they help achieve the best combination of human and machine intelligence. AI needs clear guidance and instruction from human operators to produce its best results, which are subsequently validated by humans (Human-AI feedback loop).

In conclusion, mastering the art of writing, analyzing, sharing, and innovating is critical to harness the full potential of AI. Effective knowledge management, particularly the transformation of tacit knowledge into explicit knowledge, is essential for training AI and enhancing organizational intelligence. This is the WASI effect. You can read more about the WASI effect [HERE](#).



## MINDSET Critical Thinking



In this sphere, you will find key principles to help raise awareness that AI necessitates a profound change in the relationship between humans and work. With the increasing intelligence of systems, it is no longer sufficient to simply create standards and repetitive processes of work. Such processes will simply be automated by AI. Everyone must then formalize their knowledge clearly and precisely. Humans, therefore, need to enhance their work capabilities through innovation, creativity, critical thinking, and sharing. It is essential to break out of the rat race and cultivate a culture of intrapreneurship and interpreneurship. Without the right mindset at work, AI will replace positions where the added value becomes low.

### The WASI process

**WASI stands for: Write, Analyze, Share and Innovate.**

How to escape the intellectual rat race that hinders your progress in projects and may become fatal with the rise of AI? Being in the rat race is like going around in circles in your work and life without seeing how to improve your future. When you no longer pass without being noticed, you end up no longer fighting for a better future and merely hanging on day by day. You work somewhat like a robot and distance yourself with social media and easily accessible leisure activities.

This presentation is a pioner that prevents us from building beautiful things and progressing harmoniously. To overcome it, you need to find reasons to act and even an obligation to take action. I try to provide some guidance on how to achieve this in my book "The META-Entrepreneur", but here I want to emphasize the opportunity AI offers to help you escape the rat race.

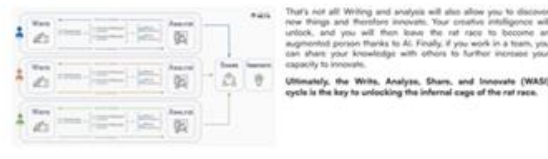
But be careful, to fully utilize your AI assistants, you will need to learn to write with high precision. This is the only way for the AI to truly understand you and respond with relevance and high quality. You will also need to develop a critical mind to analyze the AI's results and seek it to redo, adjust, correct, clarify, reframe, complete, and justify the results. This cycle of writing and critical analysis will significantly increase your intellectual capacity. It's the opposite effect of TikTok, which tends to dull the mind.



It's quite simple to understand, and it boils down to two principles:

• Firstly, to use AI effectively, you will need to completely take control of your way of thinking and working. You can no longer be passive and perform tasks like a robot. This applies to all professions, even if you are a software developer. You will need to think more before acting to better understand what you are doing as you can formalize it in writing and then use it to train your personal AI assistants. You will then do the collectively, following your manager's guidelines.

• Secondly, you are no longer alone in facing your analysis and blockages when moving forward and taking action. The more you enrich your AI assistants, the more they will help you find positive solutions to create your projects and improve your working conditions. As your AI practices improve, you will also be able to find AI assistants on the market that suit you best. No discipline or field of knowledge is inaccessible to you. Thanks to AI, you have access to a powerful intellectual force for just a few dollars a month with ChatGPT 4o. There's no need to quit for your company to provide you with this tool; you can use it at home with your own data.



### Use the META to evaluate your state of mind



**MOTION: clarify your DNA**

The Motion element should help you find a deep and lasting reason that compels you to act positively. It is not just about motivation, which can fluctuate due to circumstances, but an obligation that forces you to act positively even when you are tired or stressed. Tenacity in overcoming challenges and adopting a time horizon of several years before success are crucial for having a good future.









## 9 IT CARDS

<p><b>OVERVIEW</b></p>  <p>GENERAL INTRODUCTION TO TRAI DA CARDS IN THE TECHNICAL DOMAIN</p>	<p><b>CORE SYSTEM DATA</b></p>  <p>CORE SYSTEM DATA CONSIST OF STRUCTURED AND TRANSACTIONAL DATA THAT CONTRIBUTE TO THE EXECUTION OF OPERATIONAL PROCESSES</p>	<p><b>OPERATIONAL DATA STORE (ODS)</b></p>  <p>UNIFIED REPOSITORY THAT COLLECTS ALL STRUCTURED DATA FROM ALL DATABASES, PROVIDING A 360-DEGREE VIEW</p>
<p><b>MASTER DATA MANAGEMENT (MDM)</b></p>  <p>REPOSITORY FOR THE MOST WIDELY SHARED AND STRUCTURED DATA WITHIN THE INFORMATION SYSTEM</p>	<p><b>ENTERPRISE KNOWLEDGE GRAPH (EKG)</b></p>  <p>POTENTIAL UNIVERSAL REPOSITORY FOR KNOWLEDGE MANAGEMENT WITH VARIOUS USE CASES</p>	<p><b>DATA LAKE WAREHOUSE</b></p>  <p>REPOSITORIES CONTAINING RAW, STRUCTURED, AND UNSTRUCTURED DATA FOR BUSINESS INTELLIGENCE PURPOSES</p>
<p><b>DATA INTEGRATION</b></p>  <p>PROCESSES AND SOFTWARE FOR INTEGRATING DATA SOURCES AND GOVERNING DATA FLOWS</p>	<p><b>STYLE OF DATA BASE</b></p>  <p>DATA STORAGE TECHNOLOGIES ACCORDING TO OPERATIONAL NEEDS: TRANSACTION, INTEGRITY, CONCURRENT ACCESS, HISTORY, ETC.</p>	<p><b>ARTIFICIAL INTELLIGENCE (AI)</b></p>  <p>ARTIFICIAL INTELLIGENCE SYSTEMS FUNCTION AS AUTOMATED AND SEMI-AUTOMATED DECISION-MAKING ALGORITHMS</p>

**TO HAVE A UNIFIED VISION OF DATA AND KNOWLEDGE TO RUN AIs**



## 6 GOVERNANCE CARDS

<p><b>OVERVIEW</b></p>  <p>GENERAL INTRODUCTION TO TRAI DA CARDS IN THE GOVERNANCE DOMAIN</p>	<p><b>TRAI DA GUIDE</b></p>  <p>TRAI DA IS USED AS AN OPERATIONAL TOOL TO ASSIST IN THE GRADUAL TRANSFORMATION OF YOUR INFORMATION SYSTEM TOWARDS LARGE-SCALE AI IMPLEMENTATION</p>
<p><b>TRAI DA GLOSSARY</b></p>  <p>THIS CARD LISTS THE IMPORTANT VOCABULARY TO MASTER TO UNDERSTAND THE IMPACT OF AI AND DATA SOLUTIONS ON THE ARCHITECTURE OF THE IS</p>	<p><b>HUMAN RESOURCES</b></p>  <p>AN ACTIVE MINDSET AND ALIGNED SKILL SETS ARE REQUIRED TO ENHANCE THE POSITIVE IMPACTS OF AI AND DATA SOLUTIONS</p>
<p><b>ENTERPRISE GOVERNANCE</b></p>  <p>ENTERPRISE GOVERNANCE AIMS TO ENSURE THE QUALITY OF DATA AND AI ACROSS THE ORGANIZATION</p>	<p><b>ENTERPRISE ARCHITECTURE (EA)</b></p>  <p>ENTERPRISE ARCHITECTURE OUTLINES PRACTICES FOR MODELING AND DOCUMENTING THE BUSINESS SYSTEM</p>

**TO MANAGE UPDATES, VERSIONS, AND SECURITY**



## 6 BUSINESS CARDS

<p><b>OVERVIEW</b></p>  <p>GENERAL INTRODUCTION TO TRAI DA CARDS IN THE BUSINESS DOMAIN</p>	<p><b>PRODUCTIVITY</b></p>  <p>IMPROVING PRODUCTIVITY ACROSS ALL COMPANY PROCESSES IS A KEY OBJECTIVE OF AI</p>
<p><b>CREATIVITY</b></p>  <p>ENHANCING THE CREATIVITY OF CERTAIN COMPANY PROCESSES IS AN AI OBJECTIVE THAT COMPLEMENTS THE GOAL OF IMPROVING PRODUCTIVITY</p>	<p><b>TRUSTWORTHINESS</b></p>  <p>TRUST IN DATA AND AI MUST BE OBJECTIVELY ASSESSED TO SUCCESSFULLY IMPLEMENT AI THROUGHOUT THE ENTERPRISE</p>
<p><b>TREASURY &amp; ASSURANCE</b></p>  <p>PROPERLY MANAGING BUDGETS AND MASTERING VALUE ANALYSIS ARE ESSENTIAL FOR SUCCESSFULLY SCALING AI</p>	<p><b>YOUR CARD</b></p> 

**TO ALIGN TECHNICAL DECISIONS WITH BUSINESS NEEDS**

# IT CARDS

# GOVERNANCE CARDS

# BUSINESS CARDS

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UNIFIED REPOSITORY THAT COLLECTS ALL STRUCTURED DATA FROM ALL DATABASES, PROVIDING A 360-DEGREE VIEW

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**ENTERPRISE KNOWLEDGE GRAPH (EKG)**

POTENTIAL UNIVERSAL REPOSITORY FOR KNOWLEDGE MANAGEMENT WITH VARIOUS USE CASES

**DATA LAKE WAREHOUSE**

REPOSITORIES CONTAINING RAW, STRUCTURED, AND UNSTRUCTURED DATA FOR BUSINESS INTELLIGENCE PURPOSES



**TRAI DA GLOSSARY**

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ENHANCING THE CREATIVITY OF CERTAIN COMPANY PROCESSES IS AN AI OBJECTIVE THAT COMPLEMENTS THE GOAL OF IMPROVING PRODUCTIVITY

**TRUSTWORTHINESS**

TRUST IN DATA AND AI MUST BE OBJECTIVELY ASSESSED TO SUCCESSFULLY IMPLEMENT AI THROUGHOUT THE ENTERPRISE

**DATA INTEGRATION**

PROCESSES AND SOFTWARE FOR INTEGRATING DATA SOURCES AND GOVERNING DATA FLOWS

**STYLE OF DATABASE**

DATA STORAGE TECHNOLOGIES ACCORDING TO OPERATIONAL NEEDS: TRANSACTION, INTEGRITY, CONCURRENT ACCESS, HISTORY, ETC.

**ARTIFICIAL INTELLIGENCE (AI)**

ARTIFICIAL INTELLIGENCE SYSTEMS FUNCTION AS AUTOMATED AND SEMI-AUTOMATED DECISION-MAKING ALGORITHMS

**ENTERPRISE GOVERNANCE**

ENTERPRISE GOVERNANCE AIMS TO ENSURE THE QUALITY OF DATA AND AI ACROSS THE ORGANIZATION

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ENTERPRISE ARCHITECTURE OUTLINES PRACTICES FOR MODELING AND DOCUMENTING THE BUSINESS SYSTEM

**TREASURY & ASSURANCE**

PROPERLY MANAGING BUDGETS AND MASTERING VALUE ANALYSIS ARE ESSENTIAL FOR SUCCESSFULLY SCALING AI

**YOUR CARD**



# TRAIDA

## AI & Data Solutions



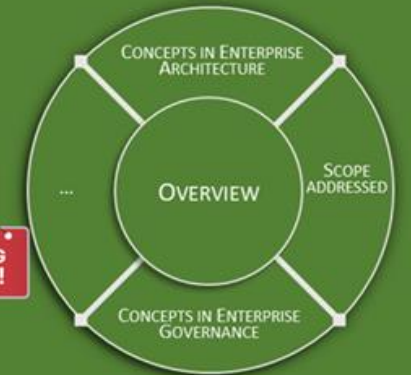
<p>GENERAL INTRODUCTION TO TRADA CARDS IN THE GOVERNANCE DOMAIN</p>	<p>TRAIDA IS USED AS AN OPERATIONAL TOOL TO AID IN THE STRATEGIC TRANSFORMATION OF YOUR INFORMATION SYSTEM TOWARDS LEVERAGE AI CAPABILITIES</p>	<p>THIS CARD LISTS THE IMPORTANT VOCABULARY TO UNDERSTAND THE IMPACT OF AI AND DATA SOLUTIONS ON THE ARCHITECTURE OF THE IS</p>	<p>AN ACTIVE MINDSET AND ADEQUATE SKILL SETS ARE REQUIRED TO ENHANCE THE POSITIVE IMPACT OF AI AND DATA SOLUTIONS</p>	<p>ENTERPRISE ARCHITECTURE OFFERS PRACTICES FOR MODELLING AND COORDINATING THE BUSINESS OPERATIONAL ARCHITECTURE</p>
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### OVERVIEW



COMING SOON!

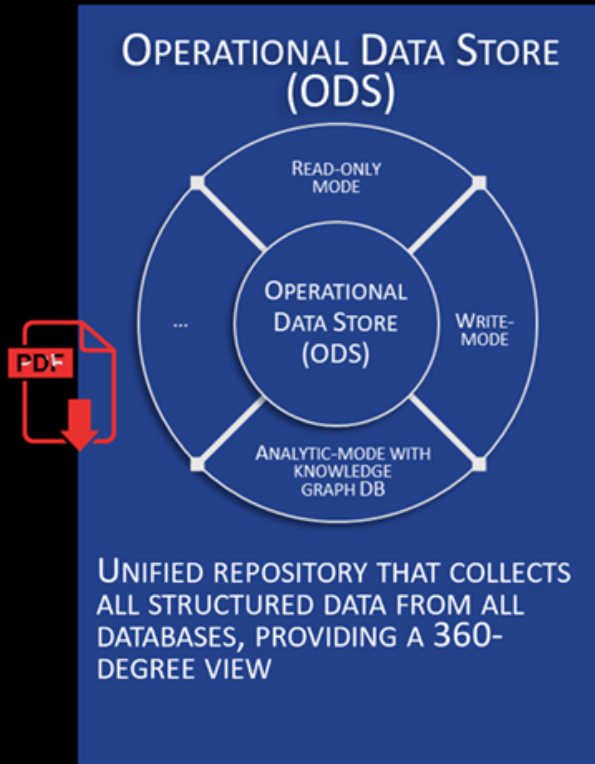
GENERAL INTRODUCTION TO TRADA CARDS IN THE GOVERNANCE DOMAIN

### OPERATIONAL DATA STORE (ODS)



UNIFIED REPOSITORY THAT COLLECTS ALL STRUCTURED DATA FROM ALL DATABASES, PROVIDING A 360-DEGREE VIEW

# EACH CARD IS DESCRIBED IN FOUR SECTIONS AND A SET OF TOPICS



1. CONDITIONS OF SUCCESS
2. IMPORTANCE OF THIS CARD FOR YOUR TRANSFORMATIVE AI
3. BLUEPRINT
4. YOUR SITUATION & OBJECTIVES

# OUR OFFER

## DRINKIZZ NOCODE & AI OFFER

**3 MODULES - TOTAL DURATION : 6 DAYS**

### MODULE 1

DRINKIZZ NOCODE & AI MASTERCLASS  
1/2 DAY - \$500

### MODULE 2

DRINKIZZ NOCODE & AI WORKSHOP  
1/2 DAY - \$500

### MODULE 3

NOCODE & AI FIRST IMPLEMENTATION  
5 DAYS - \$2,500

## EXECUTIVE SUMMARY

Digital transformation is a crucial issue for small and medium-sized enterprises (SMEs) wishing to remain competitive in today's market. However, many SMEs struggle to understand and implement digital tools, particularly in terms of data management and process automation.

Drinkizz, with more than 5 years of experience in using NoCode & AI solutions, offers the NoCode & AI offer, designed to support SMEs in their digital transition. This offer is based on the real case of Drinkizz, which was able to simplify the management of its data and automate its key processes by integrating suitable digital tools that combine NoCode & AI.

Drinkizz uses **Engage-Meta**, an open-source community specializing in NoCode, AI, and data management, as a knowledge base and accelerator to build and optimize its IT infrastructure. Drinkizz adapts and reuses **Engage-Meta's** content to enhance its information system.

**Drinkizz** offers the world's first Organic Natural Energy (**O.N.E**) drink, made from organic ingredients and natural processing. Focused on health, sustainability, and transparency, Drinkizz uses Blockchain technology to give consumers full insight into their products, promoting well-being and positive energy in daily life.

# NoCode & AI Consulting - Drinkizz

# OUR OFFER

## WHY CHOOSE OUR NOCODE & AI OFFER?

### CUSTOMIZED TO YOUR BUSINESS

Our solutions are tailored to fit your company's needs, ensuring that you can seamlessly integrate NoCode & AI solutions without overhauling your existing systems

### RAPID IMPLEMENTATION

Using NoCode & AI, we enable rapid deployment of solutions, ensuring minimal disruption to your business operations.

### COST EFFICIENCY

Our approach is built on Drinkizz's proven expertise, using open-source resources from the Engage-Meta community. This allows us to reduce costs while delivering high returns on your investment.

### OPERATIONAL NOCODE AND AI TOOLS

We recommend a suite of NoCode and AI tools, including those used at Drinkizz, to support your business operations.

**NoCode & AI Consulting - Drinkizz**

# OUR OFFER

## OPERATIONAL NOCODE AND AI TOOLS

- ✓ **ChatGPT:** For data modeling, analysis assistance, and text marketing review.
- ✓ **Knack:** For data management and organizing business information.
- ✓ **Simple Backups:** For data backup.
- ✓ **Make (formerly Integromat):** For data ingestion and process automation.
- ✓ **WooCommerce:** For online sales and e-commerce.
- ✓ **Chatbase:** For customer support automation.
- ✓ **Mailchimp:** For email marketing campaigns.
- ✓ **WordPress:** For website and blog management.
- ✓ **Google Workspace:** For professional email services and digital asset storage and management.
- ✓ **PowerBI + Copilot:** For advanced data visualization and business intelligence.
- ✓ **Bubble:** For building web applications.
- ✓ **Zapier:** For integrating apps and automating workflows.
- ✓ **Microsoft Power Platform:** For automating business workflows, building apps, and creating data insights across Microsoft services (Power Apps, Power Automate, Power BI, and Power Virtual Agents).

**NoCode & AI Consulting - Drinkkizz**

# OUR OFFER

## OUR CUSTOMERS & PARTNERS



**NoCode & AI Consulting - Drinkizz**



# NEXT SESSION ANNOUNCEMENT

**NEXT AI BY DRINKIZZ SESSIONS  
OCTOBER 30, 2024**

# Scan the QR code to download all the slides deck related to the AI BY DRINKIZZ sessions

See the Drinkizz course in No-Code and AI [HERE](#) and enjoy our free AI by Drinkizz sessions below!



**AI by Drinkizz #5** – The role of AI in building anti-fragile businesses –  
[Download the deck.](#)

**AI by Drinkizz #6** – How to Scale Your Business with AI on Data Modeling –  
[Download the deck.](#)

**AI by Drinkizz #3** – Knowledge Management with AI –  
[Download the deck.](#)

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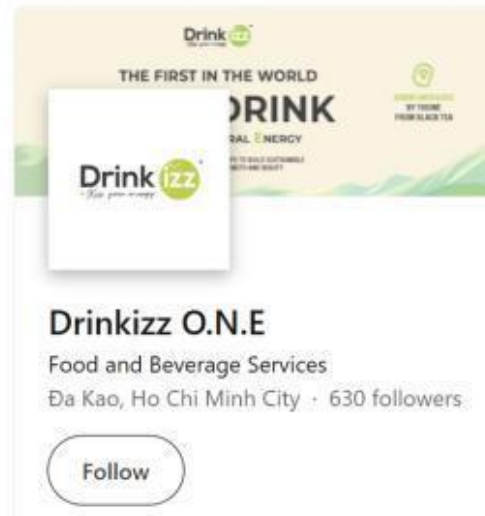
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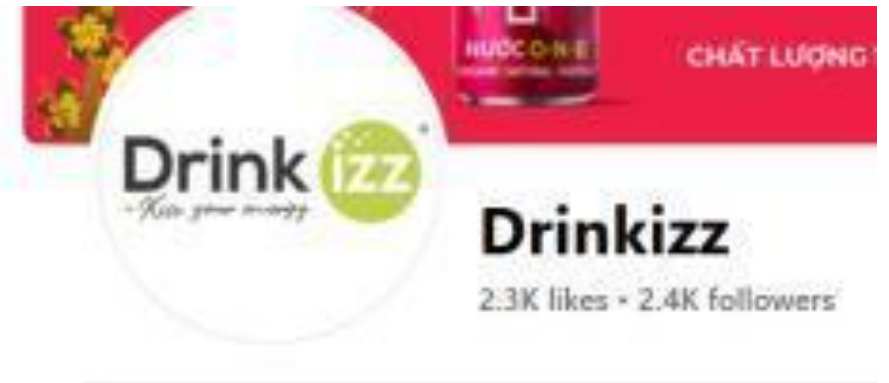
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