

Business AI **Explore** Workshop

Facilitation Guide

Release V2



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1

Introduction and overview

The Business AI Explore Workshop in context

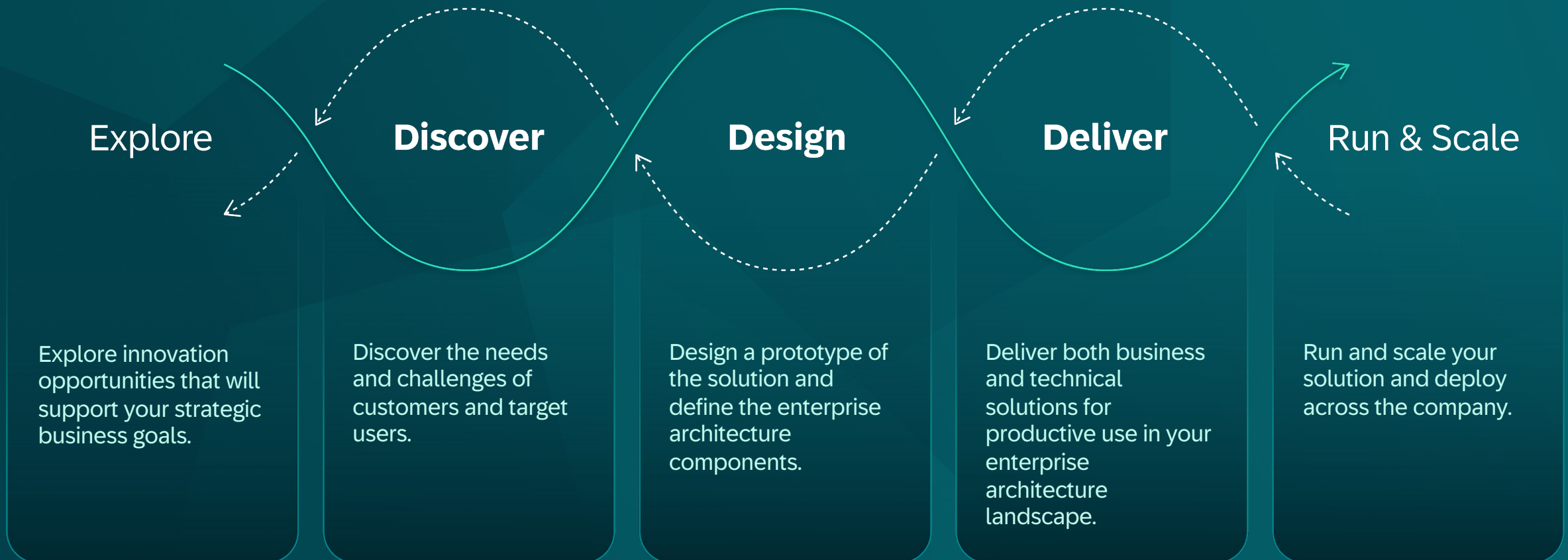
“(...) the **future of AI** isn’t about the technology itself – everyone has access to that now. It’s about **what we choose to do with it.**”

– Filip Drimalka, “The Future of No Work”.

A Human-Centered Approach to Run Innovation Projects

The [SAP's Human-Centered Approach to Innovation](#) (HCAI) is an end-to-end process for developing innovations that focuses on addressing businesses and user needs to generate value.

It supports the entire innovation lifecycle: from generating novel business ideas to developing and delivering high-value solutions. This process **consists of five iterative phases:**

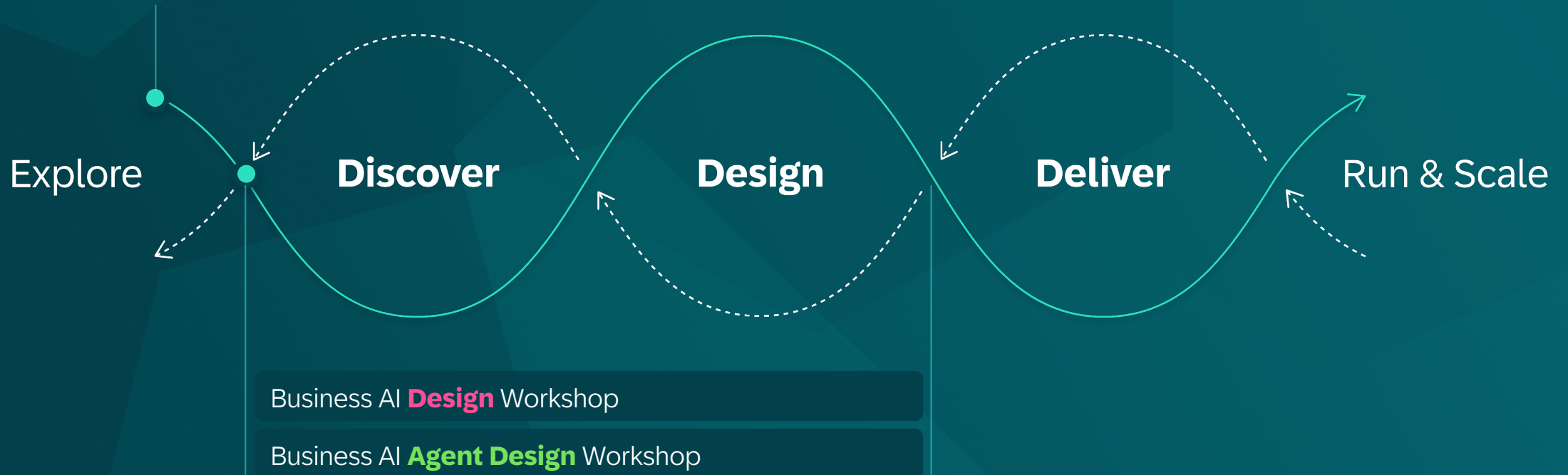


Applying Human-Centered Innovation to Business AI

The SAP AppHaus offers three different human-centered workshop formats to help companies identify and define meaningful use cases for Artificial Intelligence that focus on business and user needs:

the [Business AI Explore Workshop](#), the [Business AI Design Workshop](#) and the [Business AI Agent Design Workshop](#). These formats take place during the 'Explore', 'Discover' and 'Design' phases of the HCAI.

Business AI **Explore** Workshop



Business AI Workshop Formats



Business AI **Explore** Workshop

Understand the possibilities of AI and Identify AI use cases with business impact.



Business AI **Design** Workshop

Define a solution concept to address the pain points of an existing business process using AI capabilities.



Business AI **Agent Discovery** Workshop*

Understand the power of agents and identify agentic use cases to drive productivity.

* To be released mid of 2025



Business AI **Agent Design** Workshop*

Design an AI agent that works for you.

* To be released mid of 2025

Learning Journey

Provides detailed guidance on running interactive sessions to explore and define AI use cases, enabling participants to effectively prepare and execute Business AI Explore and Design Workshops

Selecting a Business AI workshop format

The selection of the right workshop format for your case will depend on the phase in which you are in the project and the needs of your customer or team. Here are the different situations that can guide your decision.

Business AI **Explore** Workshop

You want to **learn what AI can do** and **explore innovative AI solution ideas**.

Business AI **Design** Workshop

You **have an AI solution idea** or want to **improve the experience of an existing solution with AI**.

NOT YET RELEASED

Business AI **Agent Discovery** Workshop

You want to **automate or streamline an activity or business area** and are not sure if an agent can help.

NOT YET RELEASED

Business AI **Agent Design** Workshop

You **have an agentic use case idea** and want to **define the agent capabilities in detail**.

Business AI

Explore Workshop

A collaborative method to identify AI use cases with business impact.

Full workshop: 1 day onsite or 2 ½ days virtual

Mini workshop: 3-hours (multi-customer events)



[Learning Journey](#) 



[Method Website](#) 



Who

should participate?

Strategic decision makers from business departments, and IT experts (3 - 10 people).

Why

should you care?

AI can create real business impact—but only if you identify the right use cases. This workshop helps you expand AI adoption and maximize its value.

What

is the outcome?

A prioritized list of AI-driven innovation opportunities with business impact.

Activities

1. Get Started with AI

Understand the potential of Business AI and get inspired by its capabilities.

2. Explore Opportunities

Leveraging a set of common AI use case patterns, brainstorm potential AI-driven scenarios to address your most critical challenges.

3. Detail Out Use Cases

Describe the selected scenarios from business, technical, and ethical perspectives.

4. Compare and Prioritize

Identify the most promising use cases to start with.



It begins with the business, and I think that's important, particularly for people involved in this kind of space. They often begin too technically oriented, going into solution rather than business value mode.

– Phil Soady, Head Of Development, Oxando

2

Preparing the 1-day workshop

Necessary material and introductory session

Preparing for the workshop

Preparation Checklist – Part 1

□ Understand the format

Go through the instructions in this guide and make sure you understand the flow of the exercises. You can also reference the [MURAL board](#) aimed at virtual sessions to see how the exercises are set up.

□ Clarify the reasons for the workshop request

Talk to the customer or colleague requesting the workshop and make sure that their expectations can be covered with this format. Review [section 1](#) in this guide to decide which workshop format fits best.

□ Ensure the right audience

To run the workshop successfully, you will need potential end-users of the future AI agent, IT and domain experts. Ensure you get the right people.

□ Ensure the right experts

It is recommended to have AI experts in the workshop with experience on building AI applications. This can help to clarify limitations of the technology early on.

□ Clarify the number of participants

The more participants, the more time you will need for share-outs. Ensure you have breakout teams of no more than 6 participants.

Goal

Get ready to run the workshop.

Material

- ★ [Mural Board](#)
- ★ [Material for print](#)
- ★ Whiteboards or similar surfaces
- ★ Post-its, pens, voting dots

Tips

- ★ Start preparing for the workshop at least 1 week in advance to have everything ready.
- ★ Prepare a simplified agenda on a flipchart for on-site sessions.

Preparing for the workshop

Preparation Checklist – Part 2

☐ **Set up a virtual “Getting Started” introductory session**

For the best results, participants should understand AI’s potential and complete the prework. Schedule a 60–90 min inspiration session two weeks before the workshop to showcase AI applications and guide them in preparing relevant challenges. See the "Get Started with AI" section for details.

☐ **Ensure participants have access to the Mural board or look for alternatives**

Check during the introductory session if participants can access Mural. You can run through the Warm-up exercise to test this.

☐ **Send the prework handout and remind participants**

After the introductory session, send participants the prework instructions and follow up with reminders. Encourage them to submit their prework a few days in advance to ensure proper preparation.

☐ **Adapt the agenda for the workshop**

Check the workshop [agenda \(.xls\)](#) and adapt it according to the number of participants and time available. The more participants, the more time you will need for the share-outs.

Goal

Get ready to run the workshop.

Material

- ★ [Mural Board](#)
- ★ [Material for print](#)
- ★ Whiteboards or similar surfaces
- ★ Post-its, pens, voting dots

Tips

- ★ Start preparing for the workshop at least 1 week in advance to have everything ready.
- ★ Prepare a simplified agenda on a flipchart for on-site sessions.

Preparing for the workshop

Preparation Checklist – Part 3

□ Prepare the material

Print the material as specified in the “[Material for print](#)” section. Draw the [Value Heatmap](#) and the [Next Steps Matrix](#) on whiteboards or similar surfaces. Alternatively, you can print the Value Heatmap on a large A0 format. Have enough post-its and pens for the participants and make sure you have enough whiteboards for the exercises.

□ Check the space and equipment

If your workshop is on-site, make sure you have enough room to accommodate all breakout teams and equipment to present the necessary slides. Also ensure you have at least one vertical surface per team where to hang their scenario ideas for better collaboration.

Goal

Get ready to run the workshop.

Material

- ★ [Mural Board](#)
- ★ [Material for print](#)
- ★ Whiteboards or similar surfaces
- ★ Post-its, pens, voting dots

Tips

- ★ Start preparing for the workshop at least 1 week in advance to have everything ready.
- ★ Prepare a simplified agenda on a flipchart for on-site sessions.

Preparing for the workshop

Material for print



**Business AI
Opportunity Cards**

1 set x team
(size DIN A5, 250 gsm.,
back and forth, color)

Scenario Formulation Sentence

We can use (Gen) AI to help

to

so that / in order to

**Scenario Sentence
Template**

15 - 20 x team
(size A5, black and white)

Use Case Brief - Business View

Solution Use Name

Target User Roles

Challenges / Optimizations

Reference Indicators

**Use Case Brief
Templates**

3 sets x team
(size A3, black and white)



**Business AI
Limitation Cards**

1 set x team
(size DIN A5, 250 gsm.,
back and forth, color)

Existing Challenge

What process or activity needs to improve?

Why does it need to improve? What is not working well?

Who is mainly affected?

**Existing
Challenge
Description
Template**

15 - 20 x team
(size A5, black and white)

Generative AI Explore WS - Coach Agenda

Date: 08.05.2023

Time	Topic	Content / Description	Responsible
09:00 - 09:15	1 Welcome, agenda	Introduce the agenda, objectives and set goals and expectations	10 points
09:15 - 09:30	2 Warm-up: Thoughts about Gen AI	10 minutes of free thinking with Gen AI - ideas, questions, challenges and opportunities	10 points
09:30 - 09:45	3 Introduction: Gen AI in SAP S/4HANA	Introduction to Gen AI in SAP S/4HANA	10 points
09:45 - 10:00	4 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	4.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 4.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points
10:00 - 10:15	5 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	5.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 5.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points
10:15 - 10:30	6 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	6.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 6.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points
10:30 - 10:45	7 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	7.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 7.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points
10:45 - 11:00	8 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	8.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 8.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points
11:00 - 11:15	9 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	9.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 9.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points
11:15 - 11:30	10 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10.1 SAP S/4HANA: What processes and capabilities are impacted by Gen AI? 10.2 SAP S/4HANA: What processes and capabilities are impacted by Gen AI?	10 points

Coach Agenda

1 agenda x coach
(size A4, black and white)

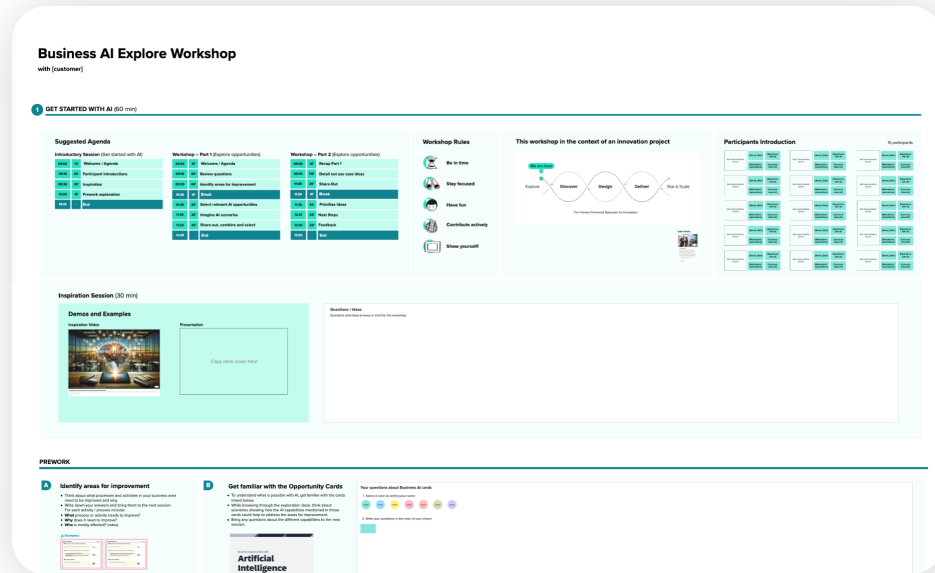
Preparing for the workshop

Material for virtual sessions

You will need to create a Mural account to access this template if you don't have one yet.

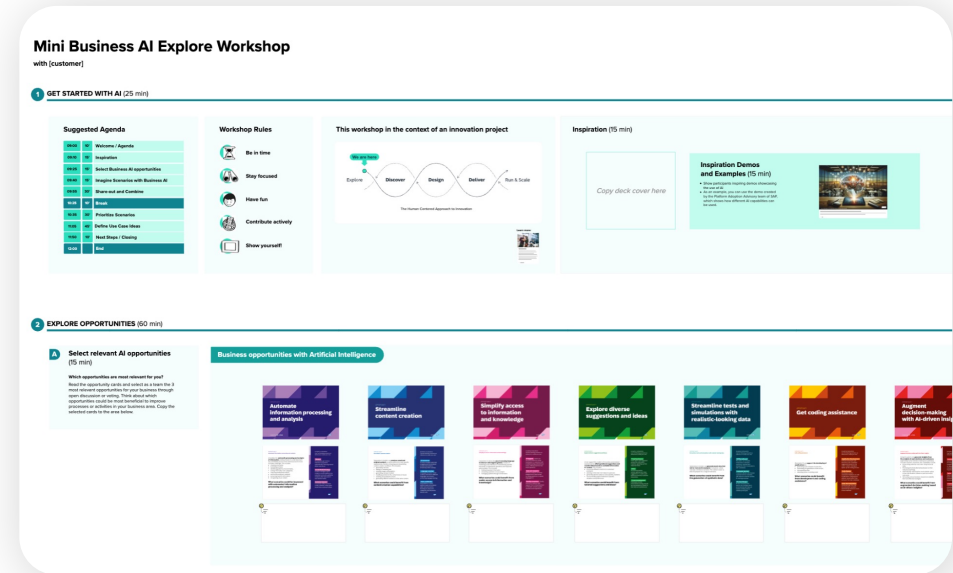
Full workshop

<https://app.mural.co/template/aa3af8c8-6338-42c3-ac17-328a90b43f75/85c570c1-6b66-4d33-abbe-f265817de1cf>



Mini-Explore Workshop

<https://app.mural.co/template/4ccb5717-7c0f-4064-a492-15296f50e918/ac5b8d2a-1886-4de1-ad76-6ad183eb6d14>



Recommendations

- **Collect customer challenges before the session**

Request participants to send the challenges prior to the workshop (“What processes and activities in your business area need to be improved and why?”)

- **Give customer time to get familiar with the topic**

Explain the opportunity cards to the participants during the introduction session and ask them to get familiar with the cards as homework. Give them enough time to assimilate the content and produce ideas before the workshop.

- **Alternative Uses**

If you only have very limited time for the workshop, you can run an ideation session using the Opportunity Cards, and the Scenario Sentence, and detail out one use case idea using the business view of the Use Case Brief.

- **Share-out Rounds**

Adjust sharing time based on the number of participants. For example, allow 2 minutes each for 6 participants or 3 minutes each for 4 participants. Help cluster post-its as they present. If time is short, review the post-its yourself and ask for clarification if needed, or choose one participant to go through them all.

- **Ideation Rounds**

Some teams will need more time to ideate than others. Remain flexible and adapt the timing for the ideation rounds depending on the team’s needs.

- **Clustering Ideas**

Avoid creating too large and generic clusters. Is better to have more small clusters than few very large. The cluster names should be clear even when reading them outside the cluster. Avoid writing 1-word names that are too generic.

PART 1

Get Started with AI

Virtual Introductory Session



Help participants understand the potential of Business AI and get inspired by its capabilities.

CORE ACTIVITIES

1. **Workshop overview**

Explain the purpose for the workshop, agenda and housekeeping rules.

2. **Introductions and expectations**

Participants and coaches get to know each other.

3. **Inspiration**

Present relevant and inspiring AI solutions.

4. **Pework**

Introduce participants to the material and explain the task to prepare before the workshop.

1. Get started with AI: virtual session

STEPS

- A Welcome and agenda** – 10 min
Welcome the participants, introduce the agenda and purpose of the session ([see agenda](#)).
- B Introduction and Expectations** – 15 - 20 min
Participants write in a post-it their name, role, motivations and expectations for the session, experiences and concerns related to AI, and use it to present themselves to the team ([see exercise sheet](#)).
- C Inspiration** – 30 - 40 min
Explain what Artificial Intelligence is and how it can be used in business. Use examples and demos of existing solutions (see demo example by SAP: <https://url.sap/qdpse3>).
- D Prework explanation** – 15 min
Explain participants the opportunity cards and the Existing Challenge template so they can prepare for the workshop and answer their questions. ([see prework handout](#)).



90 min



All together

Goal

Introduce participants to AI, inspire them with its possibilities, set clear expectations, and create a welcoming, open environment for expression.

Outcome

Participants are inspired to ideate AI use cases and understand what they need to prepare for the workshop.

Material

- ★ [Mural Board](#)
- ★ [Business AI Opportunity Cards](#)
- ★ [Existing Challenge template](#)

Tips

- ★ Have this virtual session two weeks prior to the workshop.
- ★ You don't necessarily need a virtual board tool to run this session.

Agenda of Introductory Session*

09:00	10 min	Welcome, agenda
09:10	20 min	Participant introductions
09:30	30 min	Inspiration
10:00	15 min	Pework explanation
10:15		End

* Modify if needed

Introduction and Expectations



20 min



All together

STEPS

Introduce yourself to the team

- Take a post-it and fill it in as indicated in the picture (2 min)
- Introduce yourself to the team and place your post-it on a whiteboard or wall that stays visible during the entire session (1 min per person).

NOTE: If you do this virtually, you can use the [Mural board](#) that includes this template or ask participants to answer similar questions via chat.

Draw a portrait of yourself	What is your name and role?	
What are your motivations and expectations for the session?	What is your experience with AI?	What are your concerns about AI?

Example 1 minute profile

Input Presentation

Inspiration*



30 min



All together



Show participants how AI can be used in action.
You can use the following reference application created by the PAA team at SAP as inspiration.
(<https://url.sap/qdpse3>)

Settings

☐ Work in translated language

Request State

☐ Unanswered

☐ Answered

Request Type

☐ Booking Assistance

☐ Cancellation

☐ Feedback

☐ General Inquiry

☐ Post-Trip Complaint

☐ Problem During Travel

☐ Special Requests

☐ Unexpected Problem

Urgency

☐ Low

☐ Medium

☐ High

Sentiment

☐ Calm

☐ Worried

☐ Agitated

Search

Inbox (15)

Sort by newest

J

Jose

30.10.2023

CANCELLATION OR CHANGE

Cambio de Reserva Hotelera - Bog...

Jose wants to extend his hotel stay.

A

Adam

30.10.2023

GENERAL INQUIRY

Ideale Reisezeit für Mallorca

Adam fragt nach bester Reisezeit für Mallorca.

J

Jean

30.10.2023

GENERAL INQUIRY

Conseils pour une visite au Grand ...

Demande de conseils pour visiter le Grand Canyon.

トム・ゲイビス

30.10.2023

BOOKING ASSISTANCE

ヨーロッパ複数都市ツアーの支援が...

ヨーロッパ複数都市ツアーの予約支援が必要

A

Adelheid

30.10.2023

CANCELLATION OR CHANGE

Anfrage zur Stornierung

Adelheid möchte ihre Reise nach Indonesien stornieren.

B

Bob Williams

30.10.2023

BOOKING ASSISTANCE

Difficulties Booking a Pet-friendly ...

Bob needs help booking a pet-friendly cabin in Colorado.

J

Jan

30.10.2023

BOOKING ASSISTANCE

Cambio de Reserva Hotelera - Bogotá en Noviembre

30.10.2023

Medium Urgency

Calm

Cancellation or Change

J

Customer Information

Original Language

Travelers

Guests

Location

Country

BookingCode

Jose

Spanish

Jose

1

Bogotá

Colombia

RTK234523

Summary

Incoming Message

Response Preparation

Suggested Response

Similar Emails (5)

Administrative

Incoming Message

jHola!

Espero que estén bien. Tengo una reserva en su hotel en Bogotá para noviembre, con la referencia: RTK234523.

Queria hacerles una solicitud de cambio. Inicialmente reservé por 5 días, desde 5/11/2023 hasta 10/11/2023. Pero ahora, me gustaría extender mi estadia 2 días más.

¿Seria posible ajustar mi reserva para que abarque desde 5/11/2023 hasta 12/11/2023? Esto serian en total 7 días en lugar de los 5 que tenía antes.

Espero su respuesta y si hay algún cambio en el costo, agradecería que me lo informaran.

Gracias de antemano por su ayuda.

Saludos, Jose

Response Preparation

Suggested Actions:

Hotel Availability

Provide additional information for your answer:

Options found, special offerings, travel remarks...

☒ Include responses from similar answered emails

Regenerate response

Suggested Response

jHola Jose!

Settings

☒ Work in translated language

Request State

☒ Unanswered

☐ Answered

Request Type

☐ Booking Assistance

☐ Cancellation

☐ Feedback

☐ General Inquiry

☐ Post-Trip Complaint

☐ Problem During Travel

☐ Special Requests

☐ Unexpected Problem

Urgency

☐ Low

☐ Medium

☒ High

Sentiment

☐ Calm

☐ Worried

☐ Agitated

Search

Inbox (2)

Sort by oldest

A

Adelheid

30.10.2023

CANCELLATION OR CHANGE

Cancellation Request

Adelheid wants to cancel her trip to Indonesia.

C

Cyrill

30.10.2023

BOOKING ASSISTANCE

Request for Booking Extension - Gr...

Cyrill requests booking extension for additional person.

Summary

Incoming Message

Response Preparation

Suggested Response

Similar Emails (5)

Administrative

Cancellation Request

Adelheid wants to cancel her trip to Indonesia.

Incoming Message

Dear ThorTours team,

Unfortunately, I have fallen ill and cannot proceed with my trip to Indonesia that I booked last week. Attached is my medical certificate.

I would like to cancel the trip and rebook it at a later date.

Can you assist me with this?

Thank you Adelheid

Response Preparation

Suggested Actions:

Flight Cancellation

Hotel Cancellation

Provide additional information for your answer:

Let the customer know that a cancellation will result in a fee of 100 USD

☒ Include responses from similar answered emails

Regenerate response

Suggested Response

Dear Adelheid,

We are very sorry that you cannot start your trip due to your illness. Of course, we can cancel your trip. However, please note that a cancellation fee of 100 USD applies.

As soon as you feel better and are ready to plan your trip again, we are at your disposal to help you with the rebooking.

Get well soon and we look forward to welcoming you on one of our trips in the future.

Your ThorTours Team

Answer

* Replace this slide with pictures of your solutions if available and add your own slides

1d. Get started with AI: prework

Ask participants to prepare the following for the next session:

1 Areas for improvement

Request participants to think about: “What processes and activities in your business area need to be improved and why?”. They should write down their answers and bring them to the workshop. Use the [examples](#) to show participants how to fill-out the templates. Ideally, participants can also send their answers a few days prior to the workshop. To ease the formulation, you can send the participants the Existing Challenge template as PDF form to write their answers and print the filled-in templates before the workshop or import them to the Mural board if the workshop will be virtual. This document contains 6 empty “Existing Challenge” templates to fill-out digitally. Send participants the [prework handout](#) after the session for reference.

2 Get familiar with Business AI opportunities

Explain participants the opportunity cards . Use the [explanation provided in this guide](#) as reference. As part of the prework, ask participants to review the opportunity cards and think about scenarios showing how the AI capabilities mentioned in those cards could help to address challenging processes and activities.



Variable



All together

FOR
COACH

Goal

Give participants time to understand what AI can do for them and where to apply it.

Outcome

Participants understand what they need to prepare for the workshop.

Material

- ★ [Business AI Opportunity Cards](#)
- ★ [Existing Challenge template](#)

Tips

- ★ Discard cards that are not relevant to the audience you are working with. For example, the opportunity card related to “Generation of code” might not be relevant for non-technical groups.
- ★ Give participants around two weeks to work on the challenges.

Prework: Existing challenges examples

What processes and activities in your business area need to be improved, why and who is affected?



5 min



All together

Existing Challenge



What processs or activity needs to be improved?

Example: Answering customer requests about payment status and contract details in different languages.

**ANSWERING CUSTOMER REQUESTS ABOUT TRAVEL BOOKINGS
AND TRAVEL REQUIREMENTS IN DIFFERENT LANGUAGES.**



(Activity or
Process
to Improve)

Why does it need to improve? What is not working well?

Example: Finding all the information needed to answer every customer request is time consuming.

- TOO MANY DAILY REQUESTS WITHOUT AN OVERVIEW OF WHAT IS URGENT.
- LOTS OF DIFFERENT SOURCES TO FIND REQUESTED INFORMATION MAKE THE PROCESS TIME-CONSUMING AND CAUSE DELAYS IN RESPONSE.
- SOMETIMES, ONE QUESTION IS ANSWERED IN DIFFERENT WAYS BY DIFFERENT PEOPLE, RESULTING IN CONFUSION FOR CUSTOMERS



(Current
problems with
the activity /
process)

Who is mainly affected?

Example: Customer Service Officers

- CUSTOMER SUPPORT REPRESENTATIVES
- CUSTOMERS
- SALES TEAM



(Role /
Department)

Existing Challenge



What processs or activity needs to be improved?

Example: Answering Customer requests

CREATION AND ACCESS TO ONBOARDING INFORMATION



(Activity or
Process
to Improve)

Why does it need to improve? What is not working well?

Example: Lots of different sources to find requested information make the process time-consuming.

- ONBOARDING MATERIALS ARE SCATTERED ACROSS VARIOUS PLATFORMS, MAKING IT HARD FOR NEW HIRES TO FIND WHAT THEY NEED.
- INFORMATION IS OUTDATED AND INCONSISTENT, LEADING TO CONFUSION AND INEFFICIENCIES.
- THE MANUAL PROCESS OF UPDATING DOCUMENTS IS TIME-CONSUMING AND PRONE TO ERRORS.



(Current
problems with
the activity /
process)

Who is mainly affected?

Example: Customer Service Officers

- HUMAN RESOURCES
- NEW EMPLOYEES
- DEPARTMENT MANAGERS



(Role /
Department)

1d. Get started with AI: opportunity cards

Use the provided slides and the opportunity cards to explain participants the Business Opportunities with AI.

The opportunity cards highlight how AI can benefit businesses by showcasing specific capabilities. Each card represents an opportunity pattern, grouping related capabilities. For example, "Automate information processing and analysis" includes capabilities like the creation of summaries, translation of content, and extraction of key information from documents. "Streamline content creation" covers capabilities like generating text and images to speed up content production.

The back of each card explains the opportunity and its associated capabilities, along with examples to show their value in different contexts. Participants can use these examples as inspiration to think about their own.

These cards are used during the workshop to help participants ideate scenarios in which AI is used to generate value.

Before the workshop, review the cards to familiarize yourself with the capabilities and scenarios they illustrate and use the slides provided next to present the cards to the participants.



Variable



All together

FOR
COACH

Goal

Explain participants what the opportunity cards are and their purpose.

Outcome

Participants understand the different opportunity cards and how should they use them to prepare for the workshop..

Material

★ [Business AI Opportunity Cards](#)

Tips

★ Find scenario examples related to the participants' industry to illustrate the different opportunities.

Business Opportunities with AI

This set of cards shows the diverse opportunities that AI makes available to businesses, revolutionizing our work processes.



Business Opportunities with AI (back side)

AI opportunity ←

AI capabilities ←
creating the
opportunity

Question ←
for ideation

OPPORTUNITY

Streamline content creation

Generative AI models can **produce novel and original content**, helping to streamline content creation workflows. This includes:

- generating new text
- creating images and graphics,
- generating narrated texts
- modifying content to fit a certain tone or mood,
- creating personalized content,
- generating different variations of the same content.

What scenarios could benefit from content creation capabilities?

EXAMPLE SCENARIOS

Use the following scenarios as reference to create your own.

E-Commerce

Product managers generate engaging and personalized product descriptions, enhancing online catalogs.

Language Learning

Language educators create auditory exercises in different languages and accents, enhancing language learning.

News and Media

Subscribers to media platforms get personalized daily news summaries, focusing on topics and categories they frequently interact with.

THE BEST RUN **SAP**

→ **Example scenarios using the capabilities**

Pework handout



Variable



Individually

STEPS

Prepare for the upcoming workshop

- Think about: “What processes and activities in your business area need to be improved and why?”. Write down your answers in the [Existing Challenge template \(PDF form\)](#) and bring them to the workshop. For each activity / process include:
 - **What** process or activity needs to improve?
 - **Why** does it need to improve?
 - **Who** is mainly affected? (roles)
- Read the [Business AI opportunity cards](#) and think about scenarios showing how the AI capabilities mentioned in those cards could help to address the challenging processes and activities.

1. Example challenging processes and activities:

Existing Challenge

AppHaus

What process or activity needs to be improved?

Example: Answering customer requests about payment status and contract details in different languages.

ANSWERING CUSTOMER REQUESTS ABOUT TRAVEL BOOKINGS
AND TRAVEL REQUIREMENTS IN DIFFERENT LANGUAGES.



(Activity or
Process
to improve)

Why does it need to improve? What is not working well?

Example: Finding all the information needed to answer every customer request is time consuming.

- TOO MANY DAILY REQUESTS WITHOUT AN OVERVIEW OF WHAT IS URGENT.
- LOTS OF DIFFERENT SOURCES TO FIND REQUESTED INFORMATION MAKE THE
PROCESS TIME-CONSUMING AND CAUSE DELAYS IN RESPONSE.
- SOMETIMES, ONE QUESTION IS ANSWERED IN DIFFERENT WAYS BY DIFFERENT
PEOPLE, RESULTING IN CONFUSION FOR CUSTOMERS



(Current
problems with
the activity /
process)

Who is mainly affected?

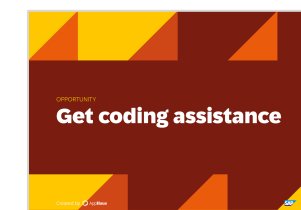
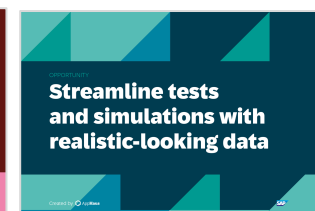
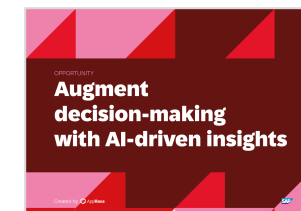
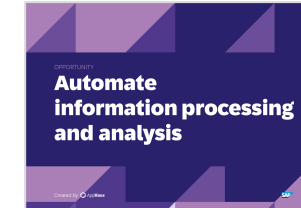
Example: Customer Service Officers

- CUSTOMER SUPPORT REPRESENTATIVES
- CUSTOMERS
- SALES TEAM



(Role /
Department)

2. Cards to get familiar with:



3

Running the 1-day workshop

Step by step exercises and coach instructions

1-day On-site Workshop Agenda*



10 min



All together

09:00	10 min	Welcome, agenda
09:10	20 min	Review questions about opportunity cards
09:30	60 min	Identify areas for improvement
10:30	10 min	Coffee Break
10:40	20 min	Select relevant AI opportunities
11:00	20 min	Imagine AI scenarios
11:20	50 min	Share-out and select
12:10	60 min	Lunch
13:10	10 min	Recap
13:20	120 min	Detail out use case ideas
15:20	20 min	Share-out
15:40	10 min	Coffee Break
15:50	30 min	Prioritize Ideas
16:20	20 min	Next Steps
16:40	20 min	Feedback
17:00	-	END

* This is a suggested agenda, modify if needed

PART 2

Explore Opportunities

On-Site / Virtual Session



Identify critical challenges and brainstorm potential AI-driven solutions to address them.

CORE ACTIVITIES

- 1. Identify areas for improvement**
Participants share the existing challenges and select the most important to solve.
- 2. Select relevant Business AI Opportunities**
Participants select relevant opportunities to improve the selected activities and processes.
- 3. Imagine scenarios with AI**
Participants write down scenario ideas for the use of AI to address the challenges selected.
- 4. Share-out and select**
Participants present their ideas, cluster them and select the most promising ones to describe further.

2. Explore opportunities: challenge selection

STEPS

A

Identify challenges and areas for improvement – 60 min

Before the workshop, gather the challenges participants submitted during [prework](#) and arrange them on a whiteboard or virtual platform. During the session, ask each participant to explain their challenge and answer any questions. Help group similar or duplicate ideas, keeping clusters small and focused.

After presenting all challenges, give participants 5-8 minutes to silently add any missing challenges or additional details. Once done, review the clusters and ask participants to vote on the most important challenges. Limit it to 3 challenges per team of 3-6 people, based on the group size.

Finally, form breakout groups of 3-6 people, each working on a maximum of 3 different challenges.

([see exercise sheet](#))



60 min



All together

FOR
COACH

Goal

Identify activities and / or processes to improve within a selected business area.

Outcome

Participants select the most important challenges to tackle in the session.

Material

- ★ [Existing Challenge template](#)
- ★ Pens and whiteboard

Tips

- ★ Plan enough time for this section as it has the potential to include valuable discussion about the problems worth solving.

Identify areas for improvement



60 min



All together

STEPS

What processes and activities in your business area need to be improved and why?

- Share your challenges with the team and stick them on a whiteboard. Discard duplicate challenges as you present or combine very similar challenges together. (2 - 3 min per person)
- Silently, write down missing challenging activities or processes. (5 – 8 min)
- Share the additional challenges with the team. (2 min per person)
- Select the most important challenges to focus on during the workshop. (max 3 challenges per breakout team).
- Decide who will work on which challenge, forming breakout teams of 3 – 6 people

Existing Challenge



What processes or activity needs to be improved?

Example: Answering customer requests about payment status and contract details in different languages.

**ANSWERING CUSTOMER REQUESTS ABOUT TRAVEL BOOKINGS
AND TRAVEL REQUIREMENTS IN DIFFERENT LANGUAGES.**



(Activity or
Process
to Improve)

Why does it need to improve? What is not working well?

Example: Finding all the information needed to answer every customer request is time consuming.

**- TOO MANY DAILY REQUESTS WITHOUT AN OVERVIEW OF WHAT IS URGENT.
- LOTS OF DIFFERENT SOURCES TO FIND REQUESTED INFORMATION MAKE THE
PROCESS TIME-CONSUMING AND CAUSE DELAYS IN RESPONSE.
- SOMETIMES, ONE QUESTION IS ANSWERED IN DIFFERENT WAYS BY DIFFERENT
PEOPLE, RESULTING IN CONFUSION FOR CUSTOMERS**



(Current
problems with
the activity /
process)

Who is mainly affected?

Example: Customer Service Officers

**- CUSTOMER SUPPORT REPRESENTATIVES
- CUSTOMERS
- SALES TEAM**



(Role /
Department)

Example Existing Challenge

2. Explore opportunities: ideation

STEPS

B

Select relevant Business AI opportunities – 15 - 20 min

Using the set of Business AI opportunities, ask participants to select up to 3 most relevant Business AI opportunities to improve the challenging processes and activities selected.

They can use dot-voting or select through an open discussion.

Encourage participants to look at the capabilities and examples in the cards and think which ones would be most beneficial to tackle the challenges selected.

To ease the decision, each participant can review each card silently and indicate with a vote which opportunities could benefit which challenges as shown in the example of the exercise sheet. Then select the cards with most votes across challenges.

([see exercise sheet](#))

C

Imagine scenarios with AI – 15 - 20 min

Next, ask participants to silently write down scenarios explaining how AI can be used to address the challenging activities and processes selected previously. Use the Scenario Sentence Template and ensure enough scenario sentence templates are available.

Encourage participants to write as many scenarios as possible and use the capabilities and example scenarios on the cards as reference and inspiration. To encourage variety of ideas, you can have participants focus on a different card every 5 minutes.

([see exercise sheet](#))



40 min



In teams of 6 or less

FOR
COACH

Goal

Ideate scenarios where AI capabilities can be used to address the identified challenges.

Outcome

As many AI scenario ideas as possible to address the selected challenges.

Material

- ★ [Business AI Opportunity Cards](#)
- ★ [Scenario Sentence Template](#)
- ★ Pens and whiteboard

Tips

- ★ Have participants read the cards before the workshop to make the selection process easier.
- ★ Ensure each scenario sentence focuses only on one role or department as beneficiary. This will help to find a narrow focus.

Select Relevant AI Opportunities



15 min



In teams of 6 or less

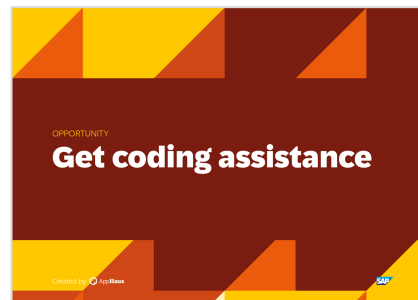
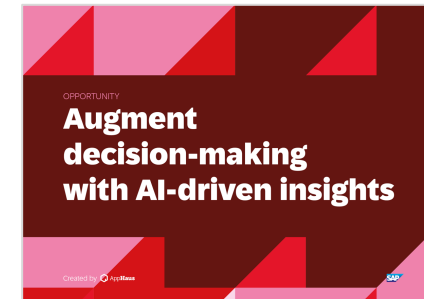
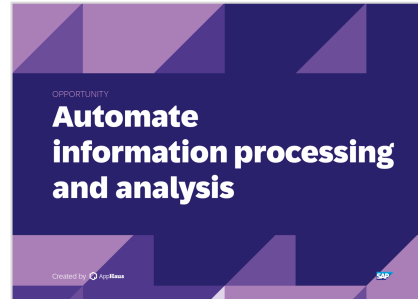
STEPS

Which opportunities are most relevant to improve your activities and processes?

- Read the opportunity cards and select as a team the 3 most relevant opportunities for your business through open discussion or voting. Think about which opportunities could be most beneficial to improve the processes or activities selected in the previous exercise.

If the decision becomes difficult, each participant reviews each card silently and indicates with a vote which opportunities could benefit which challenges as shown in the next page. Then select the cards with most votes across challenges.

At the end of this exercise, you should have decided for the 3 most relevant opportunities for your business.



Select Relevant AI Opportunities – optional



15 min



In teams of 6 or less

Which opportunities could benefit which challenges?

OPPORTUNITY
Streamline content creation

Generative AI models can **produce novel and original content**, inspiring to streamline content creation workflows. This includes:

- generating new text
- creating images and graphics,
- generating narrated texts
- modifying content to fit a certain tone or mood,
- creating personalized content,
- generating different variations of the same content.

What scenarios could benefit from content creation capabilities?

EXAMPLE SCENARIOS
Use the following scenarios as reference to create your own.

Contentment
Product managers generate product descriptions, product press releases, product press coverage.

Language Learning
Language education create audio lessons in different languages and accents, reviewing language learning.

News and Media
Newsroom editors produce personalized news headlines focusing on topics and channels they frequently interact with.

OPPORTUNITY
Streamline access to information and knowledge

Generative AI allows the **use of everyday language to interact with digital systems**. Instead of mastering a user interface or remembering specific keywords, it understands questions and responds appropriately. This includes:

- finding requested information
- answering questions on any subject
- managing systems through conversation.

What scenarios could benefit from easier access to information and knowledge?

EXAMPLE SCENARIOS
Use the following scenarios as reference to create your own.

IT Support
Teams can use chat powered by AI to assist employees or customers with troubleshooting and technical issues, offering real time first-level guidance.

Data and Analytics
Business analysts can draw insights from data models by asking questions in natural language.

Quality Assurance
Quality assurance agents get support from virtual assistants to inspect certain quality standards and regulations.

OPPORTUNITY
Explore diverse suggestions and ideas

Generative AI can support decision-making by **offering suggestions and creative ideas based on available information or context**. This includes:

- proposing different solutions to customers' problems
- advising on the best next steps in a process
- generating diverse ideas to solve specific problems
- recommending options tailored to specific situations

What scenarios could benefit from diverse suggestions and ideas?

EXAMPLE SCENARIOS
Use the following scenarios as reference to create your own.

Travel Assistance
Travel agents get suggested answers to reservation and pricing, speeding up their response times.

Product development
Product teams get different solution proposals to address a specific user requirement.

Sales
Account executives receive optimal next steps suggestions AI learns from previous customer interactions.

Existing Challenge

What process or activity needs to be improved?

ANSWERING CUSTOMER REQUESTS ABOUT TRAVEL BOOKINGS AND TRAVEL ARRANGEMENTS IN DIFFERENT LANGUAGES

Why does it need to improve? What is not working well?

- TOO MANY DAILY REQUESTS WITHOUT AN OVERVIEW OF WHAT IS URGENT.
- LOTS OF INTEREST SUBJECT TO FIND REQUESTS INFORMATION MAKE THE PROCESS TIME-CONSUMING AND CAUSE DELAYS IN RESPONSE.
- SOMETIMES ARE QUESTIONS IF ANSWERED IN DIFFERENT WAYS BY SUPPORT PEOPLE, RESULTING IN CONFUSION FOR CUSTOMERS

Who is mainly affected?

- CUSTOMER SUPPORT REPRESENTATIVES
- CUSTOMERS
- SALES TEAM

Existing Challenge

What process or activity needs to be improved?

CAUTION AND ACCESS TO GARBAGING INFORMATION

Why does it need to improve? What is not working well?

- GARBAGING INFORMATION IS TYPICALLY ACCESS THROUGH PLATFORMS MAKING IT HARD FOR NEW HIREES TO FIND WHAT THEY NEED.
- INFORMATION IS OUTDATED AND INCONSISTENT, LEADING TO CONFUSION AND INEFFICIENCIES.
- THE MANUAL PROCESS OF UPDATING DOCUMENTS IS TIME-CONSUMING AND PRONE TO ERRORS.

Who is mainly affected?

- HUMAN RESOURCES
- NEW EMPLOYEES
- SENIORITY MANAGER

Existing Challenge

What process or activity needs to be improved?

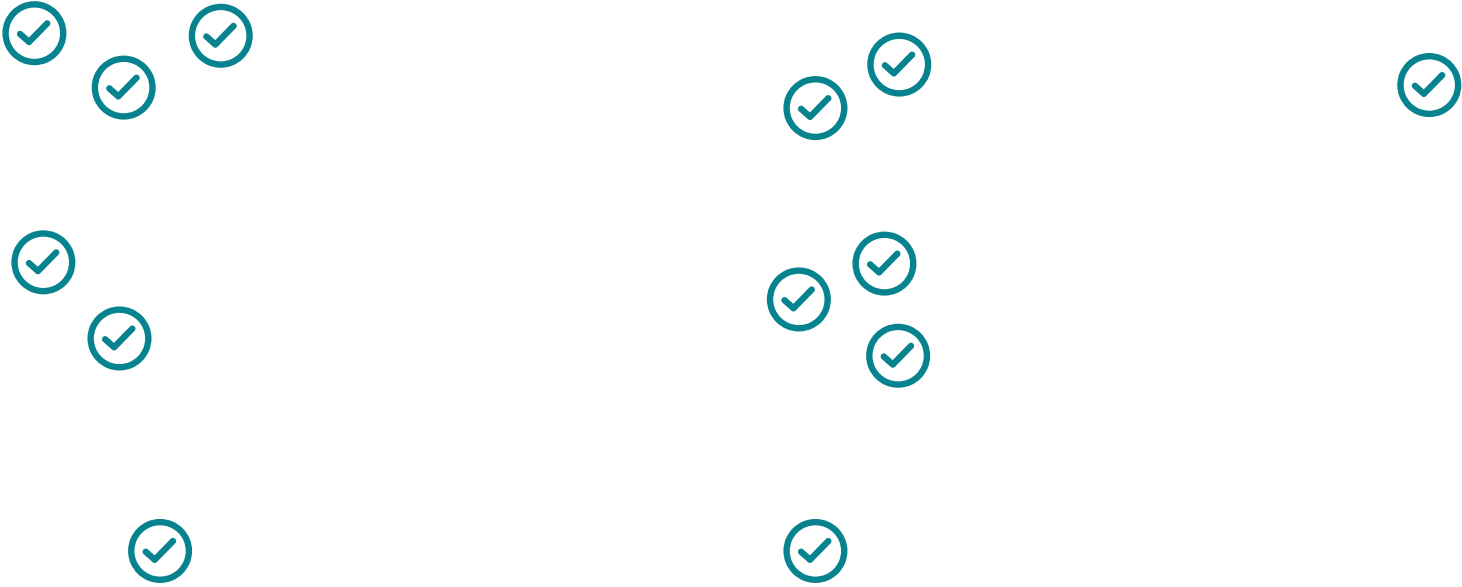
ANSWERING CUSTOMER REQUESTS ABOUT TRAVEL BOOKINGS AND TRAVEL ARRANGEMENTS IN DIFFERENT LANGUAGES

Why does it need to improve? What is not working well?

- TOO MANY DAILY REQUESTS WITHOUT AN OVERVIEW OF WHAT IS URGENT.
- LOTS OF INTEREST SUBJECT TO FIND REQUESTS INFORMATION MAKE THE PROCESS TIME-CONSUMING AND CAUSE DELAYS IN RESPONSE.
- SOMETIMES ARE QUESTIONS IF ANSWERED IN DIFFERENT WAYS BY SUPPORT PEOPLE, RESULTING IN CONFUSION FOR CUSTOMERS

Who is mainly affected?

- CUSTOMER SUPPORT REPRESENTATIVES
- CUSTOMERS
- SALES TEAM



Imagine scenarios with AI



20 min



In teams of 6 or less

STEPS

What would you use AI for and how?

- Silently, write down scenario sentences illustrating how AI capabilities can be used to address the challenging activities and processes selected in the first exercise. Use the scenarios and capabilities in the selected cards as reference and inspiration.

Write as many different scenarios as possible, ensuring at least one per challenge. To ensure a variety of ideas per challenge, you can have each scenario inspired by a different card.

Existing Challenge

What processes or activity needs to be improved?

Example: Answering customer requests about payment status and contract details in different languages.
ANSWERING CUSTOMER REQUESTS ABOUT TRAVEL BOOKINGS AND TRAVEL REQUIREMENTS IN DIFFERENT LANGUAGES.

Why does it need to improve? What is not working well?

TOO MANY DAILY REQUESTS WITHOUT AN OVERVIEW OF WHAT IS URGENT.
PROCESS TIME-CONSUMING AND CAUSE DELAYS IN RESPONSE.
SOMETIMES, ONE QUESTION IS ANSWERED IN DIFFERENT WAYS BY DIFFERENT PEOPLE, RESULTING IN CONFUSION FOR CUSTOMERS

Who is mainly affected?

Example: Customer Service Officers
- CUSTOMER SUPPORT REPRESENTATIVES
- CUSTOMERS
- SALES TEAM

OPPORTUNITY Ease information processing and understanding

Generative AI makes it possible to **automatically process and analyze information** so it becomes easier to understand. This includes:

- making summaries,
- translating content,
- editing or reviewing text,
- identifying patterns,
- sorting content into categories,
- performing sentiment analysis
- extracting specific information.

What scenarios could be improved with easier and faster information processing and analysis?

EXAMPLE SCENARIOS Use the following scenarios as reference to create your own.

International Sales Sales and marketing teams translate product manuals into various languages with minimal effort, supporting global distribution.

Social Media Strategy Content managers check content in social platforms for potential community guideline violations, like hate speech, and misinformation.

Customer Service A customer officer receives a daily summary of key open issues from customer orders.

Scenario Formulation Sentence

We can use AI to help ...

Example: Sales and Marketing Teams

CUSTOMER SERVICE OFFICERS (CSOs)

(Role / Department)

to ...

Example: translate product manuals into various languages

IDENTIFY THE MOST URGENT E-MAIL REQUESTS BASED ON THEIR CONTENT

(Activity supported by AI)

so that / in order to ...

Example: reduce translation efforts while supporting global distribution

URGENT CUSTOMER ISSUES GET PRIORITIZED AND CSOs CAN BETTER ORGANIZE THEIR TASKS

(Objective)



Example Scenario Sentence Formulation

2. Explore opportunities: selection

STEPS

D Share out and select – 50 min

Have each participant share the scenario sentences and place them on a whiteboard or similar surface. Help participants discard duplicate ideas as they share. Then, ask participants to check which scenarios can be combined in one solution. Ideas addressing the same challenge for the same beneficiary group and with similar objective could fit well together, but not all scenarios have to be combined. Finally, give descriptive names to the combined scenarios. Use the last 5 minutes to vote for the scenarios participants find most valuable and select the top 3. You can run an “investing game” to ease the selection process. ([see exercise sheet](#))



50 min



In teams of 6 or less

FOR
COACH

Goal

Select the most promising scenario ideas to detail out as use cases.

Outcome

A selection of the top three AI scenarios to take to the next exercise.

Material

- ★ Post-its, pens
- ★ Voting dots

Tips

- ★ Don't combine too many scenarios in one solution. Try to keep them at a granular level and only discard duplicates or combine very similar ideas together.

Share-out and select



50 min



In teams of 6 or less

STEPS

What scenarios would you invest in?

- Share your scenario sentences with your peers. (30 min)
- Combine too similar scenarios in one. For example, ideas addressing the same challenge for the same beneficiary group and with similar objective could fit well together, but not all scenarios have to be combined. Give descriptive names to the combined scenarios (10 min).
- You now get 5 votes, each worth 100€. Distribute the votes on the scenarios you would invest in and select the top 3. (5 min).

Intelligent request mailbox

Scenario Formulation Sentence

AppHaus

We can use AI to help ...

Example: Sales and Marketing Teams

CUSTOMER SERVICE OFFICERS (CSOs)

(Role / Department)

to ...

Example: translate product manuals into various languages

IDENTIFY THE MOST URGENT E-MAIL REQUESTS BASED ON THEIR CONTENT

(Activity supported by AI)

so that / in order to ...

Example: reduce translation efforts while supporting global distribution

URGENT CUSTOMER ISSUES GET PRIORITIZED AND CSOs CAN BETTER ORGANIZE THEIR TASKS

(Objective)

Scenario Formulation Sentence

AppHaus

We can use AI to help ...

Example: Sales and Marketing Teams

CUSTOMER SERVICE OFFICERS (CSOs)

(Role / Department)

to ...

Example: translate product manuals into various languages

WRITE TAILORED ANSWERS TO CUSTOMER INQUIRIES WITHOUT HAVING TO INVESTIGATE AVAILABLE OPTIONS IN DIFFERENT SOURCES

(Activity supported by AI)

so that / in order to ...

Example: reduce translation efforts while supporting global distribution

REDUCE THE TIME TO ANSWER EACH REQUEST AND IMPROVE CUSTOMER SATISFACTION

(Objective)

Example of combined scenario with solution name

PART 3

Detail Out Use Cases

On-Site / Virtual Session



Describe selected scenarios from business, technical, and ethical perspectives.

CORE ACTIVITIES

- 1. Distribute the scenario ideas**
Each participant or pair of participants takes one selected scenario to detail out.
- 2. Complete the Business View**
Fill-out the Business View of the Use Case Brief template, describing the value of the solution.
- 3. Complete the Technical View**
Fill-out the Technical View of the Use Case Brief template, describing data needed, output and potential technical limitations.
- 4. Complete the Ethical View**
Fill-out the Ethical View of the Use Case Brief template, indicating aspects of potential ethical concern.

3. Detail out use cases

STEPS

A

Distribute the selected scenario sentences – 5 min

Distribute the selected scenarios to different members or pairs of the team, so that they can be described simultaneously.

B

Describe the selected scenarios – 115 min

Ask participants to describe each selected scenario in detail using the Use Case Brief. The Use Case Brief includes three views: business, technical, and ethical. Start with the business view. The technical view will work best if you have representatives from the implementation team who know which data can be useful and what the limitations of the technology are. When filling out the technical view, use the Limitation Cards to help participants identify limitations that could affect the use case. Use the last 10 minutes for participants to share in the breakout team the use cases they worked on. ([see exercise sheet](#))



120 min



In pairs

FOR
COACH

Goal

Describe the selected scenario ideas in detail, converting them in well described use cases.

Outcome

A clearly defined use case that eases evaluation and helps implementation teams determine the next steps.

Material

- ★ [Use Case Brief Templates](#)
- ★ [Business AI Limitation Cards](#)
- ★ Pens and whiteboard

Tips

- ★ Distribute the Use Case Briefs among the participants to save time and have a share-out afterwards. (e.g. each pair is responsible to complete the details for one scenario)
- ★ Use the [Use Case Brief PDF Form](#) to document your use cases digitally after the workshop.

Detail out use cases



140 min



In pairs

STEPS

Describe your selected scenarios in detail.

- Distribute the selected scenarios to different pairs of the team, so that they can be described simultaneously. (5 min)
- Fill out the Business View, Technical View, and Ethical View of the Use Case Brief for each scenario selected (20 - 30 min per view).
- Share the Use Case that you detailed out with your team (10 min / 3 min per pair)

Use Case Brief – Ethical View AppHaus

Would the solution involve... Comments

Processing personal data

Processing sensitive personal data

Automated decision-making

Negatively affecting individual

High-risks

Use Case Brief – Technical View AppHaus

Input data needed What data is needed for this use case?

Main capabilities and expected output What should the solution be able to do? What information should the

Use Case Brief – Business View Intelligent Enterprise Institute AppHaus

Solution Idea Name *INTELLIGENT TRAVEL REQUEST MAILBOX*
What is the name of your solution idea?

Target User Roles <small>Who will use this solution? What is their role and in which department do they work?</small> CUSTOMER SERVICE EMPLOYEES	User's Objectives <small>What should the target users be able to accomplish with the solution?</small> <ul style="list-style-type: none"> MANAGE AND PRIORITIZE CUSTOMER REQUESTS ADDRESS REQUESTS ACCURATELY RESPOND TO CUSTOMERS ON TIME 	Relevance Indicators <small>Reach: How many potential users does this solution have?</small> <div> Few Some Many </div> <small>Strategic Relevance: How important is this solution to achieve the organisation's targets?</small> <div> Low Med High </div> <small>Business Value: How would you rate the business impact of your solution idea?</small> <div> </div> <div>Low High</div>
Challenges / Optimizations <small>What challenges are being addressed? What does the solution improve?</small> <ul style="list-style-type: none"> REQUESTS COME IN DIFFERENT LANGUAGES TAKES LOTS OF MANUAL SEARCHES IN DIFFERENT PLACES TO ANSWER SOME REQUESTS ARE MORE URGENT THAN OTHERS, BUT IT'S HARD TO IDENTIFY THOSE REQUESTS TO FIRST ATTEND TO. 	Business Benefit <small>What makes this a valuable solution for the company? What KPIs are improved?</small> DECREASES THE TIME TO SOLVE CUSTOMER REQUESTS BY 50%, INCREASING CUSTOMER SATISFACTION	

AI Limit
Which AI limit is most relevant?

LEARN FROM NEW DATA ON-THE-FLY

HARD TO IMAGINE OPTIONS PRIOR OVER TIME

Process Steps
How does the process look now and where could the solution help?

```

    graph LR
      A[REQUEST RECEIVED AS E-MAIL] --> B[Sort requests manually by urgency and type]
      B --> C[Open urgent request]
      C --> D[Translate request]
      D --> E[Find information in multiple systems]
      E --> F[Consult pricing with colleagues]
      F --> G[Write answer]
      G --> H[Send answer]
  
```












Detail out use cases: business view

The Business View

The Business View of the Use Case Brief provides a summary of the use case, highlighting its purpose and the value it brings to both the business and end-users.

This is the minimum of what needs to be described for each scenario.

Use Case Brief – Business View

Solution Idea Name <i>What is the name of your solution idea?</i>		
INTELLIGENT TRAVEL REQUEST MAILBOX		
Target User Roles <i>Who will use this solution? What is their role and in which department do they work?</i> CUSTOMER SERVICE EMPLOYEES	User's Objectives <i>What should the target users be able to accomplish with the solution?</i> <ul style="list-style-type: none"> • MANAGE AND PRIORITIZE CUSTOMER REQUESTS • ADDRESS REQUESTS ACCURATELY • RESPOND TO CUSTOMERS ON TIME 	Relevance Indicators Reach: <i>How many potential users does this solution have?</i>  Few  Some  Many
Challenges / Optimizations <i>What challenges are being addressed? What does the solution improve?</i> <ul style="list-style-type: none"> • REQUESTS COME IN DIFFERENT LANGUAGES • TAKES LOTS OF MANUAL SEARCHES IN DIFFERENT PLACES TO ANSWER • SOME REQUESTS ARE MORE URGENT THAN OTHERS, BUT IT'S HARD TO IDENTIFY THOSE REQUESTS TO FIRST ATTEND TO. 	Business Benefit <i>What makes this a valuable solution for the company? What KPIs are improved?</i> <p>DECREASES THE TIME TO SOLVE CUSTOMER REQUESTS BY 50%, INCREASING CUSTOMER SATISFACTION</p>	Strategic Relevance: <i>How important is this solution to achieve the organisation's targets?</i>  Low  Med  High
Business Value: <i>How would you rate the business impact of your solution idea?</i>      Low High		
Process Steps <i>How does the process look now and where could the solution help?</i> <pre> graph LR A[REQUEST RECEIVED AS E-MAIL] --> B(SORT REQUESTS MANUALLY BY URGENCY AND TYPE) B --> C[OPEN URGENT REQUEST] C --> D(TRANSLATE REQUEST) D --> E(FIND INFORMATION IN MULTIPLE SYSTEMS) E --> F(CONSULT PRICING WITH COLLEAGUES) F --> G(WRITE ANSWER) G --> H[SEND ANSWER] </pre>		

Detail out use cases: technical view

The Technical View

The Technical View of the Use Case Brief is meant to describe technical aspects of the use case, such as the data and systems required, main capabilities expected, and possible limitations of the technology.

This technical view works better if you have a technical expert in the team.

To complete the “Business AI Limitations” section, take a look at the [Business AI Limitation Cards](#) and discuss as a team which limitations might affect the use case and how.

Use Case Brief – Technical View

Input data needed

*What data is needed for this use case?
What data is available?*

- REQUEST TEXT (E-MAIL)
- BOOKING SYSTEM DATA

Main capabilities and expected output

What should the solution be able to do? What information should the solution provide and in which format?

- PRIORITIZE REQUESTS BY URGENCY
- TRANSLATE E-MAILS WHEN NEEDED
- FORMULATE ANSWER E-MAIL
- CATEGORIZE REQUESTS BY TYPE
- HIGHLIGHT MAIN INFORMATION IN THE REQUEST LIKE BOOKING ID, DESTINATION AND TYPE OF SERVICE REQUESTED
- SHOW AVAILABLE SERVICE OPTIONS IN THE BOOKING SYSTEM
- SHOW POSSIBLE ALTERNATIVES TO SOLVE THE REQUEST

AI Limitations

Which AI limitations could affect the use case and how? Use the limitation cards as reference.

LEARN FROM
NEW DATA
ON-THE-FLY

HARD TO IMPROVE
OPTIONS PROVIDED
OVER TIME

ENSURE A
CONSISTENT AND
PREDICTABLE
OUTPUT

DIFFERENT URGENCY
LEVELS COULD BE DERIVED
FOR SIMILAR REQUESTS

Detail out use cases: ethical view

The Ethical View

The ethical view of the Use Case Brief aims to make participants aware of ethical considerations when implementing the use case.

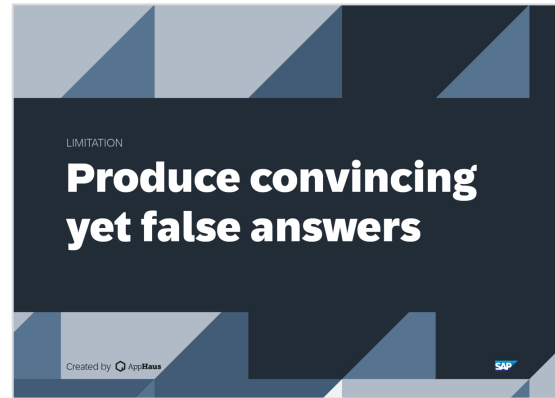
Questions answered with “Not Clear Yet” should be reviewed again at later stages, but before implementation. Questions answered with “yes” should be accompanied by comments indicating possible risk mitigations for the aspect in question. For example, if the use case needs to process identifiable personal data, think about how these data could be anonymized without negatively impacting the desired benefits.

The questions displayed in this document are based on the [SAP AI Ethics Handbook](#) and might be subject to change.

Use Case Brief – Ethical View

Would the solution involve...			Comments
Processing personal data	Would the solution process any information relating to an identified or identifiable natural person for training purposes or during productive usage? (excludes anonymized data sets or the process of anonymizing personal data).	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Clear Yet	CUSTOMER'S E-MAIL TO BE ANONIMIZED FOR ANALYSIS OF INFORMATION
Processing sensitive personal data	Would the solution include the processing of sensitive personal data like information on sexual orientation, religion, biometric data (including face imaging &/or voice recognition)?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Clear Yet	
Automated decision-making	Does the solution involve fully or partially automated decision-making? Does it include cases where no human intervention or human supervision takes place? (excluding any recommender system)	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Clear Yet	
Negatively affecting individuals	Could the solution negatively affect the well-being of individuals or groups (social, safety, financial, and/or physical) or intrude/restrict an individual's fundamental rights and freedom, if the AI system is insufficiently trained and tested, incorrectly used by customers or used for a different purpose than the original scope?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Clear Yet	
High-risks	Does the use case belong to one of the following domains: E.g. Categorisation of natural persons, Management and operation of critical infrastructure, Employment/HR, Healthcare, Private services and Public services and benefits, Law Enforcement, Migration, Democratic processes?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Clear Yet	

Business AI Limitation Cards



Business AI Limitation Card Example (back side)

AI Limitation ←

LIMITATION

Ensure that the model always behaves ethically

Generative AI models, like GPT, learn from vast online data, inheriting both its knowledge and biases. They **lack a moral compass to discern right from wrong, and have no awareness of cultural nuances**, so they might produce biased or inappropriate content.

Ensuring consistent ethical behavior requires continuous monitoring and fine-tuning, as AI can't inherently understand or uphold human ethics.

AI Limitation Explanation ←

DISCUSSION QUESTIONS

Discuss **if this limitation could affect your use case and how**. The following questions might help.

Is the scenario one where biased or prejudiced outputs could lead to discrimination or harm to certain groups?

Will the AI be making recommendations that could have long-term consequences for individuals, such as in career, education, or health?

Is there a potential for the solution to produce outputs that might be considered controversial or offensive in certain contexts or cultures?

→ Discussion questions

PART 4

Compare and Prioritize

On-Site / Virtual Session



Identify the most promising use cases to start with.

CORE ACTIVITIES

1. **Share-out**

Participants share their described use cases with the entire team.

2. **Prioritize use cases**

Participants position the use cases on a value heatmap evaluating them based on business value and complexity

3. **Decide for most relevant use cases**

Based on the evaluation, participants select the use cases they want to have implemented first.

4. **Define next steps**

Decide for the main action items to follow up from the session, indicating what needs to be done, until when and who will be responsible

4. Compare and Prioritize

STEPS

A Prioritize your Use Case Ideas – 30 min

Bring all participants together and have them share their use case Ideas to the other teams to get feedback. Next, help participants position the Use Case briefs in the Value Heatmap relative to each other, based on agreed criteria (e.g. Business Value and Complexity). The use case ideas can be positioned in the Heatmap after each presentation or after all teams have presented. Consider that the positioning of a use case idea is relative and might change after every new idea presented. Discuss the position of the ideas in the value heatmap as a team and decide which use case(s) should be tackled first.

([see exercise sheet](#))



30 min



All Together

FOR
COACH

Goal

Compare the described use cases with each other to define a priority.

Outcome

A few selected use cases to start with.

Material

- ★ [Value Heatmap](#)
- ★ Post-its, pens and whiteboard

Tips

- ★ Select the criteria for the prioritization in advance to avoid wasting time.
- ★ Prefer use cases that are not too complex to realize but provide high business value.

Prioritize your use case ideas



30 min

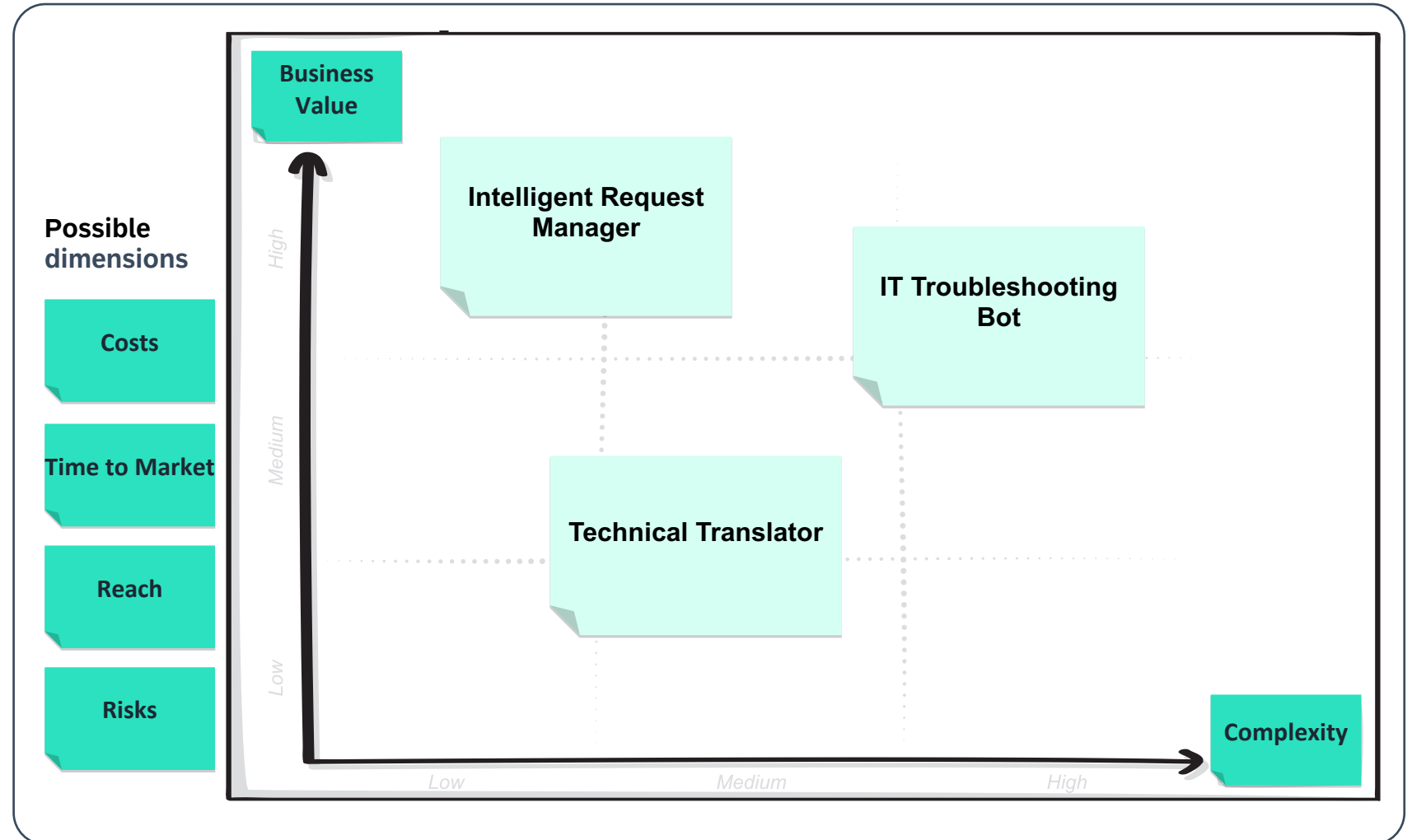


All together

STEPS

What use cases are most valuable and should be implemented first?

- All participants come together. Each team presents their Use Case Ideas to the other team and receives feedback (20 min)
- Participants position the Use Case Briefs or their solution names in the Value Heatmap relative to each other, based on agreed criteria (e.g. Business Value and Complexity). Discuss the position of the ideas in the value heatmap as a team. (25 min)
- Participants decide which use case idea to take to the next step. (5 min)



4. Compare and Prioritize

STEPS

B

Define action items – 20 min

In a team discussion decide for 4 - 5 action items to follow up from this session. Indicate in a next steps matrix what needs to be done, until when and who will be responsible.
([see exercise sheet](#))

C

Collect feedback – 20 min (optional)

In a whiteboard place 2 large post-its, each with a question: “What did you like?” and “What do you wish for next time?”. Ask participants to write down silently answers to both questions. Then ask them to share their feedback with the team and place their post-its on a whiteboard. (1 min per person)



30 min



All together

Goal

Agree on action items.

Outcome

Action plan with 4 – 5 clear action items to follow up.

Material

- ★ [Next Steps Matrix](#)
- ★ Post-its, pens and whiteboard

Tips

- ★ If the participants have not yet come to a decision, agree on a follow-up session to decide the use case to move forward with and ensure customer commitment to continue.
- ★ Depending on case, a next step could be a [Business AI Design Workshop](#) to detail out the content for the use case with end users.

Next steps



20 min




All together

STEPS

Define action items.

- In a team discussion decide for 4 - 5 action items to follow up from this session. Indicate in a next steps matrix what needs to be done, until when and who will be responsible. (20 min)






	ACTION ITEMS				
WHAT					
WHEN					
WHO					

4

Running the 3-hour workshop at events

Step by step exercises and coach instructions

Main differences between a mini and a full AI Explore ws

	3-hours	1-day
	Mini Business AI Explore	Full Business AI Explore
 Audience	Multiple customers / partners at events	One to one customer / team engagements
 Preparation	No introductory session, no prework	60 - 90 min introductory session, and prework
 Focus	Generating as many AI scenario ideas as possible	Addressing specific challenges
 Starting point	Starts with AI opportunities and scenario sentences	Starts with challenges and puts more emphasis on them
 Sequence	Value Heatmap is done before the Use Case Briefs to prioritize scenario ideas	Value Heatmap is done at the end to select described use case ideas to implement

Mini Business AI Explore Workshop

Activities

1. Get Started with AI

Understand the potential of Business AI and get inspired by its capabilities.

2. Explore Opportunities

Leveraging a set of AI patterns, brainstorm potential AI-driven scenarios to address your most critical challenges.

3. Compare and Prioritize

Identify the most promising scenarios to detail out.

4. Detail Out Use Cases

Convert the selected scenarios in use case ideas by describing them from business, technical, and ethical perspectives.



It begins with the business, and I think that's important, particularly for people involved in this kind of space. They often begin too technically oriented, going into solution rather than business value mode.

– Phil Soady, Head Of Development, Oxando

Agenda*

09:00	10 min	Welcome, agenda
09:10	20 min	Inspiration: intro to Business AI + Demos / Examples and Opportunity Cards
09:30	15 min	Select relevant AI opportunities
09:45	15 min	Imagine gen AI scenarios
10:00	25 min	Share-out
10:25	10 min	Coffee Break
10:35	25 min	Compare and prioritize scenarios
11:00	50 min	Detail out selected scenarios
11:50	10 min	Closing / Next steps
12:00	-	END

* This is a suggested agenda. Modify if needed.

PART 1

Get Started with AI

On-Site / Virtual Session



Help participants understand the potential of Business AI and get inspired by its capabilities.

CORE ACTIVITIES

1. Workshop overview

Explain the purpose for the workshop, agenda and housekeeping rules.

2. Inspiration

Present relevant and inspiring AI solutions.

1. Get started with AI

STEPS

- A Prework** (optional) – variable
If possible, send participants the cards a few days prior to the session and ask them to get familiar with them. Discard cards that are not relevant to the audience you are working with.
- B Introduction and Expectations** – 10 min
Welcome the participants, introduce the agenda and purpose of the session
- C Inspiration** – 20 min
Explain what Gen AI is and how it can be used in business. Use examples and demos of existing solutions (see demo example by SAP: <https://url.sap/qdpse3>), explain the Opportunity Cards and answer the participants' questions.



30 min



All together

FOR
COACH

Goal

Set the right expectations, introduce participants to the topic of AI and inspire them.

Outcome

Participants understand the workshop format and are inspired to ideate AI scenarios.

Material

- ★ [Mural Board \(if virtual\)](#)
- ★ [Business AI Opportunity Cards](#)

Tips

- ★ To shorten the session further, ask participants to already select the 3 most relevant cards and write 2 - 3 [Scenario Sentences](#) for each selected card as homework. In that case, you can skip steps 2A and 2B during the session, saving about 30 minutes.

PART 2

Explore Opportunities

On-Site / Virtual Session



Brainstorm potential AI-driven solutions to address existing challenges.

CORE ACTIVITIES

1. Select relevant Business AI Opportunities

Participants select relevant opportunities to improve the selected activities and processes.

2. Imagine scenarios with AI

Participants write down scenario ideas for the use of AI to address the challenges selected.

3. Share-out and combine

Participants present their ideas, cluster them and select the most promising ones to describe further.

2. Explore opportunities

STEPS

- A Select relevant Business AI opportunities** – 15 min
Using the set of Business AI opportunities, ask participants to select up to 3 most relevant Business AI opportunities for their businesses. Use voting or select through an open discussion. Participants should think about which opportunities could be most beneficial to improve challenging processes and activities in their business areas. ([see exercise sheet](#))
- B Imagine scenarios with AI** – 15 min
Ask participants to silently write down scenarios explaining how AI can be used to address existing challenges. Use the Scenario Sentence Template and ensure enough scenario sentence templates are available. Encourage participants to write as many scenarios as possible and use the capabilities and example scenarios on the selected cards as reference and inspiration. To encourage variety of ideas, you can have participants focus on a different card every 5 minutes. ([see exercise sheet](#))
- C Share-out** – 25 min
Have each participant share the scenario sentences and discard duplicate ideas. Check which scenarios can be combined in one solution. Ideas with the same or related beneficiary and similar objective could fit well together, but not all scenarios have to be combined. Give descriptive names to the combined scenarios. ([see exercise sheet](#))



55 min



In teams of 4 or less

FOR
COACH

Goal

Ideate scenarios where Gen AI capabilities can be used to address existing challenges.

Outcome

As many AI scenario ideas as possible to address existing challenges.

Material

- ★ [Business AI Opportunity Cards](#)
- ★ [Scenario Sentence Template](#)
- ★ Pens and whiteboard

Tips

- ★ Have participants read the cards before the workshop to make the selection process easier.
- ★ Ensure each scenario sentence focuses only on one role or department as beneficiary. This will help to find a narrow focus.

Select Relevant AI Opportunities



15 min

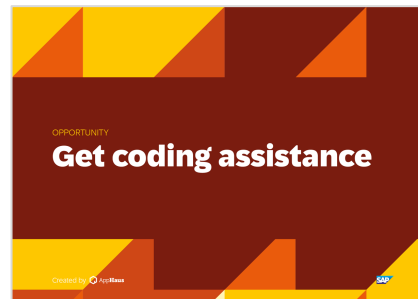
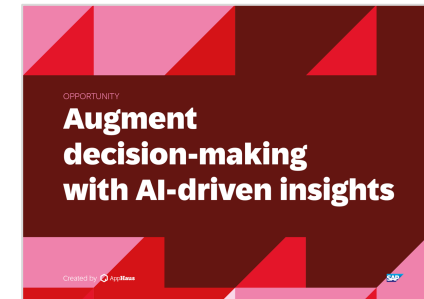
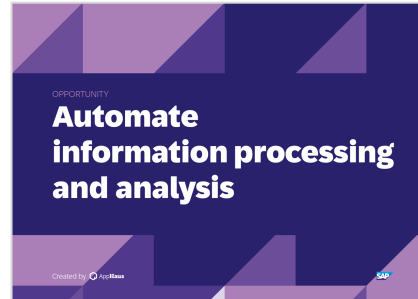


In teams of 4 or less

STEPS

Which opportunities are most relevant for you?

- Read the opportunity cards and select as a team the 3 most relevant opportunities for your business through open discussion or voting. Think about which opportunities could be most beneficial to improve processes or activities in your business area.



Imagine Scenarios with AI



15 min



In teams of 4 or less

STEPS

What would you use AI for and how?

- Silently, write down scenarios explaining how AI can be used to address existing challenges. Write as many scenarios as possible (at least 3) and use the capabilities and example scenarios on the selected cards as reference and inspiration. To encourage variety of ideas, you can focus on a different card for each scenario sentence.

OPPORTUNITY
Ease information processing and understanding

Generative AI makes it possible to **automatically process and analyze information** so it becomes easier to understand. This includes:

- making summaries,
- translating content,
- editing or reviewing text,
- identifying patterns,
- **sorting content into categories,**
- performing sentiment analysis,
- extracting specific information.

What scenarios could be improved with easier and faster information processing and analysis?

EXAMPLE SCENARIOS
Use the following scenarios as reference to create your own.

International Sales: Sales and marketing teams translate product manuals into various languages with minimal effort, supporting global distribution.

Social Media Strategy: Content managers check content in social platforms for potential community guideline violations, like hate speech, and misinformation.

Customer Service: A customer officer receives a daily summary of key open issues from customer orders.

THE BEST FOR SAP



Scenario Formulation Sentence

AppHaus

We can use AI to help ...

Example: Sales and Marketing Teams

CUSTOMER SERVICE OFFICERS (CSOs)



to ...

Example: translate product manuals into various languages

IDENTIFY THE MOST URGENT E-MAIL REQUESTS BASED ON THEIR CONTENT



so that / in order to ...

Example: reduce translation efforts while supporting global distribution

URGENT CUSTOMER ISSUES GET PRIORITIZED AND CSOs CAN BETTER ORGANIZE THEIR TASKS



Exercise Sheet

Share-out



25 min



In teams of 4 or less

STEPS

Share your scenario ideas with your team

- Share your scenario sentences with your peers. (15 min)
- Check which scenarios can be combined in one solution. Ideas addressing the same challenge for the same beneficiary group and with similar objective could fit well together, but not all scenarios have to be combined. Give descriptive names to the combined scenarios (10 min).

Intelligent request mailbox

Scenario Formulation Sentence



We can use AI to help ...

Example: Sales and Marketing Teams

CUSTOMER SERVICE OFFICERS (CSOs)



(Role / Department)

to ...

Example: translate product manuals into various languages

IDENTIFY THE MOST URGENT E-MAIL REQUESTS BASED ON THEIR CONTENT



(Activity supported by AI)

so that / in order to ...

Example: reduce translation efforts while supporting global distribution

URGENT CUSTOMER ISSUES GET PRIORITIZED AND CSOs CAN BETTER ORGANIZE THEIR TASKS



(Objective)

Scenario Formulation Sentence



We can use AI to help ...

Example: Sales and Marketing Teams

CUSTOMER SERVICE OFFICERS (CSOs)



(Role / Department)

to ...

Example: translate product manuals into various languages

WRITE TAILORED ANSWERS TO CUSTOMER INQUIRIES WITHOUT HAVING TO INVESTIGATE AVAILABLE OPTIONS IN DIFFERENT SOURCES



(Activity supported by AI)

so that / in order to ...

Example: reduce translation efforts while supporting global distribution

REDUCE THE TIME TO ANSWER EACH REQUEST AND IMPROVE CUSTOMER SATISFACTION



(Objective)

Example of combined scenario with solution name

PART 3

Compare and Prioritize

On-Site / Virtual Session



Identify the most promising use cases to start with.

CORE ACTIVITIES

1. **Share-out**

Participants share their described use cases with the entire team.

2. **Prioritize use cases**

Participants position the use cases on a value heatmap evaluating them based on business value and complexity

3. **Decide for most relevant use cases**

Based on the evaluation, participants select the use cases they want to have implemented first.

4. **Define next steps**

Decide for the main action items to follow up from the session, indicating what needs to be done, until when and who will be responsible

4. Compare and prioritize

STEPS

A

Compare and prioritize scenarios – 25 min

Help participants position the Scenario Sentences in the Value Heatmap relative to each other, based on agreed criteria such as Business Value and Time to Market. Discuss the position of the ideas in the Value Heatmap as a team and decide which top 2 scenarios should be defined in detail. If the scenario sentence templates are too big for the space available in the Value Heatmap, number them and add a post-it with the corresponding number to the Value Heatmap. ([see exercise sheet](#))



25 min



In teams of 4 or less

FOR
COACH

Goal

Select valuable scenarios to describe in detail as use cases.

Outcome

Top two scenarios to detail out.

Material

- ★ [Value Heatmap](#)
- ★ Post-its, pens and whiteboard

Tips

- ★ Select the criteria for the prioritization in advance to avoid wasting time.
- ★ Prefer scenarios that are not too complex to realize but provide high business value.

Compare and prioritize scenarios



25 min

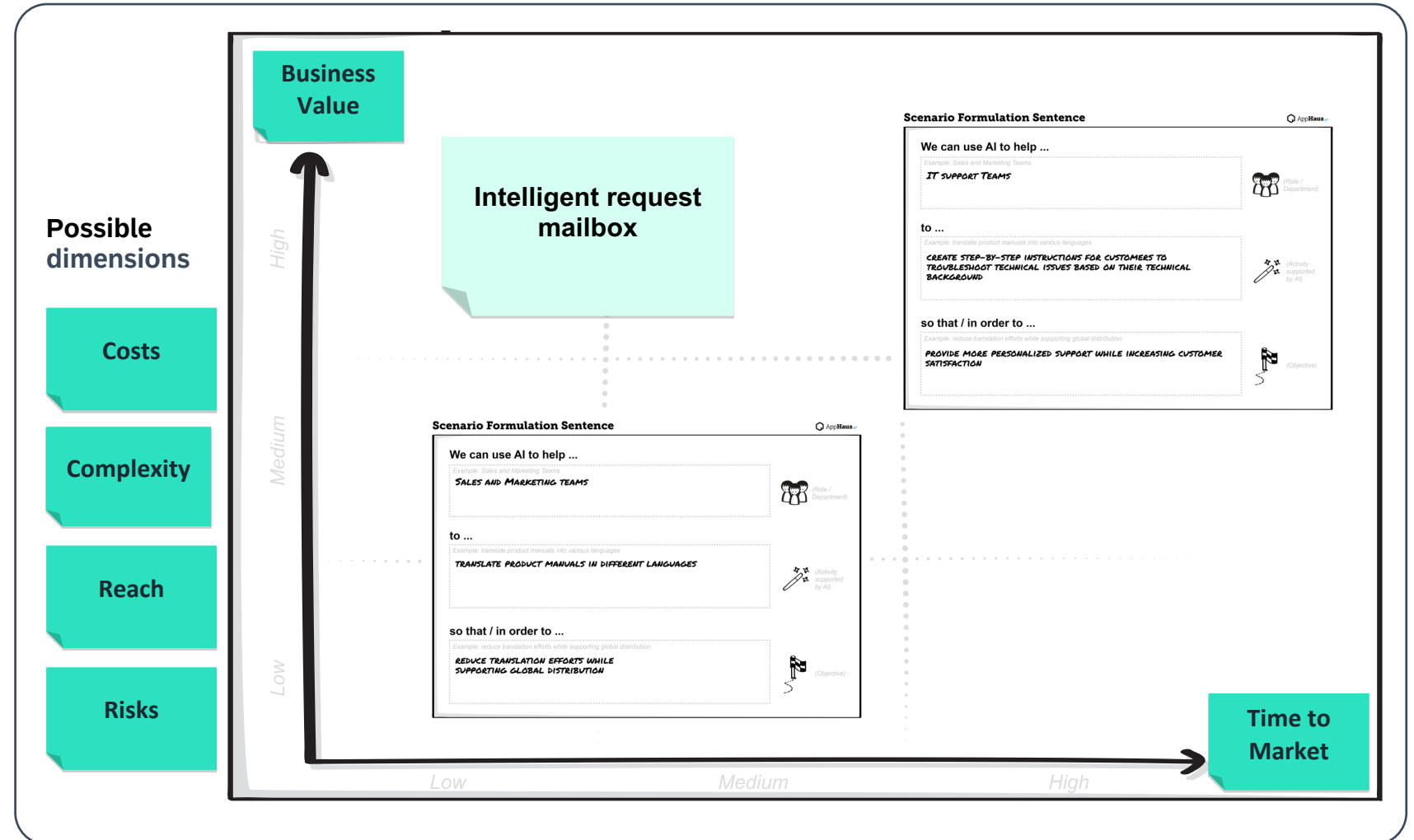


In teams of 4 or less

STEPS

What scenarios should be detailed out and taken forward?

- Position the Scenario Sentences or their corresponding names in the Value Heatmap relative to each other, based on agreed criteria (e.g. Business Value and Time to Market). Discuss the position of the ideas in the value heatmap as a team. (20 min)
- Decide which top 2 scenarios to describe in detail. (3 min)



PART 4

Detail Out Use Cases

On-Site / Virtual Session



Describe selected scenarios from business, technical, and ethical perspectives.

CORE ACTIVITIES

- 1. Distribute the scenario ideas**
Each participant or pair of participants takes one selected scenario to detail out.
- 2. Complete the Business View**
Fill-out the Business View of the Use Case Brief template, describing the value of the solution.
- 3. Complete the Technical View**
Fill-out the Technical View of the Use Case Brief template, describing data needed, output and potential technical limitations.
- 4. Complete the Ethical View**
Fill-out the Ethical View of the Use Case Brief template, indicating aspects of potential ethical concern.

4. Detail out use cases

STEPS

- A Distribute the selected scenario sentences** – 2 min
Distribute the selected scenarios to different members or pairs of the team, so that they can be described simultaneously.
- B Describe the selected scenarios** – 40 min
Ask participants to describe the selected scenarios in detail using the Use Case Brief. The Use Case Brief includes three views: business, technical, and ethical. Start with the business view and complete the technical and ethical views if time allows. The technical view will work best if you have technical experts who know which data might be useful and what the limitations of the technology are. When filling out the technical view, use the Limitation Cards to help participants identify limitations that could affect the use case. Use the last 10 minutes for participants to share in the team the use cases they worked on. ([see exercise sheet](#))
- C Define action items / Close the session** – 10 min
In a team discussion decide any follow up activities from this session and document it.



50 min



In teams of 4 or less

FOR
COACH

Goal

Describe the selected scenario ideas in detail, converting them in well described use cases.

Outcome

A clearly defined use case that eases evaluation and helps implementation teams determine the next steps.

Material

- ★ [Use Case Brief Templates](#)
- ★ [Business AI Limitation Cards](#)
- ★ Pens and whiteboard

Tips

- ★ Use the [Use Case Brief PDF Form](#) to document your use cases digitally after the workshop.
- ★ If you want participants to share the created use cases with other teams add the necessary time for share-out.
- ★ Close the workshop with a short discussion on next steps.

Detail out use cases



50 min




In teams of 4 or less

STEPS

Describe your selected scenarios in detail.

- Distribute the selected scenarios to different pairs of the team, so that they can be described simultaneously. (2 min)
- Each pair details out a scenario idea using the Use Case Brief (Business View, Technical View and Ethical View). Start with the Business View and complete the Technical and Ethical views if time allows. (35 min)
- Share the Use Case that you detailed out with your team (6 min / 3 min per pair)

Use Case Brief – Ethical View 

Would the solution involve... Comments


Processing personal data

Processing sensitive personal data

Automated decision-making



Negatively affecting individual

High-risks












Use Case Brief – Technical View 

Input data needed What data is needed for this use case? What data...

Main capabilities and expected output What should the solution be able to do? What information should the...

Use Case Brief – Business View  

Solution Idea Name *INTELLIGENT TRAVEL REQUEST MAILBOX*
What is the name of your solution idea?

Target User Roles <small>Who will use this solution? What is their role and in which department do they work?</small> CUSTOMER SERVICE EMPLOYEES	User's Objectives <small>What should the target users be able to accomplish with the solution?</small> <ul style="list-style-type: none"> MANAGE AND PRIORITIZE CUSTOMER REQUESTS ADDRESS REQUESTS ACCURATELY RESPOND TO CUSTOMERS ON TIME 	Relevance Indicators <small>Reach: How many potential users does this solution have?</small> <div>  Few  Some  Many </div> <small>Strategic Relevance: How important is this solution to achieve the organisation's targets?</small> <div>  Low  Med  High </div> <small>Business Value: How would you rate the business impact of your solution idea?</small> <div>      </div> <div>Low High</div>
Challenges / Optimizations <small>What challenges are being addressed? What does the solution improve?</small> <ul style="list-style-type: none"> REQUESTS COME IN DIFFERENT LANGUAGES TAKES LOTS OF MANUAL SEARCHES IN DIFFERENT PLACES TO ANSWER SOME REQUESTS ARE MORE URGENT THAN OTHERS, BUT IT'S HARD TO IDENTIFY THOSE REQUESTS TO FIRST ATTEND TO. 	Business Benefit <small>What makes this a valuable solution for the company? What KPIs are improved?</small> DECREASES THE TIME TO SOLVE CUSTOMER REQUESTS BY 50%, INCREASING CUSTOMER SATISFACTION	

AI Limit
Which AI limit...

LEARN FROM NEW DATA ON-THE-FLY

HARD TO IMAGINE OPTIONS PRIOR OVER TIME

Process Steps
How does the process look now and where could the solution help?

```

    graph LR
      A[REQUEST RECEIVED AS E-MAIL] --> B[Sort requests manually by urgency and type]
      B --> C[Open urgent request]
      C --> D[Translate request]
      D --> E[Find information in multiple systems]
      E --> F[Consult pricing with colleagues]
      F --> G[Write answer]
      G --> H[Send answer]
  
```

Next steps



10 min




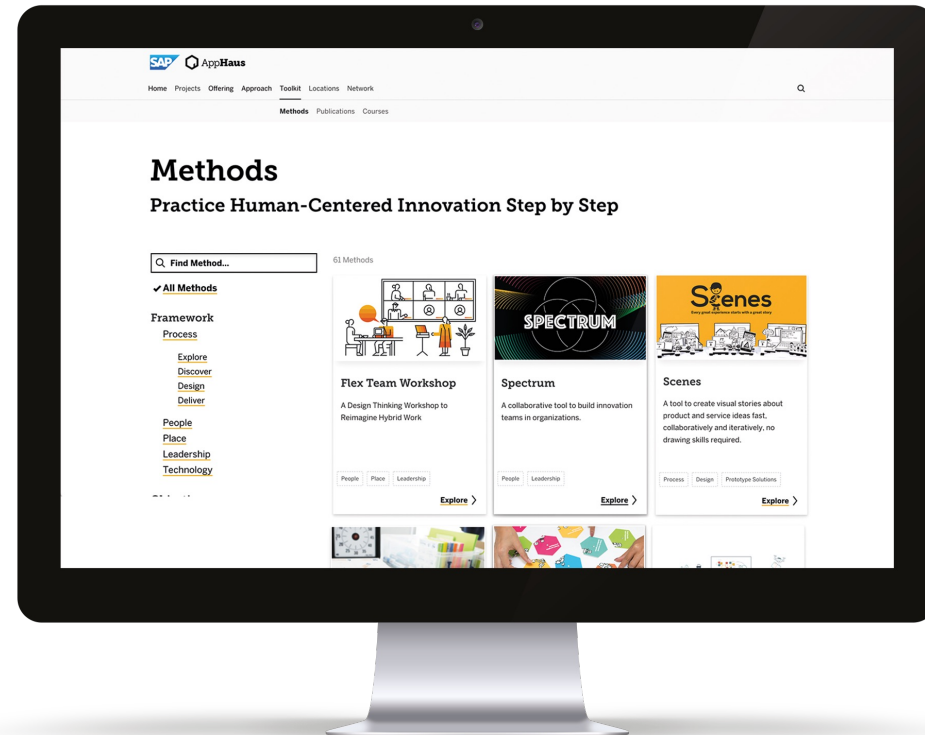
All together

STEPS

Define action items.

- In a team discussion decide for 4 - 5 action items to follow up from this session. Indicate in a next steps matrix what needs to be done, until when and who will be responsible. (20 min)

	ACTION ITEMS				
WHAT					
WHEN					
WHO					



Practice Human-Centered Innovation

apphaus.sap.com/toolkit/methods