

A CEO's perspective on AI and Virtual Teams

Navigating Tomorrow: Employing Virtual, AI & Remote Project Management Approaches!

November 16, 2024

Agenda

- **How we work**
This is how we do it
- **Fun with AI**
From InfoGPT to Launching MVPs in 2 weeks
- **My Way**
Regrets, I've had a few
But then again, too few to mention
- **Q&A**
Anything goes

How we work





Offices in:

- Cincinnati, OH
- Chicago, IL
- Cebu City, Philippines
- Manila, Philippines
- Dubai, UAE

Remote Team Members In:

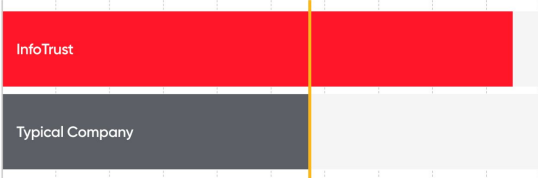
- USA
- Canada
- United Kingdom
- Spain





Employees say this is a great place to work

95% of employees at InfoTrust say it is a great place to work compared to 57% of employees at a typical U.S.-based company.



Source: Great Place To Work® 2021 Global Employee Engagement Study.

95%

100%

People care about each other here.

100%

When you join the company, you are made to feel welcome.

100%

When people change jobs or work units, they are made to feel right at home.

98%

I am given the resources and equipment to do my job.

98%

I feel good about the ways we contribute to the community.

Why us?

01

Impact

02

**Policies &
Procedures**

03

**Challenge
& Connect**

Our Massive Transformative Purpose (MTP) as our north star

Our success creates abundance for our team while funding groundbreaking medical research toward a future where no child dies from preventable and curable disease.

100% Participation in LTI (even international PEO)

1% time - Pro Bono work

5-10% EBIT - InfoTrust Foundation (about \$250K - '24)



Total Given

\$42,919



Families Impacted

2,146



Locations Served

- Ohio
- Dubai
- Philippines
- Illinois
- Georgia
- Colorado
- Florida
- Washington DC
- Toronto
- Ukraine
- Michigan
- Tanzania
- Arizona
- Mexico
- Wisconsin
- Ghana

Activities & tools that help build trust and improve communications such as Clifton StrengthsFinder

Remote first - documented guidelines

Variety of communications forums & gatherings

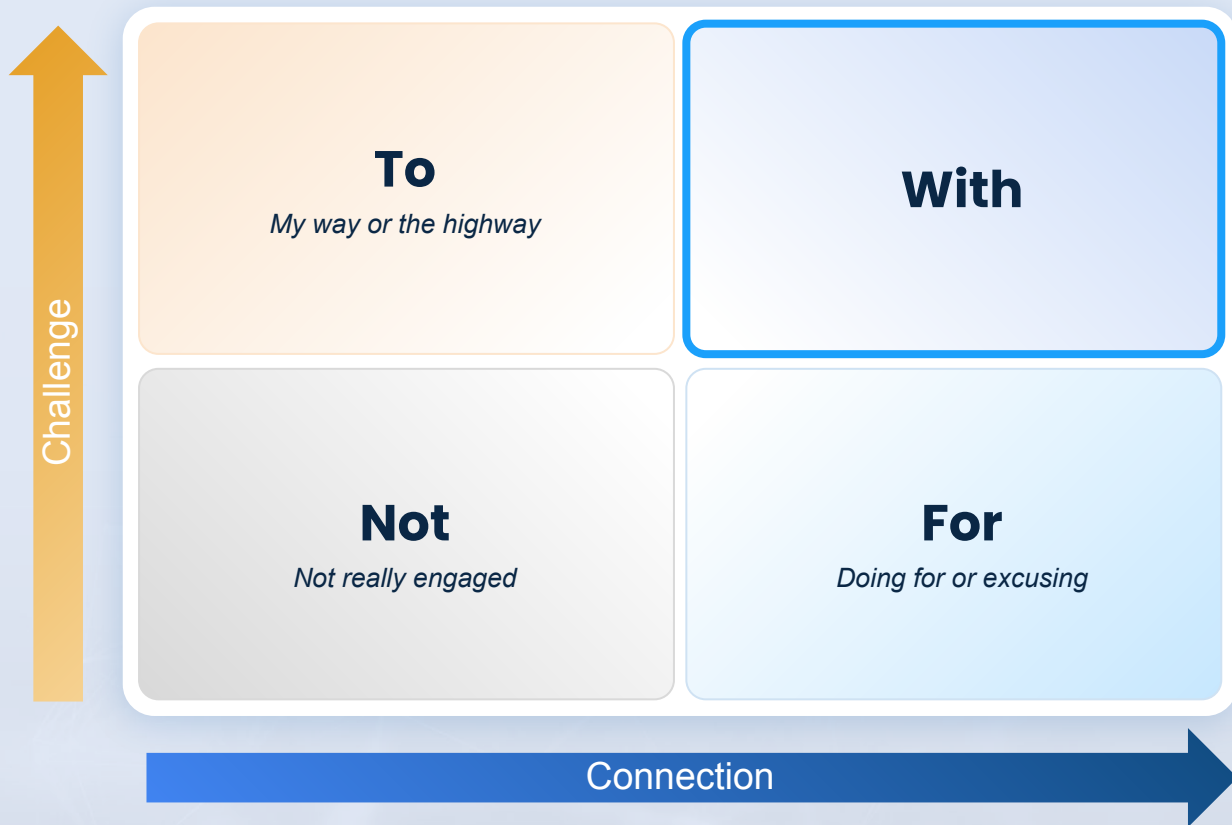
Regular cadence of gathering and responding to employee feedback



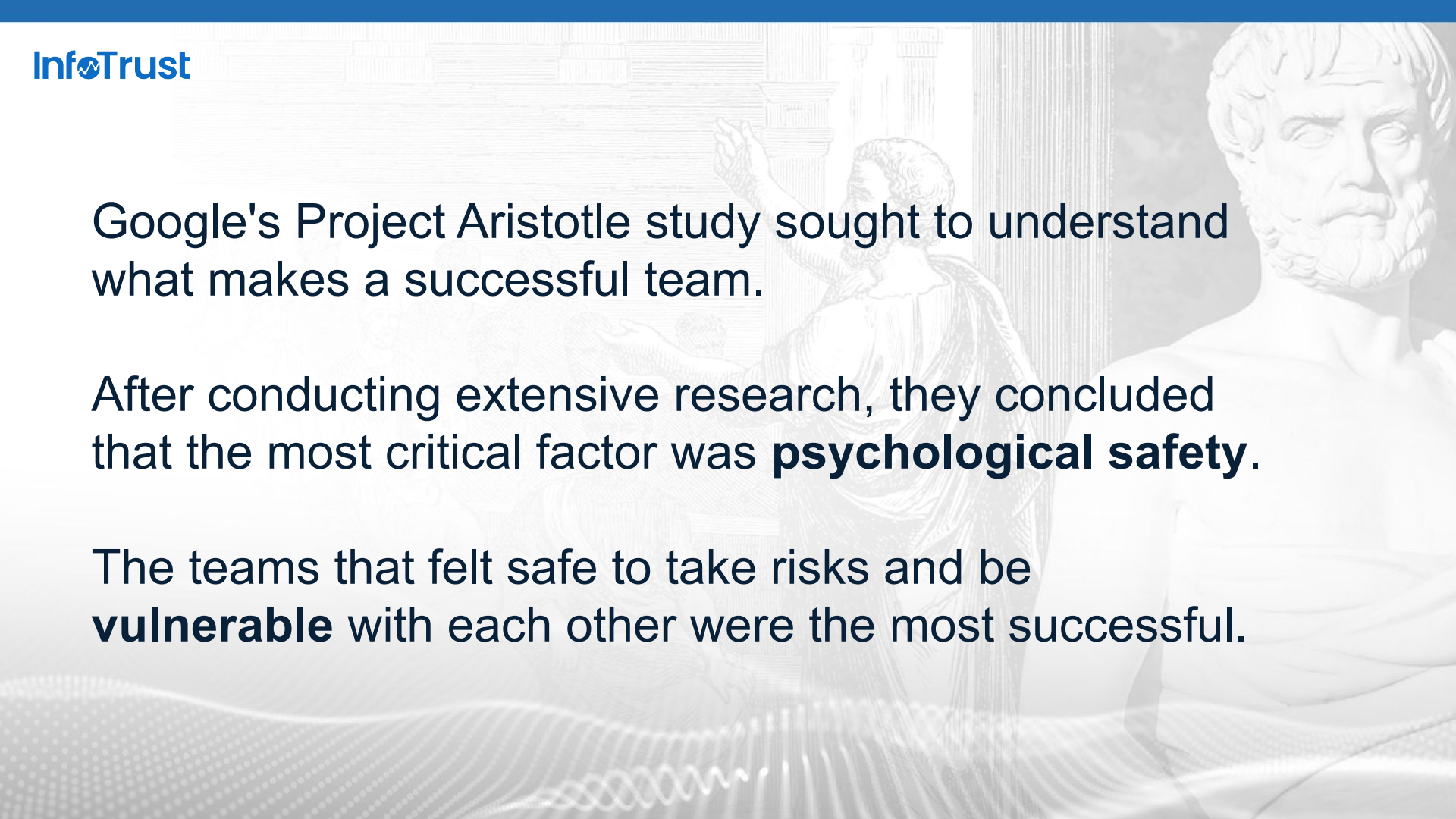
DR. MALIK MUHAMMAD

Helping leaders
step into their
superpowers.





1. Think of a recent discussion, conflict, feedback with someone.
2. Place a dot in this matrix based on your own assessment of where you were on the challenge axis and the connection axis.
3. What prevented you from getting to “With”.
4. What will you do differently to more consistently operate in the “with” box.

A large, faint, light-colored background image of the philosopher Aristotle. He is shown from the waist up, wearing a draped garment, with his right hand raised in a gesture of teaching or explanation. The image is semi-transparent and serves as a backdrop for the text.

Google's Project Aristotle study sought to understand what makes a successful team.

After conducting extensive research, they concluded that the most critical factor was **psychological safety**.

The teams that felt safe to take risks and be **vulnerable** with each other were the most successful.

- Leadership team members: Cincinnati, Lexington, Indianapolis, San Francisco, London, Cleveland, Chicago
- Weekly calls - zoom
- Quarterly meetings - in-person
- 2 day meeting
- Every in-person interaction is an opportunity to deepen connections, allowing them to carry over into virtual meetings.

2.5h – building connection

- Exercises like 1-1-1

- What is the most significant / transformative experience in your life?

- Who is the single most influential person in your life?

- What has been the most significant, life changing decision in your life?

3h – building connection

Exercises:

- Active listening
- Reflective listening
- etc

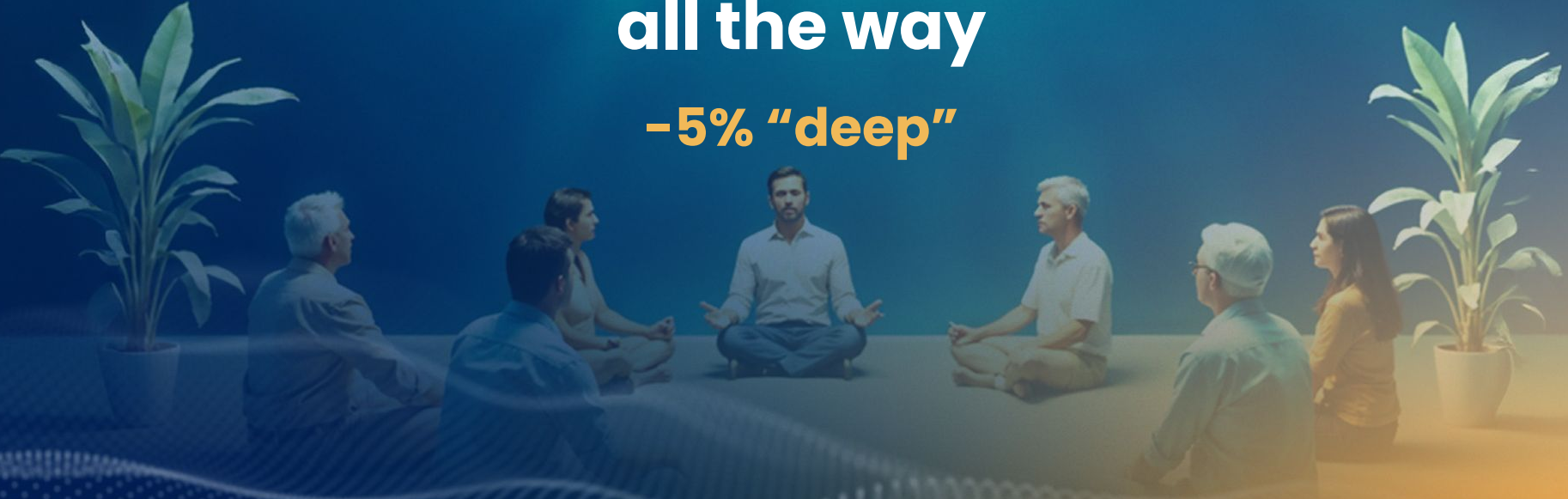
“

**This was the most productive
planning session in the
last 5 years**

- *SVP, 7 years w/ company*



Vulnerability has to start with us, as leaders, going deep... all the way

-5% "deep"



Fun with AI








 Under Review
 Working POC


Impact


Costs


Operational Integration


Privacy

	 ChatGPT Plus	 ChatGPT Team	 ChatGPT Team API	 Gemini Paid	 Ollama GKE <i>Self Managed</i>
Impact	Major; Find answers faster.	Major; Find answers faster.	Considerable; Find answers faster. Mid UX.	Major; Find answers faster.	Major; Find answers faster.
Costs	\$38,400 / yr.	\$48,000 / yr.	~ \$3,520 / yr. * Metered Usage	\$38,400 / yr.	\$3,438 - \$32,832 / yr.
Operational Integration	Implement (Easy) Adoption (Adv.)	Implement (Easy) Adoption (Adv.)	Implement (Mid.) Adoption (Adv.)	Implement (Easy) Adoption (Adv.)	Implement (Adv.) Adoption (Adv.)
Privacy	Used to train models	Not used to train models	Not used to train models	Not used to train models	N/A - Self Managed



 Impact

GONG

Considerable; Save time note taking and summarizing

Zoom AI

Considerable; Save time note taking and summarizing.

spinach.io

Considerable; Save time note taking and summarizing

otter.ai

Considerable; Save time note taking and summarizing

 Costs

~ \$230,400 / yr.
* Pricing is not available publicly

\$0 Additional Cost

~ \$42,955 / yr.
* Based 1.4k meeting hours in April

\$38,400 / yr.

 Operational Integration

Implement (Easy)
Adoption (Mid.)

Implement (Easy)
Adoption (Mid.)

Implement (Easy)
Adoption (Mid.)

Implement (Easy)
Adoption (Mid.)

 Privacy

Used to train models

Not used to train models

Used to train models

Used to train models

Platform Usage at InfoTrust

	BU1	BU2	BU3	Marketing	Sales	People	Other
Officially Supported by IT	InfoGPT						
	ZOOM Meeting Summary						
Not Supported by IT	 			WRITER lumen5 Flick			



InfoGPT vs ChatGPT



InfoGPT behind the scenes is ChatGPT through the API. *However*, the following reasons make InfoGPT a better app for use at InfoTrust than the free version of ChatGPT today.



Paid Models

Access to newer, paid models



Internal Knowledge

Internal knowledge base connection from sources such as Confluence with more to come.



Prompt Library

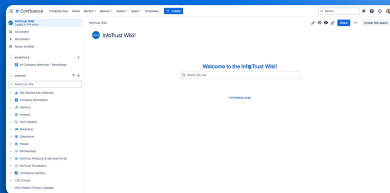
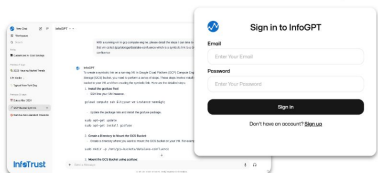
Prompt library provides users with template prompts to get the best answers on the first try.

InfoGPT

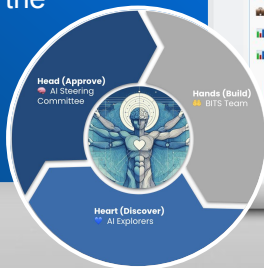
ChatGPT clone for at a fraction of the cost.

What is InfoGPT?

InfoGPT is a customized, conversational generative AI assistant intended to replicate the ChatGPT experience. It is built on an open source project called Open WebUI and connected to the newest ChatGPT models via the OpenAI API.



InfoGPT+ will search the InfoTrust Wiki in Confluence for contextual information to supplement the request sent to ChatGPT.



InfoGPT+
ChatGPT 4o-mini for processing. Able to answer with internal knowledge from the InfoTrust Wiki in Confluence.

How can I help you today?

Suggested

- Prompt Enhancer: Get better results when talking with InfoGPT
- Summarize a Document: Insert your text from an article or document to summarize it

Dashboard Metrics:

- Active users: 216
- New users: 197
- Average engagement time per active user: 16m 27s

Line Chart: Shows engagement time per active user from Sep 01 to Nov 01. The y-axis ranges from 0 to 100. The line starts at approximately 80, drops to 40, and then fluctuates between 40 and 60.

Coding Success Story

#2 - Tag Explorer approval process

Andy
Launched new product MVP in 2 weeks

Culture Success Story

Analysis of stay interview

Lisa
Sentiment analysis from stay interviews.

Coding Success Story

#2 - Tag Explorer approval process

Corey & Ryan
Rebuilt and deployed TagExplorer Chrome Extension.

Closing Success Story

#1 Draft Email Campaigns

Dom
Drafted email campaigns to source new deals.

Opportunities

- **Internal knowledge at InfoTrust is disjointed** and prioritized differently in different departments. AI will only be as smart as the context we give it.
- AI adoption “spikes” when the org is reminded. **There is no regular cadence** for these reminders or an individual who is solely accountable for adoption.
- Have a team dedicated to servicing internal information systems (BITS) also focus on **system adoption and usage** as key KPIs.

- 35 Remember the AI Use Policy
- 36
- 37 My Way
- 38
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- 40



InfoTrust | Click to add title

InfoTools

InfoTrust Links Has access to this site

Share

Rec

 Help Center ⓘ	 InfoTrust Wiki ⓘ
 Jira ⓘ	 InfoGPT ⓘ
 Confluence ⓘ	 Salesforce ⓘ
 Trainual ⓘ	 Paycor ⓘ
 Bonusly ⓘ	



Search



Set as default

INFO Have a question? Check out the InfoGPT user guide! <https://infotrust.atlassian.net/wiki/x/EYD0N>

All chats

Confluence

Web Search

Upload Files



for processing. Able to answer with internal knowledge from the InfoTrust Wiki in Confluence.

+ How can I help you today?



⚡ Suggested

Prompt Enhancer

Get better results when talking with InfoGPT

Summarize a Document

Insert your text from an article or document to summarize it



Remember the AI Use Policy

As InfoGPT is using ChatGPT behind the scenes, we must still adhere to the same requirements for the AI Use policy today. **No client data** can be shared within InfoGPT as it will pass to ChatGPT.

InfoTrust's AI Use Policy

InfoTrust recognizes that the use of generative artificial intelligence ("AI") tools can increase productivity and innovation. We support the use of AI tools in a safe, ethical, and secure manner. This AI General Use Policy (the "Policy") is a guideline to provide employees with guardrails for responsible use of AI while protecting InfoTrust and mitigating risks of misuse, legal implications, unethical outcomes, potential biases, inaccuracies, and information or data security breaches.

This Policy applies to all InfoTrust employees and independent contractors utilizing AI tools.

This Policy is intended to provide further guidance and is not intended to limit, contradict, or replace applicable mandatory rules, policies, legal requirements, legal prohibitions, and contractual obligations, all of which remain in full force and effect. Any use of AI tools under this Policy must comply with the relevant policies, internal controls, and guidelines of the Company, including but not limited to the Company's:

- Code of Ethics and Business Conduct
- Anti-Harassment/Anti-Discrimination Policy
- Information Security Policy
- Internal Recording Policy

ALL AI-GENERATED OR REVISED CONTENT MUST BE PROOFREAD, REVIEWED FOR ACCURACY, AND EDITED BY YOU BEFORE SENDING. THE USE OF AI MUST BE DISCLOSED IN THE CONTENT CREATED.

External AI May NOT be Used For or On:

- ANY CLIENT DATA
- Outward-facing recording during client/sales calls.
- Sharing InfoTrust proprietary information, such as corporate strategy, playbooks, financial information, with any external third parties, including AI. For example, you may NOT ask ChatGPT to reword InfoTrust's annual priorities.
- Any content involving Personal Information or Personally Identifiable Information ("PII") as defined by PCI DSS, GDPR, CCPA/CPRA, or confidential information of InfoTrust, InfoTrust's clients, or any third parties. When in doubt, do not share the information with any third parties, including AI, without first obtaining consent and authorization.
- Proprietary information, including but not limited to copyrighted or patentable information of InfoTrust, InfoTrust's clients, or any third parties.
- Creation of any offensive, discriminatory, illegal, or inappropriate content, or content that otherwise violates any of InfoTrust's policies.

Before You Start:

- InfoTrust reserves the right to audit any AI use and data sets used with AI technology.
- If you become aware of an actual or potential violation of this Policy, you must promptly disclose this fact to the Acting AI Officer (security@infotrustllc.com) with all relevant documents and information.

Your Responsibilities:


As the user of AI, you are responsible for ensuring that what is created is technically and functionally accurate and free from typos. AI (specifically Natural Language Processors, "NLPs") can fabricate facts and hallucinate. Therefore, it is the responsibility of the end-user to verify the correctness and context of AI-generated content every time it is used. **ALL CONTENT MUST BE PROOFREAD AND REVIEWED BY YOU BEFORE SENDING. IT IS THE CREATOR'S RESPONSIBILITY TO VERIFY AND TEST THE SOURCE CODE FOR ACCURACY.** Even the use of AI to generate content shared internally must be carefully checked for accuracy and functionality, and you must inform the receiver that AI was used and that you have verified the content for accuracy.

Any violations of this Policy may result in the termination of the use of AI in the workplace at InfoTrust's sole discretion. This Policy is not intended to, and does not preclude or dissuade employees from engaging in legally protected activities under state or federal law.

What are we doing w/ AI professionally?

Democratizing AI for Marketing on Google Cloud using InfoTrust AI and Vertex AI

Step	Traditional Approach	InfoTrust new MVP product
Access to data	2 days	1 day
Data readiness assessment	2 days	1 day
Data cleanup and modeling	2–3 weeks	1 day
Audiences pushed to GA4	2 days	1 day
Totals (Time to Live)	3–4 weeks	2 days

A still from the movie 'Forrest Gump' showing Tom Hanks as Forrest Gump sitting on a wooden bench. He is wearing a light-colored suit, a blue and white checkered shirt, and a blue and white checkered tie. He is holding a white box in his lap. To his right is a brown suitcase. The background shows a stone wall and a car with a person in the back seat.

**AND THAT'S
ALL I HAVE
TO SAY
ABOUT THAT**

**Forrest
Gump**

My Way



Meet Our CEO



Alex Yastrebenetsky

InfoTrust Co-Founder



Quick Bio:

- Born in Ukraine, which was part of the USSR at the time
- University of Cincinnati graduate
 - B.S. Computer Engineering and MBA
- 13 years at Attachmate, with roles that included software engineering, consulting, PM and product management
- Co-founded InfoTrust in 2010
- Co-authored two Amazon best-selling books on digital analytics and data privacy

Outside of Work:

- EO, YPO, Strategic Coach, MMT, Abundance
- Engaged in community work at the crossroads of education, healthcare, and entrepreneurship.
- Board member:
 - Cincinnati Children's HMC Foundation Board
 - University of Cincinnati Blue Ash College
 - Sycamore Community City School District
 - Greater Cincinnati Chamber of Commerce

SouthWest Ohio Chapter Board - 2006 - 2010

VP of Communications

Co-founder first Agile Cincinnati user group

In 5 years

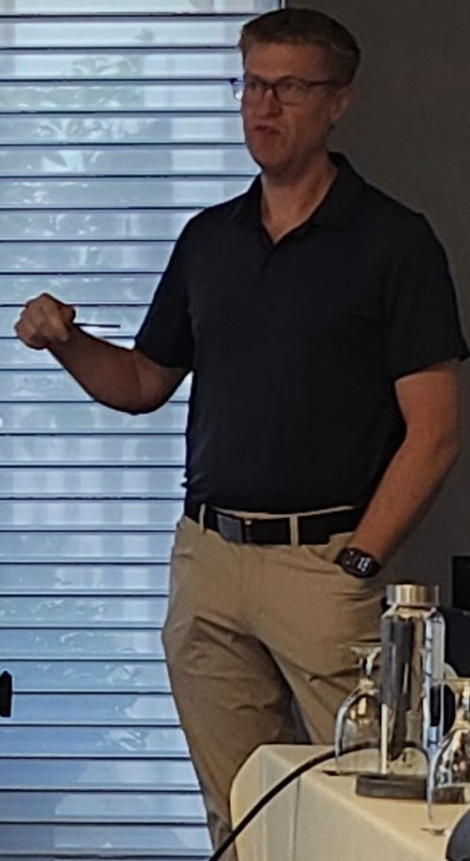
InfoTrust will donate \$1M annually into

InfoTrust
FOUNDATION

HEARTWORKS

A platform that
accelerates the best ideas to cure
congenital heart disease
for the 1 in 100 born with it and the
2.4 million living with it

07/15/2020





Questions?



Mission

At InfoTrust, we believe in leveraging our success to give back to the communities in which our team members live and work. Through our nonprofit organization, the InfoTrust Foundation, we create miracles centered around these five causes:

- Better education for all students
- Ending poverty
- Healthcare innovation
- Gender equality
- Sports accessibility for underprivileged youth



Thank you so much!

In such a trying time
it is greatly appreciated! Im
sure when my baby gets her 4hour
pass home to enjoy her family she
will enjoy the food as well.
Again thank you so much!

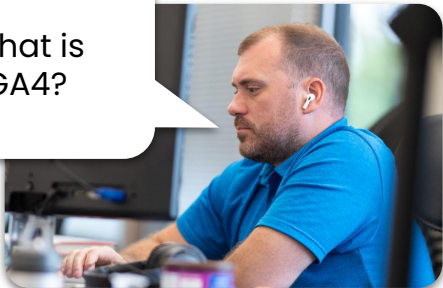
Loretta [REDACTED]
and family!!

Thank You!

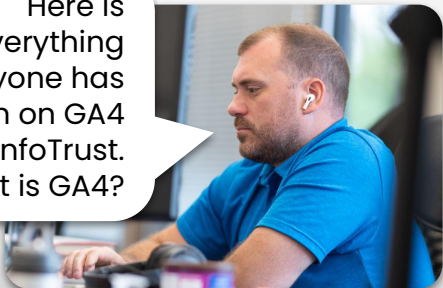


How AI Works Today (for InfoTrust)

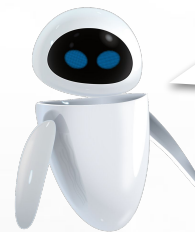
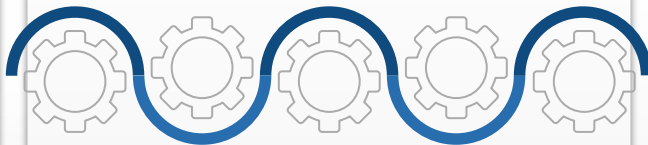
What is GA4?



Here is everything everyone has written on GA4 at InfoTrust. What is GA4?



 OpenAI



GA4 is a web analytics tool that helps businesses understand how users interact...

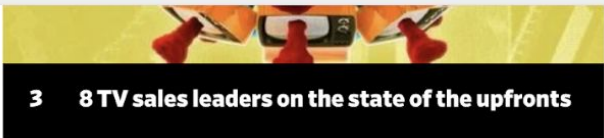


Based on the additional context you gave me from InfoTrust, GA4 is a platform that **pisses clients off** from time to time. Thank you for all of your company information on GA4. I will save this for later, but probably never use it.

01:19 PM ET

What industry leaders won't miss about TV upfront presentations

(VIRTUAL) TABLE
By Allan V. Cook



3 8 TV sales leaders on the state of the upfronts

01:18 PM ET

Watch the newest commercials on TV from M&M's, Advil, Vaseline and more

NO-LAYOFF PLEDGE
InfoTrust



4 Ad business cut 36,400 jobs in April

12:44 PM ET

Jerry Stiller brought his cantankerous comic genius to commercials as well as TV and film

12:38 PM ET

The top 5 creative brand ideas you need to know about right now: May 11, 2020

12:31 PM ET

NBCU calls for ad industry to use the pandemic to fix what's broken

MARKETING ANALYTICS FIRM PUSHES 'NO LAYOFFS' PLEDGE

11:53 AM ET



Considering an HCM solution? See why users

01-03-2022 Tue 08:01:51



01-03-2022 Tue 08:01:51





ARTICLE

INFOTRUST FOUNDATION SCHOLARSHIP FUND

ESTABLISHED AT UNIVERSITY OF CINCINNATI FOR STUDENTS
IMPACTED BY UKRAINE-RUSSIA CONFLICT

