Moveworks

IT leader's guide:
3 must-haves for enterprise
copilot success

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Introduction

If you're like most IT departments, then your team is often the first line of defense in addressing employee technical challenges. Whether it's password resets, software malfunctions, hardware issues, or network connectivity problems, your team works hard to ensure smooth operations and productivity — despite increasingly complex global tech stacks and limited resources.

To rise to this challenge, your support team needs to provide the right information to the right person at exactly the right time. But managing and accessing this staggering amount of information dispersed across countless systems, databases, and repositories can often feel next to impossible.

Not only do employees struggle to find the correct information for basic support questions, but your resources end up tied up with information retrieval. Inaccessible information may hinder your team's focus on strategic initiatives and reduce service quality.

What's an IT leader to do? The answer lies in uniting **the three must-haves of enterprise search, automation, and productivity.**

By the end of this ebook, you should have a clearer understanding of how to implement these strategies, measure their impact, and achieve tangible results. Get ready to revolutionize your IT operations and elevate your organization to new heights.

Chapter 1

SEARCH explores how enterprise search can be your lifeboat: by unifying and empowering your employees to quickly access critical data into a single, searchable platform, your teams can stay better focused on resolving incidents, fulfilling service requests, and elevating your operational excellence.

Chapter 2

AUTOMATION discusses how automation can help to revolutionize how IT teams operate by automating routine tasks, providing employees with self-service options, improving knowledge accessibility, and reducing the volume of support tickets — empowering your team to focus on strategic initiatives. This chapter delves into the power of AI-powered automation, and how [AI copilots](#) can understand context, make informed decisions, and automate complex tasks.

Chapter 3

PRODUCTIVITY Coupling search with automation helps to fully realize enterprise search's potential and enable much greater IT teams efficiency. Together, these functions can automate routine tasks triggered by search results to break down silos, automate IT processes, improve incident response, and enhance outcome measurement.

01: You need more than just search for employee support

Knowledge is the fuel [powering your support team](). It is critical for service delivery, incident resolution, and knowledge management. Your large IT organization likely oversees an immense volume of information distributed across numerous systems, databases, and repositories. However, without a centralized, robust search capability, this knowledge may remain trapped in silos, hindering efficient problem-solving and service restoration.

> Enterprise search is about much more than simply finding documents; it's about unlocking the collective knowledge of your entire organization and is especially critical for IT teams.
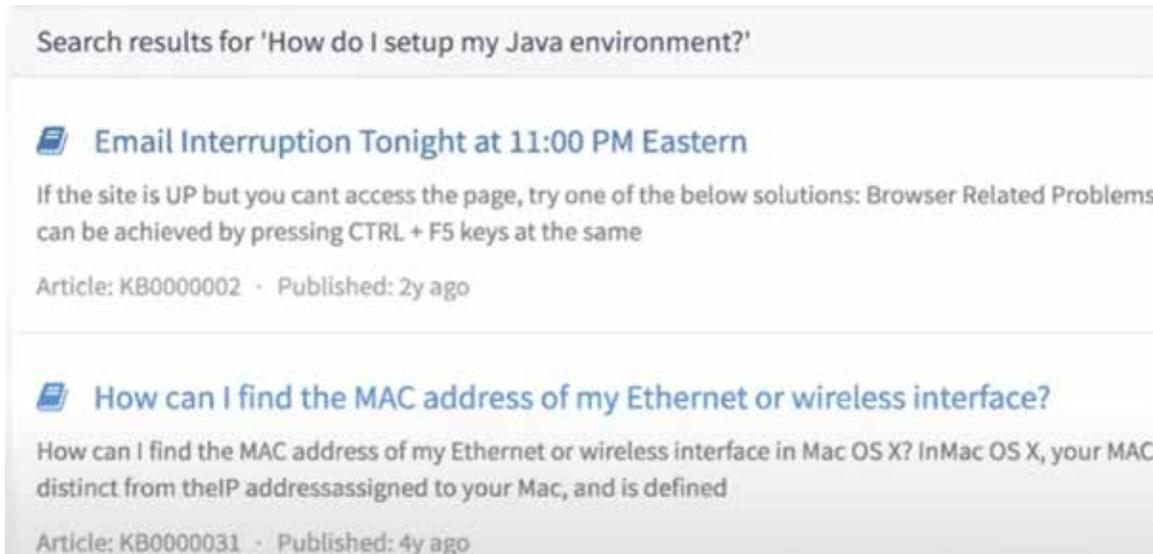
By surfacing relevant information swiftly, it can help accelerate employee problem-solving, reduces resolution times, and improves overall service quality. By implementing a comprehensive enterprise search solution, IT teams can better unlock the full potential of their organization's knowledge base, accelerate incident resolution and improve service quality.

Additionally, a robust search capability supports knowledge management initiatives by facilitating the discovery and reuse of existing knowledge articles. With your high volume of tickets, time is of the essence. As you push towards greater efficiency, enterprise search should no longer be a luxury, but a necessity for driving operational productivity and delivering exceptional service experiences.

This chapter delves into why a simple search tool isn't enough for most support teams, exploring the complexities and benefits of this powerful technology.

- Why help desks rely on enterprise search
- How enterprise search works
- How AI augments enterprise search
- What to look for in enterprise search software
- Enterprise search use cases
- Broadcom's knowledge management success story
- Why search is only the beginning

From understanding its core functions to harnessing the potential of AI, you'll gain insights into how enterprise search can help to drive operational excellence and empower your IT team. Now let's dive in and discuss how to transform your business with the power of information at your fingertips.

Search results for 'How do I setup my Java environment?'

📘 **Email Interruption Tonight at 11:00 PM Eastern**

If the site is UP but you cant access the page, try one of the below solutions: Browser Related Problems can be achieved by pressing CTRL + F5 keys at the same

Article: KB0000002 · Published: 2y ago

📘 **How can I find the MAC address of my Ethernet or wireless interface?**

How can I find the MAC address of my Ethernet or wireless interface in Mac OS X? InMac OS X, your MAC distinct from theIP addressassigned to your Mac, and is defined

Article: KB0000031 · Published: 4y ago

Irrelevant search results are common with traditional keyword search tools

Why help desks rely on enterprise search

Enterprise IT support teams rely heavily on search to identify common issues, resolve incidents, and create knowledge bases. However, keyword-based search tools often fall short. Limited search capabilities, inconsistent information across silos, and difficulties in creating and maintaining effective knowledge bases may hinder knowledge management efforts and may overwhelm support teams.

Employees struggle to find relevant information quickly, leading to increased support tickets and frustration. Additionally, a lack of integration between search tools and other IT systems limits their effectiveness and prevents organizations from making data-driven decisions about technology investments and support strategies.

Core support tasks	Current state	What's possible with copilot enterprise search
Support	Users take too long to find the necessary information	**Faster information retrieval:** Users may find answers instantly, giving them substantial time back to focus on strategic, more impactful work.
	Users can't find the information they need	**Better user experience:** Implementing robust search tools equipped with complex query handling, NLP, and contextual understanding can greatly improve user information retrieval.
	Users are using outdated or incorrect information	**More accurate, consistent information:** Breaking down information silos and ensuring data is up-to-date using internal knowledge base and file search with external search should give users more accurate and complete information.
	Steady streams of high volume, low effort ticket queues steal agent bandwidth	**Increased self service:** Users can better find solutions independently across their company's knowledge, files, and external help centers. **Increased agent satisfaction:** More self-service helps to decrease support tickets volume and workload, letting agents focus on more complex tickets.
Accessing information, creating knowledge bases	Breaking information out of silos is time-consuming, low priority	**Enhanced content discovery:** By instantly searching across internal KB, different file types and platforms, agents can better find previously inaccessible answers.
	Potentially challenging to keep existing knowledge bases up-to-date	**More up-to-date KBs:** Search insights help to quickly identify knowledge gaps, enabling more updated KBs.
	Potentially challenging to ensure knowledge is accurate and effective	**More trusted KBs:** The best enterprise search tools build user trust by grounding answers in company context, adhering to permissions, and citing sources. These features allow organizations to more accurately determine which articles are most helpful, and those needing improvement, leading to a more effective knowledge base.

Accessing information, creating knowledge bases	Redundancy of questions, support requests, etc. bog down agent queues	**Quickly address high frequency questions:** Improved search functionality helps users quickly locate the information they need within their internal KB and across different file types and platforms.
Technology implementation	Without integration with ticketing systems, asset management tools, and other IT applications, search tools may provide limited view of information	**Unified information view:** Better understand user behavior and IT service usage by integrating ticketing systems, asset management tools, and other IT applications. Improve insights, break down ticket data and visualize the areas of service needing strategic action for data-driven support strategies and technology investments.
User training	Employees who become overwhelmed and unable to find onboarding and training information quickly may be less productive	**Efficient onboarding and training:** Streamlined search capabilities enable employees to quickly access the information they need during onboarding and training, enhancing productivity.

How does enterprise search work?

With consumer search tools like Google readily available, you might think, "Search? That's easy!" But when it comes to [enterprise search](), the situation is far from simple, especially because most organizations have a vast ocean of data, ranging from structured data neatly organized in databases to unstructured content scattered across emails, documents, and multimedia files. Additionally, enterprise search often requires more specificity and accuracy than a typical Google search, necessitating more refined and advanced search techniques.

At its core, enterprise search solutions work by crawling and indexing content from all your different data sources, like file shares, intranets, and databases — the unstructured and structured data sources we discussed earlier. They build a centralized "map" of sorts, allowing users to quickly search and retrieve information from across the organization in one place.

Enterprise search tools offers many benefits, however, there a number of factors that may limit the search performance of standard search tools:

- **Data format limitations:** Many search tools are restricted to specific file formats, such as documents or spreadsheets. This limitation significantly hampers their effectiveness as it excludes valuable information contained within PDFs, presentations, images, network diagrams, and databases.

- **Data privacy and security concerns:** When allowing unified access across all repositories, you should make sure that sensitive data remains protected. Ensuring sensitive data remains protected while maintaining accessibility is a critical challenge. The software you choose should adhere to the right permissions and attempt to ensure that only authorized users have access.

- **Language barriers:** Organizations with a global workforce encounter difficulties when search tools are primarily designed for a single language. Effective enterprise search requires multilingual capabilities to empower employees worldwide to access knowledge – regardless of their language

- **Integration challenges:** Having a fragmented IT landscape, with numerous systems and applications, may pose integration hurdles for enterprise search tools. To deliver a cohesive user experience and comprehensive search results, seamless integration with CRM, HR, asset management, and other critical systems may be essential.

However, not all enterprise search is created equal. As technology has advanced, we've seen a shift from traditional keyword-based search to more intelligent, AI-powered copilot approaches. This new technology enables companies to utilize advanced techniques to not only find information but to also uncover valuable insights.

With natural language processing (NLP), machine learning, and AI search engines, enterprise data may be understood and interpreted in ways that traditional keyword-based searches have a harder time achieving. Below, we'll discuss how approaches using ML and NLP enable discovery of relevant information for greater potential accuracy and better user experience.

How AI augments enterprise search for copilots

AI-powered search is a game-changer for organizations looking to unlock the full value of their information assets. Compared to the traditional search, this new technology allows enterprise copilots to leverage advanced techniques to not just find information, but uncover insights. With NLP and machine learning, AI copilot search engines are able to understand and interpret enterprise data in ways that traditional keyword-based search are typically challenged to achieve.

- **Natural language processing (NLP):** NLP enables computers to understand, interpret, and generate human language. In the context of search, NLP allows users to ask questions in plain, everyday language rather than relying on specific keywords. The AI search engine can then parse the query, understand the intent behind it, and deliver more relevant results.

- **Machine learning and relevance:** Another key aspect of AI in search is machine learning, particularly when it comes to relevance and ranking. Machine learning algorithms can analyze user behavior, learn from past searches, and continuously improve the

relevance of search results over time.

For instance, if users consistently click on a particular document after searching for a specific term, the AI search engine may learn to rank that document higher for similar queries in the future. This type of relevance tuning happens automatically and continuously, ensuring that users always get the most pertinent information for their needs.

- **Knowledge graph and entity understanding:** AI-powered search engines can also leverage knowledge graphs to better understand the relationships between different entities within enterprise data. A knowledge graph is essentially a map of all the key concepts, people, places, and things within an organization's knowledge base, along with the connections between them.

By understanding the intricate relationships between incidents, problems, changes, and assets, AI-powered search in copilots delivers unparalleled insights. For instance, searching for a specific device might not only reveal its technical specifications but also surfaces associated incidents, change requests, and maintenance history.

- **Conversational interfaces:** With the power of NLP, users can engage in back-and-forth dialogues with an AI copilot, refining their queries and diving deeper into specific topics. This natural, conversational approach to search makes it easier for users to find what they need. Plus, these copilots can learn from each interaction, getting smarter and more helpful over time.

What to look for in enterprise copilot search software

Modern AI-powered search goes beyond simple keyword searches. From AI summarization to on-the-fly translation to controlled permissions — these are some key features that you should be aware of when picking the right enterprise search software.
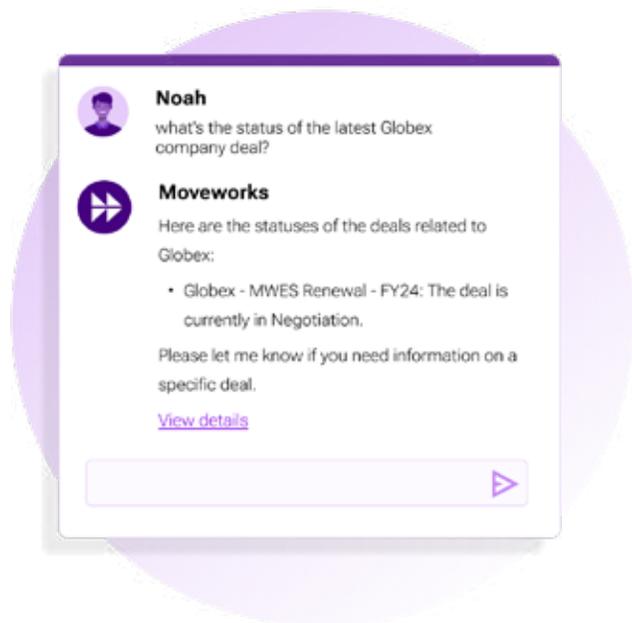
Key features of enterprise search software:

- **AI summarization:** Few people would enjoy sifting through dozens of lengthy documents and reports just to find the key pieces of necessary information. AI summarization automatically generates concise summaries of search results, saving you valuable time and preventing information overload. No more sifting through endless text — get straight to point and the most relevant information quickly.

- **Search intent:** Search intent refers to the ability of AI to understand the underlying purpose or goal behind a user's search query. By analyzing the context, user behavior, and historical data, AI may infer the intent of the search, reducing the need for users to continuously provide feedback or refine their queries.

- **Scalability and performance:** First and foremost, your search solution needs to be able to keep up with your data. As your content grows and evolves, your search engine should be able to scale seamlessly without missing a beat. Look for platforms that are able to handle high volumes of data and deliver lightning-fast query results, even under heavy load.

- **Translation:** Global teams need access to information across multiple languages. AI translation allows users to search and receive results in their native language, even if the source material is in a different language. Real-time translation breaks down language barriers and unlocks an enterprise's collective knowledge for every single employee.

- **Security:** Security features help to ensure the protection of sensitive data and uphold data privacy regulations. Your enterprise search software should prioritize security with features like robust access controls and encryption protocols to help safeguard sensitive information.

- **Accuracy:** One of the goals of enterprise search is the ability to deliver accurate, relevant results that directly answer the question being asked — not just a list of keyword-matched documents to sort through. With features like sentence-level embedding, you can give employees more accurate answers with search results that surface the more relevant sentences from different information sources.

- **Ease of use:** Don't underestimate the importance of usability — both for your IT team and your end-users. Your search platform should be easy to set up and configure, with clear documentation and support resources. And the user interface should be intuitive and user-friendly, with features like autocomplete, faceted navigation, and actionable results. Give your employees a [single source of truth](#) with an easy to use interface that acts as their central hub for answers, allowing them to search for information across all systems and file types in one place.

- **Integrations:** Your data resides in various applications and repositories. To provide a truly unified search experience, enterprise search software [integrates seamlessly](#) with your knowledge bases and applications, ensuring a unified search experience. Eliminate the need for employees to waste time jumping between business applications in search of answers — access all your information from a single, centralized location.

- **Customization and extensibility:** No two organizations are exactly alike, and your enterprise search solution should be flexible enough to adapt to your unique needs and use cases. Consider platforms that offer a high degree of customization and [extensibility](#), from tweaking relevance algorithms to building custom connectors and UI components. A robust API and developer ecosystem is a big plus.

- **Action-oriented:** The most advanced enterprise search solutions go beyond simply finding information. They allow your employees to take action too. Scheduling meetings, generating reports, or updating systems of record — whenever possible each of these actions should be triggered by the original search.

With these enhanced capabilities in mind, let's explore how various use cases for how enterprise search could be applied across your organization.

Enterprise search copilot use cases

Whether customer support agents want to reference past resolutions or the sales team is hunting down product specs, enterprise search streamlines information retrieval not just for IT teams, but for all departments. Below are common use cases for various departments.

<u>IT</u>	• Enables employees to self-serve and find information across the company's disparate systems, repositories (file shares, databases, and intranets), and applications • Supports secure search, permissions, and compliance controls for safe self-service
HR	• Allows employees find information from employee directories, skills profiles, and training material, reducing the volume of HR inquiries • Enables employees to independently find company policies, benefits, and compliance documentation • Empowers HR teams to quickly locate past resume collections for recruiting searches, streamlining the hiring process
Finance	• Empowers employees to self-serve and access financial data spread across ERP, accounting, banking, and other systems • Allows independent retrieval of previous financial reports, audit documentation, budgets, and forecasting models • Enables discovery of personalized, relevant finance policies, compliance requirements, tax guidance, and regulatory updates
Sales	• Enables sales teams to quickly locate the latest product details, pricing guides, and sales presentations • Allows employees to independently identify subject matter experts to leverage for customer engagements • Empowers sales to find past successful proposals and case studies for similar opportunities on their own
Marketing	• Provides marketing with access to market research, competitive intelligence, customer data • Allows marketing to independently search and repurpose existing creative assets like images, videos, and files • Enables marketing teams to surface relevant product information and sales enablement content on their own
Engineering	• Empowers engineering to search internal knowledge bases, product documentation, and code repositories • Allows engineering to independently locate testing reports, product requirements, and patent information • Enables engineering to identify experts and previous project documentation for knowledge sharing
Legal	• Enables legal to self-serve and conduct eDiscovery searches across emails, documents, and communications data • Allows legal to independently index policies, contracts, and regulatory content for search and review

How Broadcom successfully integrates scattered knowledge with AI-powered enterprise search

Broadcom is a multi-billion dollar global infrastructure technology company with a long history of innovation. It designs, develops, and manufactures a wide range of semiconductor and infrastructure software products.

The company underwent rapid growth and transformation over the years. However, the acquisitions that it made over the last decade presented significant integration challenges. Information was spread across 10 different knowledge bases, making it difficult for employees to access the right information. As employees relied on an ever-growing pool of SaaS applications, scattered knowledge bases, and outdated search systems, keeping pace with the fast-moving business was becoming a challenge and hindering the overall productivity.

They turned to Moveworks and launched 1.Bot. As a result, the employees were instantly able to use Google Chat to resolve a variety of issues like resetting passwords, unlocking accounts, creating tickets, checking ticket status, and finding answers from knowledge base articles.

As a result, Broadcom is able to resolve 57% of its IT issues in under a minute. The bot is able to pull information from different knowledge bases and surface it in a single interface. Additionally, with real time visibility into knowledge base gaps, Broadcom's team can now create new articles, or update old ones, so employees can self-serve.

The Moveworks Reasoning Engine — a powerful combination of the company's proprietary large language model, MoveLM™, and the world's most advanced LLM offerings — powers 1.Bot to resolve IT support issues conversationally, directly in chat.

Goal:
Employees get answers — without the service desk

Employees

- Get the answers they need in ~60 seconds
- Access all knowledge from one interface
- Receive only relevant results from enterprise search system

Service Desk

- Buy back more time to focus on high-priority projects
- Achieve real-time visibility over knowledge base gaps within all knowledge repositories
- Address spikes in support questions following M&As, without adding IT headcount
- Retain agents – help desk doesn't feel like the "helpless desk"

Broadcom created the following goals for their employees and service desk

"You don't want your users going all over the place to search for information. The advantage of Moveworks is that there's one familiar go-to place for employees to get their answers."

— **Stanley Toh,** Head of End-User Services & Experience, Broadcom

Search enables operational excellence

Beyond simply locating information, search serves as a catalyst for operational excellence. Advanced **enterprise search solutions leverage AI and natural language processing** to unlock hidden insights from unstructured data and consolidate data from disparate systems, which helps to enhance incident management, problem resolution, and knowledge management.

This unified view of information helps improve data governance and compliance, ensuring sensitive data is protected and regulatory requirements are met. Moreover, when search solutions are readily available, personalized, and easy to use, they help to drive employee self-service, free up your L1 team, raise morale and retention, and enable your team to refocus on more strategic work.

Why search is only the beginning for copilots

However, to truly revolutionize service delivery, we should evolve beyond basic information retrieval. By infusing reasoning capabilities into our search tools, Moveworks creates enterprise search solutions that not only understand the nuances of IT support, but are able to initiate certain autonomous actions too.

For most companies, improving enterprise search is only the beginning. It's only by also adding

automation to your search that you begin to unleash new frontiers in productivity. **As your agents refocus on complex problem-solving and strategic initiatives, this often aids in higher retention, better job satisfaction, and greater operational excellence.**

Just imagine what's possible when search and automation work together seamlessly to free your IT support team from mundane tasks. The potential for employees to independently resolve a vast majority of their IT issues, from VPN troubles to conference room bookings. And benefits aren't limited to IT either, with HR processes, like updating emergency contacts or submitting PTO, or financial tasks, like PO adjustments or expense reports, managed and automated with the power of agentic AI.

This isn't a dream; it's the potential of a truly advanced agentic enterprise search solution. By combining search with [reasoning](#), Moveworks' [agentic AI platform](#) is able to independently find information and [take certain actions on a user's behalf](#), all while maintaining factuality and helping users to avoid harmful content. By automating routine processes and empowering employees to self-serve, you can start to dramatically reduce L1 support, boost productivity, and transform your organization's efficiency.

Moveworks enables AI-powered enterprise search

Moveworks offers an AI-powered enterprise search solution designed to enhance employee productivity and efficiency. Gone are the days of manually searching through business applications, Google Docs, PowerPoint, PDFs and more.

By consolidating information from various business systems into a single platform, our Enterprise Search empowers employees to quickly find the data they need to complete tasks.

- **Search information:** Source verifiable information from your internal knowledge bases, files, and external sources of your choice.

- **Ask clarifying & follow up questions:** Reach the right answer faster by asking the copilot follow up and clarifying questions.

- **Handle complex requests:** Ask the copilot multiple questions at once without issue. The copilot asks for more info when needed.

- **Summarized and cited responses:** Each response is summarized from multiple sources and includes citations for the user to be able to dig in and learn more.

- **Multilingual support:** Moveworks is built to provide truly multilingual support, not just basic translation, so you are able to provide faster help around the globe.

It ensures accuracy and builds trust by integrating your business's context, permissions, and more. With the power of generative AI, Moveworks Enterprise Search gives your employees time back to focus on strategic work by automating daily tasks and questions.

02: Unleash the power of AI-driven automated action

Automating actions can be foundational for high-performing IT departments. But to fully harness its incredible potential, we must first understand the underlying principles. This chapter will help guide you on a journey of discovery, starting with the fundamentals of AI-powered automation in copilots and ending in understanding its practical applications for your IT environment. We will discuss topics such as:

- Foundational concepts of AI-powered automation
- Key automation use cases for IT
- The business value of automation

We'll begin to explore the core concepts of AI, demystify complex terminology, clarify how AI can drive actions and automation in copilots, and finally explore the critical role of context in AI-powered systems.

Armed with this knowledge, we'll then shift our focus to learning the practical applications of automation within IT, discuss how to measure its potential impact, and share how reasoning may enable intelligent decision-making.

By the end of this chapter, you should have a clearer picture of how to tangibly transform your IT operations to enhance user satisfaction, improve service delivery, and elevate your efficiency.

Understanding foundational AI concepts

AI delivers essential capabilities necessary for complex problem-solving and decision-making by leveraging technologies like [machine learning (ML)](#), and [natural language processing (NLP)](#). These technologies are core components of workflow automation and help to enable systems to understand, learn, and execute tasks with increasing sophistication.

Conversational AI empowers machines to understand and respond to human language naturally, creating interactive platforms like chatbots and virtual assistants. **Generative AI** can enhance the capabilities of conversational AI by creating dynamic, contextual, and informative content, enabling more comprehensive and personalized user responses.

While many AI tools can provide general information, many of them may fall short when faced with complex, industry-specific challenges. For example, a traditional AI chatbot might struggle to accurately categorize what topic a user is asking about, which may lead to irrelevant answers. Point AI solutions also generally lack the depth of understanding required to execute tasks like account access, self-service automation, or complex approval workflows.

[An AI copilot](#) can work to overcome these hurdles by integrating all systems under one conversational interface. When an AI copilot can access specific approved enterprise data and

domain knowledge, it can deliver more accurate and effective solutions.

Consider how an AI copilot that understands your organization's unique workflows, data structures, and terminology could streamline processes like password resets, accelerating resolution times and improving employee satisfaction. This level of contextual understanding can be crucial for boosting overall IT productivity and efficiency.

How AI copilots enable automated actions

AI copilots can transform work by simplifying collaboration, enhancing information access, and automating repetitive tasks, freeing employees for strategic innovation.

An agentic AI copilot, powered by advanced reasoning capabilities, may be able to surpass traditional chatbots and narrow AI tools by independently analyzing complex issues, considering multiple solutions, and executing autonomous decisions. Best in class copilots may use reasoning to adapt to user needs, optimizing task execution and information retrieval.

While these intelligent assistants excel at automating routine tasks, unlocking their full potential requires a deeper understanding of the specific context in which they operate. To truly maximize the benefits of AI-powered automation, you should consider the critical role that context plays in driving successful outcomes.

Core AI topics defined

- **Machine learning (ML):** Empowers systems to learn from data, identify patterns, and make predictions. This capability is crucial for optimizing workflows, improving decision-making, and enhancing automation over time.

- **Natural Language Processing (NLP):** A branch of artificial intelligence that teaches computers to understand, interpret, and generate human language. This involves processing large volumes of text data and transforming it into a structured format.

- **Natural Language Understanding (NLU):** A subset of NLP that focuses on extracting meaning from text. This includes understanding the context, sentiment, and intent behind written language.

- **Conversational AI:** Enables machines to understand, process, and respond to human language in a natural way. It is often used in chatbots and virtual assistants to facilitate human-like interactions.

- **Generative AI:** A broad label used to describe machine learning that employs unsupervised learning algorithms to create new content. Applications of genAI include natural language and image generation. When combined with conversational AI, it can enable dynamic interactions and personalized content generation.

- **AI copilots:** Copilots use generative AI to enhance workplace productivity. Many can provide direct answers to questions, summarize content, and offer references. Copilots typically integrate with various enterprise applications to perform search, action, and productivity tasks, empowering users to be more effective.

- **Agentic AI:** This refers to artificial intelligence systems capable of independently making decisions and taking actions to fulfill predetermined objectives without human intervention.

AI-powered automation needs context

AI copilots are designed to interact with users in a natural, conversational manner. **However, challenges arise from the ambiguity of human language and countless ways that users can ask a question.** Not only might a user ask the same question in a number of different ways, but users often phrase questions in everyday terms without explicit specifications. These variations and vagueness can make it difficult for the AI to accurately interpret the user's intent.

To overcome this hurdle, AI copilots require context. This context helps the copilot to figure out whether the user is referring to a colleague, an IT asset, a physical location, or something else entirely.

Knowledge graphs, which map out entities and their relationships within an organization, are invaluable tools for providing this essential context. By leveraging knowledge graphs and other relevant data sources, **AI copilots are able to more intelligently infer the user's intended meaning, deliver accurate, helpful responses, and recommend subsequent actions.**

An example of AI-powered action with context

For example, imagine that a user, Drew, just started work at a new company. He messages an AI copilot that he needs access to Microsoft office. In this context, an AI copilot could:

- **Interpret** the query as a software provisioning request

- **Gather additional context** by identifying Drew's role, department, and the specific Microsoft Office applications required.

- **Evaluate** potential solutions based on company policies, access controls, and available self-service options.

- **Suggest** self-service options, guide Drew through the access request process, or direct him to the appropriate IT department.
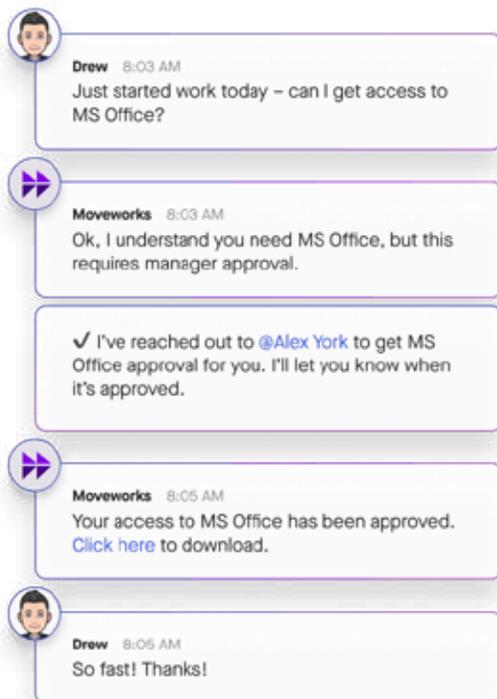
In this example, we see how [AI was able to give the right answers to the right people](#) at the right time by combining generative AI with a deep understanding of identity and organizational context. By understanding these connections, AI is able to gain critical enterprise and department specific context which enables it to deliver increasingly accurate and relevant responses and to boost productivity and efficiency across your organization.

Key AI and automation use cases in IT

Now that we've explored the foundational elements of AI-powered automation, let's dive into specific areas where this technology can up-level your IT operations. We'll examine how AI-powered automation can start to be applied to tackle common IT challenges in service management, knowledge management, and other areas. With these examples, you'll begin to discover automation's potential to transform your IT department and streamline employee self-service.

Drew   8:03 AM
Just started work today – can I get access to MS Office?

Moveworks   8:03 AM
Ok, I understand you need MS Office, but this requires manager approval.

✓ I've reached out to @Alex York to get MS Office approval for you. I'll let you know when it's approved.

Moveworks   8:05 AM
Your access to MS Office has been approved. Click here to download.

Drew   8:05 AM
So fast! Thanks!

Incident management	AI may expedite incident response by automatically detecting anomalies, classifying incidents based on severity and type, and routing them to the appropriate teams. Some machine learning tools can also predict potential incidents based on historical data, helping to enable automated and proactive measures. Think of how some incident management platforms offer AI-driven incident prediction and prioritization.
Problem management	By analyzing incident patterns, AI can identify root causes of recurring issues, automating the creation of problem tickets and assigning them to the correct teams. This proactive approach helps to reduce MTTR (Mean Time to Repair) and improves overall system stability. For instance, AI-powered provision management could automate repetitive tasks across business applications using natural language commands.
Service request fulfillment	Routine service requests, such as password resets, software installations, or hardware requests, can be automated using AI-powered workflows. Additionally, AI search can let users find structured data from various databases or apps using natural language queries, which may reduce service request volume. The right copilot platform can automate and accelerate service work streams across the enterprise to help transform your service desk, improve end-user satisfaction, free up IT staff, and improve productivity.
Change management	Routine change tasks, such as scheduling downtime or informing impacted users, may be automated using AI. This may reduce the risk of errors and help to ensure that changes are implemented smoothly. Consider how some change management platforms can provide AI-driven change optimization or automate change request workflows and impact assessments.
Knowledge management	AI can analyze support tickets and knowledge base articles to automatically create new knowledge articles or update existing ones. This can help enable your knowledge base to be more up-to-date and easily accessible to both agents and end-users. You can potentially speed up and supercharge content creation for your support teams by giving them the ability to fill knowledge gaps. This can be done by generating knowledge articles, sourced directly from data with certain AI-powered knowledge base management tools.
Workflow management	AI can optimize workflow processes by automatically routing requests to the correct individuals or teams based on predefined rules and priorities. This helps to reduce manual intervention and ensure timely processing of requests. Simplify and accelerate approvals by unifying all of your workflows into one conversational AI platform. By automating these tasks, IT teams may significantly improve efficiency, reduce costs, and enhance overall service delivery.

Understanding the business value of copilot automation

Automation has the potential to up-level your IT department and entire organization, but you should gain leadership buy-in first to set the foundation for success. To build a [compelling case for automation](#), you should focus on quantifiable metrics like time and cost savings and process acceleration.

Beyond its numerous potential financial benefits, automation is also a cornerstone of operational excellence. It can help to mitigate risks, ensure compliance, and enhance the employee experience. This is because by automating repetitive tasks, organizations may be able to better minimize human error, reduce the likelihood of compliance breaches, and to deliver faster, more efficient support.

To measure automation's potential success, **identify specific projects that can benefit from automation and calculate the time and cost savings.** These tangible results can help to demonstrate the technology's value to stakeholders.

Moreover, the cumulative effect of automation on operational excellence and overall efficiency cannot easily be overstated. Just consider how each instance of friction, from password resets to software access issues, can represent a bottleneck impacting your wider organization.

By eliminating routine tasks and streamlining processes with automation, you can help to empower your IT departments to elevate the overall user experience and start to unlock significant productivity gains.

Unite automation and search to power productivity

IT departments are often being told to do more with less, support huge volumes of repetitive employee requests, and enable high performance of an ever-expanding tech stack. That's why you should consider a radical new approach to the challenge of IT productivity – uniting your enterprise search and automation together.

By merging AI-powered automation with enterprise search, organizations may be able to radically transform their IT operations and unlock new levels of productivity.

Search provides rapid access to relevant knowledge from across your enterprise, which can empower the intelligent automation of countless actions and workflows. Conversely, automation has the potential to make search faster and smarter, since it can automatically index new content, update search results, and suggest actions to resolve user issues. **When automation is paired with search, it can enable the seamless transition from search to action to resolution.**

In the following chapter, How uniting search and automation unlocks productivity, we begin to explore the symbiotic relationship between search and automation. We dive deep into how they can potentially accelerate problem-solving, boost team efficiency, optimize knowledge management, and streamline workflows. Together they set the foundation to deliver countless improvements to productivity not just to your IT department but potentially across your entire organization.

How Moveworks reasoning enables smarter automations

Moveworks **Reasoning Engine** allows our Copilot to consider the context of an employee's question by applying context awareness on multiple levels to enable more accurate search results. **Reasoning is the cornerstone of our Copilot's intelligence, enabling it to think critically and solve problems like a human.**

The Reasoning Engine is **designed to dynamically choose different approaches to address a user's request,** making it more interactive and capable of handling complex tasks.

When applied across an enterprise, this can enable:

- **Enhanced decision-making:** Analyze patterns and trends within the context to inform better decisions.

- **Optimized task execution:** Automatically trigger subsequent actions

- **Improved information retrieval:** Provide more relevant search results by understanding the context of information knowing all of the sources to locate it from and plugin action capabilities

Just imagine how taking this holistic approach across your entire enterprise can help to deliver a superior user experience and drive operational efficiency.

Powered by an agentic generative AI infrastructure

Plans multiple steps

Executes the next action

Observes and adapts
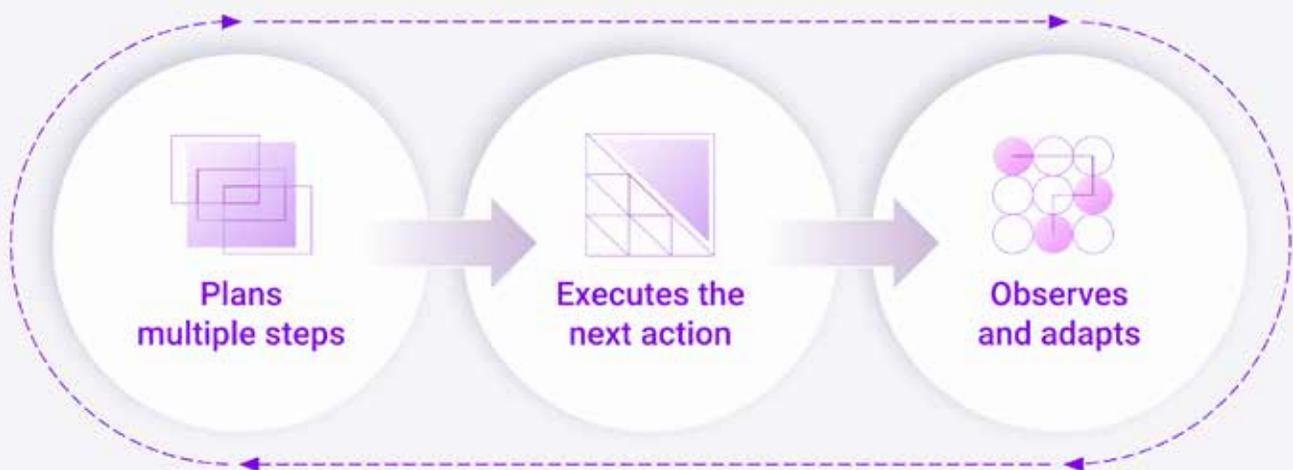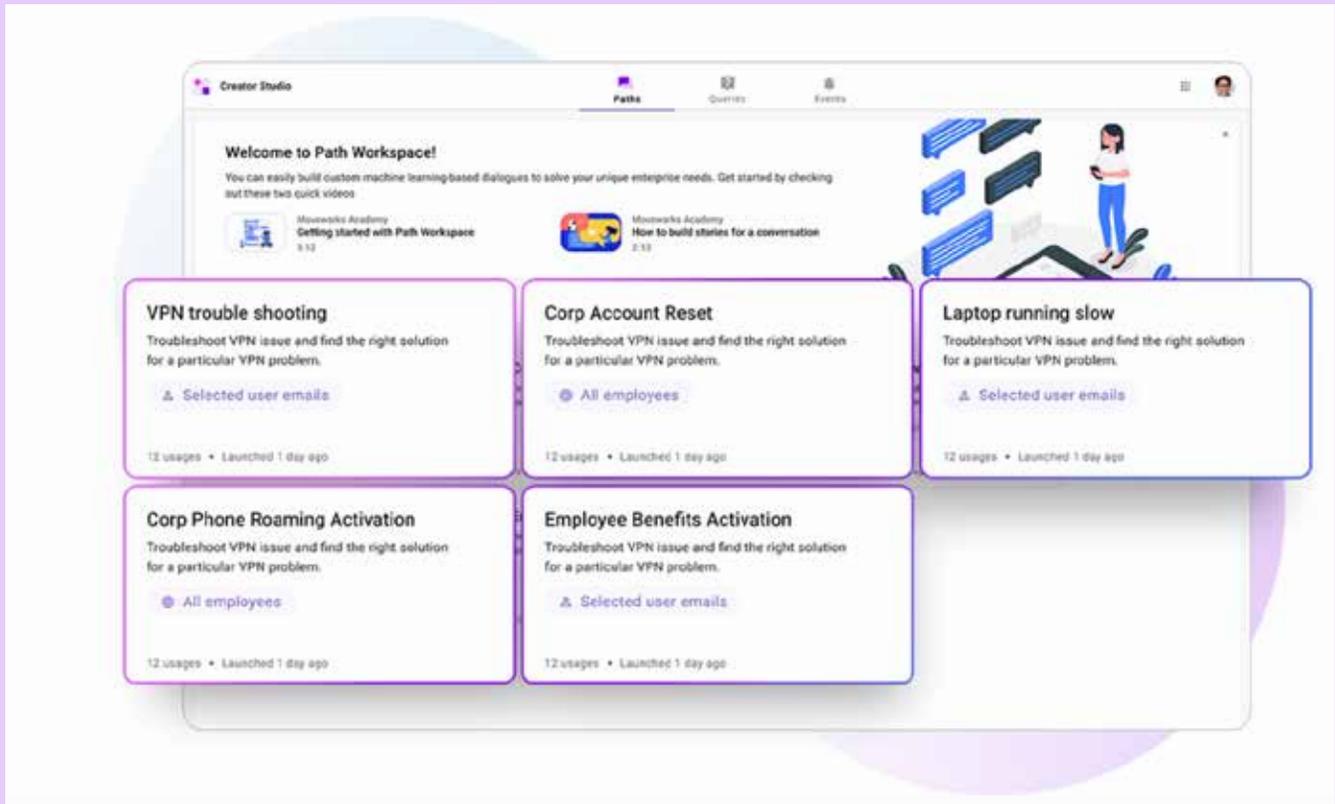
Build custom conversational AI workflows: Extend the Moveworks platform with Moveworks Creator Studio

[Creator Studio](#) empowers organizations to extend the Moveworks platform to create custom conversational AI workflows that suit their specific needs. It connects to any system within your organization, enabling the Copilot to function as a true enterprise-wide solution.

Customize the platform to your unique business needs:

- **Extensible integration:** Connect your Moveworks Copilot to business applications to support your unique use cases.

- **Workflow automation:** Use Creator Studio Paths to design fluid yet controlled conversational workflows that deliver answers, initiate workflows, and surface resources.

- **Data lookups:** Leverage Creator Studio Queries to look up data across your organization using only a few words.

- **Employee notifications:** Use Creator Studio Events to send important messages to your employees straight from your business systems using triggered events.

- **Generative intents:** Let AI figure out when to trigger custom paths by providing it with just a few sample utterances.

03: How search and automation united unlock productivity

As an IT leader, you're likely familiar with the challenges of managing a sprawling IT environment. Your current tech stack and numerous applications may have numerous data silos and a lack of visibility across multiple applications and systems. And you may also face countless employees bottlenecked by the inability to find or resolve their own issues. As a result, your employees might frequently escalate even the simplest of issues to your support team – escalations that may quickly overwhelm agents and divert resources from your more critical initiatives.

Have you ever considered how these issues of search and action could be interconnected? **What if your lower productivity was a direct result of your limited search and automation capacities?**

The result of this lower productivity might be skyrocketing service costs, with one Deloitte report finding that as much as 9% of company revenue may be spent on technologies, support, and operations. Or consider how other reports have found that 33% of tech spend each year can be underutilized with users unsure of how to fully utilize applications.

This perfect storm of challenges may be a barrier to innovation and a drain on productivity for IT teams, employees, and across your entire organization. That's why this chapter will set the foundation for understanding the following:

- Why isolated approaches to search and automation fall short
- How copilots unite search and action for productivity
- The benefits of greater IT productivity for IT teams and employees
- Quantifying the benefits of search and automation
- IT and beyond: How copilots enhance productivity across the enterprise

By breaking down these silos and automating manual tasks, you can empower your team to focus on higher-value work and deliver exceptional service to your end-users. Together, they set the foundation to deliver countless potential improvements to productivity not just for your IT department, but across your entire organization.

Some issues go **beyond Search**

I need Salesforce to see my accounts

Messaging platforms

Data lakes

RPA

Integration and automation platform

Infrastructure

IT applications

Productivity tools

Finance applications

HR applications

Sales applications

Knowledge bases

File storage

## Why isolated approaches to search and automation fall short

Without a unified approach to search and automation, organizations may become trapped in cycles of inefficiency. Employees often struggle to locate necessary information, which can lead to increased time spent on research and problem-solving, potentially diverting their attention from core responsibilities and strapped support teams.

The result? A fragmented, slow, and potentially frustrating user experience, with your employees struggling to find the information they need and IT teams frequently overwhelmed with support requests.

To address these challenges, leaders will often turn to search solutions, application toolkits, application specific copilots, or attempt to build their own solution, yet each of these are still challenged to truly unite the power of search and automation and deliver meaningful impact.

Search solutions
can't take actions or
automate workflows
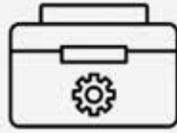
App toolkits lack
scalability, flexibility,
and customization

App copilots are siloed
to specific applications
or ecosystems

Homegrown solutions
require dedicated
expertise/resources to build

- **Search solutions:** These do a good job of surfacing information, however they often fall short of allowing employees to take action and set up automations. Employees and IT teams may struggle to switch between finding information in a search solution, and then may need to switch into other applications to take necessary actions. Users and IT teams are challenged by frequent context switching to find information and perform necessary actions, this resource-intensive process may reduce efficiency, increase the risk of errors, and have a limited impact on overall ticket bloat.

- **Application toolkits:** These can be an option for teams seeking to automate their support. Yet mapping out each and every single turn of a conversation is very challenging to scale and can be extremely resource intensive. Consider a full featured employee support solution with robust natural language understanding to avoid needing to script out every dialogue flow across your entire enterprise.

- **Application-specific copilots:** These can be helpful tools for power users of individual applications or application specific suites. However, these copilots are designed with the goal of driving productivity within that specific realm or app, rather than across multiple applications and information sources. Even with app-specific copilots, difficulty with a lack of self-service options and accessing relevant information across other applications and systems is common. These app-specific copilots may perpetuate a fragmented approach, prevent holistic visibility of siloed information, and limit the potential for automated actions.

- **Homegrown solutions:** Other options include building your own AI or employing APIs to access limited AI functionalities, like content generation, language translation, or data visualization. Using APIs for business AI typically comes with significant limitations, including dependency on third-party providers, potential data privacy and security risks, performance limitations, restricted customization, challenges to automating across systems and the potential for rapidly escalating costs.

How copilots unite search and action for productivity

An enterprise copilot is an AI-powered assistant designed to augment human capabilities and streamline operations within an organization. AI copilots are transforming work by seamlessly combining search and action. These intelligent assistants excel at surfacing information across systems and automating routine tasks, freeing users for higher priority tasks.

However, not all copilots are created equal, especially when it comes to supporting IT and help desk teams. While general-purpose copilots can assist with common IT tasks like ticket summarization or drafting standard email responses, their capabilities are often limited to generic language models. These tools may struggle with IT-specific terminology, complex problem-solving, and understanding the nuances of your organization's unique processes. On the other hand, application specific copilots may excel in the application environment, but can limit your holistic visibility and may make it difficult to automate actions based on data from diverse applications and systems.

That's why for many IT departments an agentic AI copilot, powered by advanced reasoning capabilities, can surpass more limited copilots in both search and automation. These agentic copilots can do this by independently analyzing complex issues, considering multiple solutions,

Powered by an agentic generative AI infrastructure

Plans multiple steps → Executes the next action → Observes and adapts

and executing autonomous decisions. These best in class copilots can use reasoning to adapt to user needs, optimizing task execution and information retrieval.

Especially for IT teams, an effective copilot should enable automated and accelerated service workstreams, faster content creation and knowledge gap filling, and facilitate high-impact automation use cases and workflows for streamlined and productive support.

The benefits of greater IT productivity for IT teams and employees

IT teams often juggle a high volume of routine requests alongside complex issues. This demands exceptional access to knowledge and quick actions. **By streamlining information retrieval processes and automating routine tasks with an agentic copilot,** employees

can more quickly find the information they need and in some cases automatically take action, while support teams may be able to dedicate more time and energy to strategic initiatives, enhancing satisfaction, and driving innovation. This can result in:

- **Accelerated resolution:** By combining search and automation, copilots can dramatically accelerate issue resolution. AI-powered triage quickly categorizes and prioritizes incoming tickets, while advanced search capabilities swiftly identify relevant knowledge articles and solutions. Automation then takes over routine workflows and tasks, freeing up agents to focus on complex problems and in some cases resolving employee issues with minimal agent involvement. This streamlined process may significantly reduce mean time to resolution, which can improve overall user satisfaction and boost team efficiency.

- **Enhanced team productivity:** Copilots can significantly boost team productivity by automating repetitive tasks and streamlining workflows with use cases across many departments. By handling routine processes like ticket routing, data entry, and report generation, copilots can free up IT teams to focus on strategic initiatives, problem-solving, and innovative projects. Additionally, employees using copilots for support can get unblocked much faster. This increased bandwidth may empower both employees and IT teams to drive greater business growth and deliver exceptional service experiences.

- **Optimized knowledge management:** Copilots can help to revolutionize knowledge management by automating the creation and maintenance of up-to-date knowledge bases. This empowers both employees and agents to find answers quickly through intelligent search, reducing dependency on support teams. By fostering a self-service culture, copilots not only can lighten the support load but may also improve satisfaction and productivity.

- **Improved operational efficiency:** Copilots can revolutionize operational efficiency by breaking down silos between IT and enterprise systems. With access to a unified data pool, copilots can enable optimized workflows, bottleneck identification, and the automation of repetitive tasks across departments. This holistic view of operations may enhance decision-making, reduce errors, and drive overall productivity.

- **Measurable impact:** Copilots can provide invaluable insights into the impact of uniting search and automation by tracking and analyzing key performance indicators. By measuring metrics such as ticket resolution time, first contact resolution rate, and agent handle time, copilots may help to demonstrate the tangible benefits of these integrated capabilities, which can enable the justification of ongoing investment and performance optimization.

Quantifying the benefits of copilot search and automation together

We know that empowering your teams with AI is especially critical for IT teams where your human resources are limited, costly, and can't easily scale. However, the benefits of a copilot can many times go beyond just cost savings and productivity gains – they may also support profitability as well, through metrics such as potential increases in revenue, reductions in cost, and savings in time.

Direct productivity benefits

Benefit category	Observable results	Impact	Metrics
Productivity savings	• Faster resolution times • Improved employee satisfaction (i.e., reduced frustration with IT support, support in native language)	• Increased employee focus time on core activities • Improved employee morale and engagement • 24/7 availability of AI-powered support • Multi-lingual support • Personalized recommendations and knowledge base suggestions	• End user time saving: For improved IT resolution rates, including but not limited to the following: • Access restoration time: How long it takes to reset passwords or unlock accounts • Time to answer troubleshooting questions: Duration to provide answers to how-to inquiries • Approval wait time: The time needed to obtain manager approvals for requests
Cost savings	• Reduced labor costs (i.e., time saved on tickets, password resets) • Reduced training costs	• Lower IT operational expenses • Increased budget allocation for strategic initiatives	• Annual salary cost associated with saved time • Reduced training hours cost
IT team efficiency gains	• Reduced ticket volume (i.e., through self-service capabilities, improving first-contact resolution rates) • Faster resolution times (i.e., AI-powered knowledge management)	• Increased capacity for strategic IT projects • Identify service hotspots: AI pinpoints challenge areas • Improved IT service delivery capabilities	• Mean time to resolution (MTTR): Average resolution time before and after AI copilot • High-touch issue resolution time: The time to resolve complex issues needing subject matter expert (SME) or L2/L3 input. • Number of tickets: Compare the number handled by IT team before and after AI copilot

Productivity benefits and cost savings are certainly a major advantage of AI copilots in IT. Copilots can also indirectly influence productivity through improving support scalability, enhancing user experiences, and improving knowledge sharing and retention. GitHub released data on its copilot's impact, showing that 74% surveyed developers could focus on more satis-fying work.

However, the potential for indirect benefits – and revenue growth – may happen through: increased **employee effectiveness** and **enhanced information visibility**. The ease of informa-tion access with 24/7 support, automation and self-service capabilities typically helps to enable much faster service, satisfaction, and empowered employees to focus on core revenue-gener-ating work.

Indirect productivity benefits

Benefit category	Observable results	Impact
Improved support scalability / IT staff empowerment	• Reduced ticket volume due to self-service and AI-powered resolution • Increased capacity for handling future support needs	• Reduced need for additional IT support staff as workload increases • Increased self-serve support • IT staff allowed to focus on complex issues and strategic initiatives
Enhanced user experience	• 24/7 availability of AI-powered support • Multi-lingual support • Personalized recommendations and knowl-edge base suggestions	• Increased user satisfaction with IT services • Improved localized support • Improved user adoption of technology within the organization
Improved knowledge sharing & retention	• AI-powered knowledge base continuously updated with successful resolutions	• Easier, more visible access to relevant knowledge for IT staff and end-users • Reduced time spent on problem-solving tasks • Increased usage of knowledge bases and other information platforms (ITSM, CRMs, ERPs, etc)

IT and beyond: How the Moveworks copilot helps enable productivity across the enterprise

Copilots enable boosted productivity across IT teams – and company-wide – by seamlessly integrating into workflows. Moveworks Copilot can allow teams to accomplish more with less by automating tasks, improving efficiency by helping to optimize processes and action lead to resolutions. Extending from IT and support teams to HR and finance, our AI copilot may enable increased capacity across departments to handle complex issues with finesse.

Moveworks has mapped the top 140 use cases across common enterprise systems. The top use cases under each of these ten widely used systems are captured below:

System	Common use cases
IT Operations	* Notifying employees about maintenance * System outage alerts * Announcing IT service launches * Retrieving system configuration information * Checking server status * Diagnosing and fixing API errors * Configuring environment variables * Guiding through infrastructure provisioning
Identity and Access Management (IDAM)	* Multi-factor authentication requests * Security incident alerts * Password resets * Access request status updates * Compliance training reminders
Application Management System (AMS)	* Sending application maintenance reminders * Upcoming outage notifications * Submission reminders * Checking application status * Viewing logs * Searching users * Configuring settings * Viewing usage * Requesting access * Reporting issues
Project Management System (PMS)	* Project milestone updates * Task assignments * Managing timelines * Reporting progress *Workflow optimization
Collaboration System	* Sending meeting reminders * Task notifications * Document updates * Welcoming new employees * Finding meeting rooms * Scheduling meetings
Customer Relationship Management (CRM)	* Sending key milestone updates * Requesting customer feedback * Notifying of product updates * Alerting sales reps on leads * Looking up customer information * Checking order status * Resolving customer issue
Financial Management System (FMS)	* Managing budgets * Submitting and tracking expenses * Approving purchase requests * Adjusting payroll deductions * Resolving payment disputes

System	Common use cases
Human Resource Information Systems (HRIS)	* Onboarding new hires * Managing benefits * Payroll information * 401k balance lookups * Benefits enrollment * Health information access * Performance review reminders * Compliance training reminders
Marketing System	* Creating content * Launching campaigns * Analyzing performance * Competitive analysis * Social media posts * Website analytics
Procurement System	* Purchase order lookups and approvals * Policy guidance * Delivery updates * Contract expiration alerts * Requisition status updates * Inventory and vendor information lookups

IT and beyond: Moveworks unleashes productivity enterprise-wide

You should aim to couple search with automation to fully realize their enormous potential. Throughout this chapter, we've explored the limitations of taking isolated approaches to search and automation and looked into the measurable and transformative potential of the Moveworks Copilot to unite these two essential functions.

By automating routine tasks triggered by search results with AI copilots, IT teams can support significantly enhanced efficiency for more streamlined workflows and improved service delivery. Moreover, automation not only helps to ensure that search results are up-to-date and relevant, but in the best kind of copilot it can also plan out multiple steps, execute actions, and more easily streamline workflows.

What are the potential outcomes?
- **Increased team productivity**
- **Improved team morale**
- **Improved employee satisfaction**
- **Enhanced innovation**
- **Reduced operational costs**

These are tangible productivity benefits that can transform not just your IT department, but your entire organization. By seamlessly combining search capabilities with the ability to take action, the Moveworks copilot may empower IT teams and entire organizations to be able to achieve previously unprecedented levels of productivity.

Automate the support lifecycle with generative AI

Accelerate ticket resolution with Moveworks Service Management

Copilot with Service Management automates the ticket lifecycle using GenAI. With Moveworks, employees get a centralized place to make requests while support teams receive and resolve issues autonomously. It's all powered by an NLU-led approach that applies conversational dynamics and contextual analysis into the service experience.

Features and functionalities

- **Ticketing lifecycle management**: Manage the entire inbound ticketing process as well as query creation and resolution with an interactive copilot experience.

- **Holistic domain support**: Integrate with the entirety of your service ecosystem to automate and explore common issues.

- **Outcome-based triage**: Let chat and embedded form interfaces determine the best path to resolution: immediate solutions, SME routing, additional information gathering, internal hand-offs, etc.

- **Comprehensive search**: Find unstructured and structured data across knowledge bases, portals, file systems, data lakes, and systems of record – all from one place where employees already work today.

- **Copilot messages**: Leverage the copilot to send engaging, in-chat messages to employees to drive organizational change and compliance.

Lily
There's an issue with the audio in the Rolling Stones conference room - can someone take a look at it?

Moveworks
I can create a ticket for this issue. The description will be: "There's an issue with the audio in the Rolling Stones conference room". Can I proceed with creating this ticket?

View details

Lily
Yes please

Moveworks
I have created a ticket for the audio issue in the Rolling Stones conference room. The ticket ID is IT-40567. Our IT team will look into this issue as soon as possible.

Moveworks