EBOOK

BA Insight Platform

Connect, Prepare, and Deliver Trusted Knowledge
for AI, Search, and Generative AI Experiences

Contents

Make AI Work Where You Work

Enterprises are rapidly deploying AI with the promise of faster decisions and higher productivity. But as these initiatives move from experimentation to production, a hard reality sets in: AI is only as effective as the knowledge it can access, understand, and trust. When enterprise data is fragmented, unstructured, or not secure, even advanced AI quickly falls short.

95% of AI projects fail. Not because the technology isn't ready. Not because the models aren't sophisticated enough. They fail because AI can't access the enterprise knowledge it needs to truly deliver value.

BA Insight is the AI Enablement Platform that transforms enterprise data into actionable intelligence across any AI system, anywhere in your organization.

Our technology solves the fundamental challenge that derails AI success: getting your AI systems connected to complete, enriched, and secure enterprise data across 95+ sources without compromise.

95%

of AI projects fail due to unstructured, siloed data that isn't optimized for AI.

The Reality Behind AI Failure

Enterprises invest in AI with big hopes of faster decisions and less busywork. Those are solid goals, but most AI projects into the same wall: the AI never gets the information it needs to do the job well.

AI can't deliver good answers if it can't find good information.

Inside every organization, knowledge sits in all kinds of places. Trials data in Veeva Vault. Legal content in iManage. Customer details in Salesforce. Service records inside ServiceNow. Product info in Confluence or boxed away in a shared drive.

Meanwhile, your AI tools focus almost entirely on the sources they were built around. Copilot leans on Microsoft 365 or Amazon Quick on the AWS platform. Your LLM reads whatever it was fed during setup. And that's the trap. Most of your important knowledge is somewhere else.

So when someone asks a simple question: "What did we recommend to the Milan account?", the AI hesitates, guesses, or gives part of the story. Not because it's unintelligent, but because it's working with blind spots.

Reality check: Your AI platform isn't the problem. Your foundation is.

Until your knowledge is unified, enriched, and protected the same way your teams expect, AI will continue to stumble. Fix the foundation, and everything built on top suddenly works the way it should.

The data gap domino effect

1. Security gets shaky

Connecting AI directly to enterprise systems without keeping item-level permissions intact is risky. One wrong result can expose something someone shouldn't see. In regulated industries, that's a non-starter.

2. Low-quality content produces questionable output

Unsorted, unlabeled, or stale content puts AI in a tough spot. It guesses. Maybe it fills in the blanks. Or it produces responses that feel off. Once that happens a few times, the damage is done.

3. People stop trusting the answers

If AI keeps missing key details, users fall back to the old routine of manual searches across scattered systems. Adoption drops fast, and productivity never moves.

The Infrastructure Layer Every AI Initiative Needs

99%

of Fortune 500 companies have adopted AI in some capacity

- DemandSage, 2025

AI can only be as good as the information you give it.

Every successful AI project has one thing in common: the groundwork was set before a single model went live. That foundation is the real engine behind strong answers, confident adoption, and consistent results. And what most teams discover too late is that AI platforms don't give you that essential baseline on their own.

This is where things usually get more complicated and confusing. Organizations plug an AI tool into a couple of systems and expect it to "figure out the rest." It doesn't, and it never will, because the tool wasn't built for that job.

AI enablement fills that gap.

AI enablement is the layer that connects your scattered knowledge, prepares it to be understood, and makes it safe to deliver back to your teams and workflows. It adapts to your environment instead of forcing you into someone else's template. And it works across legacy systems, cloud apps, niche repositories, and the places where your high-value content sits out of reach.

4 Essentials of AI Enablement

To maximize AI's impact across an organization, there are four key components that need to be examined.

1. Universal connectivity

Most companies have dozens of systems with valuable information. None of them were built to talk to each other. AI needs all of it, though, not just the convenient pieces.

With pre-built connectors, you can reach data in more than 95 enterprise applications without months of custom engineering. That means AI can finally use what your teams rely on every day: Confluence content, Salesforce records, files in NetDocuments, case notes in iManage, and so much more.

And the flow can go both ways. Pull content for analysis. Push updates back where they belong. Keep everything synced so AI isn't guessing from out-of-date snapshots. This is the difference between an AI solution that feels half-informed and one that feels plugged into the company.
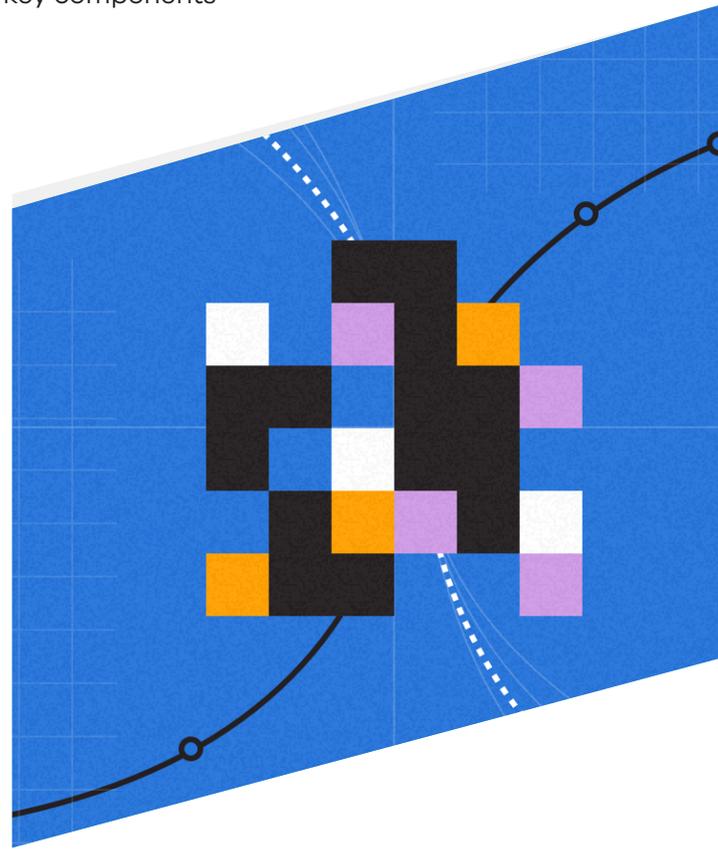
2. Intelligent data preparation

Raw content is messy. Files have vague names, metadata is missing, and half the useful details live in someone's head instead of in the document. AI can't read minds; it needs clear signals.

Automated classification takes that burden off your teams. Content is scanned, understood, and labeled with meaningful metadata the moment it appears. Related items get linked. Key entities are recognized. Patterns are picked up. This isn't clerical work. It's what prevents hallucinations and lost context later on.

Once the content is enriched, AI finally sees the full picture instead of digging through a jumble of text. When that happens, response quality makes a noticeable jump.

4 Essentials of AI Enablement

3. Security that stays intact

AI adoption slows immediately when security breaks down. One wrong search result that exposes data someone shouldn't see, and suddenly every risk conversation gets louder.

A proper enablement layer keeps item-level permissions exactly as they are. If someone can't open a document in the source system, they won't get it through AI. And every action leaves an audit trail. This is how organizations keep compliance teams comfortable while still moving forward.
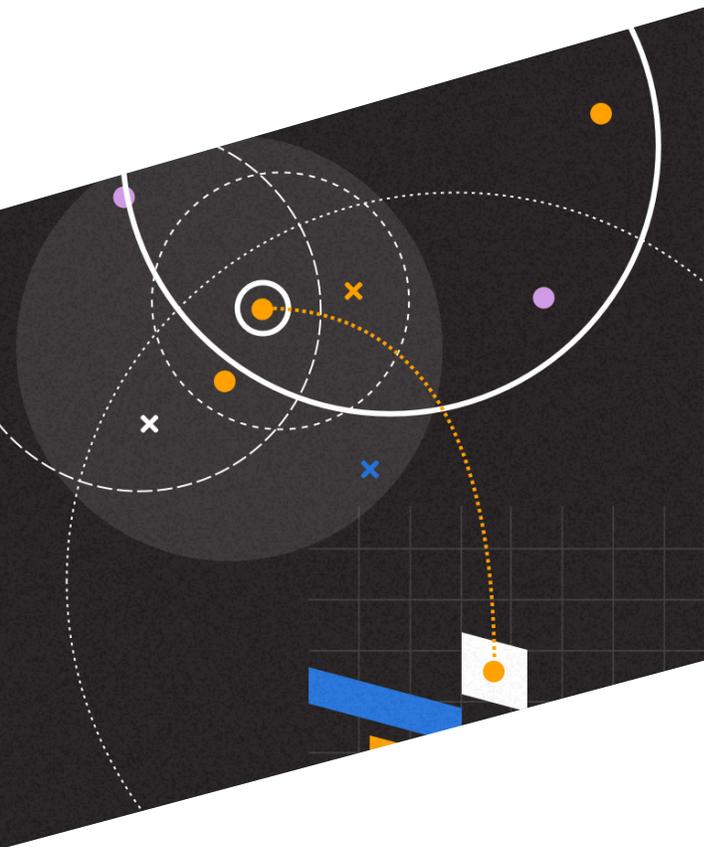
## 4. Architecture that doesn't limit you

AI changes fast. Your needs change, too. Locking the entire company into one vendor or one model can quickly become a costly regret.

A platform-agnostic setup keeps your options open. You can use Microsoft Copilot today and bring in another model later. Test multiple LLMs against the same content. Let different teams experiment with various tools (without fragmenting your knowledge again). Your foundation should stay steady even if your AI stack shifts over time.

Taken together, these pieces form the infrastructure that makes AI actually work at scale. Without it, organizations stall out in pilots and proofs of concept. With it, teams feel like AI finally "gets" the context around their work, which is where adoption takes off.

AI Enablement + Enterprise Search: Why They Matter Together

Strong answers depend on connected, clean, and secure knowledge.
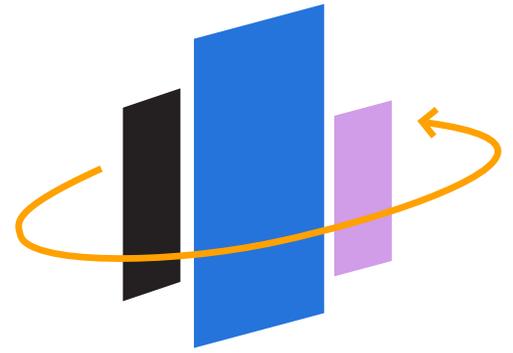
The shift to AI-ready enterprise information

Search and AI have always been linked. Both depend on the same thing: information that's complete, clear, and organized well enough for a system to make sense of it. When the information is solid, search feels sharp and dependable. When it isn't, everything struggles.

Good search today relies on context, clean metadata, and a unified view of content. AI needs those same qualities (just amplified). Without context or structure found in a single, accurate version of the truth, results swing from helpful to irrelevant in a heartbeat.

This is why improving the quality of your information pays you back twice. You don't have to be deep into AI to benefit from this work. You might be experimenting or evaluating models. You might be early in your roadmap but know AI is on the horizon. No matter the timeline, high-quality, contextualized information remains the foundation for every step ahead.

Enterprise risks without a unified platform

When information stays scattered, the same challenges will keep showing up:

AI hallucinations: Unstructured or unlabeled content forces AI to guess. It fills in blanks that shouldn't be filled, and suddenly you have answers no one recognizes.

Security worries: If an assistant pulls content without the right permissions in place, someone sees something they shouldn't. Even small mistakes make teams nervous.

Poor adoption: People give up fast when answers feel unreliable. A few bad moments can stall an entire program.

Mixed results: Different departments ask similar questions but get different answers. Confusion builds and trust drops.

Context-less search results: Employees see long lists of documents with no sense of relevance. It slows everyone down and forces people back into manual work.

These issues aren't signs that the technology you chose is weak or the AI platform won't work for your needs. What these challenges reveal is that the knowledge underneath it wasn't ready to support the expected experience.

BA Insight is Your Bridge Between AI Ambition and AI Reality

Connect, switch, and scale on your terms

BA Insight closes that gap by giving organizations a flexible, secure way to prepare and deliver knowledge across every workflow without forcing them into one vendor, one model, or one environment.

Our platform connects with Copilot, Azure OpenAI, Amazon Kendra, Amazon Quick, OpenSearch, and others. You're free to explore, test, and switch tools as your needs shift. You never have to commit your entire strategy to one model or rebuild your foundation every time something new arrives.

Built for real-world environments

BA Insight works across on-premises, cloud, and hybrid environments. You don't have to rethink your architecture or redesign your business processes. We fit the reality you already have.

This matters even more in knowledge-heavy fields such as legal, life sciences, financial services, and other highly-regulated industries. These teams can't cut corners on security, nor can they afford messy information. AI must respect the context, history, and sensitivity of their work.

BA Insight gives them the structure, preparation, and flexibility to do that—no matter where they are in their AI journey.

Knowledge Access:
Bring All Your Knowledge Into One View

Content lives everywhere: Jira, FileNet, SharePoint, Google Drive, cloud tools, and the "mystery folder" no one remembers creating. None of these systems talk to each other, and AI can't fill the gaps on its own.

BA Insight connects to 95+ enterprise systems so your search and AI tools can finally see the whole picture. You keep the systems you already rely on. We simply bridge them.
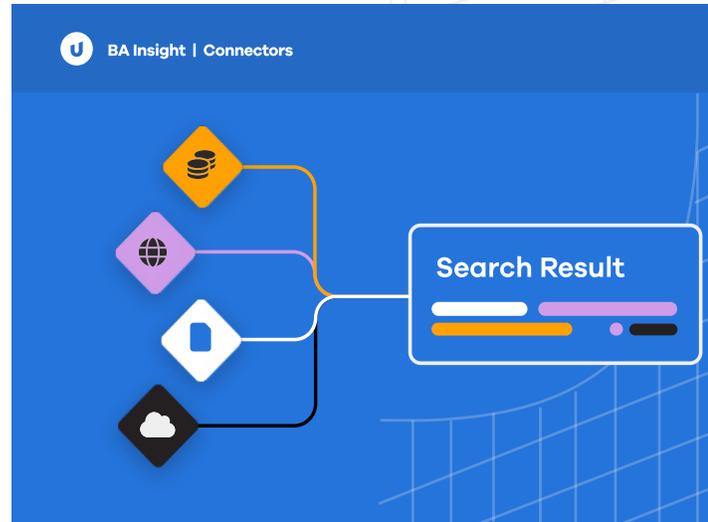
What BA Insight Delivers

One unified view of your content, no matter where it lives

Answers that pull from the full record, not just a narrow or partial slice

A single, consistent search experience employees can trust every day

AI results grounded in complete context, not guesswork or hallucinations

The Outcome

Users quickly surface the information they need, with no guesswork

Eliminates frustrating "system-hopping" just to piece together answers

AI search includes permissions, so users won't receive answers that includes restricted knowledge

Less time searching, and more time for high-value tasks

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Knowledge Preparation: Structure Your Information for AI

Once your systems are connected, your information still needs clarity. Raw content just isn't friendly to AI (honestly, it isn't very friendly to people either). Documents show up with vague titles. Metadata is missing or inconsistent. Old versions linger and nothing lines up across systems.

AI tries its best, but guessing is unavoidable, which inevitably leads to bad answers.
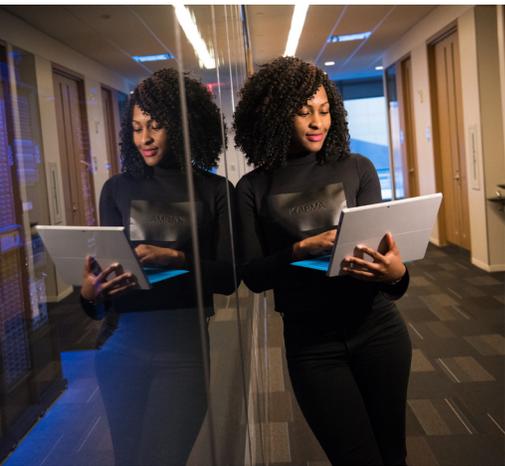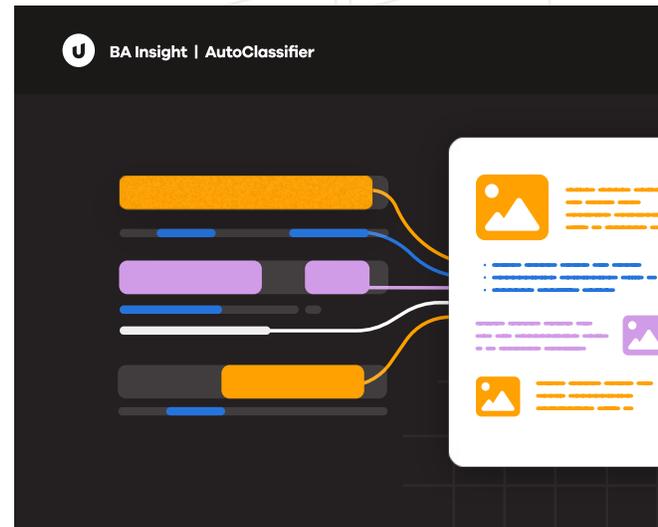
How BA Insight Fixes the Root Problem

- Adds clear, meaningful metadata
- Flags important entities and topics
- Links related content
- Cleans up labels and structure across systems
- Helps AI stop "filling in the blanks"

The Immediate Difference for Users

- Search results improve right away
- Answers are grounded in your verified knowledge, not "made up by AI"
- Hallucinations fade
- Teams feel safer relying on AI tools
- Information becomes easier to browse, filter, and trust

Knowledge Delivery:
Knowledge When You Need It

Access and preparation happen behind the scenes, but delivery is where people feel the improvement. Your teams shouldn't have to leave their workflows to find what they need.

Search should be effortless, which is why BA Insight ensures Information appears naturally in the places your team already works.

BA Insight | SmartHub

▼ **Everything**   What are you looking for?
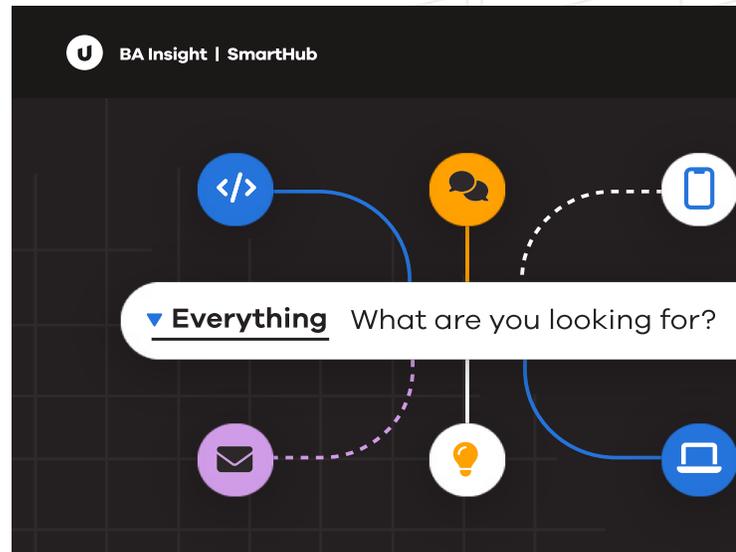
Where BA Insight Shows Up for Workers

- Inside search hubs
- Inside copilots and assistants
- Inside the apps people open every morning
- Inside workflows where decisions actually happen

Why Delivery Matters

- It reduces friction by putting answers directly where work already happens
- It builds trust in both search and AI by delivering consistent, reliable results
- It cuts down on context switching that slows people down and breaks focus
- It helps employees stick with newer tools instead of retreating to familiar habits

The Extra Wins That Start Showing Up Everywhere

Once knowledge is connected, cleaned up, and delivered where people actually work, users start to notice improvements that make the entire organization feel more aligned, efficient, and impactful.

When search just works right, what may initially seem like small daily improvements begins to incrementally build momentum, resulting in significant gains across the entire organization.

Work just moves faster

A manager finds a document instantly instead of pecking through five systems. A project team pulls up the right background info without recreating what already exists. Someone who used to ask IT for help simply stops needing to submit more tickets. These perks add up as people spend more time doing real work, and less time navigating through information clutter.

Decisions improve because the full story finally shows up

Better information leads to better choices. It sounds simple, but most teams have never had an easy way to gather the full context before taking action. With a unified foundation, you gain stronger team input and greater confidence across the board.

People start trusting AI, instead of just testing it

We know that when AI delivers shaky answers, people treat it like a novelty. But when AI delivers steady, accurate responses, it becomes a normal part of the workday. That shift hinges on trust. And trust grows when results stay consistent, sensitive data stays protected, and the assistant responds with context rather than guesswork.

IT stops carrying the weight alone

Small daily interruptions add up with search issues, missing documents, inconsistent metadata, permission questions, confused users. Once the knowledge foundation is fixed, IT finally gets the breathing room needed to focus on stakeholder priorities.

Your whole system scales easier

This is one of the most overlooked benefits. When information is unified and structured, growth stops feeling like a strain. You can add a new AI model without rethinking the entire architecture. You can bring in new tools without starting from scratch. You can expand a workflow without breaking everything. The possibilties are endless.

How BA Insight Fits Into Real Workflows

AI gets a lot of attention for its features, but none of that matters if people can't use it naturally in their everyday work. Adoption hinges on simplicity. It needs to fit the toolbox teams already open every morning, not sit off to the side waiting for someone to remember it exists.

BA Insight makes that possible by working inside your environment. You don't have to restructure or redesign processes. The platform connects the systems you already rely on, so AI and search can finally understand the full context of your business.

As organizations explore copilots, knowledge graphs, and agentic RAG, the ability to adapt becomes even more important. Most teams want to try different approaches before committing long term. BA Insight supports that flexibility by working with Copilot, Azure OpenAI, Amazon Kendra, Amazon Quick, Google Gemini, and others. You're free to test, compare, and adjust without losing the work you've invested in your foundation.

And for industries where compliance matters (i.e. legal, life sciences, financial services, etc.) this flexibility comes with something just as important: stability. Security trimming stays intact. Permissions remain as they should. You get the freedom to explore without putting sensitive information at risk.

Why this matters for daily work

AI feels like part of the workflow, not a separate destination

Teams don't have to bounce between tools to find answers

Results improve because the system finally sees everything connected

You move forward without disrupting how people already work

What This Means for Your AI Journey

Once a trusted knowledge foundation is established, the whole conversation around AI changes. As uncertainty and skepticism fades, the focus shifts from proving readiness to actually deciding how far you want to go.

This is when teams start examining where AI can be deployed to save time, improve decisions, or lighten workloads.

The impact your teams will notice

| Faster turnaround on research and analysis

| More complete information behind decisions

| Less time wasted tracking down sources

| A growing sense of trust in the tools

Your roadmap opens up, too. Some organizations choose to roll out AI agents department by department. Others focus first on search improvements.

Many continue experimenting with different models before committing to one direction. All of these paths work because a strong knowledge foundation supports every possibility—without requiring a rebuild.

The greatest benefit: freedom

| With BA Insight, organizations aren't tied to a single vendor

| Switching or expanding models doesn't undo your prior work

| New tools can be added without breaking your structure

| Your strategy can evolve at the same pace as the market

Instead of feeling locked in, you gain room to grow. AI stops being a fragile experiment and becomes something that can actually scale with your organization.

Bringing It All Together

AI creates an ongoing, fundamental shift in how organizations work, how decisions get made, and how people access critical information. Those that succeed aren't chasing the newest model or rushing into another pilot. They're the ones focused on the foundation first.

Better answers today... and the ability to evolve tomorrow

Once your knowledge is connected, structured, and delivered in the right moments, everything changes. Search becomes more reliable. AI becomes more accurate. Security is stronger than ever. And your organization gains the freedom to experiment, grow, and evolve without fear of disruption.

This is the real goal of AI enablement: giving your business a foundation strong enough to support whatever comes next, whether that's a full Copilot rollout, a move toward agents, or simply better answers for your teams today.

BA Insight is built for that kind of journey. Our technology is not a quick fix or a one-time tool. With our AI enablement solution, you gain a steady, flexible solution that helps your organization make smarter use of the knowledge it already owns.

What BA Insight delivers for enterprises

- A unified view of information across systems, eliminating silos

- Cleaner, clearer content that AI and search can actually use

- Delivery that fits naturally into your teams' daily workflows

- Confidence that your systems can grow without breaking

- Flexibility to explore new AI opportunities at your own pace
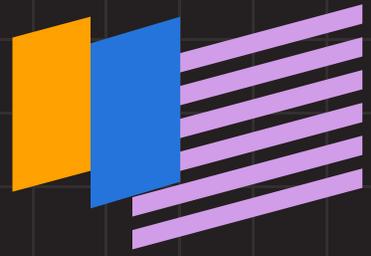
BA Insight

Our mission

At BA Insight we provide AI-agnostic enterprise search and AI enablement technology, seamlessly connecting 95+ systems while enriching knowledge from all connected sources to supercharge enterprise AI. We help enterprises to access, prepare, and deliver the knowledge needed to power AI projects.

Contact us.

uplandsoftware.com/bainsight