

# The Rise of AI in the Workplace: Safeguarding Data and Ensuring Compliance



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Senior Director  
Plative

Great Place To Work.  
Certified  
FEB 2024-FEB 2025  
USA



# PLATIVE

Award-winning Partner for **ERP + CRM + AI**



**700+**  
Certifications



**>3,000**  
Projects and  
Programs  
Completed



**Top-Ranked**  
North American  
Partner



Partner Innovation  
Award Winner



NEW YORK | TORONTO | VANCOUVER | MANILA | MUMBAI





# What We Do

Delivering unparalleled value across front and back office

## Our Services



Zero to Cloud in 60 Days



Advisory and Strategy



Implementation and Optimization

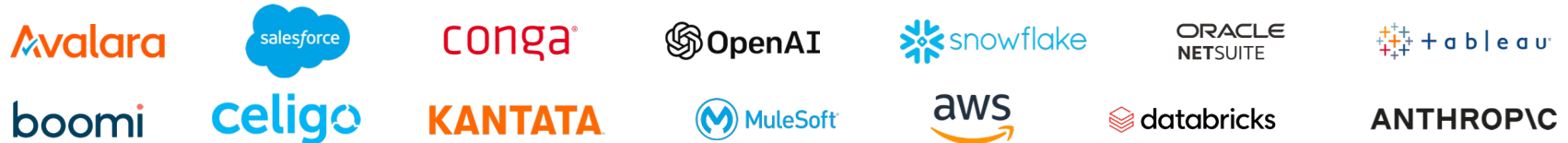


Ongoing Innovation

## Our Expertise

Core ERP	Spend Management	Contract Mgmt	CPQ & Billing	Artificial Intelligence	Commission	Analytics & BI
Sales Tax Compliance	eCommerce	CRM	AR Automation	Marketing	iPaaS	Database

## Our Primary Technology Partners



Question 1:  
Who Here Has An AI-Governance  
Strategy?

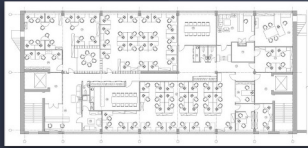
# Question 2:

## Can A Machine Lie?

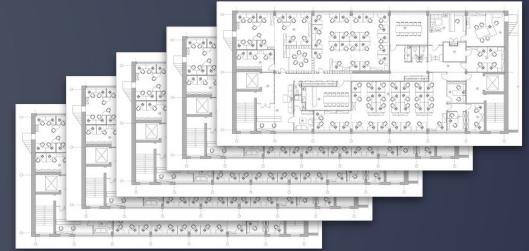
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Floor plan



Copies



## The Original

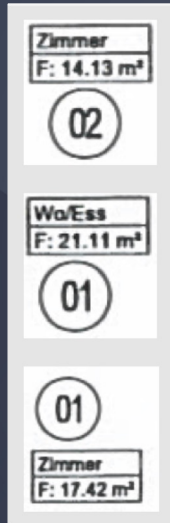
Zimmer
F: 14.13 m <sup>2</sup>
02
Wo/Ess
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01
Zimmer
F: 17.42 m <sup>2</sup>



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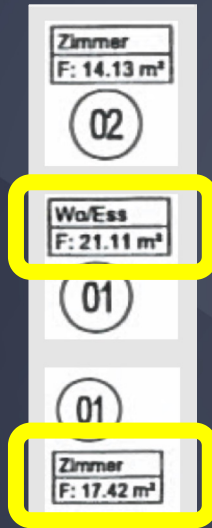
## The Original



## The Copy



## The Original

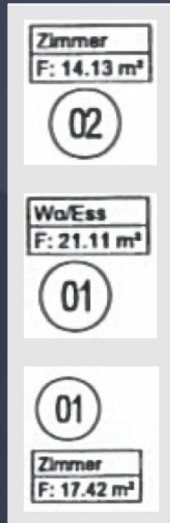


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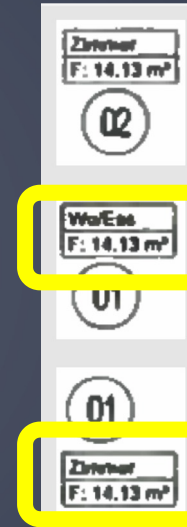


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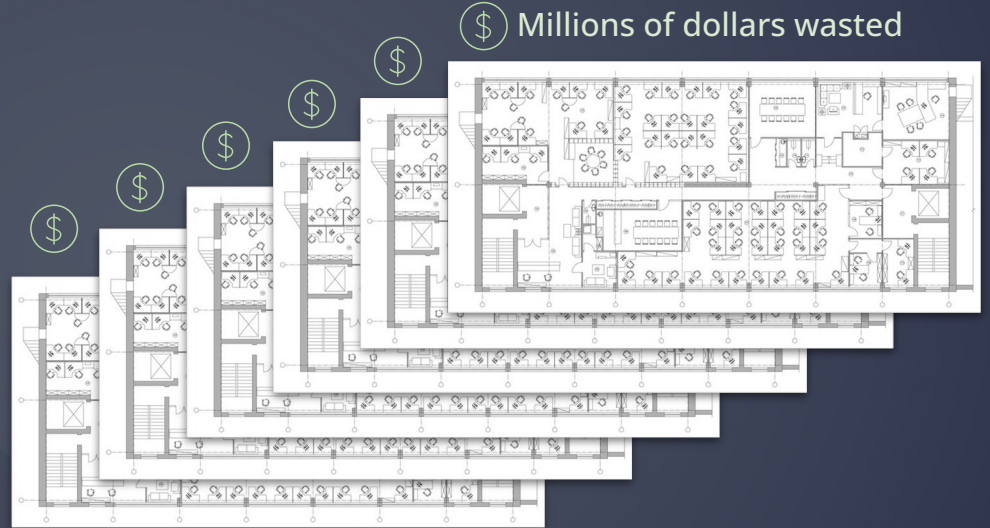


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## The Copy



**JBIG2**  
Compression



# When machines lie, there are **costly** implications



 **Hey there!**  
Welcome to Air Canada Support!

Air Canada offers reduced bereavement fares if you need to travel because of an imminent death or a death in your immediate family.

You'll be asked to submit appropriate documentation. This is simply to help us make sure that those benefitting from bereavement fares are the ones for whom it was intended. While we apologize for this extra step, it's necessary to maintain the integrity of this important program.

If you need to travel immediately or have already travelled and would like to submit your ticket for a reduced bereavement rate, kindly do so within 90 days of the date your ticket was issued by completing our Ticket Refund Application form. You will need to submit:

- a copy of the death certificate
- a Statement of Death issued by the coroner or the funeral director
- a letter from the attending physician or hospital (original or

Type your question here..  

0 / 150 Powered by rozibot

## Air Canada must honor refund policy invented by airline's chatbot

Air Canada appears to have quietly killed its costly chatbot support.

by **Ashley Belanger** - Feb 16, 2024 9:12am PST

208



When machines lie, there  
are **costly** implications

# The AI + Trust Imperative

Is your company prepared for the AI revolution?

## 78%

Of CIOs say that scaling AI is their top priority for data strategy by 2025<sup>1</sup>.

## 75%

Of company's employees are using AI with or without corporate strategy<sup>2</sup>.

## 88%

of IT leaders feel they <sup>3</sup> can't meet AI demand safely.

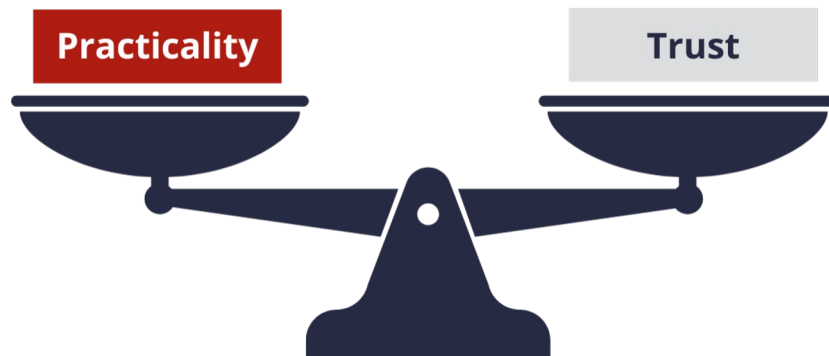


**Sources:**

1. McKinsey's State of AI Survey
2. CFO Magazine State of AI Survey
3. Salesforce research the AI-IT disconnect

# The Balancing Act

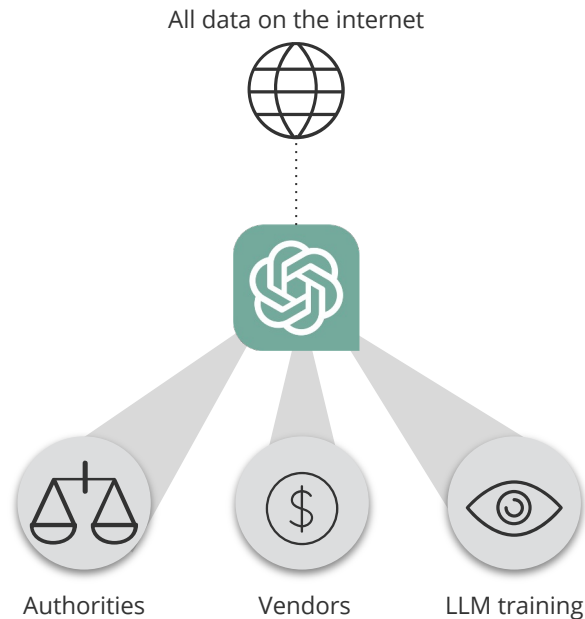
Of Practicality and Trust in AI





# The Balancing Act

Of Practicality and Trust

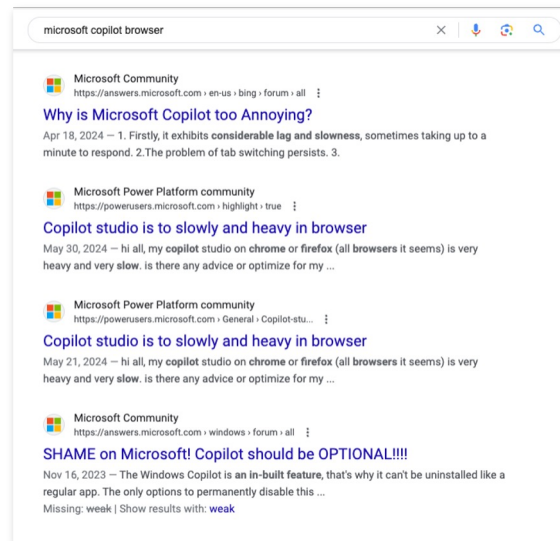


# The Balancing Act

## Of Practicality and Trust

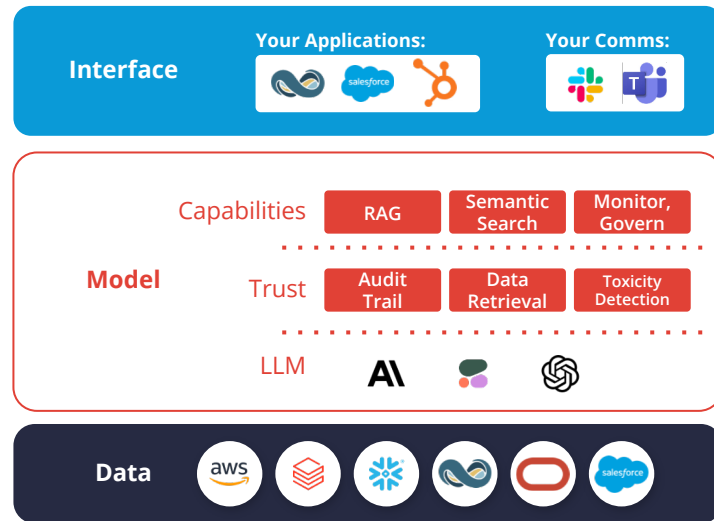
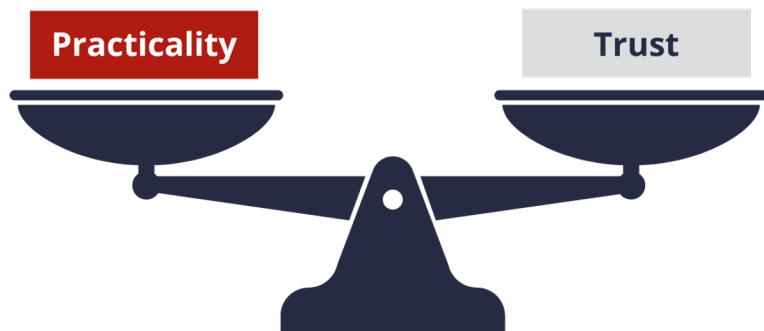


On-platform-only "AI"



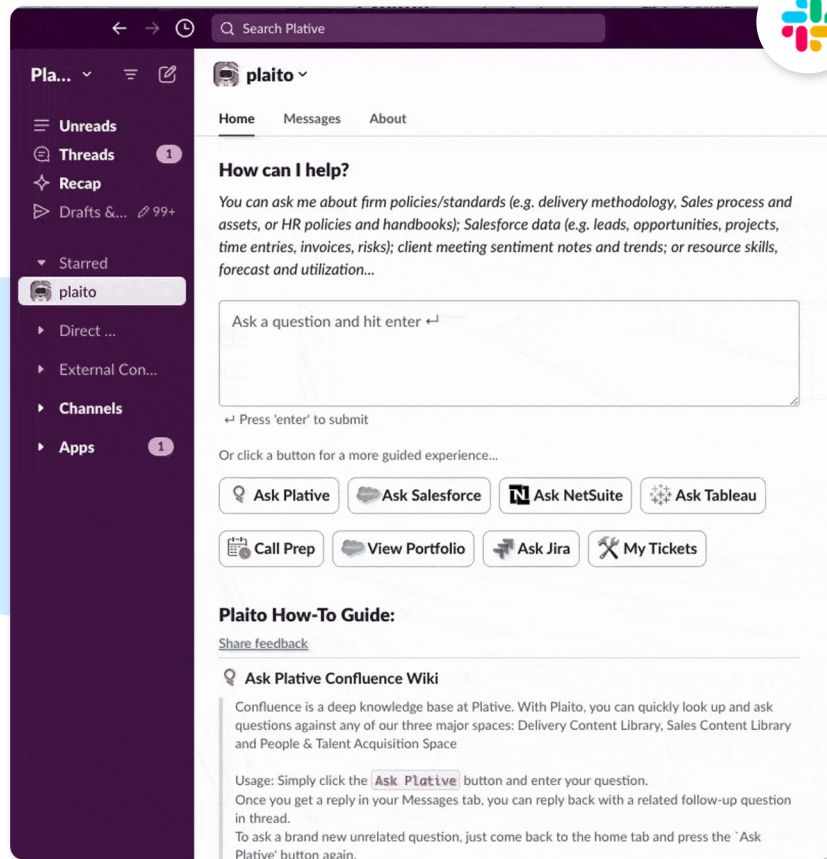
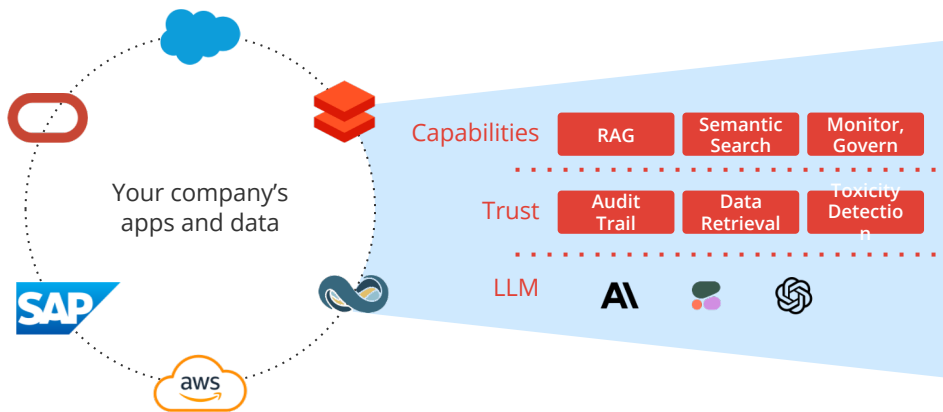
# Enabling Your Enterprise Infrastructure

Balancing Practicality and Trust



# What This Unlocks

Real, impactful GenAI at work





ASK NETSUITE

*Stop running reports,  
Start asking NetSuite*

The screenshot shows the Plaito mobile application interface. On the left is a purple sidebar with navigation options: Home, Activity, Later, Lists, and More. The main content area is titled 'plaito' and features a search bar with the placeholder text 'Ask a question and hit enter'. Below the search bar are several buttons for asking questions: 'Ask Plative', 'Ask Salesforce', 'Ask NetSuite' (highlighted with a red box), 'Ask Tableau', 'Call Prep', 'View Portfolio', 'Ask Jira', and 'My Tickets'. The main content area also includes a 'Plaito How-To Guide' section with a 'Share feedback' link and a 'Confluence Wiki' section.

Search Plative

plaito

Home Messages About

### How can I help?

You can ask me about firm policies/standards (e.g. delivery methodology, Sales assets, or HR, IT & Finance policies and handbooks); Salesforce data (e.g. leads, opportunities, projects, time entries, invoices, risks); client meeting sentiment notes/trends; resource skills, forecast & utilization; or customer success stories...

Ask a question and hit enter ↵

↵ Press 'enter' to submit

Or click a button for a more guided experience

Ask Plative Ask Salesforce Ask NetSuite Ask Tableau

Call Prep View Portfolio Ask Jira My Tickets

#### Plaito How-To Guide:

[Share feedback](#)

#### Ask Plative Confluence Wiki

Confluence is a deep knowledge base at Plative. With Plaito, you can quickly look up and ask questions against any of our three major spaces: Delivery Content Library, Sales Content Library and People & Talent Acquisition Space

Usage: Simply click the **Ask Plative** button and enter your question. Once you get a reply in your Messages tab, you can reply back with a related follow-up question in thread.

To ask a brand new unrelated question, just come back to the home tab and press the 'Ask Plative' button again.

#### Ask Salesforce

Have a conversation with Salesforce on account, project, opportunity and contact records. Just click the **Ask Salesforce** button and search by name or submit a Salesforce or Apollo record URL.

Usage 1: Click **Ask Salesforce** and enter a company name, Salesforce Account URL, or Apollo organization URL

Usage 2: Click **Ask Salesforce** and enter a Salesforce project or opportunity name or URL



Getting a customer overview

The screenshot shows the Plaito mobile application interface. On the left is a dark purple navigation sidebar with icons for Home, Activity, Later, Lists, and More. The main content area is titled 'plaito' and features a search bar at the top. Below the search bar is a 'How can I help?' section with a text input field and a list of buttons for various services: Ask Plative, Ask Salesforce, Ask NetSuite (highlighted with a red box), Ask Tableau, Call Prep, View Portfolio, Ask Jira, and My Tickets. Below this is a 'Plaito How-To Guide' section with a 'Share feedback' link and two main sections: 'Ask Plative Confluence Wiki' and 'Ask Salesforce'. The 'Ask Plative Confluence Wiki' section explains that Plaito is a knowledge base for Plative and provides usage instructions. The 'Ask Salesforce' section provides instructions on how to ask questions related to Salesforce accounts, projects, and records.

# Ready to Take the Next Step?

plative.ai





# Assessing Your Company's AI Readiness

Defining the starting line of your AI journey, then charting the path forward

1

## Aware

The organization's stakeholders are aware of the capabilities and potential impact that AI can have on companies within their industry. However, there is no coordinated AI strategy at the organization.

2

## Minimal

There are very small pockets of teams or singular individuals that are mankind use of AI in their day to day, however, there is no widespread adoption or roll-out strategy of AI above singular point solutions.

3

## Emerging

The organization has elevated certain AI point solutions and are beginning to see the results of those solutions on certain teams. There is no org-wide strategy to deploy at this point, but many users are starting to adopt.

4

## Practicing

Point solutions have been deployed along with a training strategy for team members, and the organization's end-users all have the access to enablement documentation to support the roll-out.

5

## Optimizing

The organization has a coordinated strategy and roadmap for AI that they are actively building and continuously delivering on.

6

## Leading

Customized and purpose-built applications are being leveraged and optimized regularly. The organization has adopted and documented their AI philosophy to the organization.

Book your free AI readiness assessment:

[WWW.PLATIVE.AI](http://WWW.PLATIVE.AI)



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