The monday.com AI app hackathon

AI Smart Forms for monday.com

Adaptavist

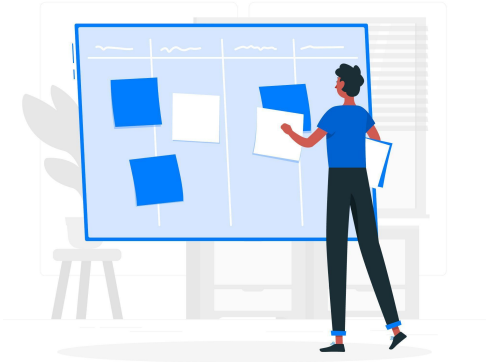
Customer challenges and user needs

Customer challenges and user needs

Many WorkForms users need a quick and easy way to:

Get back to responders

Why? Writing custom responses is a time consuming and tedious task. Finding the proper tone and format can be frustrating.



Categorize replies

Why? Organizing and categorizing data can be complex for large data sets.

Extract form insights

Why? Extracting insights and summarizing data sets can be time consuming.

Proto-persona

Proto-persona

Although many roles in all kinds of companies face these challenges, below is the proto-persona that has guided our efforts.

Sarah Miller

AGE	37
EDUCATION	BSBA in Marketing
OCCUPATION	Marketing Specialist
LOCATION	New York
TECH LITERATE	High

> As a marketing specialist, my passion lies in collecting feedback, extracting valuable insights, and shaping strategies that elevate brands and creates impactful marketing experiences that truly connect with customers

Background

- Marketing Specialist with a focus on digital advertising.
- Based in North America.
- Holds a Bachelor's in Marketing
- Strong communication and writing skills.
- Creative and analytical mindset.

Behaviours

- Collects feedback using monday.com WorkForms.
- Engages with form responders and extracts insights.
- Conducts pricing and market research.
- Analyzes marketing data for optimization.
- Presents research findings to stakeholders.

Goals

- Identify market segments and target audience.
- Understand customers' needs and preferences.
- Optimize marketing messages and strategies.
- Shape future marketing campaigns.
- Utilize feedback for informed decision-making.

Needs

- Personalised messages to form responders.
- Detailed analysis of customer needs and preferences.
- Actionable insights to make informed decisions.
- Advanced analytics tools to streamline efforts.

Frustrations

- Writing custom responses to responders is time-consuming.
- Organizing and categorizing large data can be complex.
- Extracting insights and summarizing data sets manually.
- Finding the proper tone for customized feedback is frustrating.

Proposed solution

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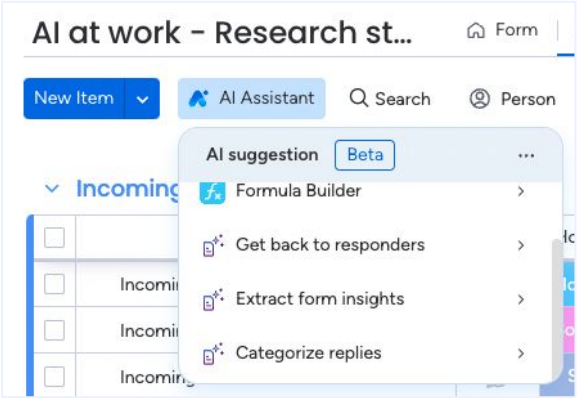
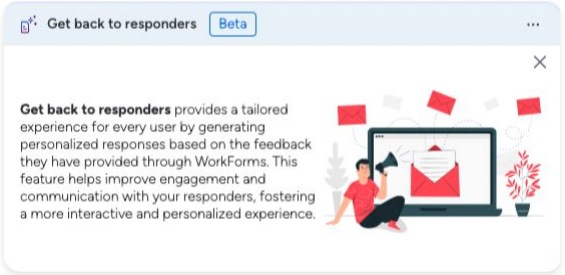
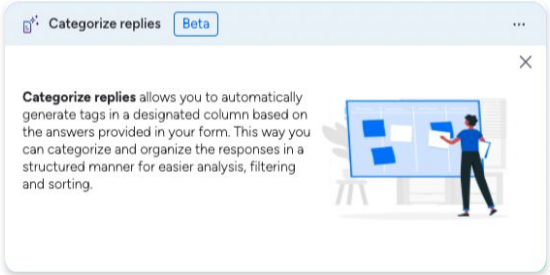
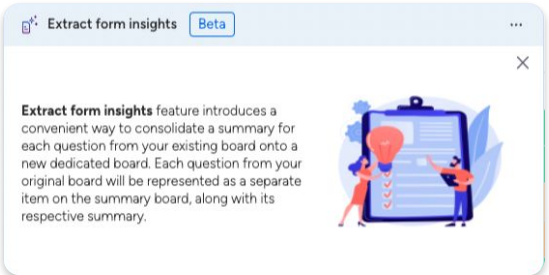
AI Smart Forms will enable monday.com users to save time in their WorkForms flow by helping them:

- ✓ **Communicate with form respondents.**
- ✓ **Automate the analysis and categorization of qualitative information.**



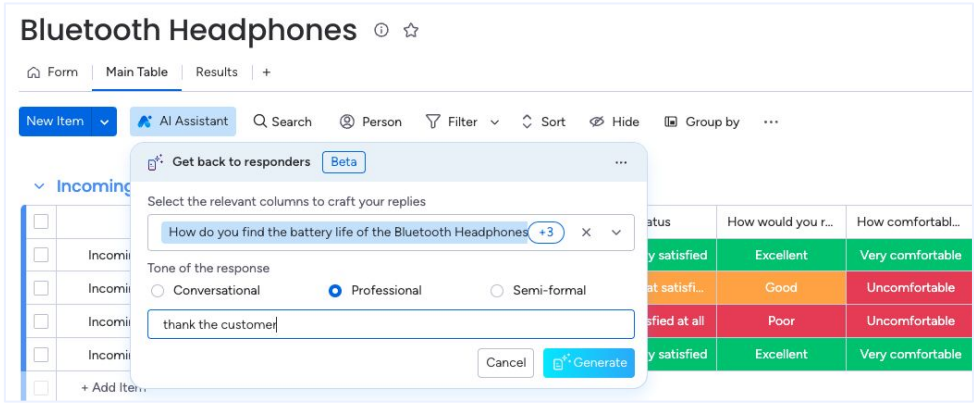


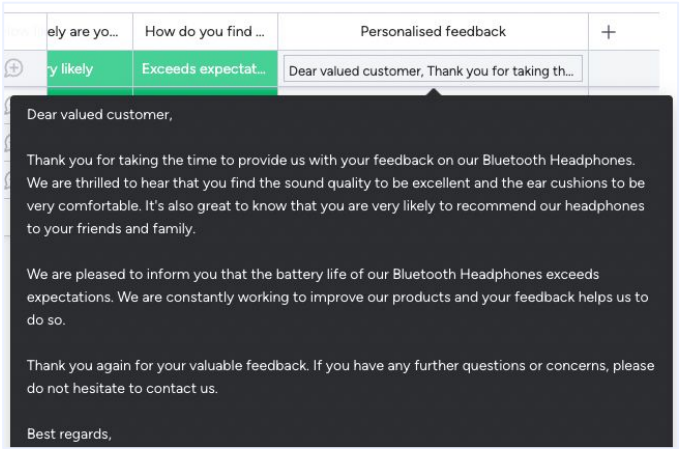




Proposed solution

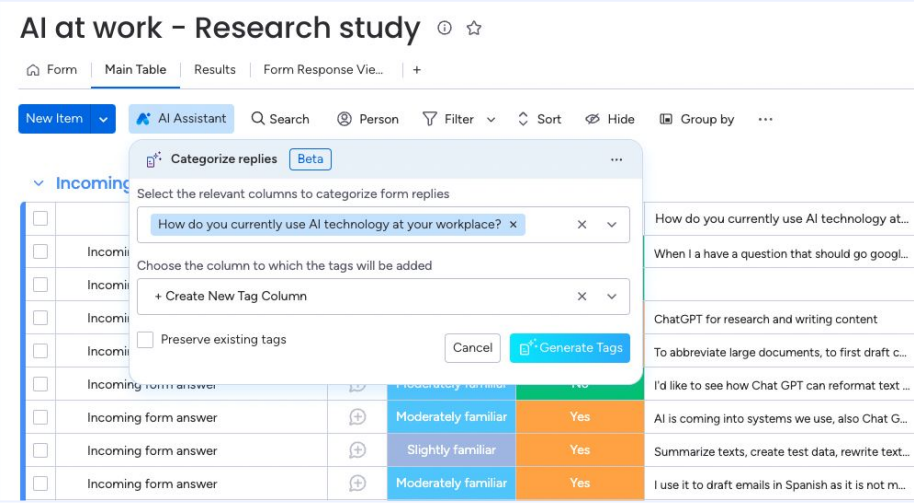
Quickly get back to responders using the personalized replies that the app crafts based on the feedback they have provided through WorkForms.





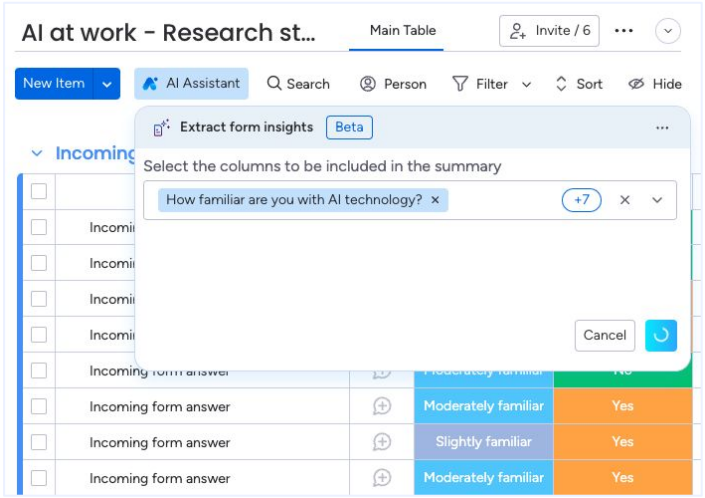
Proposed solution

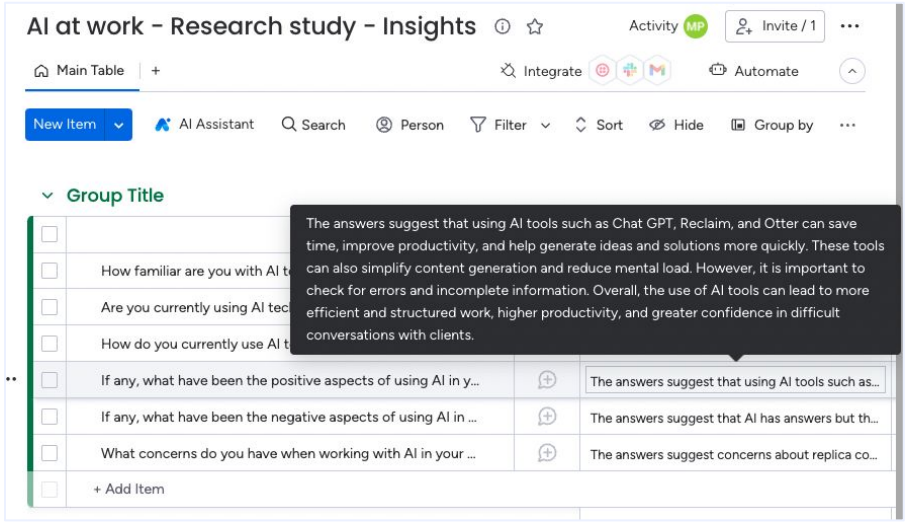
Categorize replies automatically based on the answers provided by the responders. Organizing, analyzing, filtering and sorting the responses becomes much easier.



Proposed solution

Extract form insights from your forms onto a new dedicated board.
A summary of the replies will be provided for each question.





One app, many use cases

One app, many use cases

Get back to responders

A Marketing Specialist who uses surveys to gauge clients willingness to pay for a service and sends tailored replies to show appreciation.

One app, many use cases

Get back to responders

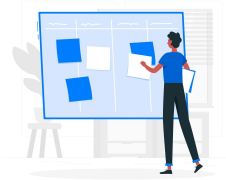
A UX Researcher who uses WorkForms to explore user needs and writes custom emails to respondents to propose an interview.

One app, many use cases

Categorize replies

An Event Planner who published a form to gather questions for the Q&A section and wants to classify the responses by topic.

One app, many use cases



Categorize replies

A Product Manager who gathers product feedback and wants to organize client requests by subject.

One app, many use cases

Extract form insights

An HR Director looking to understand the results of the annual employee satisfaction survey without having to read each individual response.

One app, many use cases

Extract form insights

An IT Support Manager trying to figure out what are the most common issues reported.

The technologies behind AI Smart Forms

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NEXT.JS as the main framework

🦜🔗 LangChain as the AI framework

Vercel as the deployment system

The technologies behind AI Smart Forms

NEXT.JS as the main framework

Advantages:

- It is React!
- Client and server sides in the same environment.
- Server API gateway: Requests to OpenAI are made through the server side.
- Security: As the OpenAI requests are made in the server side, the authorization header is hidden in the client side.

The technologies behind AI Smart Forms

🦜🔗 LangChain as the AI framework

Advantages:

- It provides interfaces to connect with the main LLM systems in the market, as OpenAI.
- Easy to use. You don’t need to deal with the request or the response, as they can be managed as JavaScript objects.
- In our case, we have used the OpenAI models in the server-side.

The technologies behind AI Smart Forms

Vercel as the deployment system

Advantages:

- Integration between Next.js and Vercel.
- When a push is done to a specific branch, the deployment starts automatically.
- It provides a URL where the whole (client and server) application is deployed. This URL can be used as a new build in monday.com.

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