Prep Your Business for AI Chat

CHECKLIST TO PREP YOUR BUSINESS FOR AI CHAT

Delivering long-term value using Domo's AI Chat is easier with a little bit of prep. This checklist will help your business teams prepare to ask the right questions, identify the best insights, and take action.

Your business teams want to be able to ask their data anything. That's precisely why we created Domo's AI Chat with AI Readiness, which work together to help businesses get more accurate, meaningful answers with less effort. Follow these steps to strengthen your AI Chat response quality, optimize security, and introduce your teams to their new workday companion.

1 Prepare your data.

When it comes to the success of AI Chat, your insights are only as good as the data foundation on which they're built. Adding context and ensuring data quality will make your AI Chat responses more usable and reliable.

✔ Clean and organize your data.

☐ Make sure your data is accurate and orderly. Use this step-by-step guide to learn how to improve your data integrity and and foster a culture of data quality and curiosity.

☐ Consider a deep clean of your data. Walk through labels, assess row considerations, and check the accuracy in and between columns to help make your data as pristine as possible. Use these essential tips from Domo to help you get there.

✔ Deepen the data relevance.

To uncover the best insights, you need the best metadata. Now's the time to prepare and add context to your data. This preparation will allow your AI Chat companion to return more accurate, meaningful answers and is an essential step if you're working with big data sets.

☐ Tap into AI Dictionary. This tool works alongside AI Chat to capture the metadata, descriptions, and other elements for each data set and standardize the data format. That's extra important for priming the AI to deliver more accurate responses.

☐ Use Text-to-Beast mode to give people the ability to prompt AI using natural language text to create custom calculated fields.

✔ Update and document your processes, governance documents, and best practices.

☐ Keep your documentation current so it's easy to support new users as the demand for AI Chat swells.

☐ Consider keeping your documentation right in Domo. Using Notebook Cards, you can create documentation on each page or dashboard as you go, adding text, links, images, dynamic summary numbers, and more. Discover how to create a card.

2 Fortify your security strategy.

As you begin to roll out AI Chat, take the opportunity to review and update your information security policies to enhance safety, compliance, and collaboration for your teams. Add these steps to your list.

✔ Manage data governance.

☐	Create policies based on user attributes, rather than individuals, for easier management.
☐	Manage and restrict access using customer user roles.
☐	Consider putting the Account API to work if you're managing a large number of users. Access information on user management in Domo Central to help you get started.
☐	Assign the appropriate permissions to users based on their roles, capabilities, and needs.
☐	Use batch data management to streamline content administration.
☐	Create workflows that enable content owners to certify content as trusted.
☐	Control access between data and groups using dynamic, closed, system, and directory groups.
☐	Use DomoStats to understand how data is being used.
☐	Set up separate instances in development and production to keep work flowing smoothly.
☐	Get more details on data governance here.

✔ Lock down your LLM.

Avoid exposing sensitive data by sharing it in public large language models (LLMs) and AI chat tools. DomoGPT helps you reap the benefits of an LLM and keep sensitive data protected in Domo's secure ecosystem.

☐	Make DomoGPT available in your instance and ensure that individuals who need it are assigned AI Service Layer grants.
☐	Review and update your organization's compliance policy around use of LLMs.
☐	Check out the benefits of using DomoGPT to keep your data within the Domo-hosted environment and away from moving unencrypted data over the public internet.

3 Prepare your team.

Plenty of users may be taking their first dip into AI. Others may have used publicly available AI chat tools at work, home, or school. Whatever their experience, it's important to adapt to users' preferences and needs by providing the right guidance and information to help them succeed. For inspiration, check out our popular AI Insights Livestream sessions.

✔ Start with a survey to identify users' needs and current AI skillsets.

Build a questionnaire—perhaps using the Form Builder App—to ask your colleagues about their familiarity with and usage of AI. Try adding these questions to drive clarity, keeping them positive and exploratory rather than punitive.

☐ Understand where users are and how they're interested in using AI chat tools. Consider the following questions to help clarify their needs:
- ☐ Do they just want an easy way to get their questions answered, without having to customize?
- ☐ Are they looking to curate visualizations for their key audiences?
- ☐ Do they need the flexibility to embed chat in an instance so they can dig deep, customize their capabilities, and build cards and charts?
- ☐ Are they comfortable creating and editing SQL queries?
- ☐ Are they a Major Domo or a data set owner who knows the data set well and can help set it up for others?

☐ Use this information to define use cases and create engaging experiences.
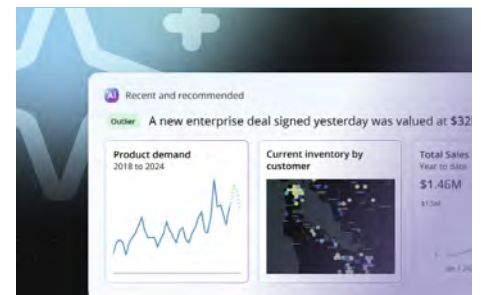
✔ Get to know your team members' concerns about AI.

Don't skip this step—it's key to helping people use AI with confidence.

☐ Listen to and address any worries your teams may have. Consider the following questions:
- ☐ Are they afraid to learn a new skill?
- ☐ Do they need reassurances around data safety and privacy?
- ☐ Are they generally uneasy about AI technology?

☐ Define and apply user attributes once you understand your users' needs and have addressed their concerns.

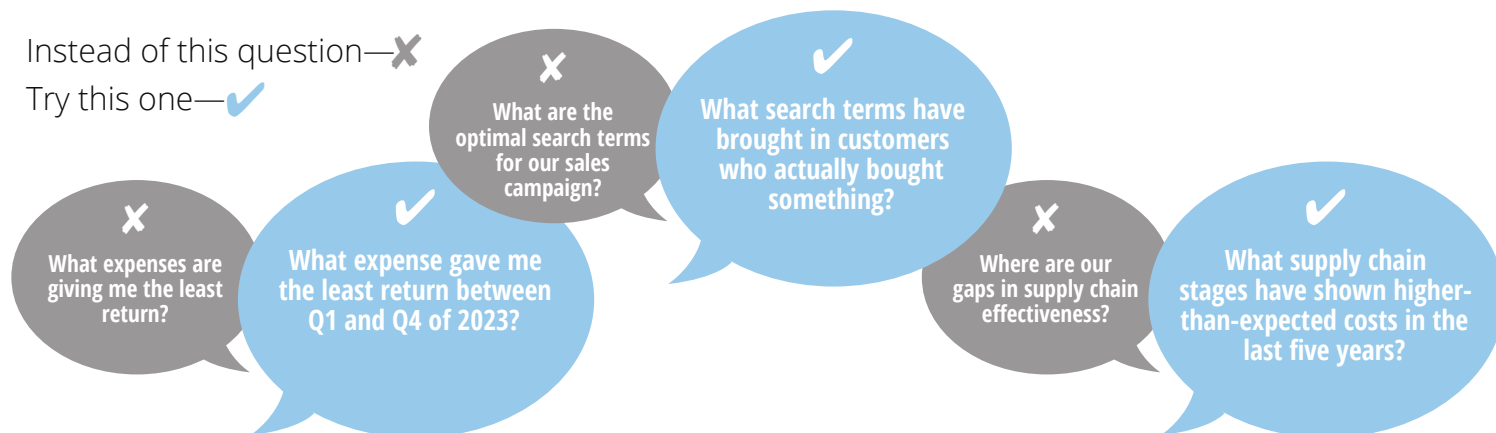## ✔ Build a training resource library.

Gather helpful materials to share as you onboard your first teams and when new users come along. You may want to create your own custom trainings or use the materials we develop as they are rolled out.

☐ Share best practices to give your people a strong understanding of how to use AI Chat. Use this blog post as a starting point.

☐ Provide short, engaging training sessions with clear guidelines on how to ask good and specific questions so users get better answers:
- ☐ Say exactly what you're looking for: The clearer you are, the better. Instead of a general "sales data" request, try something like "sales by region for Q1 2024" to get the information you actually need.
- ☐ Include timeframes to focus your search: Adding dates keeps things relevant. For instance, asking for "customer feedback from last quarter" helps zero in on what's current.
- ☐ Mention key metrics: If you have specific numbers or indicators in mind, call them out. For instance, asking for "average time on page for top blog posts" makes sure you get the right data without any guesswork.
- ☐ Share a bit of background: Giving some context helps shape the response. For example, "look at customer feedback for common support issues" points the search toward the details that matter.

Instead of this question—✗
Try this one—✔

✗ **What expenses are giving me the least return?**

✔ **What expense gave me the least return between Q1 and Q4 of 2023?**

✗ **What are the optimal search terms for our sales campaign?**

✔ **What search terms have brought in customers who actually bought something?**

✗ **Where are our gaps in supply chain effectiveness?**

✔ **What supply chain stages have shown higher-than-expected costs in the last five years?**

☐	Provide sample questions that reflect what they might realistically ask to help them get started. Use this list for ideas.
☐	Demo the transparency features available in AI Chat. Show them how they can see the exact steps taken when answering a question and if appropriate, how to edit the SQL used in the answer.
☐	Offer tips on how to adjust and filter the data being queried if answers don't look quite right.
☐	Set up some time for a training session. For options, see below.
☐	Provide ongoing training and resources, using your own sample data sets when possible.

✔ Celebrate your early adopters' wins and inspire your community to create their own.

☐	Showcase examples of good and effective use of AI in your organization.
☐	Share visualizations and charts that showcase what can be done with the new capabilities.
☐	Showcase stories of how much more effective your insights are, and where and how they're uncovering innovation, efficiencies, and savings.

Your workday companion is now ready.

With AI Chat, it takes a little bit of time to get things set up properly and get people comfortable with using these transformative tools, but it's worth it. With Domo's AI Chat at the ready, you'll be able to fast-track decision-making while maintaining the governance and security your business demands.

To get started with AI Chat, you can:

- **Head to our [Knowledge Base article](#) for further guidance on how to use AI Chat**
- **[Schedule a complimentary one-hour consultation](#) with the AI Labs team**
  A consultation is ideal for targeted questions or a general overview of AI Chat and AI Readiness.
- **Arrange an AI Enablement Engagement**
  This type of session is for customers looking for hands-on guidance to organize data and enhance their experience with AI Chat. Connect with your CSM to discuss contract options for this service.

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See all our AI resources.