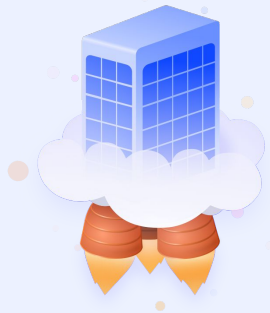


# The monday.com AI app hackathon



# AI Smart Forms for monday.com





# Customer challenges and user needs

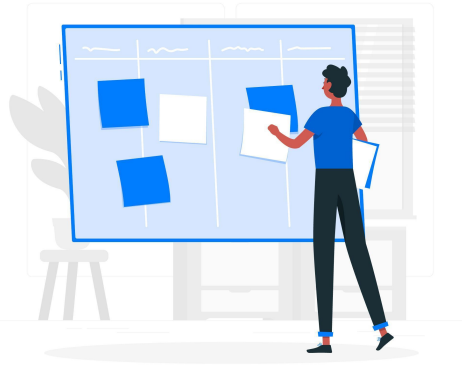
# Customer challenges and user needs

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.

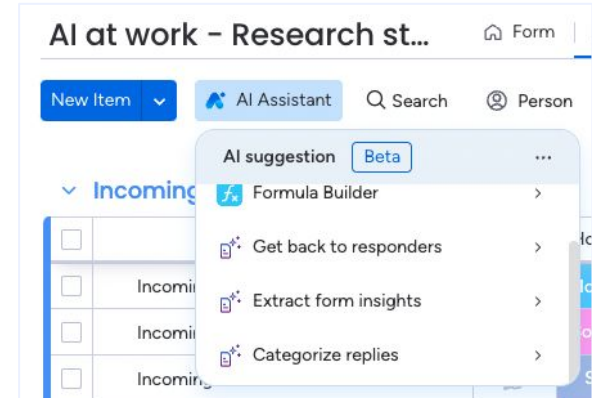


# Proposed solution

# Proposed solution

**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.**



**Get back to responders** Beta

**Get back to responders** provides a tailored experience for every user by generating personalized responses based on the feedback they have provided through WorkForms. This feature helps improve engagement and communication with your responders, fostering a more interactive and personalized experience.

**Categorize replies** Beta

**Categorize replies** allows you to automatically generate tags in a designated column based on the answers provided in your form. This way you can categorize and organize the responses in a structured manner for easier analysis, filtering and sorting.

**Extract form insights** Beta

**Extract form insights** feature introduces a convenient way to consolidate a summary for each question from your existing board onto a new dedicated board. Each question from your original board will be represented as a separate item on the summary board, along with its respective summary.



# Proposed solution

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

Bluetooth Headphones

Form | Main Table | Results | +

New Item | AI Assistant | Search | Person | Filter | Sort | Hide | Group by

Get back to responders (Beta)

Select the relevant columns to craft your replies

How do you find the battery life of the Bluetooth Headphones +3

Tone of the response

Conversational  Professional  Semi-formal

thank the customer

Cancel Generate

Status	How would you r...	How comfortabl...
Very satisfied	Excellent	Very comfortable
Not satisfi...	Good	Uncomfortable
Satisfied at all	Poor	Uncomfortable
Very satisfied	Excellent	Very comfortable



How likely are you...	How do you find ...	Personalised feedback	+
Very likely	Exceeds expecta...	Dear valued customer, Thank you for taking th...	

Dear valued customer,

Thank you for taking the time to provide us with your feedback on our Bluetooth Headphones. We are thrilled to hear that you find the sound quality to be excellent and the ear cushions to be very comfortable. It's also great to know that you are very likely to recommend our headphones to your friends and family.

We are pleased to inform you that the battery life of our Bluetooth Headphones exceeds expectations. We are constantly working to improve our products and your feedback helps us to do so.

Thank you again for your valuable feedback. If you have any further questions or concerns, please do not hesitate to contact us.

Best regards,

# Proposed solution

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

AI at work – Research study

Form | Main Table | Results | Form Response Vie... | +

New Item | AI Assistant | Search | Person | Filter | Sort | Hide | Group by | ...

**Categorize replies** Beta

Select the relevant columns to categorize form replies

How do you currently use AI technology at your workplace? x

Choose the column to which the tags will be added

+ Create New Tag Column x

Preserve existing tags

Cancel | Generate Tags

Incoming form answer	Moderately familiar	Yes	How do you currently use AI technology at your workplace?
Incoming form answer	Moderately familiar	Yes	When I have a question that should go goog...
Incoming form answer	Moderately familiar	Yes	ChatGPT for research and writing content
Incoming form answer	Moderately familiar	Yes	To abbreviate large documents, to first draft c...
Incoming form answer	Moderately familiar	Yes	I'd like to see how Chat GPT can reformat text ...
Incoming form answer	Moderately familiar	Yes	AI is coming into systems we use, also Chat G...
Incoming form answer	Slightly familiar	Yes	Summarize texts, create test data, rewrite text...
Incoming form answer	Moderately familiar	Yes	I use it to draft emails in Spanish as it is not m...



#research-writing
#document-abbreviate
#text-formatting-google-sch...
#ai-systems
#text-summarization-rewrite-...
#email-drafting-ideas

# Proposed solution

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

AI at work - Research st... Main Table Invite / 6

New Item AI Assistant Search Person Filter Sort Hide

Extract form insights Beta

Select the columns to be included in the summary

How familiar are you with AI technology? x +7 x v

Cancel Apply

<input type="checkbox"/>	Incoming form answer	<input type="checkbox"/>	Moderately familiar	<input type="checkbox"/>	Yes
<input type="checkbox"/>	Incoming form answer	<input type="checkbox"/>	Moderately familiar	<input type="checkbox"/>	Yes
<input type="checkbox"/>	Incoming form answer	<input type="checkbox"/>	Slightly familiar	<input type="checkbox"/>	Yes
<input type="checkbox"/>	Incoming form answer	<input type="checkbox"/>	Moderately familiar	<input type="checkbox"/>	Yes



AI at work - Research study - Insights Activity Invite / 1

Main Table + Integrate Automate

New Item AI Assistant Search Person Filter Sort Hide Group by

Group Title

How familiar are you with AI technology?

Are you currently using AI technology?

How do you currently use AI technology?

If any, what have been the positive aspects of using AI in your... The answers suggest that using AI tools such as...

If any, what have been the negative aspects of using AI in your... The answers suggest that AI has answers but th...

What concerns do you have when working with AI in your ... The answers suggest concerns about replica co...

+ Add Item

The answers suggest that using AI tools such as Chat GPT, Reclaim, and Otter can save time, improve productivity, and help generate ideas and solutions more quickly. These tools can also simplify content generation and reduce mental load. However, it is important to check for errors and incomplete information. Overall, the use of AI tools can lead to more efficient and structured work, higher productivity, and greater confidence in difficult conversations with clients.



**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**

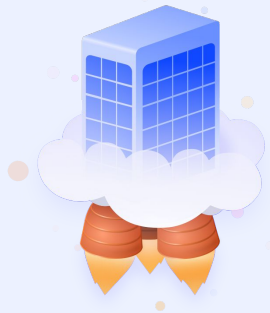
An **HR Director** looking to understand the results of the annual employee satisfaction survey without having to read each individual response.

# 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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