



# Enterprise AI Search

Powering Your Internal AI Copilots

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**Introduction:  
The Explosive Rise  
of Generative AI**

# While AI has long fascinated us, Generative AI has elevated interest to unprecedented levels.

With the ability to easily generate content, text, imagery, and even audio, Gen AI has revolutionized the future of how organizations operate by offering new possibilities for automation, creativity, and problem-solving. Like with any revolutionary technology innovation, AI is not without challenges.

Some organizations are reluctant to adopt AI, but their employees are not, causing internal conflicts that IT must manage. Other organizations want to jump feet first into AI, leaving IT running to keep up with silos of users at varying levels of AI adoption.

Two years into the industry's overall acceptance and early adoption of AI, new challenges are emerging, many of which may resemble or stem from hurdles your organization has encountered before.

## Your Data is the Heart of Your Enterprise

At the heart of every AI system is data—the raw material that allows AI to learn, adapt, and perform complex tasks that help enhance productivity. Data fuels AI, generating insights and value. Success with AI relies on understanding and managing these critical components effectively. For Generative AI, your organization's content and data are the foundation of the house you're going to build. Without the foundation... there is no house!

This eBook is designed to guide you through the essential steps of a successful Generative AI project, focusing on key considerations around data strategy, content, technology, security, and compliance. Whether you're starting from scratch or looking to improve existing processes, you'll find valuable insights and practical advice to ensure your Generative AI project delivers the results you expect.



97%

of organizations will  
implement some level of  
Generative AI by 2025

[Forrester & Grammarly](#)





02



# Data and Content Strategy: Building the Foundation

# How do you ensure your Generative AI project succeeds?

Let's start with the foundation: data and content strategy. Generative AI projects require a clear strategy that outlines the data and content necessary for the AI to function effectively.

AI's success hinges on its ability to learn from large datasets. Without a well-defined data strategy, even the most sophisticated AI can fail. If your organization's content and data are not in a place where it can be leveraged, you must start there. A solid strategy not only ensures that the AI has the resources it needs but also aligns with your business objectives. Think of data as the lifeblood of AI—the more robust and well-defined your enterprise data sources are, the more powerful your AI becomes.



## Defining Your Goals

A successful data strategy begins with setting clear objectives. What do you want your AI project to achieve? By defining these goals, you can guide your data collection and enhancements, ensuring you're not connecting and enhancing data just for the sake of it, but with a clear purpose in mind of how you're going to leverage that information for your specific use case.

An example would be of a large legal or professional services firm. What data needs to be ingested into your newly defined AI engine? How can you securely connect that data so that sensitive information stays secure? What do you plan to do once it is connected? Do you plan on summarizing case or project information? There are endless possibilities, yet one thing stays the same. You must have well defined objectives when embarking on this journey.



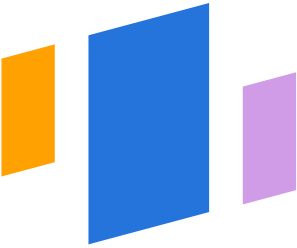
# Identifying and Connecting Data

Once you have a strategy, the next step is to identify and connect the data resources needed for your AI project. Remember, your organization will be building off this foundation for years, so it's important to make sure it's done right from the start.



## Step One

Start with a data inventory. Take stock of the data, content, and the business applications you already have, both structured and unstructured. It's essential to understand what information is at your disposal and how it can contribute to your AI project's success.



## Step Two

Map your data sources. This process involves identifying all potential sources of data within your organization. These could be internal databases, customer relationship management (CRM) systems, or external applications like Google Drive. The goal is to ensure you have a comprehensive view of the data landscape within your organization.



## Step Three

Address data gaps. Recognizing data gaps allows you to develop a plan to fill them, ensuring your AI project has the complete data it needs. Taking inventory of what resides in each business application allows you to prioritize what data is to be connected to first. It also can help your organization realize these gaps or lack of usage for business applications, leading to cost savings.



## Determining What Data to Use

It's time to determine which data should go into the AI engine. Carefully consider AI's objectives and the implications of using highly specific information.

The content you use to power Generative AI projects depends on what you want to 'do with AI'. In other words, what is the AI project you are working on meant to accomplish? Are you building a new customer service chat bot to improve customer experience? Or maybe you're looking to build an employee self-service chat bot for your internal stakeholders. While those are similar use cases, the data sets you use to support them will likely be different. And in both cases, limiting access and ensuring privacy and compliance of the data visible, is of critical importance.

So, how do you get started? Begin by defining and prioritizing data. Based on your AI project's objectives, determine which data is most relevant for your initial deployment. Consider the tasks your AI will perform and the desired outcomes. Prioritizing data ensures you're focusing on what's truly valuable to your project.

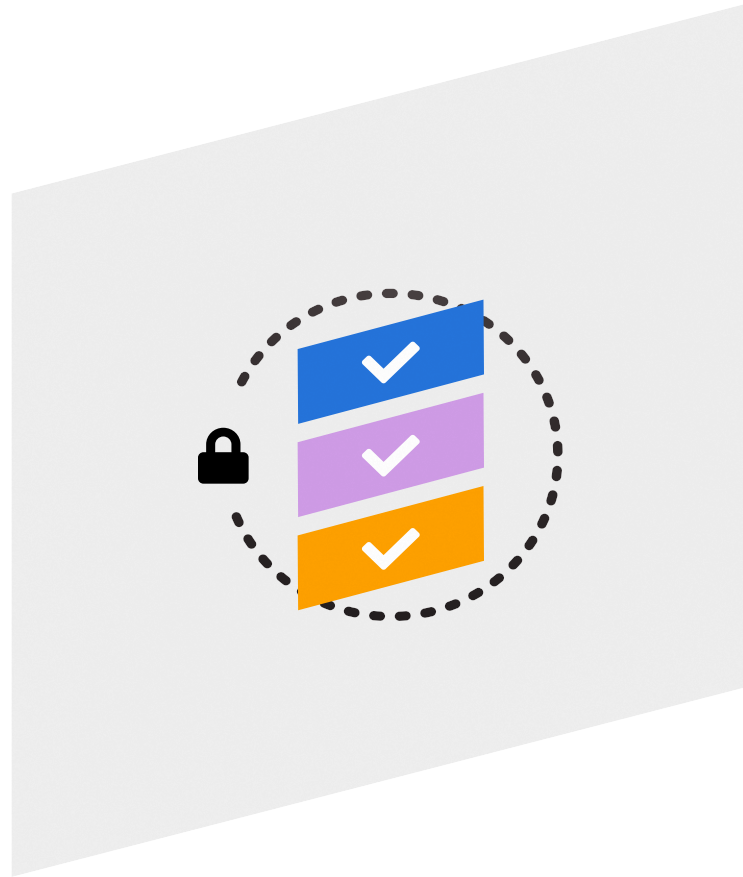


# Ensuring Compliance and Security

As you prepare your data for the AI engine, AI governance becomes a key consideration. Just as a well-constructed house needs proper maintenance and security, your AI project requires robust data governance to ensure compliance and security.

AI governance involves establishing clear rules and policies for data use. Start by defining ownership and responsibility. A lot of organizations have invested heavily into upskilling their workforce within AI to be able to run these projects effectively. Others have hired consultants or vendors who deal with AI. It's critical to clarify who owns the data and who is responsible for managing it, creating accountability and a return of value throughout the AI project.

Develop policies and procedures to govern data access, use, and retention. These policies should align with industry regulations and best practices, providing a framework for responsible data management.



At Upland Software, we've developed an AI council composed of experts within our organization that can oversee and guide these governance efforts and make sure AI is being used responsibly. These experts stretch across the business from product leaders to legal, and even marketing. These types of overseeing bodies are a must do for any serious AI project to ensure accountability and sustained success.

Security is essential to ensure your data is protected from unauthorized access. Implement encryption, access controls, and regular security audits to safeguard your data. Plenty of vendors, consultants, and subject matter experts understand the security measures needed for a secure AI environment and can aid in the building process. More than likely, your standard security protocols will not be stringent enough.



## Enriching and Augmenting Data for AI

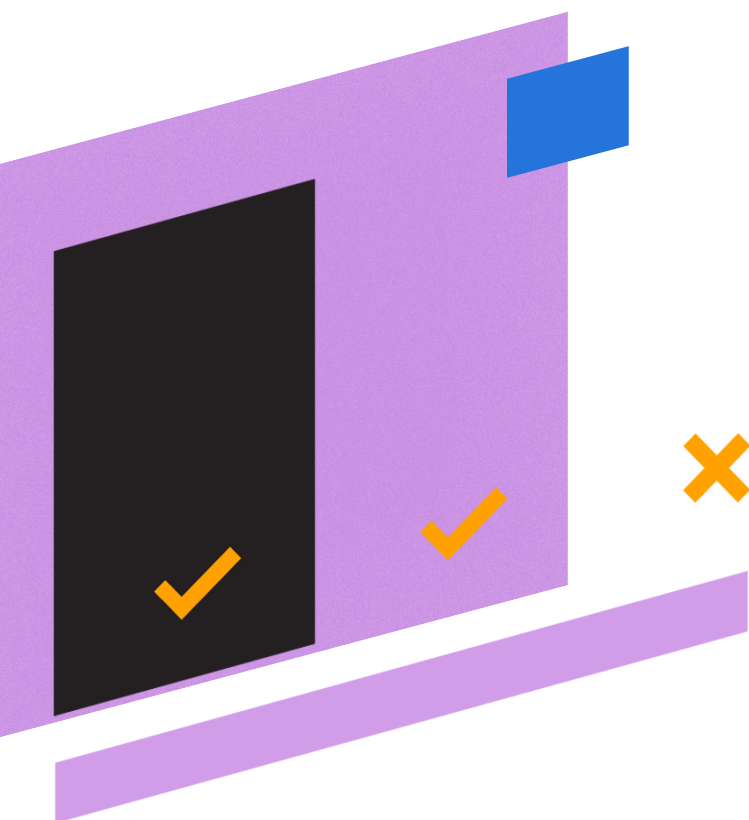
After identifying data and 'rules' for its use by the AI engine, it's important to enrich and supplement the content so AI processing can recognize it better. Connecting relevant datasets and providing context are two ways to enrich data. This phase allows for better outcomes from the AI engine by enabling it to connect more dots. The AI's performance can be greatly enhanced by adding metadata, such as tags or labels, which enable it to identify content more efficiently.

Following this step, your data will be better understood and analyzed by the AI in the context for which it was designed. In this approach, your AI will provide much more comprehensive and practical insights to your organization.

Completing augmentation, or enrichment, is an additional measure. During the inventory phase, you might be able to close any data gaps that you find. This might be adding more connectors or using outside data to enhance the knowledge your organization already has. In the process of enrichment, classification is also carried out. Information can be retrieved more quickly and placed in an even deeper context thanks to this classification process. This increases the effectiveness of technologies like RAG (retrieval augmented generation) for utilizing content in easy use cases.

## Cleaning and Preparing Data

The last step before supplying data to the AI engine is cleaning and preparing it. To guarantee uniformity, this procedure includes eliminating duplication, fixing mistakes, and standardizing formats. You provide the groundwork for the AI engine to produce accurate and dependable results by cleansing your data.





# Conclusion: Charting the Path to Enterprise AI Success

As we conclude our journey through implementing Generative AI, one thing is clear: A successful Enterprise AI project starts with a solid data strategy. By understanding the importance of data and its role in powering AI, you can create a foundation that enables your AI success. From identifying and connecting data sources to ensuring data governance and compliance, each step contributes to the overall effectiveness of your AI project, and the technological foundation of your organization.



# Taking the Next Steps with AI

If you're ready to harness the power of AI for your business, we're here to help. Our AI enterprise search solution, BA Insight, provides a comprehensive platform for integrating Generative AI into your operations quickly. [Contact us today](#) to learn more about how we can support your AI journey—from data strategy to full implementation.

Our AI search experts are ready to guide you through the process and ensure your AI project is a success. We're excited to help you leverage the power of AI to drive innovation and efficiency in your business.

Not ready to talk with us yet? No problem! Feel free to [read our blog](#) or visit our [YouTube channel](#) to view more educational content and then, let us know when you're ready to talk with a human!

