

GEM CORTEX AI

– CATALOGUE OF USE CASES AND SALES SCENARIOS

The core principle of GEM Cortex AI: We do not sell a generic promise of AI. For each scenario, we show who uses the solution, what changes in their working day, where the benefits arise and what the control points are.



Five Characteristics of a Suitable First Use Case

1. The process has a clearly identified owner and a user who can describe how the work is currently performed.
2. There is a recurring task, document or decision-making input with a measurable volume.
3. The data is available, and access permissions can be established legitimately.
4. AI can start by providing assistance or a draft subject to human approval; the risk is bounded.
5. An acceptance metric and a stop/scale decision can be defined before the start.



Overview of the Main Scenarios

1. **AI Backend for Preprocessing Insurance Documents:** Draft preparation time. One type of claim, 100-300 cases.
2. **Internal Knowledge Assistant:** Recall@k. One group, 500-2000 documents.
3. **RFP Analyzer:** Recall of critical requirements. One tender + holdout.
4. **Technical Documentation in a Restricted Environment:** Proportion of correct revisions. One type of equipment.
5. **CV Converter:** Field accuracy. 50-150 CVs, 10-20 fields.
6. **Access & Spend Baseline:** Inventory coverage. 1-2 providers, 90 days of data.
7. **Secure Enterprise AI Workspace:** Active users. One group, three tasks.
8. **Legacy Software Modernisation:** Critical path coverage. One module.
9. **Public Administration – Classification of Submissions:** Classification accuracy. One administrative area.
10. **Natural-Language BI Queries:** Metric correctness. 10-20 metrics.
 - **Recall@k:** Checks whether the correct source appears among the first k results.
 - **False negative:** A critical requirement or risk that the system has missed.
 - **Abstention:** Controlled non-response when evidence or permissions are insufficient.
 - **Holdout:** A separate test dataset that the team has not used during tuning.
 - **Read-only / draft-only:** A mode without irreversible writes or autonomous decisions.

1. *AI Backend for Preprocessing Insurance Documents*

The user's perspective: A claims handler opens a case in the existing application. Instead of reading every attachment in turn, they see a prepared summary, a list of identified facts and links to specific documents and pages. They can verify, edit or reject each item of information. The system makes no decisions on their behalf and performs no irreversible writes without approval.

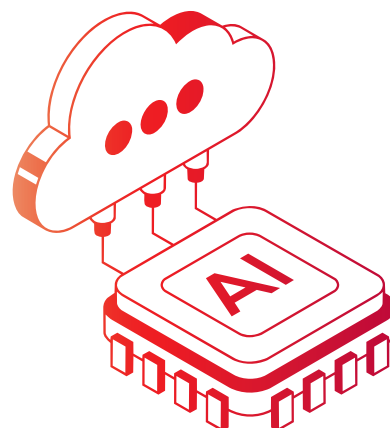
How the solution works: On receipt, the documents are checked, converted into a machine-readable format using OCR and extraction, and classified by type. Cortex retrieves the relevant passages, assembles a structured draft and returns it to the insurance workflow through an API.

Benefits: Less time spent searching; a more consistent structure for supporting materials; traceability of statements.

Control points: The pilot is draft-only; sensitive data has a defined purpose and retention period.

KPI: Draft preparation time; proportion accepted without changes; serious errors.

First pilot: One type of claim, 100-300 cases, read-only/draft-only.



2. *Internal Knowledge Assistant for Employees and New Joiners*

The user's perspective: An employee signs in with their corporate identity and asks about a procedure. The assistant retrieves only content that the user is permitted to see, provides an answer with a citation and offers to open the source. If uncertain, it suggests contacting the process owner.

How the solution works: Curated documents from SharePoint or Confluence are ingested with metadata and ACLs. The system performs ACL-aware retrieval and constructs an answer with citations. Feedback creates a backlog for correcting the sources.

Benefits: Faster familiarisation without overburdening experts; greater use of documentation.

Control points: Permissions are applied before content is passed to the model. Every answer has a citation.

KPI: Recall@k; citation accuracy; proportion of correct abstentions.

First pilot: One group, 500-2000 documents, 150+ queries.

3. *RFP Analyzer – Matrix of Compliance, Obligations and Risks*

The user's perspective: A manager uploads the documents and receives a requirements matrix with a category, severity, source page and proposed response. A lawyer focuses only on the critical points.

How the solution works: The pipeline identifies the structure of the documentation, extracts requirements, removes duplicates and creates a compliance matrix.

Benefits: Faster preparation of the matrix; a lower risk of overlooking a critical condition; clear source attribution.

Control points: Critical requirements must have a source and manual confirmation. The system must not submit a bid.

KPI: Recall of critical requirements; false negatives; reviewer time.

First pilot: One completed tender + one new holdout document.

4. *Technical Documentation in a Restricted or Critical Environment*

The user's perspective: A technician enters a query and receives an answer with a precise reference to the manual and revision. If the source is missing, the system does not answer and passes the query to an expert.

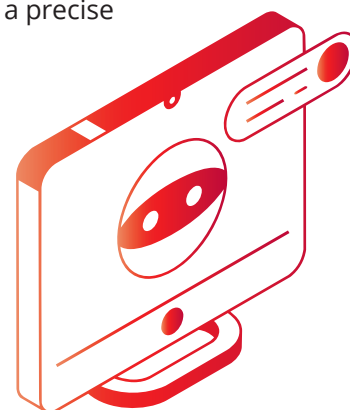
How the solution works: The knowledge layer indexes manuals and revisions. Retrieval is restricted by role, equipment type and document validity.

Benefits: Reduced risk of using an invalid revision; preservation of know-how.

Control points: A safety instruction without a source is not displayed. Offline mode requires a controlled update process.

KPI: Proportion of answers with the correct revision; retrieval time.

First pilot: One type of equipment, one document set.



5. *CV Converter – Standardised Professional Profile*

The user's perspective: A recruiter uploads a CV and receives a structured draft profile in a template. The system highlights missing fields. A person approves and exports the output.

How the solution works: The document undergoes OCR, extraction into a schema and normalisation. Critical fields are flagged for review.

Benefits: Less manual transcription; greater consistency; export to ATS/CRM.

Control points: Personal data minimisation; generating sensitive characteristics is prohibited.

KPI: Field accuracy; critical error rate; review time.

First pilot: 50–150 CVs, 10–20 mandatory fields.

6. Access & Spend Baseline

The user's perspective: The CIO, CISO and finance receive an overview of AI services, projects and costs. The first phase does not cancel anything; it identifies gaps.

How the solution works: A read-only inventory combines directory data, provider projects and billing data.

Benefits: Unified ownership; identification of unused licences; a basis for FinOps.

Control points: Each person uses their own identity. Automation depends on the Admin API.

KPI: Inventory coverage; orphaned projects; unallocated costs.

First pilot: One directory, 1-2 providers, 90 days of data.

7. Secure Enterprise AI Workspace

The user's perspective: A user signs in with their corporate identity and selects a task. Based on identity and data classification, Cortex selects a path: no-LLM, RAG or a general-purpose model.

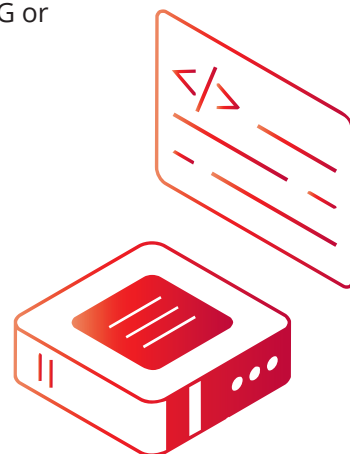
How the solution works: The input undergoes policy checks, classification and routing. Control measures response time, quality and cost.

Benefits: Reduced shadow AI; a unified identity; transparent measurement of adoption.

Control points: The model catalogue is an allowlist. User activity must be linked to a completed task.

KPI: Active users; task completion; cost per active user.

First pilot: One group, three defined tasks, one approved model.



8. Legacy Software Modernisation – discovery-first

The user's perspective: An architect receives an inventory of modules, dependencies and business rules. AI proposes tests, but code changes undergo standard review.

How the solution works: A read-only analysis of the repository creates a dependency map. This is followed by proposed migration slices.

Benefits: Faster mapping; reduced risk in rewriting; gradual expansion of testing.

Control points: No autonomous commits; business rules are approved by a person.

KPI: Critical path coverage; test pass rate.

First pilot: One module with an operational owner.



9. *Public Administration – Classification of Submissions and Preparation of Record-Keeping Data*

The user's perspective: A staff member sees the proposed administrative category and metadata. They review and confirm the items. Disputed cases are passed to a senior colleague.

How the solution works: The document undergoes OCR, classification and validation. Flow manages human approval and integration with the records management system.

Benefits: Faster registration; more consistent metadata; a traceable distinction between the proposal and the decision.

Control points: AI does not make decisions on the merits. Critical misclassification is measured.

KPI: Classification accuracy; critical misroute rate.

First pilot: One administrative area, an anonymised sample.

10. *Natural-Language BI Queries with Deterministic Calculation*

The user's perspective: A manager asks about a metric. The model maps the query to a defined metric. The calculation is performed by a read-only data layer.

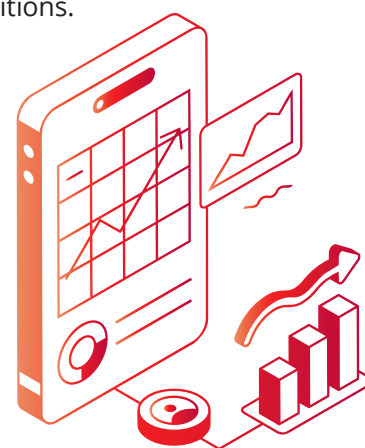
How the solution works: The query is evaluated in the context of the identity. Semantic metric mapping selects an approved query.

Benefits: Faster answers without involving analysts; consistent metric definitions.

Control points: An allowlist of metrics; row-level security; the model only interprets the result.

KPI: Accuracy of metric selection; agreement with the BI calculation.

First pilot: 10-20 metrics, a read-only data source.



Extended Catalogue of Sales Scenarios (Including Detailed Explanations)

IT Service Desk

A direct route without an LLM provides immediate, cost-effective responses to known issues, such as requests for contact details, service status or precise procedures. Only unresolved or ambiguous queries enter the knowledge layer or are handed over to a human operator. The key benefits are a measurable reduction in routine tickets, shorter resolution times and consistent response quality.

Procurement

The system automatically extracts key commercial terms, prices, deadlines and warranties from diverse offers and compares them in a clear gap matrix. This gives the procurement specialist a structured comparison for rapid decision-making, while final supplier selection and pricing decisions remain subject to the approved process and human judgement. The value lies in a dramatic reduction in time while maintaining a high level of control.

Legal Affairs and Contracts

Cortex identifies and extracts legal clauses from contract text and compares them with the internal legal playbook, flagging potential deviations with direct citations. It is an effective working aid rather than an automated legal opinion, enabling lawyers to focus on critical and high-risk passages. The result is significantly faster contract review and a lower likelihood of overlooking an inappropriate clause.

Manufacturing and Maintenance

The solution aggregates and structures free-text content from logs, incident reports and technical manuals into a unified technical summary. This enables technicians and maintenance staff to perform root cause analysis (RCA) more quickly and plan repairs more effectively. The correct documentation version and revision are always a critical control point to prevent the use of outdated or incorrect procedures.

Sales

Before a sales meeting, Cortex automatically gathers and consolidates information from the CRM system, internal documents, open tasks and other approved sources into a single clear briefing. This gives the salesperson the full context of the customer and current outstanding matters, reducing preparation time and improving the quality and professionalism of the meeting itself.

Finance

Cortex extracts data from invoices and received documents, proposes the categorisation of exceptions and prepares structured supporting material for the approval process. All accounting entries, approvals and payments, however, remain within a deterministic system with strict financial permissions. The benefits are faster processing, greater accounting consistency and easier audit traceability.

Development

An agent integrated with Jira can generate initial drafts of analyses, test cases and changes based on a requirement or source code. However, autonomy ends at the proposal stage – every commit, merge and production deployment remains in the hands of the developer and follows the standard code review and CI/CD process. This accelerates the creation of test suites without compromising code quality or security.

Voice Assistant

The speech recognition layer converts a spoken request into structured text, which Cortex then routes to a knowledge or process path. If the system does not reach the required confidence level, it automatically and smoothly transfers the call to a human operator (handoff). The value lies in the availability of round-the-clock support, with a clear and secure handover of more complex cases to a person.

Meeting operations

Cortex extracts key decisions, action items, responsible individuals and deadlines from a meeting transcript or recording and prepares draft minutes. Final publication or the creation of a task in the system takes place only after approval by the meeting participants. This significantly reduces the administrative burden, improves the team's ability to act and ensures that only approved commitments are actually recorded.

AI governance catalogue

Using Access and Control, we create a live register of all AI use cases, models, datasets, tools, owners and associated risks. This catalogue connects technical operations with decision-making accountability and cost management. A pilot in one department with a limited portfolio will verify coverage and establish processes that will lead to a sustainable and regulated AI transformation across the organisation.

Mandatory Pilot Charter Items

The Pilot Charter is a short governance document that protects both the client and the supplier from a situation in which a technical demo is treated as evidence of production value. A pilot is not successful simply because the model has produced an impressive answer. It is successful when, on representative data, it meets the predefined requirements for quality, security and business outcome.

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| ✓ Business outcome: Who will complete which task better. | ✓ Acceptance: Metric, threshold, tolerance for critical error. |
| ✓ Baseline: Volume, time, error rate, rework. | ✓ Control points: Points with human approval and rollback. |
| ✓ In / out of scope: Precise definition of data, processes and prohibitions. | ✓ TCO: Implementation, platform, consumption, operations. |
| ✓ Data & authority: Owner, legal basis, permissions, retention. | ✓ Operational ownership: RACI. |
| ✓ Eval dataset: Representative and boundary cases + holdout. | ✓ Decision gate: Date and people responsible for the stop / iterate / scale decision. |

Qualification Questions for the Sales Meeting

- Who currently performs the task, and who is accountable?
- How many cases arise, and where is time lost?
- What constitutes a serious error, and what is the tolerance?
- Which data and systems are required, and who is authorised to make them available?
- Which part can AI propose, and which part is it permitted to execute after approval?
- What conditions must hold for the client to invest in production? Conversely, what would lead to a stop?

