

Mosaic

Projects 2.0
Customer Community Session



September 2025

agenda

- 01 Why Mosaic? (10 min)
Problems we are solving
- 02 How does it work? (10 min)
Live Demo
- 03 How do I set it up? (10 min)
Tech requirements to implement Mosaic
- 04 What's changed? (15 min)
How to communicate the change internally
- 05 Next steps (10 min)
Launch toolkit for Mosaic

Why Mosaic (Projects 2.0)

Problems we are solving

The workforce is no longer just human

BUSINESS EXCLUSIVE DETAILS

Goldman Sachs launches AI tool — fueling fears that 'rise of the machines' could hit jobs

Artificial intelligence + Add to myFT

AI agents: from co-pilot to autopilot

An in-depth look at the hype and reality around "agentic AI" — the use of AI agents that perform tasks autonomously.

Amazon's corporate workforce may shrink as AI takes over routine tasks

Generative AI

Agentic AI Is Already Changing the Workforce

by Jen Stave, Ryan Kurt and John Winsor

May 22, 2025

AI agents can reimagine the future of work, your workforce and workers

Investment Banking >

HSBC eyes AI bots to replace back office jobs

The UK lender is interested in using AI agents created by a tech startup

Challenges we hear from the market...



AI Productivity Gap

Organisations are not yet seeing promised business benefits of AI.

Recent research from MIT found 95% of AI pilots fail



Underutilised Tech Stack

60% of tech leaders report that employees are not adopting new tools fast enough - putting digital ROI at risk



Wasted Unlocked Capacity

On average, 37% of roles and 20% of the workforce across our customers are highly impacted. This shift will release significant employee capacity.

Challenges we hear from you...



Low Marketplace Liquidity

Too few projects, low activation, siloed efforts.



Limited Visibility into What's Working

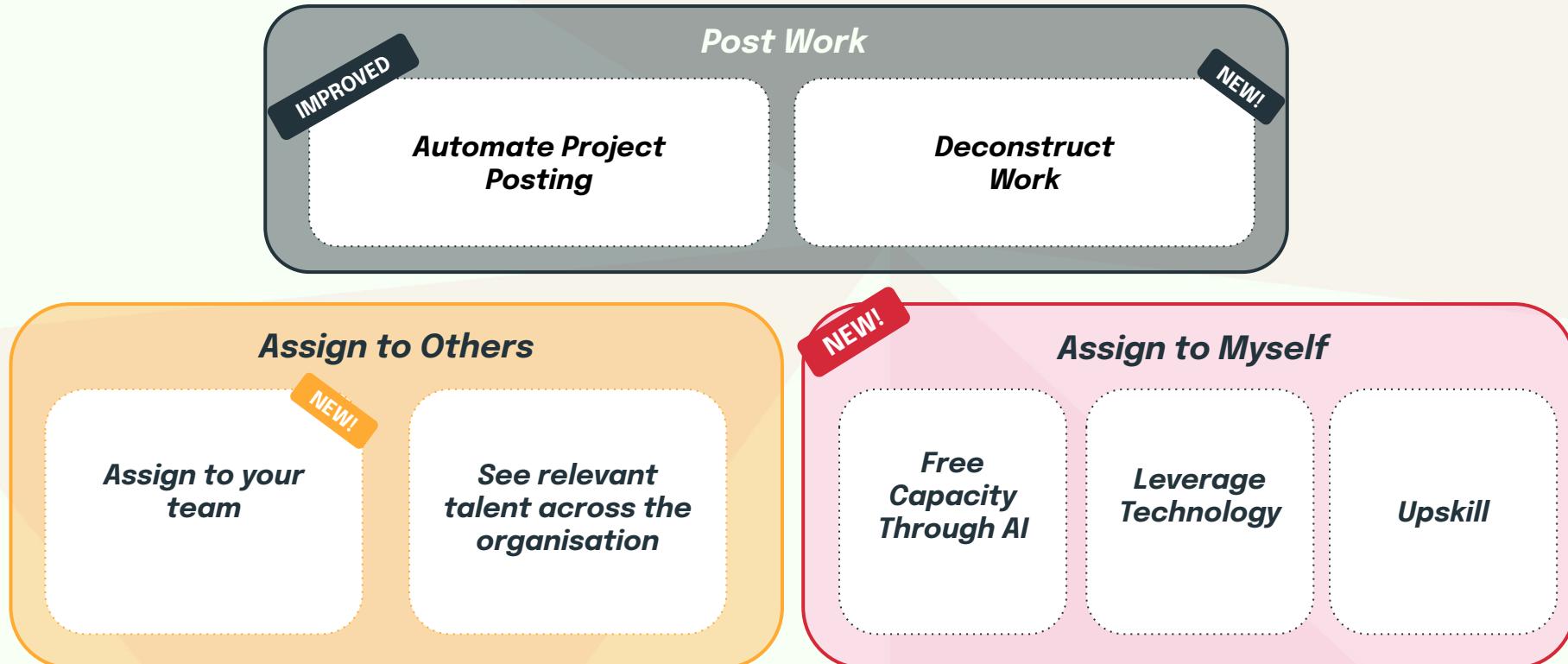
No clear view of who's creating work, who's joining, or what success looks like.



Difficult to Prove Business Value

Difficult to estimate the impact of projects and show which goals they support.

Turning Challenges into Opportunities: Projects 2.0

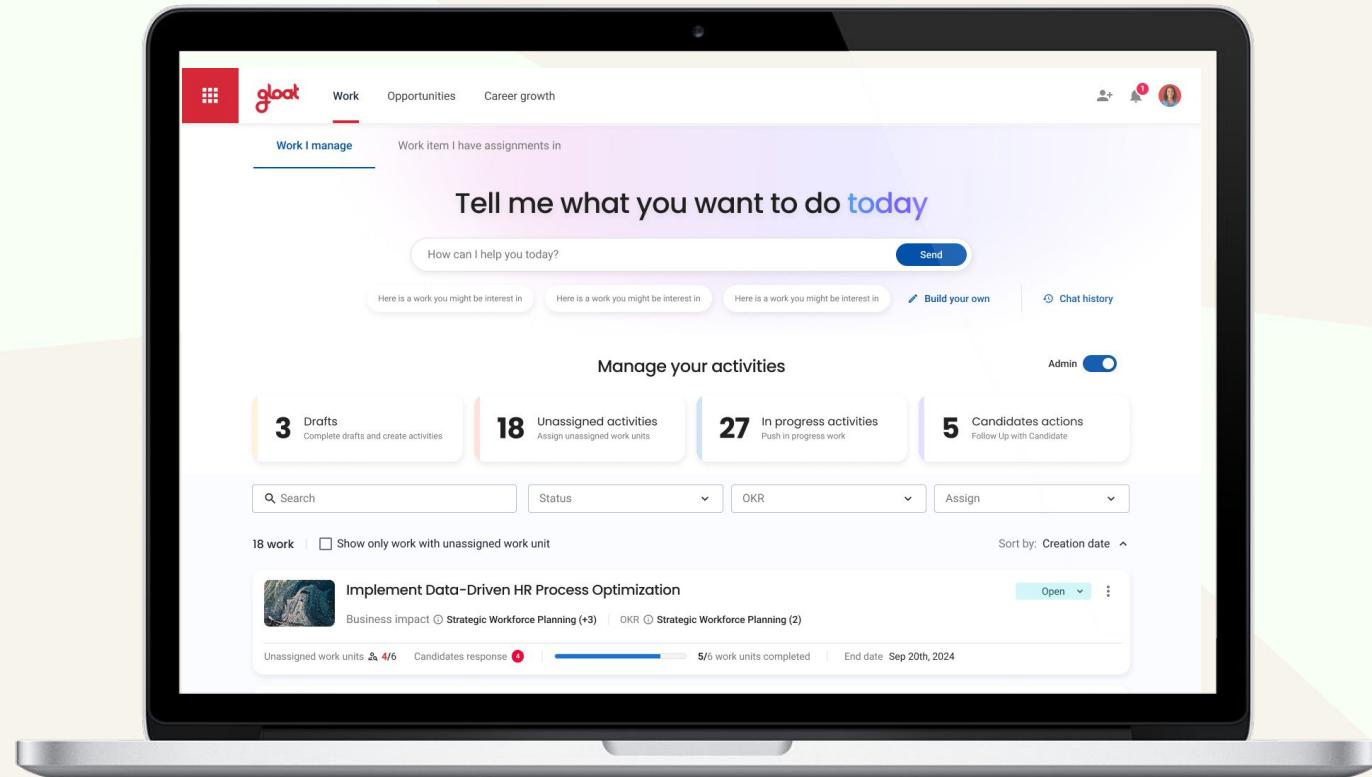


How it works

Live Demo

Let's see it in action

Live Demo



Technical Set Up

What's required to implement Projects 2.0

What's required to implement Projects 2.0?



Migrate all
Projects data to
Work & Activities

Enable on
Staging

Customer

Optional Steps

Share application data: tools & AI agents

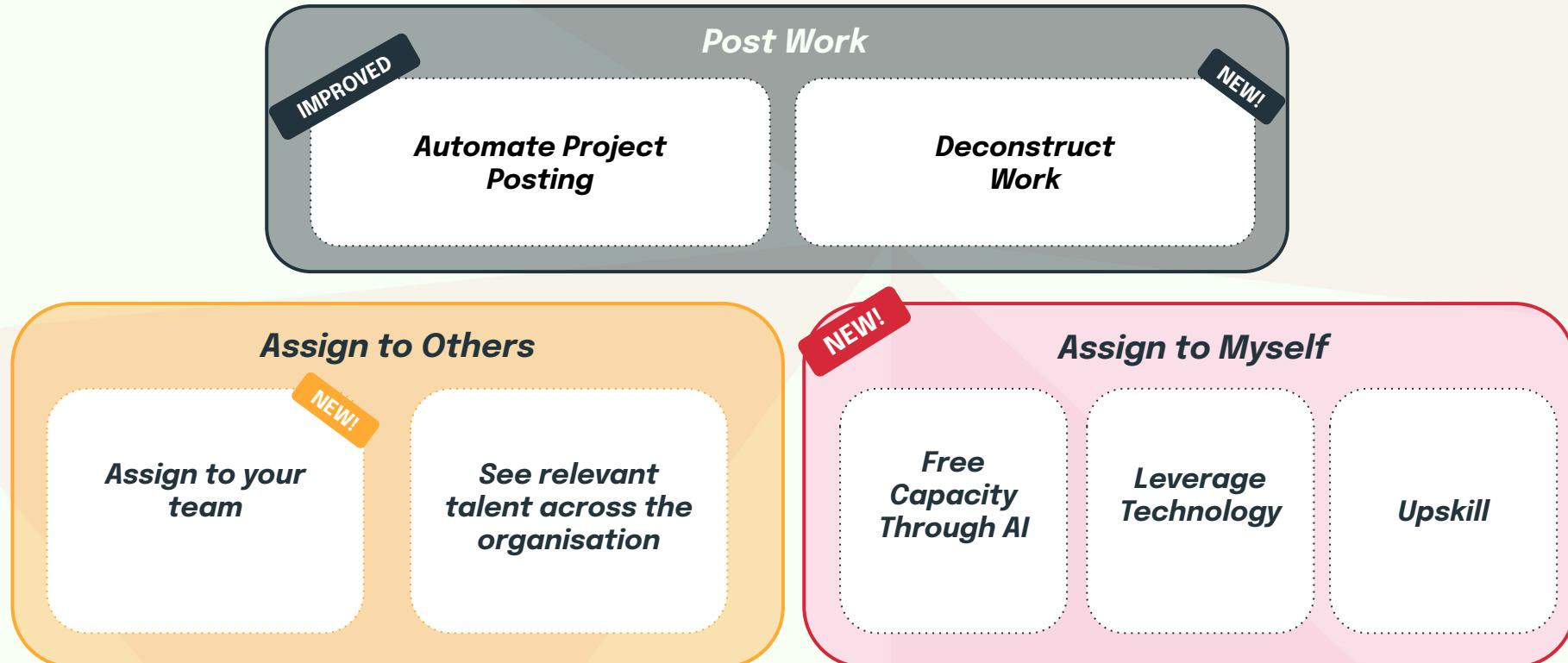
Provide Company OKRs

Review Branding Options

What's changed?

How to communicate the change internally

Turning Challenges into Opportunities: Projects 2.0



'Post Work' Enhancements

Automate Posting

Create Work

Fill in all required fields to create this work item.
Use auto-fill to speed up the process.

Work Title *

Description *

The impact of your project will be... *

Motivate candidates to join the project by explaining how they can make a difference



Pain point

Users found the project posting experience cumbersome and often dropped out before completing



Enhancement

Using AI we can populate project descriptions just using a project title, speeding up the posting process

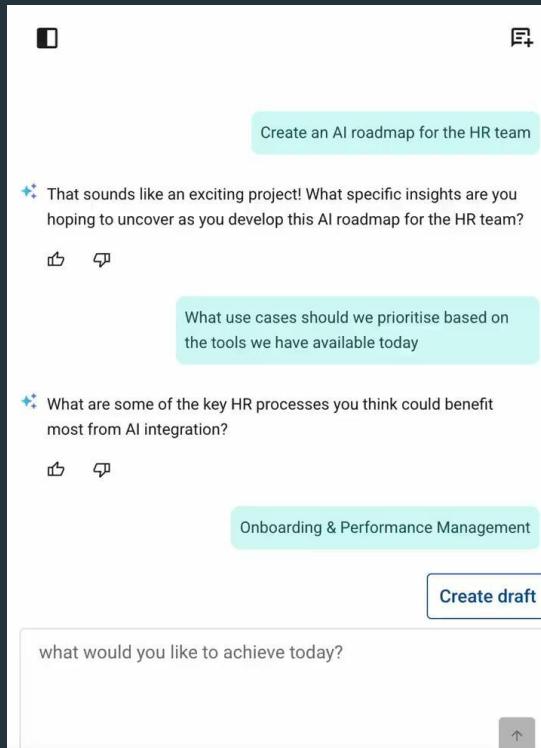


Predicted Outcome

Increased Projects Posted
Increased Unlocked Hours

‘Post Work’ Enhancements

Deconstruct Work



Create an AI roadmap for the HR team

That sounds like an exciting project! What specific insights are you hoping to uncover as you develop this AI roadmap for the HR team?

What use cases should we prioritise based on the tools we have available today

What are some of the key HR processes you think could benefit most from AI integration?

Onboarding & Performance Management

Create draft

what would you like to achieve today?



Pain point

Employees and managers struggled to frame work as “projects,” leading to low posting despite strong demand.



Enhancement

Our new AI agent simplifies the ‘work deconstruction’ process by guiding them step-by-step

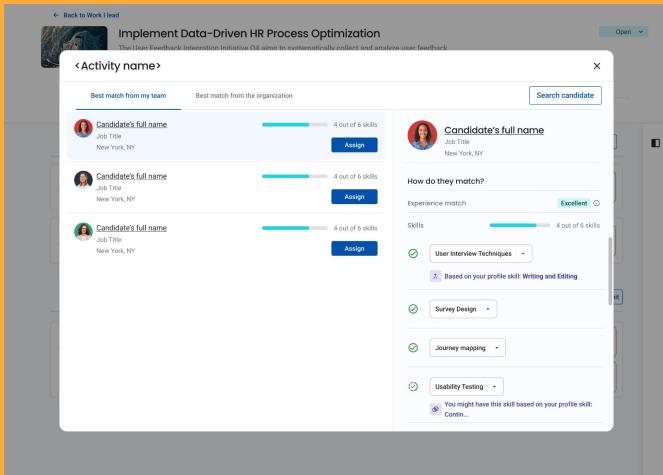


Predicted Outcome

Increased Projects Posted
Increased Unlocked Hours

'Assign Others' Enhancements

Best match from your team



Pain point

Managers had limited functionality in Gloat – they could view employee skills but couldn't assign developmental tasks to their team.



Enhancement

The platform now enables managers to assign work to employees within their team alongside talent from across the wider organization.

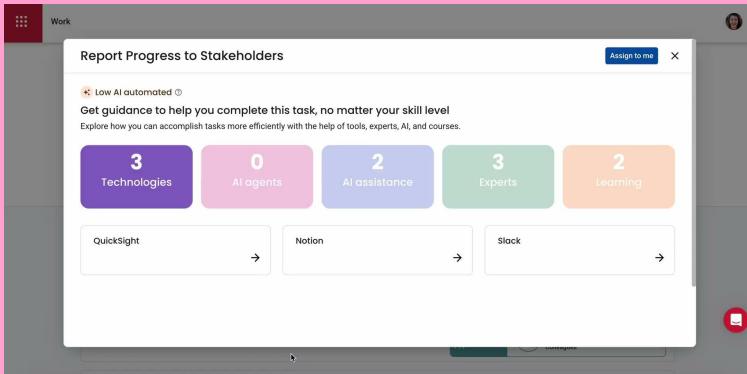


Predicted Outcome

Increased Assignments
Increased Unlocked Hours

‘Assign Yourself’ Enhancements

Free Capacity & Leverage Technology



Pain point

Many organizations have invested in AI agents & other digital tools, but employees often lack clarity on what's available & how to apply them in their day-to-day work.



Enhancement

Employees can now easily assign work to AI agents, access guided prompts to make better use of AI tools or get instructions on how to use other available technologies

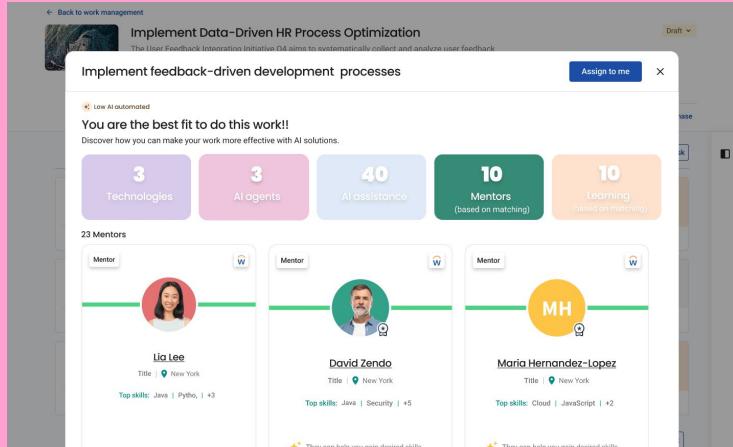


Predicted Outcome

Greater adoption of AI tools and other technologies
Increased visibility of AI & tech use cases

‘Assign Yourself’ Enhancements

Upskill



Implement Data-Driven HR Process Optimization

The User Feedback Integration Initiative Q4 aims to systematically collect and analyze user feedback.

Implement feedback-driven development processes

Low AI automated

You are the best fit to do this work!!

Discover how you can make your work more effective with AI solutions.

3 Technologies

3 AI agents

40 AI assistance

10 Mentors (based on matching)

10 Learning (based on matching)

23 Mentors

Mentor Lia Lee Title: New York Top skills: Java | Python | +3

Mentor David Zendo Title: New York Top skills: Java | Security | +5

Mentor Maria Hernandez-Lopez Title: New York Top skills: Cloud | JavaScript | +2



Pain point

Employees are encouraged to learn in the flow of work but It's hard for them to make a clear link between development opportunities & their day to day work.



Enhancement

Relevant Mentors and Learning courses are shared with employees to help them upskill and deliver tasks themselves



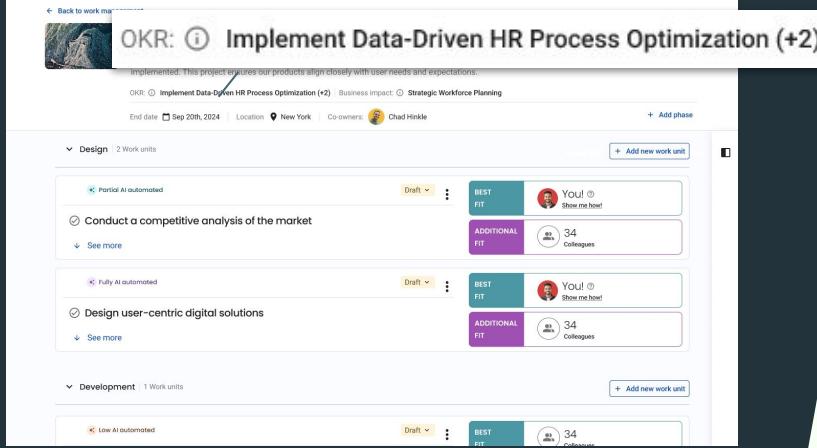
Predicted Outcome

Increased adoption of Mentoring

Increased adoption of Learning Courses

Additional Enhancements

Automatic link to OKRs



OKR: ⓘ Implement Data-Driven HR Process Optimization (+2)

Implemented. This project ensures our products align closely with user needs and expectations.

OKR ⓘ Implement Data-Driven HR Process Optimization (+2) Business Impact ⓘ Strategic Workforce Planning

End date ⓘ Sep 20th, 2024 Location ⓘ New York Co-owners: ⓘ Chad Hinkle

+ Add new work unit

Design 2 Work units

ⓘ Partial AI automated Draft ⓘ Best Fit ⓘ Additional Fit ⓘ Show me how! ⓘ 34 Colleagues

ⓘ Conduct a competitive analysis of the market ⓘ See more

ⓘ Fully AI automated Draft ⓘ Best Fit ⓘ Additional Fit ⓘ Show me how! ⓘ 34 Colleagues

ⓘ Design user-centric digital solutions ⓘ See more

Development 1 Work units

ⓘ Low AI automated Draft ⓘ Best Fit ⓘ 34 Colleagues



Pain point

Employees often struggle to see how their work connects to company goals, and businesses find it difficult to demonstrate the value of projects without clear alignment.



Enhancement

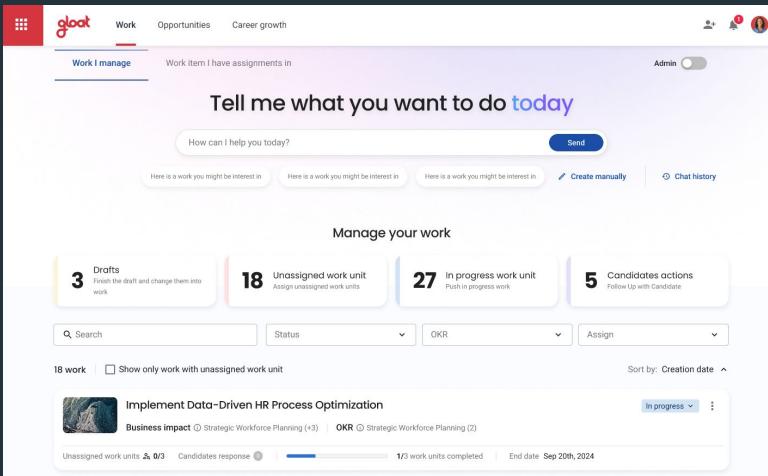
By sharing company OKRs with us, each task posted on Gloat can be automatically linked to the right organizational goal.



Predicted Outcome

Increased visibility of business impact of projects

Additional Enhancements Summary Page



The screenshot shows the gloot 'Work' page. At the top, there are navigation links: 'Work' (which is highlighted in red), 'Opportunities', and 'Career growth'. Below this is a search bar with the placeholder 'Tell me what you want to do today' and a 'Send' button. Underneath the search bar are three buttons: 'Here is a work you might be interest in', 'Here is a work you might be interest in', and 'Here is a work you might be interest in'. To the right of these are 'Create manually' and 'Chat history' buttons. The main area is titled 'Manage your work' and displays four summary cards: '3 Drafts' (with a description 'Finish the draft and change them into work'), '18 Unassigned work unit' (with a description 'Assign unassigned work units'), '27 In progress work unit' (with a description 'Push in progress work'), and '5 Candidates actions' (with a description 'Follow Up with Candidate'). Below these cards are search and filter options: 'Search', 'Status', 'OKR', and 'Assign'. A summary at the bottom shows '18 work' and a checkbox 'Show only work with unassigned work unit'. The 'Sort by' dropdown is set to 'Creation date'. At the bottom, a project detail view is shown for 'Implement Data-Driven HR Process Optimization'. It includes a profile picture, the project name, 'Business impact' (Strategic Workforce Planning +3), 'OKR' (Strategic Workforce Planning (2)), and a progress bar showing '1/3 work units completed' with an end date of 'Sep 20th, 2024'. Below the progress bar are 'Unassigned work units 3/0/3' and 'Candidates response'.



Pain point

Users often reported it was unclear what happened after a project was assigned - it was hard to track progress



Enhancement

Our new 'Work' page summarises all projects in one place and provides visibility of what tasks have been completed



Predicted Outcome

Increased Visibility of Project Completion Rates

Next steps

Launch toolkit for Projects 2.0

Where to start

Set up on Staging & Test

Use the Tech Guide to set up Mosaic

Decide testing/pilot group and timelines

Understand Change Impact

Review Project Adoption data to understand where/if there will be a change impact

Define Your Use Case

Review Gloat's Vision deck to create a few slides to explain how Mosaic can help your business goals

Communicate to the Business

Identify and target key stakeholders in the business to get their buy in

Mosaic Launch Toolkit

Vision

Assets to help you pitch Projects 2.0 to the business & explain what's changing & why



Pre Launch Readiness

A checklist to help you prepare for the launch



Comms & Training

Engagement plan and assets to help launch Projects 2.0



Tech Guide

Details on implementation data requirements



AI Governance

Documentation to support AI Governance reviews



Feedback & KPIs

Details on how to provide feedback & how to measure success of launch



What's available to you now

Task	Description	Customer	Sheet	Type	Due Date	Status
Turn on Projects 2.0 in Billing	Create Projects 2.0 on billing using the 'Turn on Projects 2.0' checkbox. This allows you to share a license with you to use the new feature. If you would like to automatically display the new feature, then you can use the 'Turn on Projects 2.0' checkbox in the sheet template and then use the 'Turn on Projects 2.0' checkbox in the 'Setup' section of the 'Setup' tab.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Technology	2024-01-15	On Track
Provide Onboarding (Optional)	Provide onboarding for the new feature to share a license with you to use the new feature. If you would like to automatically display the new feature, then you can use the 'Turn on Projects 2.0' checkbox in the sheet template and then use the 'Turn on Projects 2.0' checkbox in the 'Setup' section of the 'Setup' tab.	<input type="checkbox"/>	<input type="checkbox"/>	Technology	2024-01-15	On Track
Provide Business Impact Plans (Optional)	Provide business impact plans for the new feature to share a license with you to use the new feature. If you would like to automatically display the new feature, then you can use the 'Turn on Projects 2.0' checkbox in the sheet template and then use the 'Turn on Projects 2.0' checkbox in the 'Setup' section of the 'Setup' tab.	<input type="checkbox"/>	<input type="checkbox"/>	Technology	2024-01-15	On Track
Provide Branding Information	Provide branding information for the new feature to share a license with you to use the new feature. If you would like to automatically display the new feature, then you can use the 'Turn on Projects 2.0' checkbox in the sheet template and then use the 'Turn on Projects 2.0' checkbox in the 'Setup' section of the 'Setup' tab.	<input type="checkbox"/>	<input type="checkbox"/>	Technology	2024-01-15	On Track
Show Test Scripts	Show test scripts for the new feature to share a license with you to use the new feature. If you would like to automatically display the new feature, then you can use the 'Turn on Projects 2.0' checkbox in the sheet template and then use the 'Turn on Projects 2.0' checkbox in the 'Setup' section of the 'Setup' tab.	<input type="checkbox"/>	<input type="checkbox"/>	Technology	2024-01-15	On Track
Same details to User Feedback	Same details to user feedback for the new feature to share a license with you to use the new feature. If you would like to automatically display the new feature, then you can use the 'Turn on Projects 2.0' checkbox in the sheet template and then use the 'Turn on Projects 2.0' checkbox in the 'Setup' section of the 'Setup' tab.	<input type="checkbox"/>	<input type="checkbox"/>	Technology	2024-01-15	On Track
Review Gloat's Vision Deck Template	Review Gloat's updated vision deck to see what's new and how it aligns with your organization's goals. The template includes a 'Vision Deck' section that would work for your organization.	<input type="checkbox"/>	<input type="checkbox"/>	Vision	2024-01-15	On Track

Launch Checklist

2. Mosaic Setup

Make sure you are ready for the Goat team and end-users as they begin using and production environments. Once finished, the end-users will be able to access the new features.

Migration project data and ongoing projects will be converted to the Projects 2.0 migration system.

3. Projects to Mosaic Migration

Start off by taking full ownership of the migration from Projects to Mosaic. Mosaic is Staging up there in a Pre-launch. If it takes a day to complete the migration, then you will be ready to go.

Migration Details

- Projects will be destroyed by Gloat during the migration period. This is because as new Projects are created during the time, the migration will not be able to identify them.
- All existing Projects and Project Notes will be migrated to Mosaic as Activities.

4. Mosaic Test Scripts

Test the new features and make sure they are working as expected. The following table provides a summary of the test scripts and their status.

Test Script	Test Details	Status
Test 1: New user creation	Verify that a new user can be created and logged in successfully.	Passed
Test 2: New user login	Verify that a new user can log in using their credentials.	Passed
Test 3: New user profile	Verify that a new user can update their profile information.	Passed
Test 4: New user tasks	Verify that a new user can view and manage their tasks.	Passed
Test 5: New user reports	Verify that a new user can generate reports for their tasks.	Passed
Test 6: New user dashboards	Verify that a new user can access and analyze their dashboard data.	Passed
Test 7: New user notifications	Verify that a new user receives notifications for task updates and comments.	Passed
Test 8: New user integrations	Verify that a new user can connect and sync their external systems.	Passed
Test 9: New user AI features	Verify that a new user can utilize AI-powered features like AI-generated reports and AI-driven insights.	Passed
Test 10: New user security	Verify that a new user's data is secure and protected by Gloat's advanced security measures.	Passed

Vision

Pre Launch Readiness

Comms & Training

Tech Guide

AI Governance

Problems Projects 2.0 could help solve

	AI Strategy-to-Execution Gap
	Underutilised Tech Stack
	Wasted Unlocked Capacity

We have defined a bold AI strategy, but it has yet to translate into meaningful daily impact.

Employees are overwhelmed by too many options and uncertain about the real value.

As a result, adoption remains low and the strategy undermines on its path to success.

Instead of driving ROI, this creates technology debt and operational inefficiency.

Significant investment has been made in digital tools, yet only a fraction are consistently used.

Employees are overwhelmed by too many options and uncertain about the real value.

Without intentional redesign, this capacity risks going underutilized.

The result is lost productivity gains and missed opportunities for innovation and growth.

Awareness (2-3 weeks before launch)

Goal: Create excitement for Projects 2.0. Attract new users & prepare existing users for change.

Week	Activity	Target
4-6	Email Announcement	Coming soon message highlighting Projects 2.0 benefits, and timeline.
7-9	Teasers	Teaser banners or announcements to spark curiosity posted on internal communication channels, or existing newsletters, in email signatures.
10-16	Manager Briefing	Let managers know about the changes and how it can benefit their teams. Encourage them to share with team.
17-18	Knowledge Hub	Review Gloat's user guide and encourage users to update any internal enablement resources.
17-18	Lunch & Learn	Walk through AI features and answer any questions.

Vision Deck

Comms Toolkit & Objection Handling Guide

Mosaic Gloat's AI

Purpose of this Document

This document provides customers with clear answers to common questions about Gloat's Mosaic AI. It explains the primary benefits, data usage, and safeguards of Mosaic AI capabilities, helping organizations and employees understand how it is applied, what risks are involved, and how to prevent them.

Mosaic AI Overview

Mosaic introduces Gloat's AI capability for work orchestration. The platform combines AI with organization's goals, people, and tools to help teams plan, assign, and execute work more efficiently.

What functionality does Gloat provide to the organization?

Mosaic AI delivers end-to-end work orchestration. It can do the objectives in natural language, and the system generates directed work plans, links to relevant organizational charts, and provides real-time visibility into progress. It also provides instant talent-based on skills and experience, with transparent explanations for each suggestion.

Why is it matter?

Businesses have to work in fast-changing environments. Mosaic enables organizations to work faster and more efficiently. It can be upgraded, or automated, accelerating adoption, increasing efficiency, and reducing costs.

What is the benefit to employees and organization?

- Employees and managers: Anyone can create and break down work, assign activities, and leverage AI for smarter execution.

Gloat's AI Guide

Next Steps

Confirm Technical Readiness

1. Review Gloat's Tech & Config Guide for Mosaic
2. Test Mosaic in Staging when available
3. Optional: Share data with us on AI tools, OKRs and branding

Book Mosaic Launch Planning Session

1. Book 1-hour session with the Gloat PEM
2. Run through the Launch Toolkit, prioritise next steps and the support required from Gloat team



thank you