

How RAG Works

A simple guide to using AI with better source context



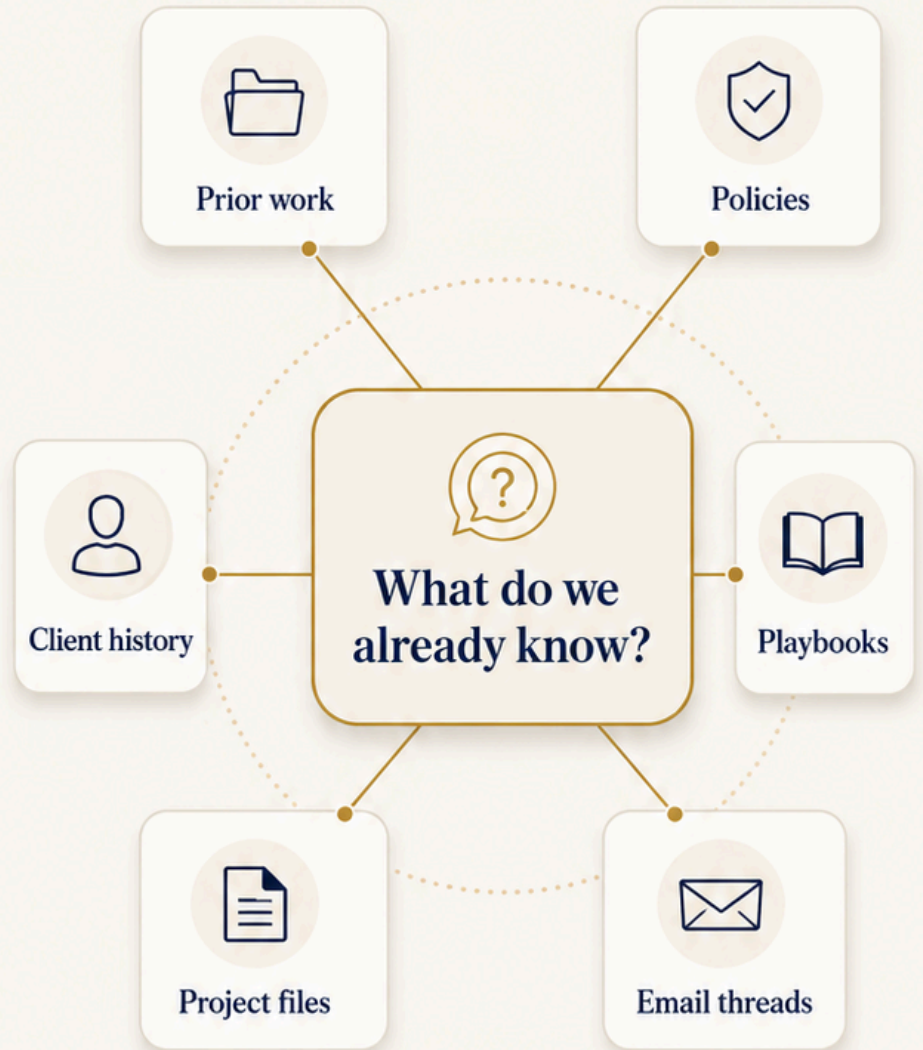
Use this guide to understand the basics of RAG and how source review supports responsible AI use.

Use the Knowledge Your Team Already Has

Professional services teams already have valuable knowledge in prior work, policies, project files, client histories, playbooks, and people's experience.

RAG helps bring relevant source material closer to the question being asked so AI can work with better context.

USEFUL KNOWLEDGE IS OFTEN SPREAD OUT



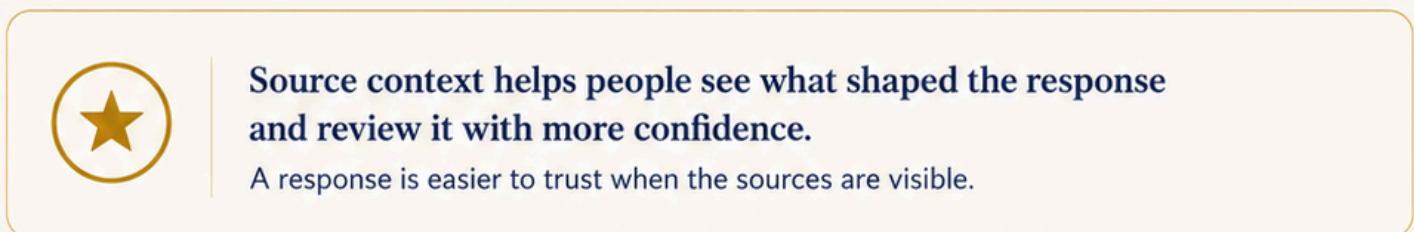
RAG helps bring relevant source material closer to the question.

Strong AI Responses Start with Source Context

Source context is the information that helps explain how a response was shaped. Without visible source context, an AI response may be harder to review.

When approved source material is available at the time of use, AI can work with that material instead of relying only on general training patterns.

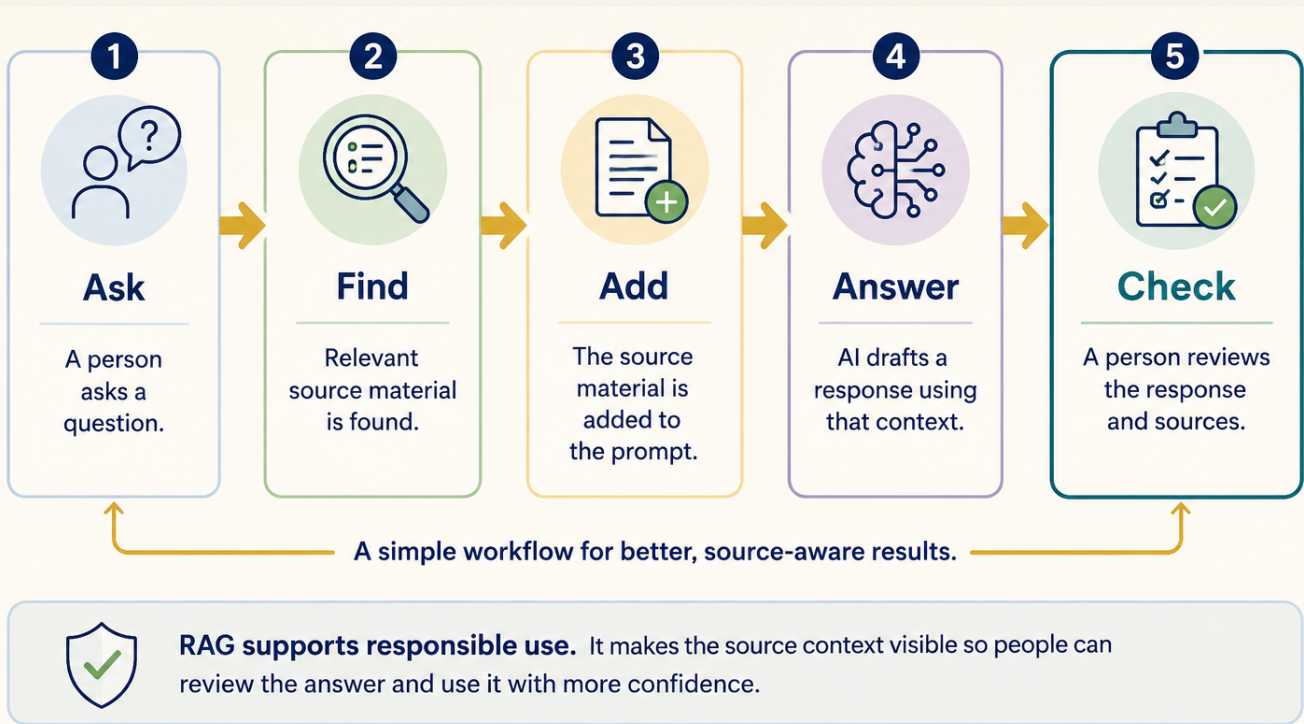
COMPARE THE PATHS



A response is easier to trust when the sources are visible.

How RAG Works

After source material is added, the work follows a simple pattern: ask, find, add, answer, and check.



A clear workflow helps teams use RAG consistently.

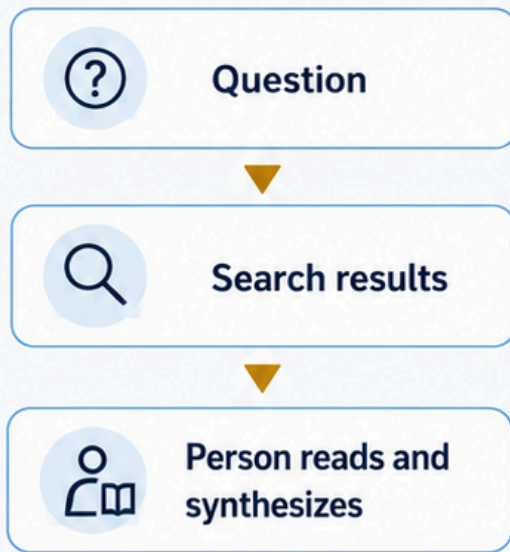
RAG Brings Source Material into the AI Workflow

Search helps people find documents or passages to read. RAG builds on that idea by bringing relevant source material into the AI workflow.

TWO WAYS TO WORK WITH INFORMATION

Search

Source material goes to the person



RAG

Source material goes into the AI context



RAG changes where source material goes.

It helps AI draft with relevant context, and it helps people review the response more confidently.

RAG changes how source material is used by bringing relevant context into the AI workflow.

Use a Review Routine for RAG Responses

RAG can make review easier, but it does not make review automatic. People still need to check whether the sources are useful, the context is enough, and the response is ready to use.

CHECK BEFORE YOU USE THE RESPONSE



RAG supports the work

- Brings relevant source material closer to the response
- Helps make review easier
- Supports more consistent source checking



People guide the work

- Confirm the sources are appropriate
- Add context when needed
- Decide whether the response is ready to use

Before You Move Forward

A RAG-supported response gives teams a better starting point for review.

Before using it, connect the response, the sources, and the human decision that follows.



Source

What shaped the response?

- What sources was this based on?
- What useful source might be missing?



Access

Can we use this material?

- Is the material appropriate for this use?
- Do permissions or team rules apply?



Review

What should happen next?

- Do the sources support the response?
- Has the right person reviewed it?

A useful RAG workflow makes the source trail easier to see. That helps people ask better questions, add missing context, and decide whether the response is ready to use.



FINAL QUESTION

What work in your organization could improve if the right knowledge were easier to find when people need it?