

Case Study

Turn AI chaos into AI confidence with BA Insight's AutoClassifier & ConnectivityHub



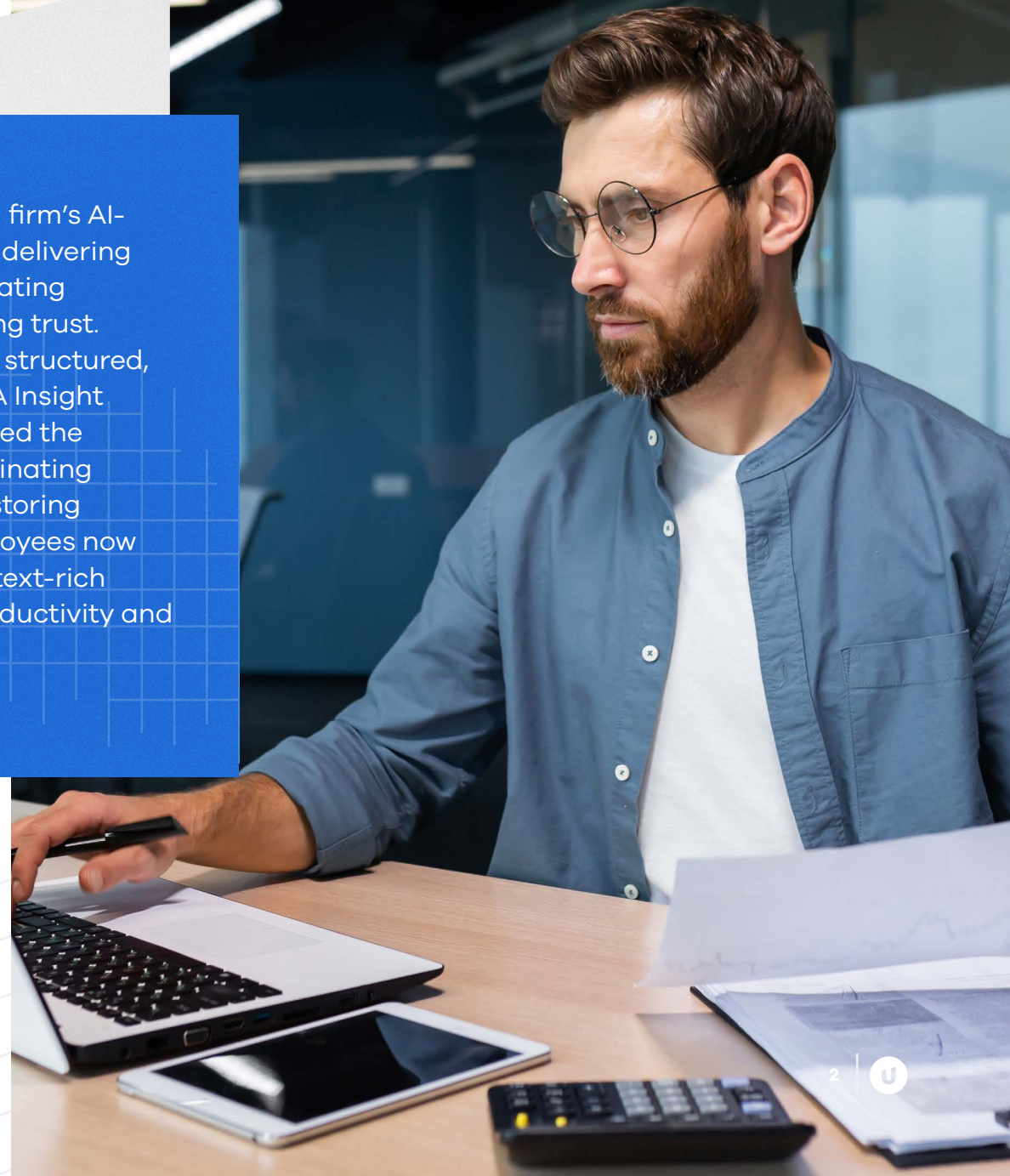
INDUSTRY

**Professional Services -
Accounting**

COMPANY

Big Four Accounting Firm.

A Big Four accounting firm's AI-powered chatbot was delivering misinformation, frustrating employees, and eroding trust. The root issue? Poorly structured, disconnected data. BA Insight enriched and connected the firm's knowledge, eliminating hallucinations and restoring confidence in AI. Employees now receive accurate, context-rich answers, boosting productivity and maximizing AI value.



BA Insight helped a Big Four accounting firm fix their self-service chatbot.

For a global Big Four Accounting firm, AI was supposed to revolutionize the productivity of their employees—everything from research to generating proposals to even strategic client recommendations. They embarked on deploying an internal generative AI-powered chatbot, the objective of which was to provide fast, reliable answers to associates about current client projects. Instead, it became a source of frustration and misinformation that didn't improve productivity but cratered it.

Poor data, bad AI: The root of the problem

Despite investing heavily in an internal development team to build their AI-powered self-service chatbot, employees quickly realized they couldn't trust its responses. Simple queries like, "What's the status of the latest audit for the client (x)?" or "Summarize the client recommendation we made to a company (y) last quarter" often returned either incomplete, misleading or entirely hallucinated answers.

The firm's leadership initially assumed the chatbot itself was flawed. However, they quickly realized the real issue was the knowledge and data the chatbot was consuming. Their knowledge, scattered across applications like Jira and Confluence, was unstructured and unlabeled and lacked the necessary context for generative AI to process it effectively. This led to:

- **Complete hallucinations:** The chatbot fabricated information, sometimes even making up client names, specific policies, or projects.
- **Employee frustration:** Instead of improving efficiency (like AI promised), the chatbot slowed productivity as associates had to search and manually verify whether the information it presented was correct.
- **Inconsistent answers:** The same query would yield different responses depending on how it was asked.
- **A looming sunk cost and engagement problem:** After months of development, the firm worried its AI initiative was failing. They poured unbelievable resources into this project with no clear return on investment. Even worse, employees stopped using it entirely.



AI enablement starts with good data.

They needed a solution that could be the connective tissue around their challenges, quickly fix the data problem, maximize the value return on their AI project, and restore employee trust in the chatbot to achieve maximum productivity efficiencies. The firm turned to BA Insight's AutoClassifier and ConnectivityHub solutions to salvage their generative AI deployment.

AutoClassifier

The firm's Confluence and Jira data was riddled with duplicate content, inconsistent formatting, lack of depth in project notes, and missing context. Enriching and augmenting this knowledge with BA Insight's AutoClassifier through metadata tagging allowed their chatbot to understand:

- The context of each document and project
- What content was the most relevant for that given query (based on employee history, role, accessibility, etc.)
- How different pieces of information were related across projects

With AutoClassifier, the chatbot stopped almost all hallucinations and started delivering precise, contextually accurate responses that employees could rely on.

ConnectivityHub

Deploying BA Insight's Jira and Confluence Graph Connectors was simple to connect this newly enriched information. Now, the chatbot could:

- Pull up-to-date project information and have a chat-like experience with client information, projects, and recommendations.
- Take advantage of a connective framework that doesn't neglect security. With BA Insight's Graph Connector technology, security and accessibility controls are indexed at the item level, ensuring there's no leakage of sensitive information anywhere in the business.

From AI failure to AI success

The firm transformed its self-service AI chatbot from a massive liability into a trusted, high-value asset with BA Insight. BA Insight was the key to turning AI chaos into AI confidence for this Big Four firm, proving that the success of every AI project starts with enriched data.



From AI breakdown to AI breakthrough

Transforming a failing chatbot onto a business asset

- **Reduction in AI hallucinations:** Hallucinations became minimal, and employees received accurate, context-rich answers instead of misleading or fabricated information.
- **Faster employee workflows:** Associates spent less time double-checking AI responses or doing things manually. Productivity skyrocketed as user engagement grew. Use cases like generating reports about specific client projects, analyzing information, and summarizing key knowledge became a seamless experience.
- **Maximizing of AI return of value:** Instead of abandoning their multi-million-

dollar AI investment, they found a strategic AI Enablement partner to help them achieve AI success, accelerating business processes, improving their bottom line, and empowering their busy employees with a better experience that delivers the right results.

- **Enhanced trust and retention:** Employees re-engaged with the chatbot with more confidence that it could provide reliable answers.

The future of AI-powered knowledge

With BA Insight, the firm didn't just fix its chatbot; it future-proofed its AI strategy. Now, their generative AI solution is powered by clean, enriched, and connected knowledge, ensuring that AI adoption is scaled accordingly. They plan to roll this out across many different departments in the business. With BA Insight, the firm transformed its chatbot from a liability into a trusted asset, future-proofing its AI strategy.

Protecting AI investments across the enterprise

Upland BA Insight's AI Enablement Platform allows enterprises to access, prepare, and expose the knowledge needed to power AI projects. BA Insight is AI agnostic; using vector search, data chunking, ML, NLP, and security trimming to index, enrich, and display knowledge from all connected sources to supercharge enterprise AI.

upland

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