Document Automation – Generative AI Cheat Sheet

What is Generative AI document automation?

Generative AI document automation uses advanced machine learning algorithms to automate document ingestion, creation, customization, and summarization, which substantially improves how an organization can manage many documents at scale. Organizations can accelerate the creation of contracts, reports, invoices, and legal documents using a Generative AI model that learns from existing defined formats, language, and organizational templates. Document automation combines data points from key integrated data sources and workflow management tools to ensure that generated documents are aligned with defined standards and processes.

Key technology roles in document automation

Role of AI model: Serves as the engine for generative AI-based document automation, leveraging machine learning to understand and generate human-like text, ensuring the correct format, style, and context for the output document.

Role of data: Data plays a key role in informing the AI model about specific needs, standards, and document personalization.

Role of prompts: Prompts guide the AI model by specifying the task, tone, style, or content requirements, acting as directions to shape and specify the final output document.

Key benefits of Generative AI document automation

- **Efficiency:** Bring unprecedented speed and accuracy to document consumption and summarization
- **Customization:** Tailor documents to specific standards and formats
- **Productivity:** Reduce manual document creation efforts
- **Scalability:** Adapt easily to different scales of operation, from manually-created documents from individual projects to large-scale production.
- **Integration:** Leverage vast datasets, formats, and standards for informed and contextually relevant output.

Document pipeline automation

Generative AI can streamline the creation, categorization, and analysis of documents at scale, enabling enhanced productivity, reduced human errors, and greater consistency across all documentation and the content creation pipeline.

Suggested example prompts:

1. **Personalized onboarding:** "Generate personalized onboarding documents for new employees based on internal corporate documentation, including welcome letters, training schedules, and policy handbooks."

2. **Product manuals:** "Create a series of detailed product manuals and user guides for a new software application based on developer documentation and release notes."

3. **Document template:** "Generate a template for executive summary packages, including company performance history, SWOT analysis, and financial planning."

Data entry and extraction

Automate the process of inputting data into systems and extracting key information from various documents, such as invoices, forms, and contracts. This reduces manual labor, minimizes errors, and accelerates data processing, allowing for quicker decision-making and analysis.

Suggested example prompts:

1. **Invoice data extraction:** "Extract total amount, vendor name, and due date from a batch of scanned invoices."

2. **Data entry form:** "Input customer information from filled-out registration forms into the CRM system."

3. **Contract info extraction:** "Identify and summarize the key obligations and termination clauses from a set of lease agreements."

Report and template generation

Compile data from multiple sources into comprehensive, coherent reports and templates tailored to specific audiences, such as management, clients, or regulatory bodies. This ensures timely insights and decision support while presenting complex data in an accessible format.

Suggested example prompts:

1. **Financial report:** "Generate a quarterly financial performance report for CFOs summarizing revenue growth, expense trends, and profit margins."

2. **Document template:** "Generate a template for new hire welcome packets, including company history, policies, and first-week agenda."

3. **Environmental report:** "Compile an environmental impact report for our CEO of the past year, highlighting sustainability initiatives and outcomes."

Proactive communications

Enable automated creation of proactive and personalized, context-aware emails, letters, and notifications that significantly enhance customer engagement and satisfaction by tailoring each message to meet individual preferences and inquiries, streamlining the communication process.

Suggested example prompts:

1. **Email:** "Generate a personalized customer response to an inquiry about a delayed shipment, including an apology and a delivery estimate."

2. **Reminder letter:** "Draft a gentle payment reminder letter for accounts overdue by 30 days."

3. **Newsletter:** "Create a monthly newsletter focusing on new product features, customer stories, and upcoming events."