insightsoftware's Approach to Artificial Intelligence (AI)

Empowering the Office of the CFO with AI-Driven Productivity

Financial professionals in the Office of the CFO are charged with providing more accurate, timely, and predictable information to support core processes like planning, budgeting, closing, consolidation, and equity management. How they do this, whether in core applications (web or Excel) and or extended apps, via AI tools, we meet the customers where they are in a way they can drive greater productivity. insightsoftware's AI solutions address these real-world challenges head-on empowering teams to achieve greater efficiency and productivity in a quantifiable manner.

This mission statement outlines insightsoftware's commitment to the accountable, safe, fair, transparent, effective, and responsible use of AI solutions. New technologies, like AI, provide tremendous opportunity for insightsoftware to develop and implement processes and solutions to help our customers optimize your productivity and impact.

Presently, we have four focus areas that deliver value today for customers and, in turn, build the foundation for what is coming soon.

- **Enhanced Data Analysis and Discovery:** Leverage Natural Language Query (NLQ) so users can ask questions and receive insights directly from their data, including trends and historical analysis, eliminating the need for complex queries. This saves time and allows users to focus on analysis and decision-making. The AI model can learn, improve, and provide ongoing recommendations, fostering user engagement.
- **Unlocking Cross-Product Insights (Future Potential):** Explore ways to leverage AI for deeper insights across our suite of products, creating a powerful differentiator.
- **Streamlined Data Acquisition:** Automate data collection from multiple sources - including metadata analysis, commonly used sources, and sources to recommend - significantly reducing setup time and accelerating the time to value for your platform. This translates to faster onboarding, improved deal value, and higher margins.
- **Contextual Product Assist:** Unlike traditional help systems, utilize AI to surface relevant content based on the user's specific task and the data they are working with. This eliminates the need for time-consuming searches and provides contextually relevant assistance, improving user experience and task completion speed. This can also guide users through specific workflows, enhancing learning and job effectiveness.

These are just some of the ways insightsoftware leverages AI to empower the Office of the CFO. By incorporating these features, our customers can achieve greater efficiency and make more informed decisions, ultimately driving their financial success.

Financial Planning and Controllership: AI-Powered Insights for Faster, Smarter Decisions

Focus: Providing a set of shared AI capabilities across our Platform products that boost productivity, uncover hidden insights, and compensate for skills shortages in the Office of the CFO.

We aim to create a distinct identity for our AI capabilities designed for the Office of the CFO. This name will foster consistency and familiarity among our customers, making it easier for them to recognize and understand the value proposition of our AI offerings.

Value Proposition

- **Platform-based Advantage:**
  AI capabilities are built on a central platform, ensuring consistency and scalability. This also allows for rapid deployment across our connected applications. We develop the AI solution once, which can then be quickly integrated into our various applications, delivering value to customers faster.
- **Real-world problem solving:**
  Focuses on addressing specific customer use cases and challenges.
    - Examples:
        - **Uncover hidden trends:** AI can analyze your general ledger data to reveal spending patterns you might have missed, helping you identify areas for cost savings.
        - **Go beyond data and get insights:** Instead of manually sifting through mountains of ESG data, AI can surface actionable insights to improve your organization's sustainability rating.
        - **Faster, smarter month-end close:** Get a clear, AI-powered summary of consolidation comments from subsidiaries and departments, allowing C-level users to make informed decisions quickly.
- **Contextual awareness:**
  Our open business data fabric standardizes financial, business, and operational data, creating a consistent understanding across an organization and empowering AI to generate relevant insights.
    - Deep understanding of user roles (*e.g.*, FP&A, Tax) and tasks.
    - Knowledge of business data and data source-specific business logic.
    - Leverages this context to deliver relevant and actionable insights.
- **Pragmatic approach:**
  Tailored solutions for the Office of the CFO, emphasizing practical applications. The majority of our AI capabilities are embedded within the insightsoftware platform. This platform-based approach is ingrained in our DNA. The way each product utilizes these services is specifically tailored to the unique roles and context within the Office of the CFO.
- **Microsoft Copilot Alignment:**
    - In addition to our AI capabilities, insightsoftware products built on and with the Microsoft tech stack can also leverage Microsoft's Copilot, ensuring a complimentary, extendable approach.

Overall, insightsoftware uses AI to deliver user-specific solutions that address real-world financial and operational challenges through a deep understanding of business data and context. The platform-based approach ensures efficient development and faster delivery of these valuable AI applications.

Data & Analytics: Empowering ISVs with Tailored AI Solutions

Focus: Providing a flexible and customizable AI development platform for Independent Software Vendors (ISVs).

Value Proposition

- **Freedom of Choice:** Unlike pre-built solutions, insightsoftware's AI solutions allow ISVs to integrate their own Large Language Models (LLMs) or choose from distinct options. This ensures they can leverage the best available technology and adapt to future advancements.
- **Customizable Chatflows:** ISVs can tailor the AI experience within their applications using customizable chatflows. This ensures a seamless user experience that aligns perfectly with the application and resonates with end-users.
- **Superior Data Quality:** insightsoftware AI solutions such as Logi AI, leverage the robust data tools of Logi Symphony to guarantee high-quality data feeding into the AI models. This eliminates "garbage-in, garbage-out" issues and ensures reliable insights.
- **Avoiding AI Hallucinations:** Multiple strategies prevent inaccurate AI responses.
    - **Chatflow training:** Guides the AI with curated starting points.
    - **Prompt augmentation:** Refines context provided to the LLM for more relevant answers.
    - **Domain-specific LLMs:** Utilizes LLMs specific to the application's domain for improved accuracy.
- **User-Driven & Secure:**
    - **Data Governance:** Our framework ensures users only see authorized data.
    - **Chat Feedback:** Enables continuous improvement based on user feedback. This enhances the quality of interactions and user satisfaction.
- **Broad Application & Integration**
    - **Flexible Embedding:** AI chatbots can be integrated into various locations within applications for easy user access, such as dashboards, reports, and visual data discovery tools.
    - **API Support & Robust Embeds:** Enables seamless integration of AI-powered chatbots within other applications and directly into user workflows (SharePoint, Teams/Slack, Custom Portals). This broadens the reach of advanced analytics and improves overall user experience.
    - **Fast-Track AI Integration**: A marketplace provides access to pre-designed AI chatflow templates specifically tailored for Logi Symphony integrations. This

streamlines customization and accelerates the incorporation of AI features into applications.

Overall, insightsoftware empowers ISVs to develop and deliver unique AI-powered solutions within their applications. This ensures that ISVs can create highly effective and secure AI experiences that enhance user engagement and drive business value by providing a flexible platform, superior data quality control, and user-driven features.

The Power of AI in a Safe and Secure Environment

At insightsoftware, we prioritize product security, data privacy, and regulatory compliance, and this commitment extends to any use of AI. Our AI solutions are designed with security at their core.

- insightsoftware AI processes the following types of data:
    - Prompts and generated content. The user submits prompts, and the service generates content via the completions, chat completions, and embedding operations.
    - Augmented data included with prompts. The service retrieves relevant data from a configured data store and augments the prompt to produce generations grounded with your data when using the data analysis feature.

- Your prompts (inputs) and completions (outputs), and your data:
    - are NOT available to other customers.
    - are NOT available to “Third parties.”
    - are NOT used to improve AI models.
    - are NOT used to improve any insightsoftware services.
    - are NOT used for automatically improving insightsoftware models; the models are stateless.

- **Preventing abuse and harmful content generation**

insightsoftware may securely retain API inputs and outputs for up to 30 days to provide the services. After 30 days, API inputs and outputs are removed from our systems unless we are legally required to retain them.