



Workbook

The Importance of Choosing the Right
Copilot Tool for Your Just-in-Time
Knowledge Strategy

Introduction

This paper discusses the challenges and considerations when choosing the right Artificial Intelligence (AI) based Co-Pilot tool to implement your Just-in-Time Knowledge Strategy. Firstly, let's quickly define three key terms, AI, JIT and Copilot, so we are all on the same page.

Artificial intelligence (AI) is a collection of technologies that allow machines to perform tasks that typically require human intelligence, such as learning, reasoning, and problem-solving.

Just-in-time (JIT) knowledge is a learning method that provides information when and where it's needed rather than providing potentially irrelevant skills. JIT learning is based on the idea that learners should only learn what they need to know to get the job done and that they should be able to access that information when they need it.

A **Copilot** is a new practical software application of generative artificial intelligence (AI) that is taking the world by storm: **AI copilots**. A copilot is an AI-powered virtual assistant that can use data and computation to help with your tasks, delivering knowledge, guidance and insight at the point of need, typically through a mobile app or by voice.

The evidential benefits of just-in-time knowledge, such as fast diagnostic, accuracy and speed in completing a task, efficiency of time, relevance of task, timeliness of expertise at the point of service, and customization, are clear. As a consultancy, we have a wealth of evidential metrics that can demonstrate the value of such a strategy. This discussion outlines the challenges and considerations when choosing your copilot technology partner and provides a quick list of the right copilot based on our experience.

Challenges



The “Silver Tsunami” and the significant “skill fade” market trend

We have seen in recent years that the gradual skill fades with the loss of experience and knowledge, leaving the industry and the baby boomer generation leaving the workforce.

Many experienced engineers and technicians have not returned to work after the pandemic, also called the “silver tsunami” Organizations face significant challenges retaining organizational and tribal knowledge, leaving their teams at an ever-increasing rate.

Solution

Selecting the right copilot tool is like choosing the perfect tool for a task; it can significantly impact your organizations success and health.

Here's why it matters:

- **Knowledge:** The right tool delivers accurate expertise and guidance based on a product, asset, or piece of equipment at the point of need, using an approved large language model.
- **Underlying AI technology:** Copilots explicitly designed for the task avoid hallucination issues commonly found when using generic tools.
- **Efficiency:** The right tool can streamline processes, automate tasks, and save time.
- **Accuracy:** Copilot tools vary in their accuracy and reliability. Choosing the right one ensures trustworthy results.
- **Scalability:** As your needs grow, the tool should be able to scale with you to meet new demands.
- **Cost-effectiveness:** Investing in the right AI tool can save resources. The right choice optimizes your budget.

Our Checklist for Selecting the Right AI Tool

To make the process of choosing the right AI tool even more manageable, here's a checklist:

- Clearly defined objectives and goals.
- Compatibility with existing systems.
- Scalability to accommodate future growth.
- Deliver a positive ROI potential.
- User-friendly interface and resources.
- Proven performance and accuracy.
- Compliance with data security regulations.
- Access to comprehensive training and support.
- Customization options to suit your needs.

Define Your Objectives

Before you search for a Copilot, clearly define your objectives. Ask yourself:

- What problem or task do you want to address?
- What are your short-term and long-term goals?
- What outcomes do you expect from using a Copilot AI tool?
- Having a clear understanding of your goals will help you narrow down your options.

Compatibility with Existing Systems

Consider the compatibility of the copilot AI tool with your existing systems and infrastructure. Ensure that it integrates seamlessly with your current software and hardware. Compatibility issues can lead to delays and additional costs.

Data Quality

The sources stress the importance of ensuring the accuracy, reliability, and up-to-datedness of the data used for just-in-time knowledge systems. Only accurate or updated information can lead to correct decisions and wasted time, negating the strategy's intended benefits. Addressing this challenge requires establishing robust data governance processes, including data validation, verification, and regular updates.

Scalability

Evaluate the scalability of the copilot - AI tool. Can it accommodate your future needs? Tools should grow with your business or project, allowing you to adapt to changing requirements without significant disruptions.

ROI Considerations

Assess the potential return on investment (ROI) and Time to Value (TTV) plus the Total Cost of Ownership (TCO) when comparing the costs of implementing a Copilot tool or any other form of AI-based technology. What are the expected benefits it will bring? Factors to consider include increased operative, engineer, and technician productivity, cost savings, and improved customer experience and outcomes.

User-Friendliness

Ease of use is crucial, especially if you or your team are not AI experts. Look for copilot tools with intuitive, simple-to-use interfaces. These tools should also support interfaces with machines like QR codes and assist the user in learning how to navigate them.

User Experience

The design and implementation of just-in-time knowledge systems must prioritize user-friendliness and intuitiveness. Employees should be able to easily access and utilize the necessary information without facing complex interfaces or convoluted processes. This involves considering factors like search functionality, information architecture, and mobile accessibility.

Organizational Culture

The knowledge transfer strategy should align with the organization's culture and values. For just-in-time knowledge to be practical, the organization needs to foster a culture of knowledge-sharing and collaboration. Employees should be encouraged and empowered to seek and share information readily using the Copilot platform.

Performance and Accuracy

Scrutinize the performance and accuracy of the tool. Research user reviews, conduct trials, and analyze the tool's track record in delivering reliable results.

Data Security and Compliance

Consider data security and compliance requirements. Ensure the AI tool adheres to data protection regulations relevant to your industry and location. Protecting sensitive information and preventing unauthorized access is crucial when implementing just-in-time knowledge systems. This requires implementing appropriate security measures, such as access controls, encryption, and data loss prevention tools. A copilot that addresses these issues with a robust security framework is essential to maintaining data integrity and building trust in the system.

Technology Infrastructure

Our conversation highlights the need to evaluate existing technology infrastructure when implementing a new copilot for knowledge transfer. This is particularly relevant for just-in-time knowledge, as it often relies on advanced technologies like AI-powered search engines and knowledge graphs. Organizations need to assess their current systems and ensure they can support the implementation and integration of these technologies.

The ease of implementing for your business IT

Will it be easy to collect data, organic knowledge articles, and instruction guides and ingest existing technical and product manuals, bulletins, FAQs, and learning articles?

Training and Support

Assess the availability of training and support. Look for partners that offer copilot support to help you get the most out of the tool. Employees may require training on effectively using copilot and helping understand the nature of just-in-time knowledge systems and tools. For younger employees who have grown up with technologies, this may be straightforward and logical for them to navigate. Organizations should provide clear guidelines and ongoing support to ensure all employees can confidently use the copilot chosen. Implementing a just-in-time knowledge strategy requires careful planning and considering these challenges and concerns. By addressing these potential issues, organizations can harness the power of just-in-time knowledge to improve efficiency, enhance decision-making, and create a more agile and responsive work environment.

Customization Options

Evaluate the customization options offered by the Copilot AI tool. Can you tailor it to your specific needs and requirements? Customization can be essential for achieving optimal results.

Conclusion

Selecting the right Copilot is a critical decision that can significantly impact your organization's success. By following the tips and checklist outlined in this guide, you can make a well-informed choice that aligns with your objectives, ensures compatibility, and maximizes ROI.

Remember that a Copilot is a versatile technology with applications across various domains, so take the time to research and explore the options available. With the right copilot tool, you'll unlock new possibilities, improve efficiency, and confidently achieve your goals.

We are committed to helping you and your business succeed by selecting a copilot technology partner.