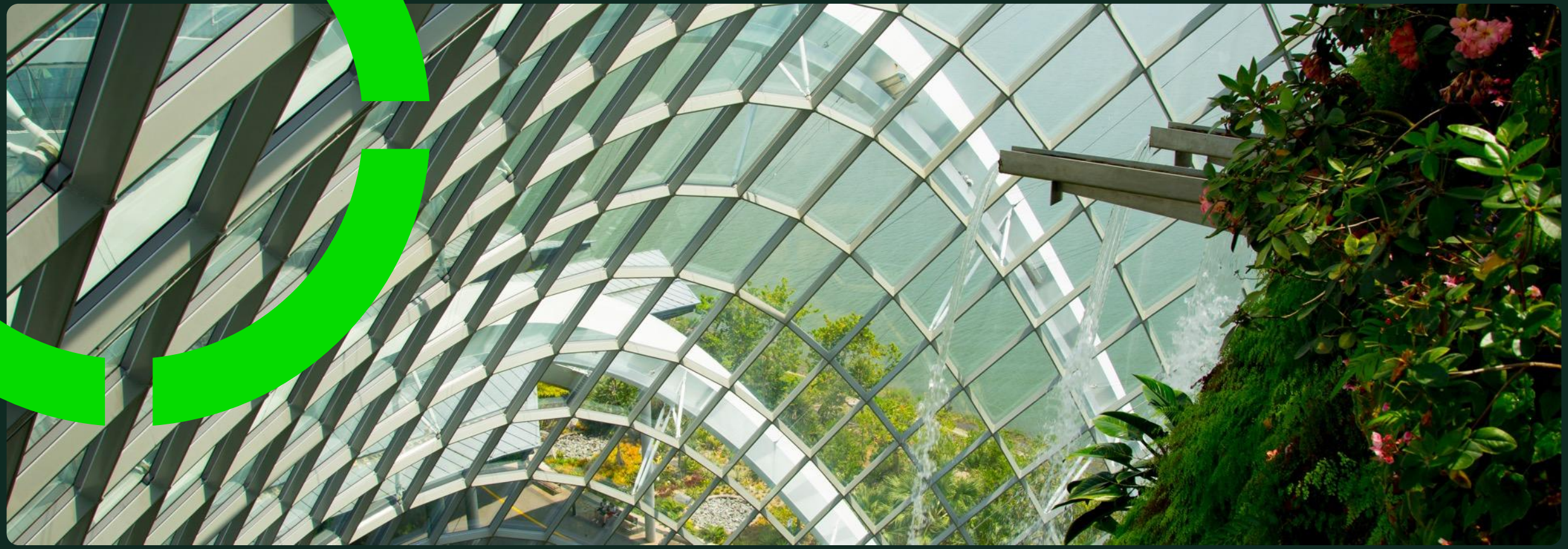


Introducing Planon AI

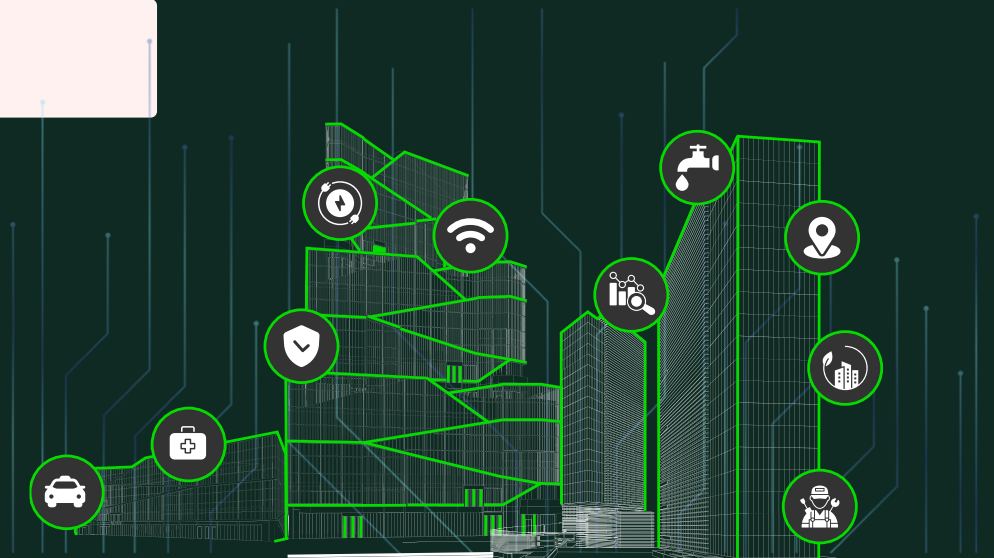
Unlock new experiences and greater efficiencies

Irina Mladenova
Chief Product Officer

Planon
Building Connections

Agenda

- AI Applications and Use Cases
- Unique Approach to AI
- Concerns and Solutions
- Business Benefits
- Discussion / Q&A



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Poll #1 Where will AI be most valuable to you?

1. Automation of laborious, repeat workflows?
2. Data insights for faster decision making?
3. Predictive capabilities?
4. Compliance and reporting?
5. Other (please specify)?

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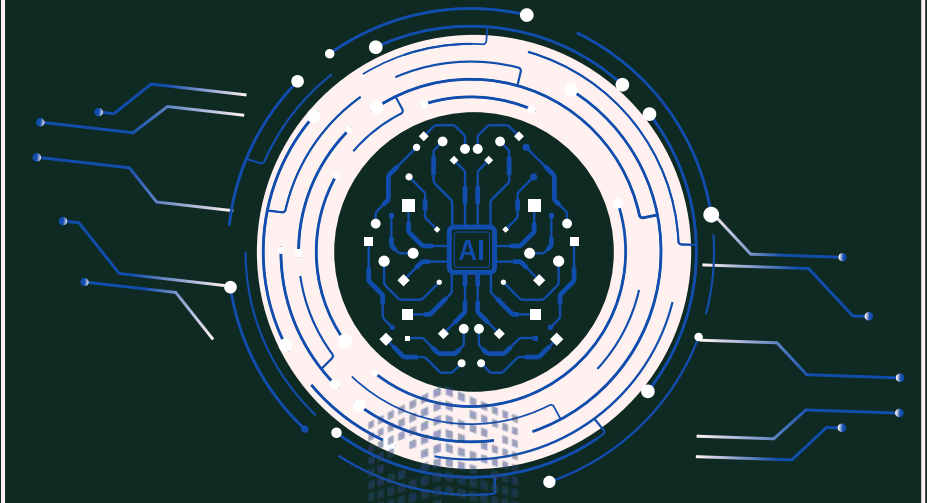
AI Unlocks New Ways of Working

Operations

Enables adaptive maintenance, real-time asset monitoring, and predictive energy management.



Experience

Let building users benefit from natural language interactions and handle service requests faster and more intuitively.

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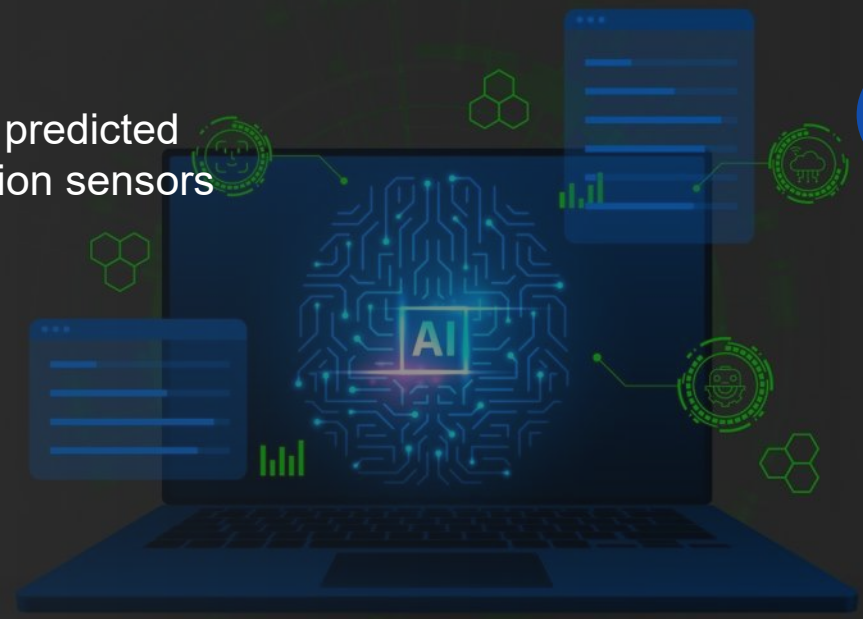
AI Transcends the Limitations of Rules-based Systems

Better with AI

Adaptive Maintenance
AI predicts optimal service intervals instead of fixed schedules.

Comfort Control
AI adjusts heating/cooling based on usage patterns, not just temperature.

Energy Demand
AI dims lights based on predicted occupancy, not just motion sensors



Only possible with AI

Smart Ticket Triage
AI prioritizes and routes work orders based on text, urgency, and history.

Document Summarization
AI extracts key actions and risks from contracts and manuals.

Chat Interfaces
Users can interact with the system using natural language instead of forms.

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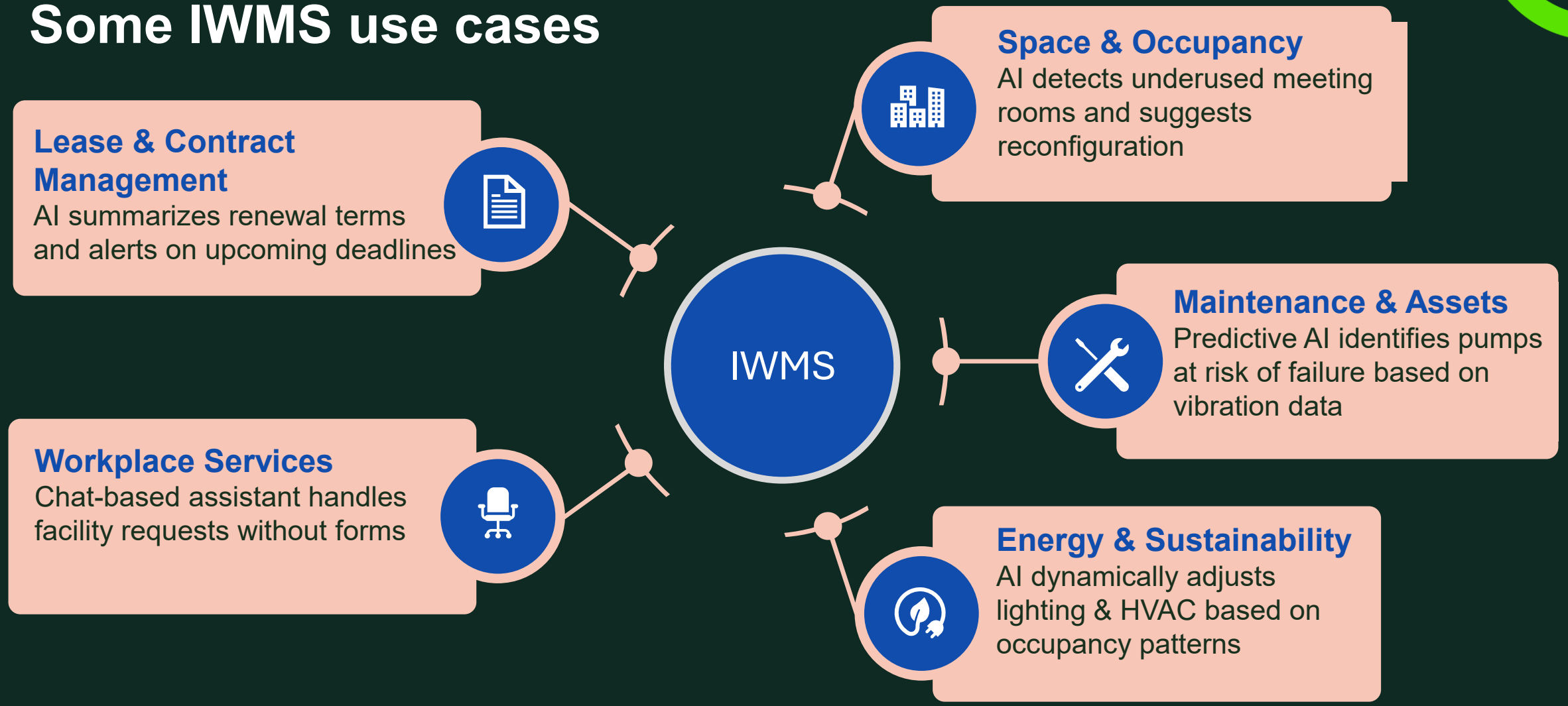
Some IWMS use cases



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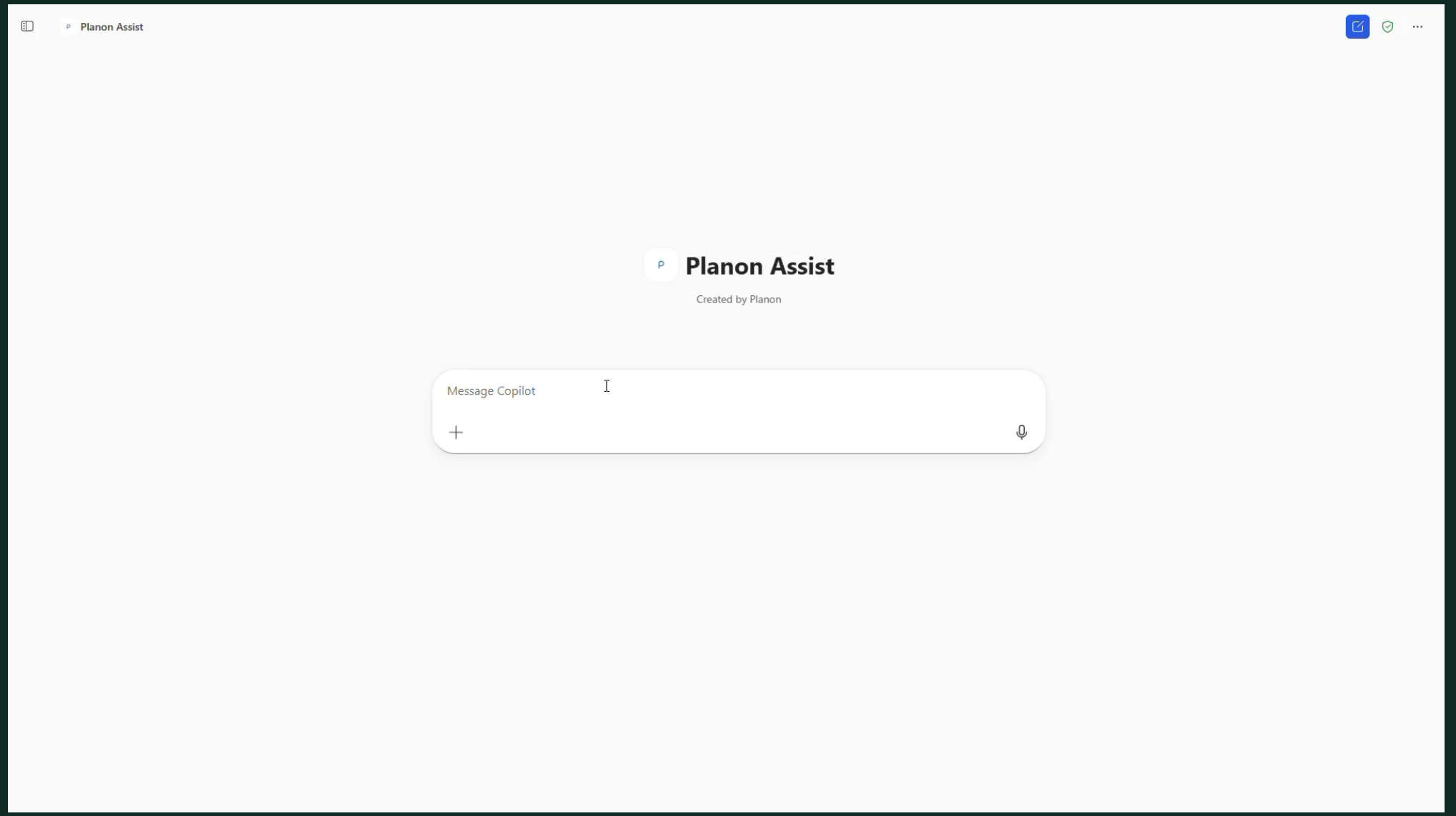
Video 1: Planon Assistant for Submitting a Service Request



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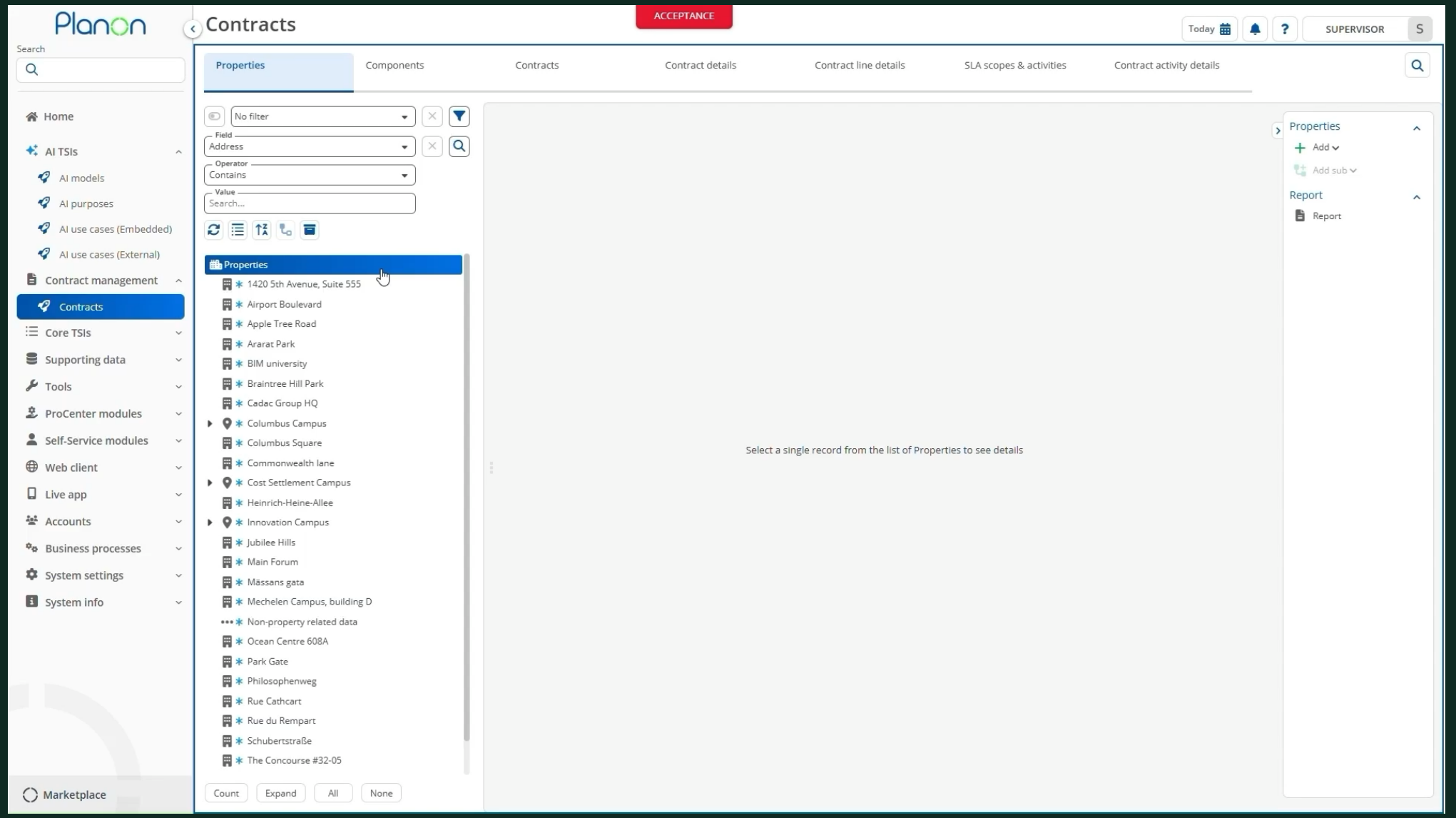
Video 2: Lease Abstraction



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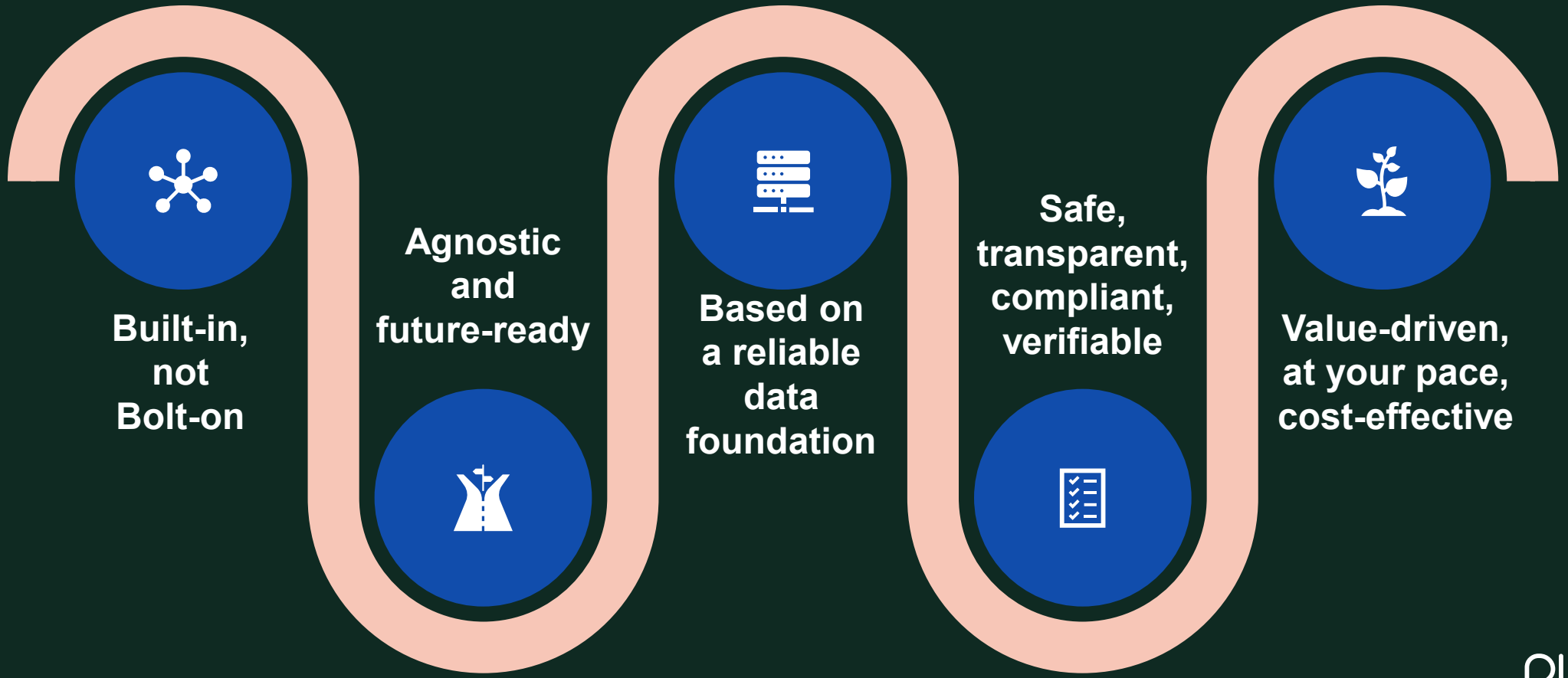
What Makes Planon AI Unique: **Five Differentiators**

Planon AI is a *framework*, not a *feature*

Enhance your data, processes, and user productivity



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Planon AI – Multiple Ways for Incorporating AI

Integrated into the Planon Platform and applicable everywhere

AI as front-end user interface

Joule · Claude · Copilot · ChatGPT

MCP Service

Connect Planon data and workflows directly into your own AI ecosystems

AI embedded in Planon solutions

LLM

LLM Services

Embed standard AI use cases via all user interfaces, based on your preferred AI services

AI via Planon Platform integration

AI

AI Use cases

Extend with fit-for-purpose AI models for specialized AI use cases

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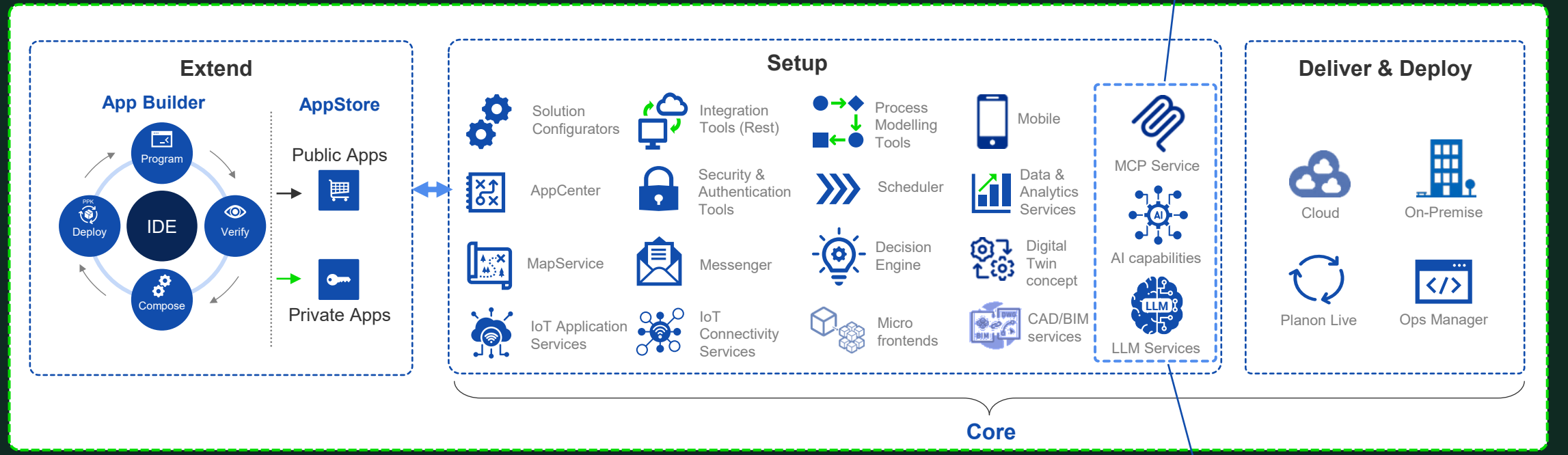
Poll #2 Which approach for enabling AI is the best fit your organization?

1. Fully embedded AI workflows that work in the background as part of the core Planon product
2. Connecting to our existing AI ecosystem (ex: Microsoft Copilot, Google, etc)
3. We have many, specific use cases and prefer to develop ourselves as private/public apps
4. A mixture of all 3 approaches
5. We have not decided yet

Planon AI – Built-in, not Bolt-on

An integrated part of the Planon Platform



Note: confidential. All examples are under current review at research stages.

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AI: The Planon approach

Connect: External integration

- Planon can be connected to popular external AI tools – like Copilot or ChatGPT using MCP (Model context protocol).
- AI use cases can be configured in Planon and exposed to the MCP server.
- Users can the trigger these use cases through natural language:
  - “The lift is broken”,
  - “Can you book a meeting room for 4 people next Tuesday?”.
  - “Can you give me a list of all properties that have rent review this year?”
- By connecting Planon to your preferred AI assistants through MCP, you maintain complete control over the models you use, ensuring Planon aligns with your AI strategy and provides a consistent, AI experience across all integrated applications.

Embed: AI in Planon

- Planon now has built-in connections to one or more Large language models.
- These models run can run in the same region as the Planon instance (GDPR compliant) and are based on the cloud provider (global and geographical models are also possible).
- AI use cases can be configured in Planon and plugged in to existing workflows within Planon. For example, within business rules, actions, scheduled tasks or step methods.
- This approach allows you to enhance your existing workflows by bringing intelligent, AI-driven automation directly into your daily processes.

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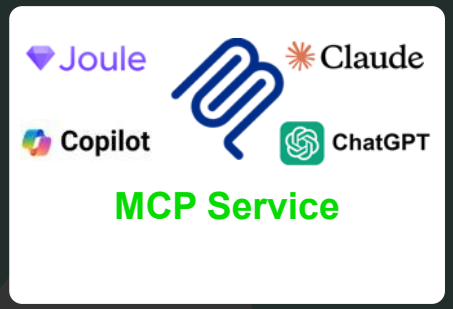
Planon AI: Connect details

AI as front-end User Interface



Connect Planon data and workflows directly into your own AI ecosystems

A Planon instance now comes with a “Planon MCP” server. This means:

- From an external assistant (with MCP client capabilities), agents can be created that can be connected to Planon. Through the agent, users will login, and standard Planon authentication and authorization will apply.
- External AI use cases (including AI tools) can be built by Planon, partners and customers.
- These External AI use cases are configurable (incl. settings, managing user access) and can be ‘exposed’ to the Planon MCP server – all configured in Planon.
- First (Planon created) **Connect** AI use cases:
  - Create service request / My requests / Request details (Planned for Q1 2026)
  - Create reservation - rooms, desks and assets (Planned for Q2 2026)

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Planon AI: Embed details

AI embedded in Planon solutions

LLM Services

Embed standardized AI use cases via all user interfaces, based on your preferred AI services

Planon can already be connected to one or more Large language models. This means:

- Embedded AI use cases (including AI tools) can be built by Planon, partners and customers to make use of the connected LLMs.
- When using these models, data never leaves the region (without your agreement), data is never stored in the model and data is never used to train the model.
- Each Embedded AI use case is configurable (incl. settings, managing user access) - all configured in Planon. When triggering these use cases through Planon, Planon's standard authorisation layer applies.
- First (Planon created) **Embed** AI use cases:
  - Lease contract abstraction (Planned for Q2 2026)
  - Service contract abstraction (Planned for Q2 2026)

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Planon AI - agnostic and future-ready

AI is evolving from **augmentation** to **automation**

Assistant

Augment (user) productivity

AI Provides insights or recommendations

Generative

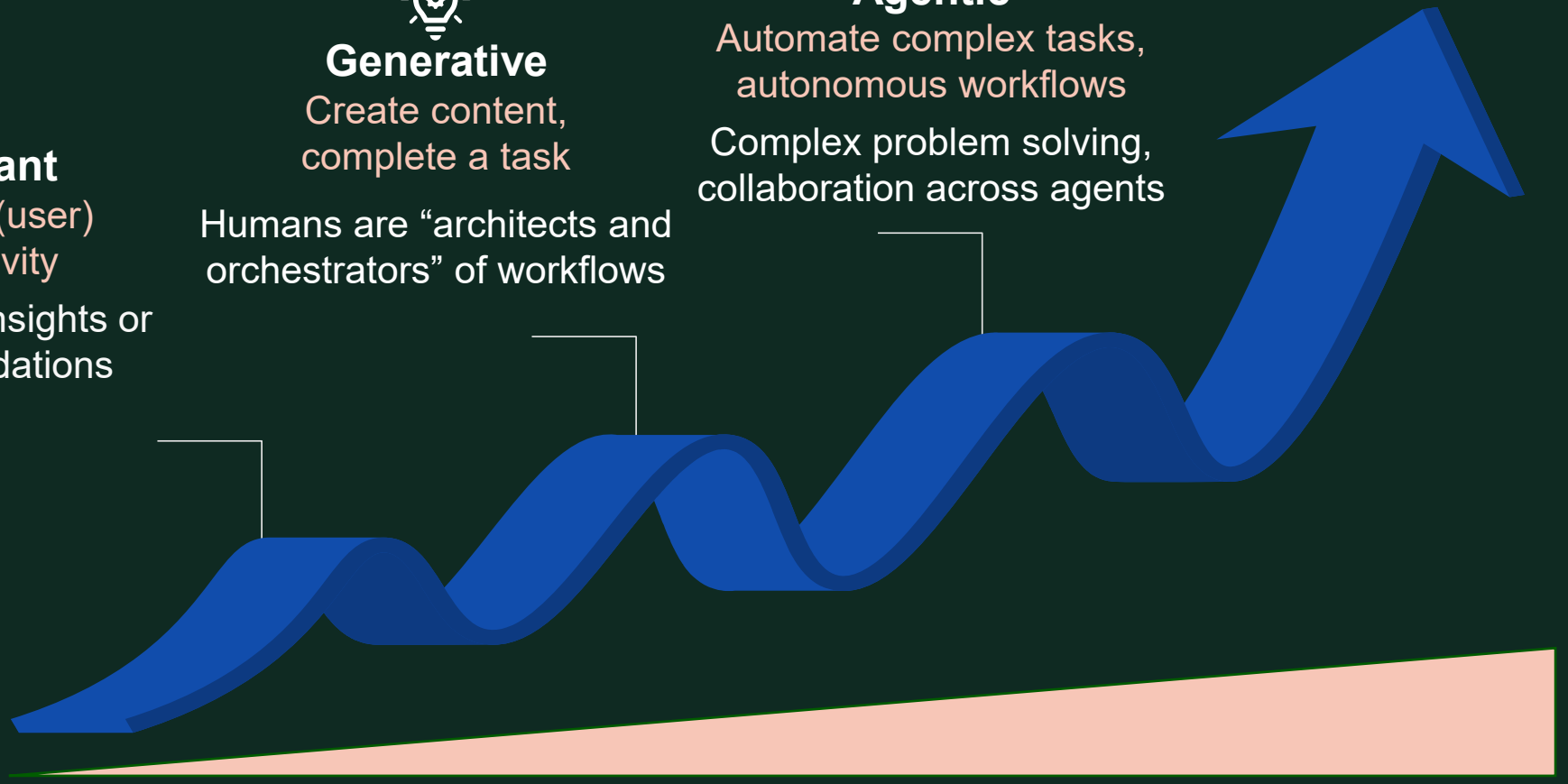
Create content, complete a task

Humans are “architects and orchestrators” of workflows

Agentic

Automate complex tasks, autonomous workflows

Complex problem solving, collaboration across agents



Engage to augment
(Supporting humans)

Engage to automate
(Replacing humans)

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There is no AI strategy without a data strategy

JLL - IFMA, Webinar Navigating the IWMS Landscape - AI, Disruption and Strategic Alignment in the Workplace (11th June 2025)

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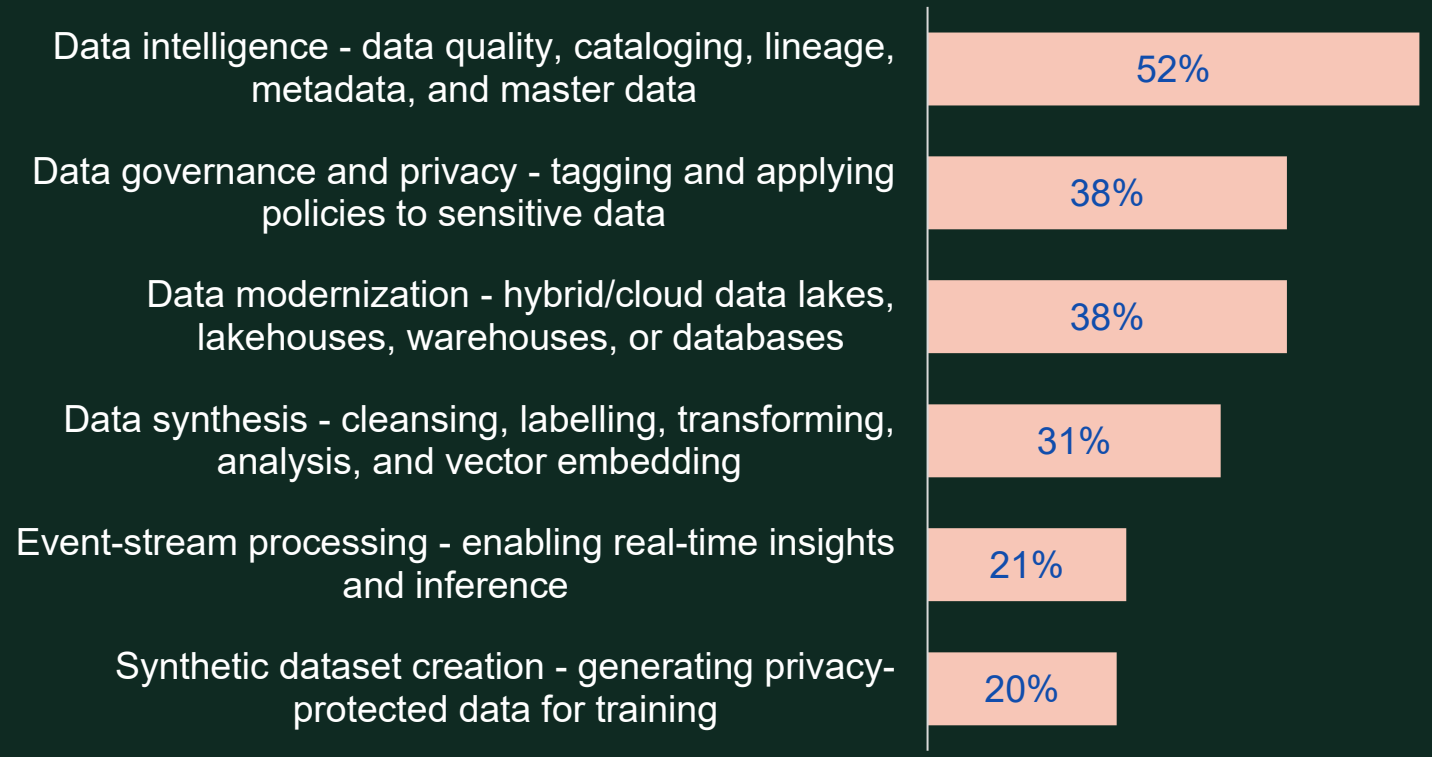
A reliable data foundation is key for benefiting from AI

Organizations are ramping up investments in data control functions for AI readiness

What is your organization's most important data-related area of focus and investment?



This is where a true unified solution like a CPIP/IWMS makes the difference for the built environment

Source: Future Enterprise Resiliency & Spending Survey Wave 1, IDC, February 2025, N=353

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Poll # 3 What concerns you the most about the use of AI in your daily work?

1. Data Privacy
2. Data Security
3. Bias and Accuracy
4. Cost
5. Complexity
6. Other (please specify

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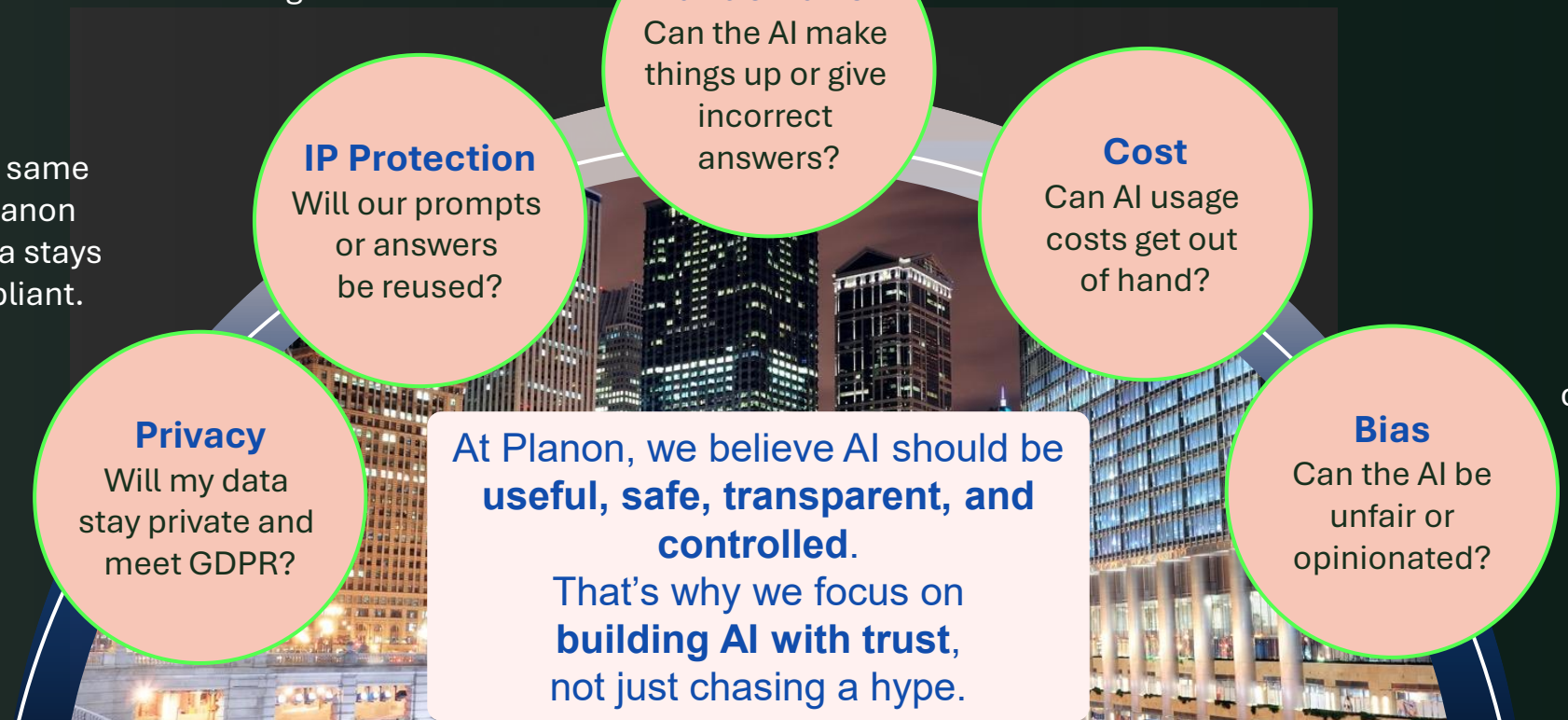
AI concerns – especially in Generative AI



Hallucination
Can the AI make things up or give incorrect answers?

The AI uses your company data-not the internet-so answers are grounded and verifiable.

IP Protection
Will our prompts or answers be reused?

No-your prompts are isolated per customer. Nothing is reused or shared for model training.

Cost
Can AI usage costs get out of hand?

You control usage through licenses. No surprise bills-cost is transparent and scalable

Privacy
Will my data stay private and meet GDPR?

Yes-AI runs in the same region as your Planon instance. Your data stays private and compliant.

Bias
Can the AI be unfair or opinionated?

Planon uses trusted models and applies them only to your data in factual, controlled scenarios.

At Planon, we believe AI should be **useful, safe, transparent, and controlled**.
That's why we focus on **building AI with trust**, not just chasing a hype.

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Planon AI – Business Benefits

Move from smart buildings to thinking buildings

Operational Efficiency

- AI unifies incident management, automates triage, and leverages predictive maintenance.
- Dynamic scheduling optimizes technician routes and SLAs, while Copilot-driven reporting eliminates manual effort.

Measurable benefits:

- Improved SLA adherence
- Lowered email-to-work-order leakage
- Lowered downtime and costs

Improved Service Experience

- Intelligent prioritization, proactive notifications, and easy self-service interfaces deliver faster, more transparent service.
- Real-time updates and predictive maintenance prevent disruptions, while agentic workflows speed coordination.

Measurable benefits:

- Decreased time to first response,
- Improved user experiences
- Increased customer satisfaction

Supporting Compliance

- AI automates document validation, converts risk assessments into actionable tasks, and creates audit-ready evidence packs.
- Integration across systems ensures a single source of truth for compliance data.

Measurable benefits:

- Increased document validity coverage
- Reduced audit prep time
- Reduced activity and asset non-compliance

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In sum, what makes Planon AI unique?

Agnostic: Any preferred AI technology can be applied, to match your specific AI use cases.

Ease of deployment: AI use cases adhere to configuration and authorization settings, making deployment straightforward.

Control: Customers are always in control of their data, AI models, assistants, and costs.

Secure setup by design: LLM services are part of the Planon instance. Data never leaves the cloud region, is never stored on the LLM, and is never used to train external AI models.

Collaborative ecosystem: Use cases can be created by Planon, customers, or partners, fostering innovation and flexibility.

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FAQ

1. Can AI be used in Planon (or with my data) without my knowledge/permission?

   Answer: No. You are in control when configuring/enabling the use cases, and configuring who has access to them.

2. For both approaches (external integration and embedded use case), how do you control who has access?

   Answer: In both cases, admins can control user group access.

3. For external integration, how do you ensure people do not access or prompt on data that they should not have access to?

   Answer: Standard Planon authentication and authorisation is applied when prompting.

4. For the cases where Planon utilises Large language models – where does our data go, and how is it used?

   Answer: You are in control of this - We can offer both geographically specific and global models. Alongside this, your data is never stored in the model, and never used to train the model used.

5. For the cases where Planon utilises LLMs – what safeguards do you have in place to prevent misuse?

   Answer: The models themselves provide some safeguards as a minimum. Next to this, we have our own system prompt (to prevent misuse) as well as guardrails on specific terms and words.

6. For the cases where Planon utilises LLMs – how do you prevent (or limit) possible hallucinations?

   Answer: Whilst not completely impossible to prevent, our system and solution prompts are focused only on using the data that is available in Planon. All answers given should be focused on providing answers, based on this.

7. How will Planon display data that has been created, or modified by AI?

   Answer: We are still assessing our options as we continue to ensure we meet all required governance. Based on this, we expect that we will have some clear indicators when data is created by AI or requires reviewing due to AI creation.

Discussion / Q&A

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Thank you

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