

AI Practical Use Case Webinar

Next Steps for Business Leaders

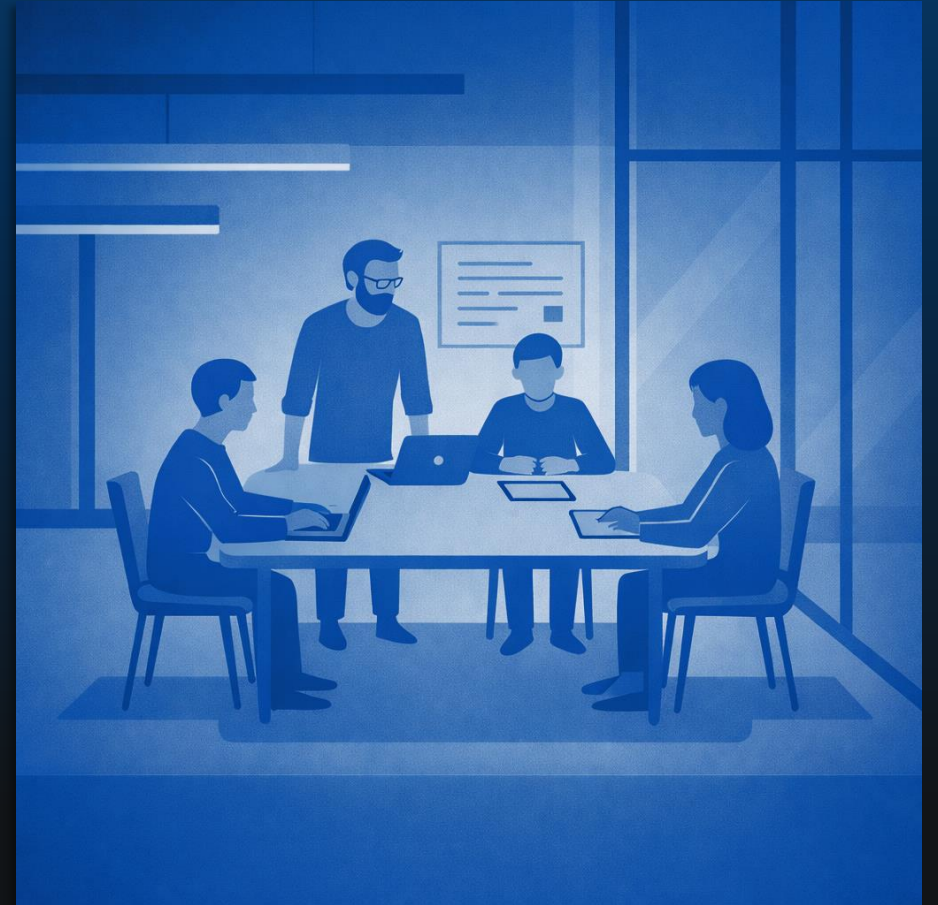


[Click here to watch webinar on YouTube](#)

IntelliTect

About IntelliTect

IntelliTect builds scalable, cloud-ready applications and AI solutions that help organizations modernize systems, harness data, and move faster. From architecture and development to integration and DevOps, we deliver software engineered for lasting impact.



IntelliTect

Our Services



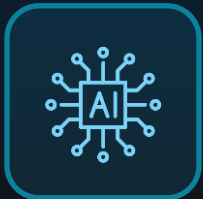
Software Development

Custom-built solutions that support growth, agility, and innovation, even in the most complex enterprise environments



Cloud & DevOps

Scalable, secure infrastructure with automated CI/CD pipelines, container orchestration, and cloud-native practices.



Data & AI

AI-powered solutions that unlock business intelligence, automate workflows, and drive smarter decisions.



System Integrations

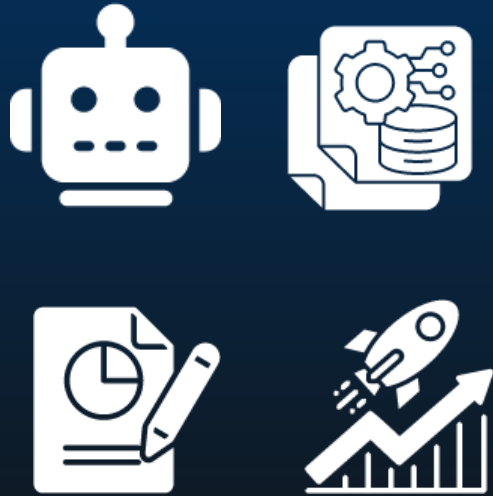
Connecting critical systems and tools to streamline workflows and eliminate data silos.

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Agenda

AI Enablement

- in your **Job** with Dan Olvera
- in your **Department** with Rob McFarland
- in your **Product** with Elizabeth Pauley



AI in your Job

Successful AI adoption starts at understanding how to personally use AI in your everyday work

Dan Olvera



How to get started?

Replace everything with AI?

Just use it instead of Google?

Post on LinkedIn about being a prompt engineer?

Starting Personal

What do you love most about your job?

What do you hate most?

This is where you should look to automate away your annoyances

Start with one process

Defining processes can take time so start with one to just start building and using the tools

Repetitive work adds up

50-60% of the average work week is repetitive, annoying tasks*
94% of businesses are slowed by these repetitive tasks*



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More than “Just” Google Search



Claude

Best at documentation,
Autonomous work,
Artifacts, Connectors

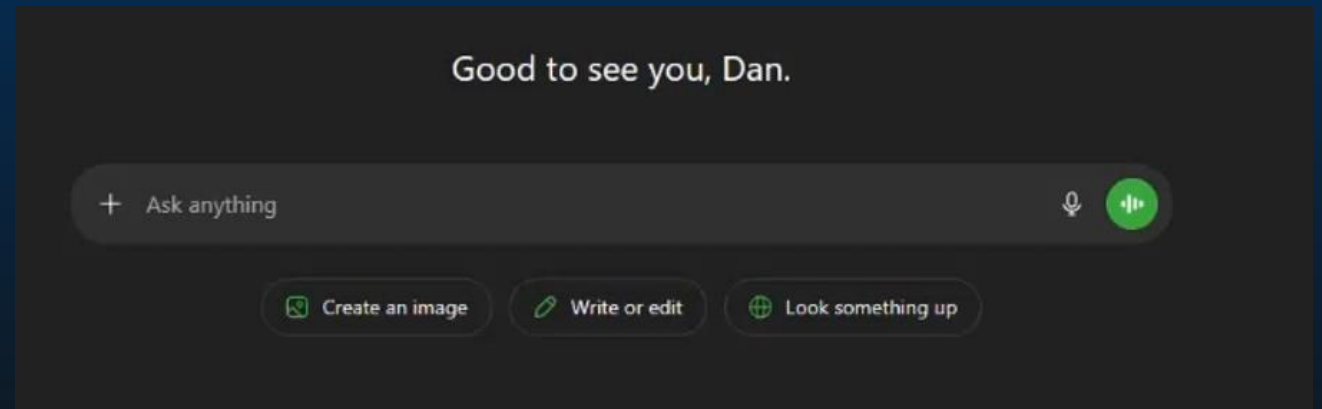


ChatGPT

Best general research,
writing, Apps, Projects,
GPTs

Leveraging ChatGPT Projects

By providing ChatGPT more context, organization, and structure, projects will help you get better ChatGPT responses for your specific use cases.



[Watch demo on Youtube](#)

Low-Barrier Automation



Copilot Studio
General agents
and flows



Zapier
Many integrations
and pre-built
actions



Event Management Pipeline

Plan Event

Graphics

YouTube Livestream

Event pages

Social Media Posts

- Every month the same 5 things that I **DON'T** like doing and I am not an **EXPERT** in
- These are not **hard** things, but tedious things that can be optimized



Event Management with AI

Prompt AI with the basic info

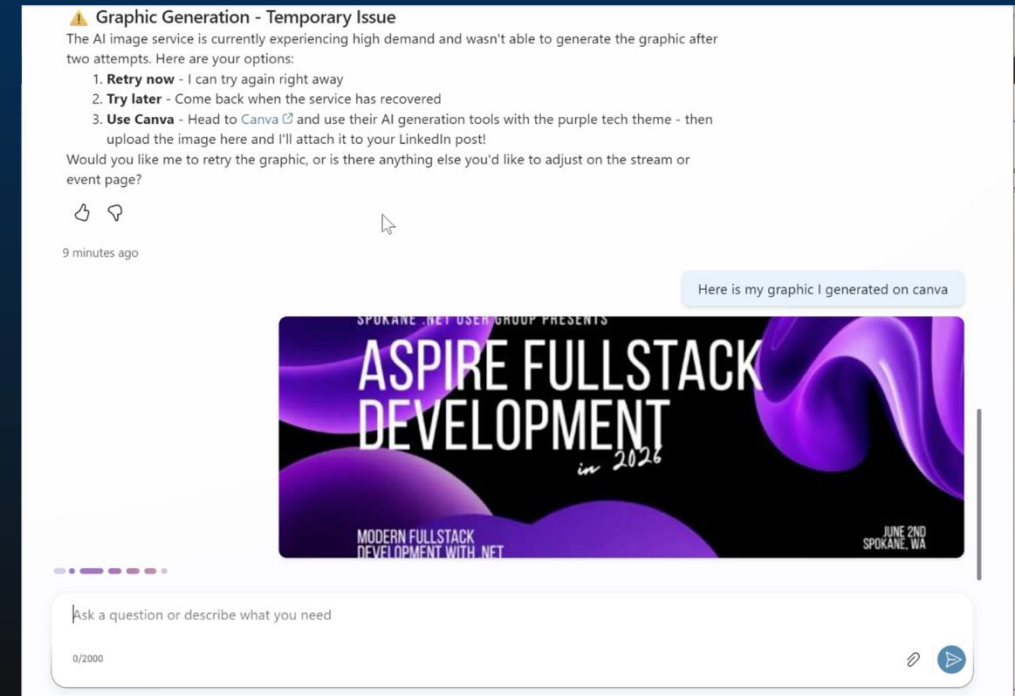
Iterative AI process

Review AI Outputs

- Now once I give the agent the overview, it can generate the graphics, schedule the YouTube livestream, write engaging description all with human review and iteration baked into it
- This also allows for content to be re-purposed easily

Copilot Studio Automation Demo

Copilot Studio agents can manage processes, build content, and manage your events all from a chat-based interface. This demo showcases creating an event and doing all the necessary admin work to schedule it.



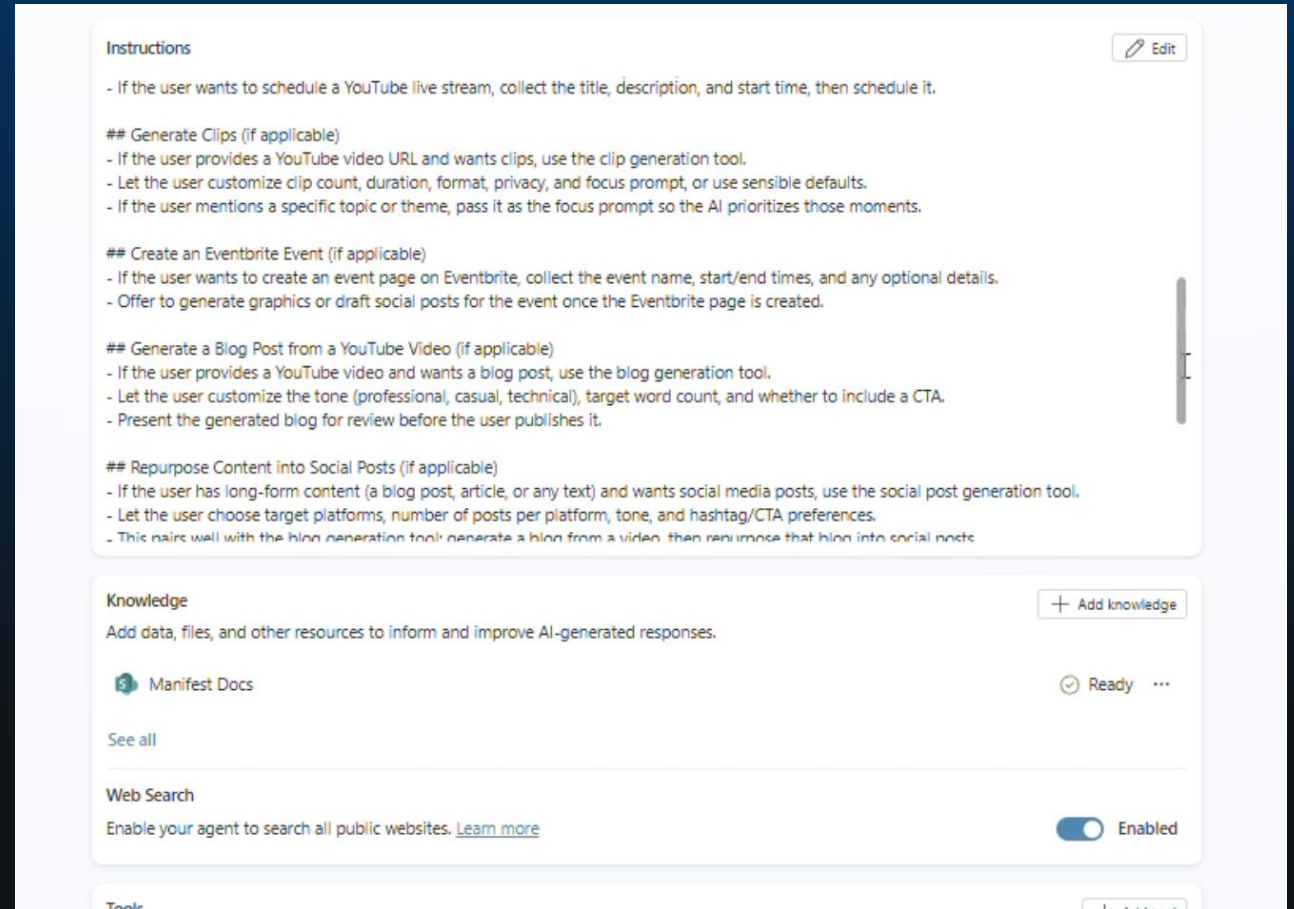
[Watch demo on YouTube](#)

Copilot Studio Automation Explained

Purpose-built agents in Copilot Studio help to power automation and provide a chat-based interface to your annoying problems. Agents can use tools and instructions to empower their decision making.



[Watch explainer on YouTube](#)



Your One Task

- Name the annoying task
- Ask AI to map ways to automate it

I'm a [role]. Every [week/month], I have to [describe the annoying task]. It involves [steps]. I want to automate this. What tools would I use? What would the workflow look like? Where would I start?

+



- Measure it before and after in hours



Sources

McKinsey

[The Economic Potential of Generative AI: The Next Productivity Frontier](#) (June 2023)

[The State of AI in Early 2024: Gen AI Adoption Spikes and Starts to Generate Value](#) (May 2024)

[The State of AI: Global Survey 2025](#) (November 2025)

[Workers Spend Too Much Time Searching for Information](#)

Metricool

[State of AI in Social Media](#) (August 2025)

Ngram

[AI Video Statistics for 2026: The Data behind Video's Biggest Shift](#) (April 2026)

Gitnux

[Workflow Automation Statistics](#) (April 2026)

ServiceNow

[Automation Statistics: What the Data Says About Business Automation](#) (2024)

Zapier

[State of Business Automation](#) (April 2021)



AI in your Department

Rob McFarland

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First Contact with an Intelligent Lifeform



AI changed the scope of the job

One person can now do work that used to require a team of specialists.

Pressure hit marketing early

Write faster, design more, analyze everything, and support more channels with fewer resources.

No longer just a writing shortcut

It is now becoming the operating layer for how modern marketing work gets planned, created, reviewed, and shipped.

Creative Production Unlocked

Image generation made value obvious

Instead of searching for stock or designing from whole cloth, we can quickly create custom imagery. Quality has improved exponentially.

What changed:

- Consistent style across multiple posts
- Faster iteration
- More control over tone, subject, visual metaphor
- Better integration with Adobe tools



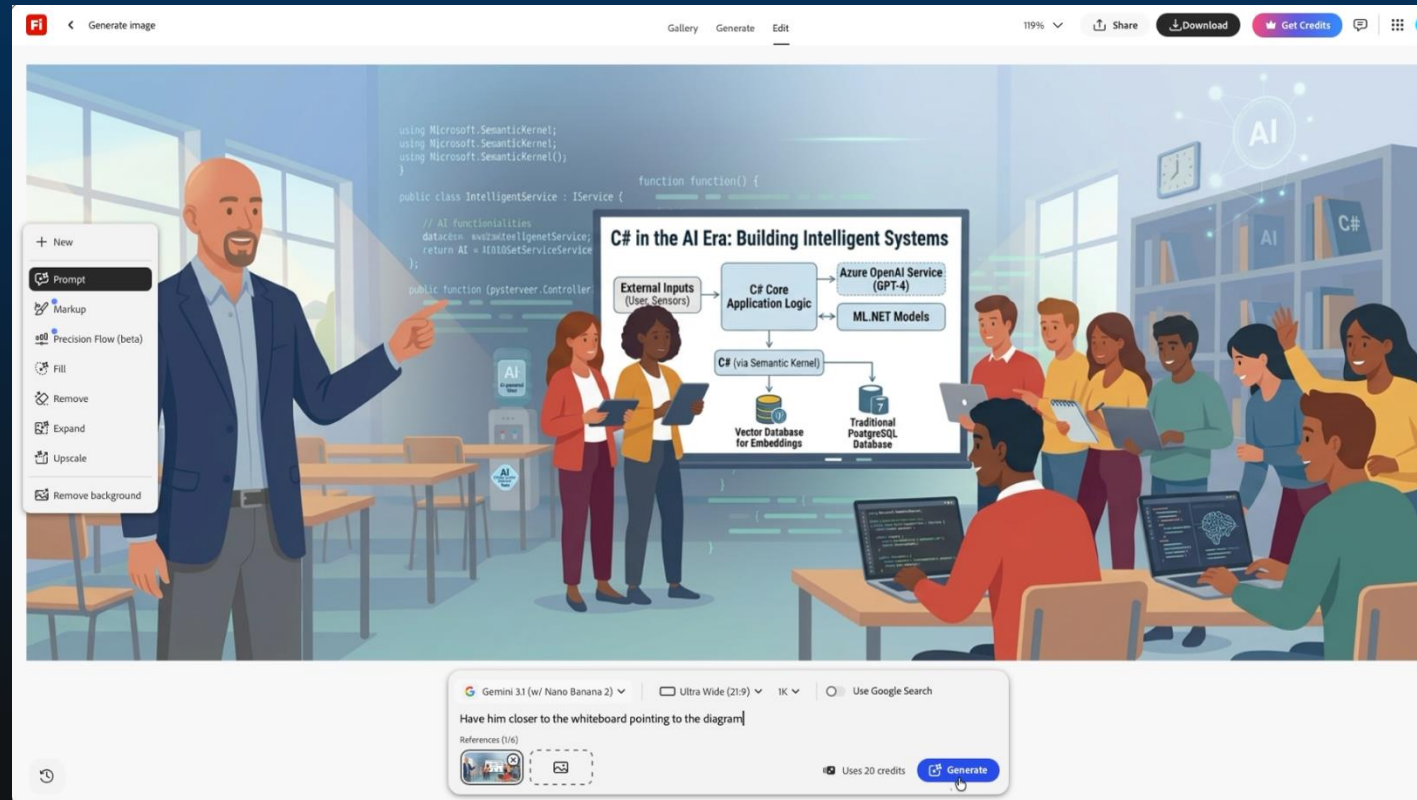
Adobe Firefly



Nano Banana



Creative Production Unlocked



[Click to watch quick Firefly demo on YouTube](#)

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Text Generation Solved A Harder Problem

Case studies exposed a real bottleneck: me

The writing is challenging enough, but the real effort was translating technical language into clear business value.



The image shows a screenshot of a flight board and a blog post snippet. The flight board has a header with 'FLIGHTS' and a yellow airplane icon. Below it is a table with three columns: 'TIME', 'DESTINATION', and 'FLIGHT'. The table contains three rows of flight information. Below the flight board is a blog post snippet with the title 'Enhancing Enterprise Integrations at Consolidated Edison with Event-Driven Logging & Monitoring' by Dan. The snippet includes a 'Background' section with a link to 'Consolidated Edison (ConEd)' and a brief description of the company's services.

TIME	DESTINATION	FLIGHT
13:10	REST	RE 400
13:15	BIZTALK	BT 500
13:20	AZURE	AZ 600

Enhancing Enterprise Integrations at Consolidated Edison with Event-Driven Logging & Monitoring

by Dan

Background

[Consolidated Edison \(ConEd\)](#) services over 10 million customers including electric, gas, and steam services. Having been in the business for over 200 years, the company partners with a vast network of vendors to provide quality service – from customer billing to business operations.

Original Workflow

- Engineer questionnaire
- Technical interpretation
- Drafting and revision
- Editorial review
- Blog, one-sheet, social posts, & supporting visuals

AI-Assisted Workflow

- Upload context
- Generate structured draft
- Edit and refine
- Create supporting assets from the same source material

Still Largely A Manual Process

Still depended on me :(

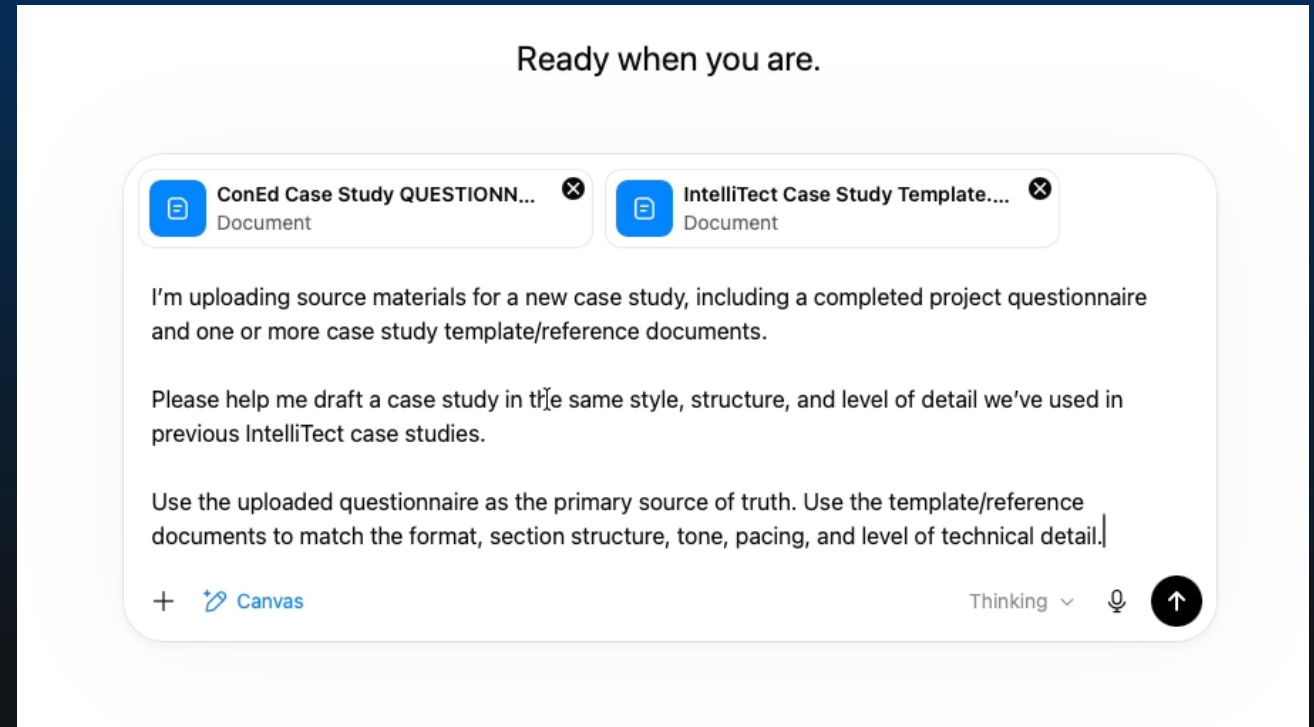
Gather context > ask follow-up questions
> structure the story > generate assets > publishing.

The next opportunity

Turn the repeatable parts of the process into an agent-driven workflow.

The goal

Capture the expertise, not just the output.



[Click to watch quick demo on YouTube](#)

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Case Study Interviewer Agent

Built in Copilot Studio and delivered through Teams, the agent turns developer interviews into case study drafts.

The developer does not fill out a long form. They have a guided conversation with an expert.

The agent captures:

- Project context
- Client challenge
- Technical approach
- Business outcome
- Quotes and follow-up details
- Missing information that needs clarification

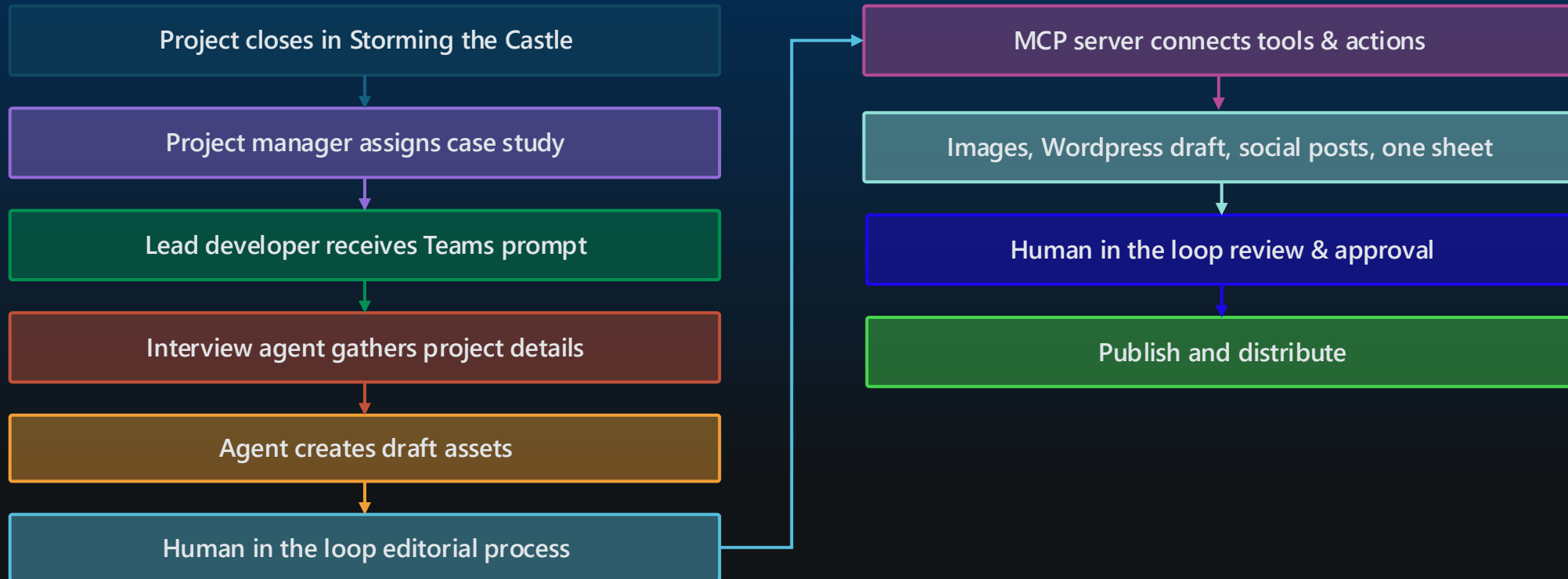
The agent generates:

- Case study blog draft
- One sheet copy
- Social media posts
- Image prompts
- Review-ready source material

Workflow: Project Close to Published Content

Doing a case study should not depend on someone remember to start it

The process can trigger when the project is closed and create marketable proof of expertise with less manual coordination. .



Storming the Castle is IntelliTect's proprietary professional services automation platform which combines project oversight, time tracking, resource utilization, opportunity pipeline management, and more.

IntelliTect

Build the System, Buy Specialized Tools

Agents and workflows we control

Strategy + Governance

Marketing Manifest, Brand Manager, approval workflows

Content Production

Case study interviews, blog drafting, image/video workflows, WordPress drafts

Demand Generation

SEO, social, email, events, CRM intake, lead scoring

Operations

Budget tracking, vendor management, backlog, automation documentation

Customer + Sales Support

RFP analysis workflows, QBR triggers, proposal support, demo video creation

Command Center

Orchestration, handoffs, agent visibility, review status

Platforms & tools we connect

Automation & Agents

Copilot Studio, Power Apps, Make, Zapier

Content & Creative

Adobe Creative Cloud including Firefly, Gamma AI, Opus Clip, ElevenLabs, Nano Banana, Canva, ChatGPT, Claude

Publishing & Campaigns

Wordpress, Mailchimp, Planable, YouTube, Eventbrite

Marketing Intelligence

SamSearch, SEMrush

CRM + Work Managment

Zoho, Asana, Planner

Marketing Manifest Agent

Agents need shared context

The Marketing Manifest gives the system a common source of truth for brand, voice, strategy, positioning, audience, offers, proof points, and approval rules.

Why it matters

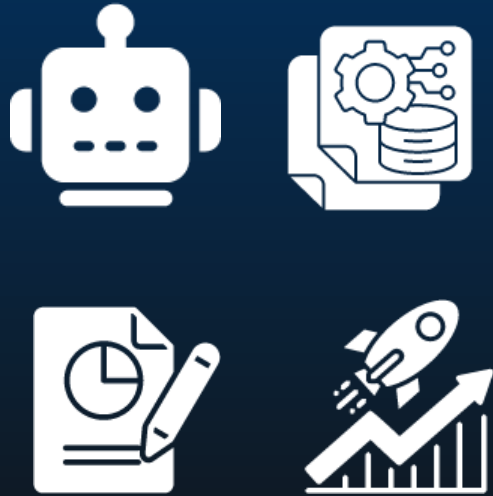
Shared context allows each agent to work from the same strategic foundation.

Influence

Follows the principles behind Karapathy's LLM Wiki and gives your agent ecosystem structured knowledge it can use to reason more consistently.

Index

1	Brand Foundation	Mission, vision, values, personality, voice, writing rules, differentiation
2	Services & Offerings	Eight service lines with descriptions, outcomes, and when-to-use triggers
3	Messaging Architecture	Positioning, value propositions, elevator pitches, audience/funnel messaging, claims rules
4	Audience & ICP	ICP definition, four buyer personas, buying committee dynamics, journey stages, objections
5	Content & Channel Standards	Format standards for blogs, case studies, web, social, email, events, landing pages, SEO
6	Claims & Proof Library	Approved claims, claims requiring support, prohibited claims, proof types, usage rules
7	Asset & Content Inventory	Asset categories, metadata schema, naming, status definitions, retrieval rules
8	Governance	Ownership, approval tiers, change process, review cadence, AI governance rules
9	Agent Definitions	Manifest agent role, sub-agent roster, interaction types, behavioral rules, escalation logic



AI in your Product

Using AI across the business to reduce administrative burden

Elizabeth Pauley



An AI-powered case management tool that helps case workers focus more on the people they serve.

Who are we helping?

- Case workers across human services, with a primary focus on **vocational rehabilitation**
- Organizations that operate under similar case management and reporting requirements

What's the problem?

- High caseloads
- Overwhelming paperwork
- Program funding tied to extensive reporting requirements

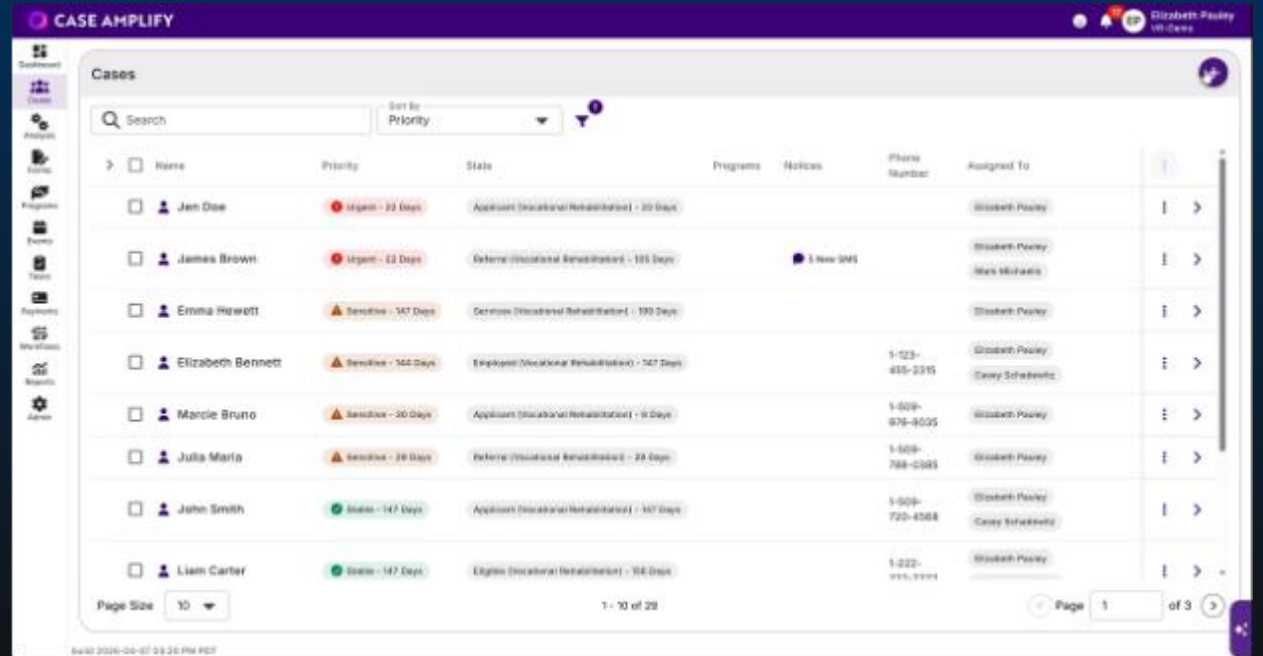
What Case Amplify Does

Automated Data Capture

The system analyzes client conversations and uploaded documents to identify and record relevant information automatically.

The Result

More present interactions. No more double-entry.



The screenshot displays the 'CASE AMPLIFY' interface. On the left is a sidebar with icons for 'Dashboard', 'Cases', 'Analysis', 'Forms', 'Programs', 'Forms', 'Tools', 'Payments', 'My Office', 'Reports', and 'Admin'. The main area is titled 'Cases' and features a search bar and a 'Sort By Priority' dropdown. Below this is a table with columns: Name, Priority, State, Programs, Notices, Phone Number, and Assigned To. The table lists eight cases with various priority levels (Urgent, Sensitive, Minor) and states (Applicant Educational Rehabilitation, Referral Educational Rehabilitation, Employee Educational Rehabilitation). At the bottom, there is a 'Page Size' dropdown set to 10 and a pagination indicator showing '1 - 10 of 28'.

Name	Priority	State	Programs	Notices	Phone Number	Assigned To
Jen Doe	Urgent - 22 Days	Applicant Educational Rehabilitation - 20 Days				Elizabeth Peasey
James Brown	Urgent - 22 Days	Referral Educational Rehabilitation - 185 Days		1 New SMS		Elizabeth Peasey Mark Michaels
Emilia Hewitt	Sensitive - 147 Days	Employee Educational Rehabilitation - 190 Days				Elizabeth Peasey
Elizabeth Bennett	Sensitive - 144 Days	Employee Educational Rehabilitation - 147 Days			1-523-435-2315	Elizabeth Peasey Casey Schwartz
Mandie Bruno	Sensitive - 20 Days	Applicant Educational Rehabilitation - 9 Days			1-609-976-4035	Elizabeth Peasey
Julia Maria	Sensitive - 28 Days	Referral Educational Rehabilitation - 28 Days			1-609-788-0385	Elizabeth Peasey
John Smith	Minor - 147 Days	Applicant Educational Rehabilitation - 147 Days			1-609-720-4588	Elizabeth Peasey Casey Schwartz
Liam Carter	Minor - 147 Days	Employee Educational Rehabilitation - 98 Days			1-222-955-7704	Elizabeth Peasey



[Click here to watch demo on Youtube](#)

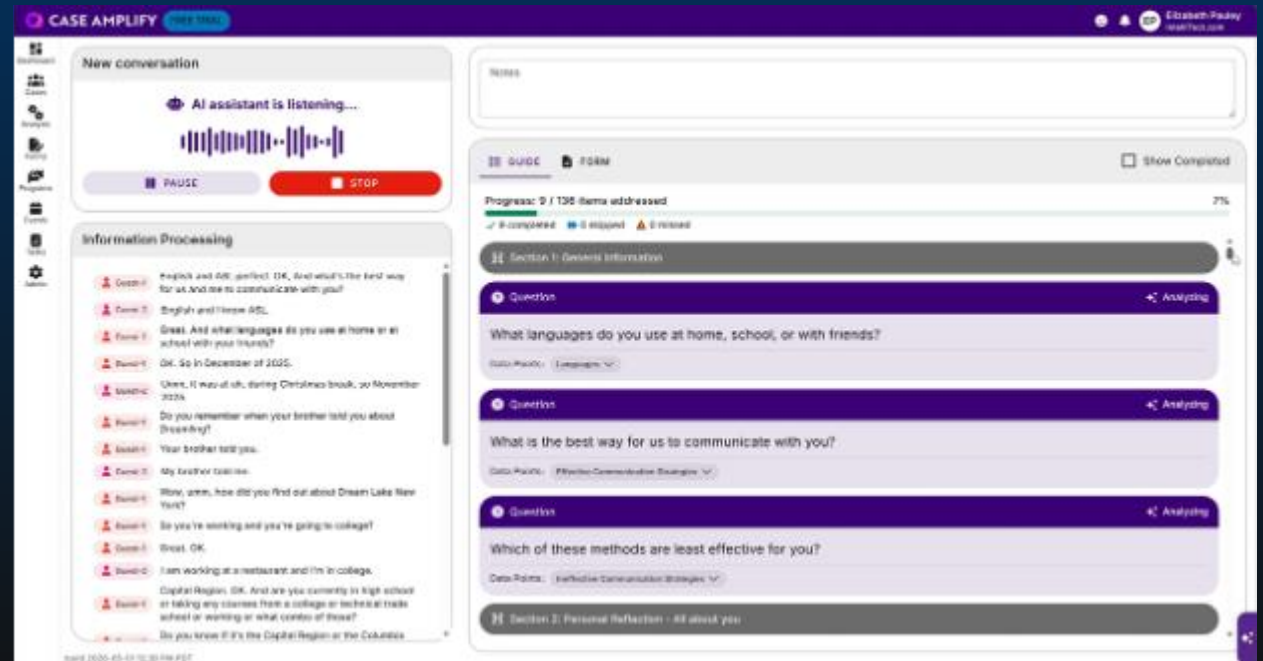
What Case Amplify Does

Guided Conversations

When organizations have standardized interview flows intended to collect very specific information, the system can guide case workers from beginning to end.

The Result

No missed questions. Complete data collection every time. Faster ramp-up for new case workers.



[Watch demo on YouTube](#)

What Case Amplify Does

💜 CARA

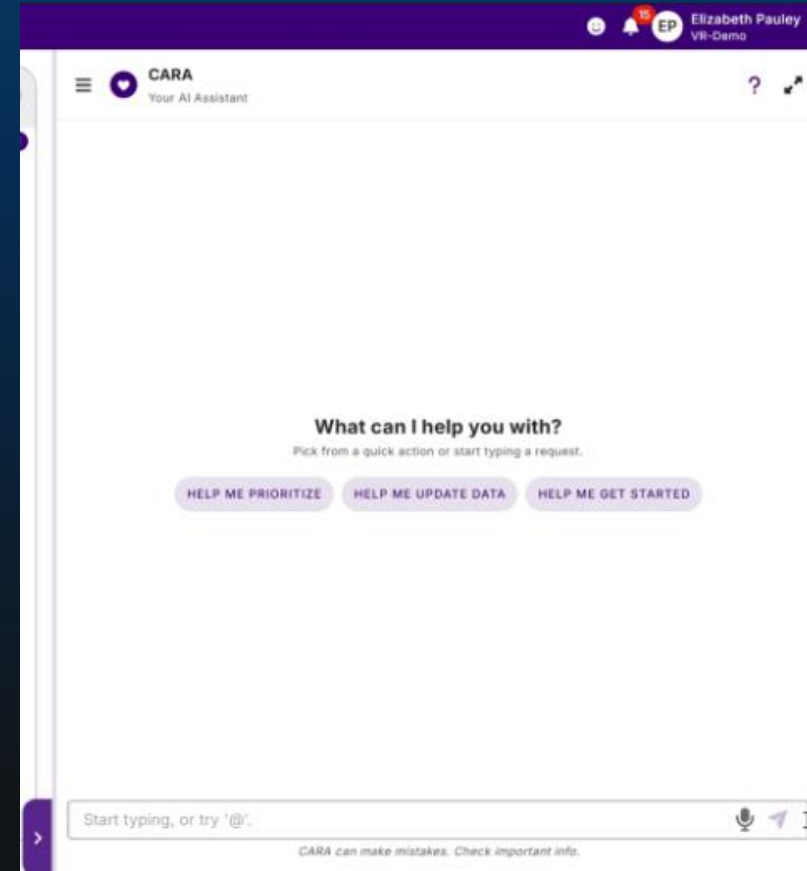
A personal AI assistant that can review case information and initiate actions throughout the system on behalf of the worker.

🚒 Summaries and Priority Indicators

Ongoing activity is distilled into clear summaries with priority flags so workers can direct attention where it's needed most.

★ The Result

Less catching up, more taking action.



[Watch demo on YouTube](#)

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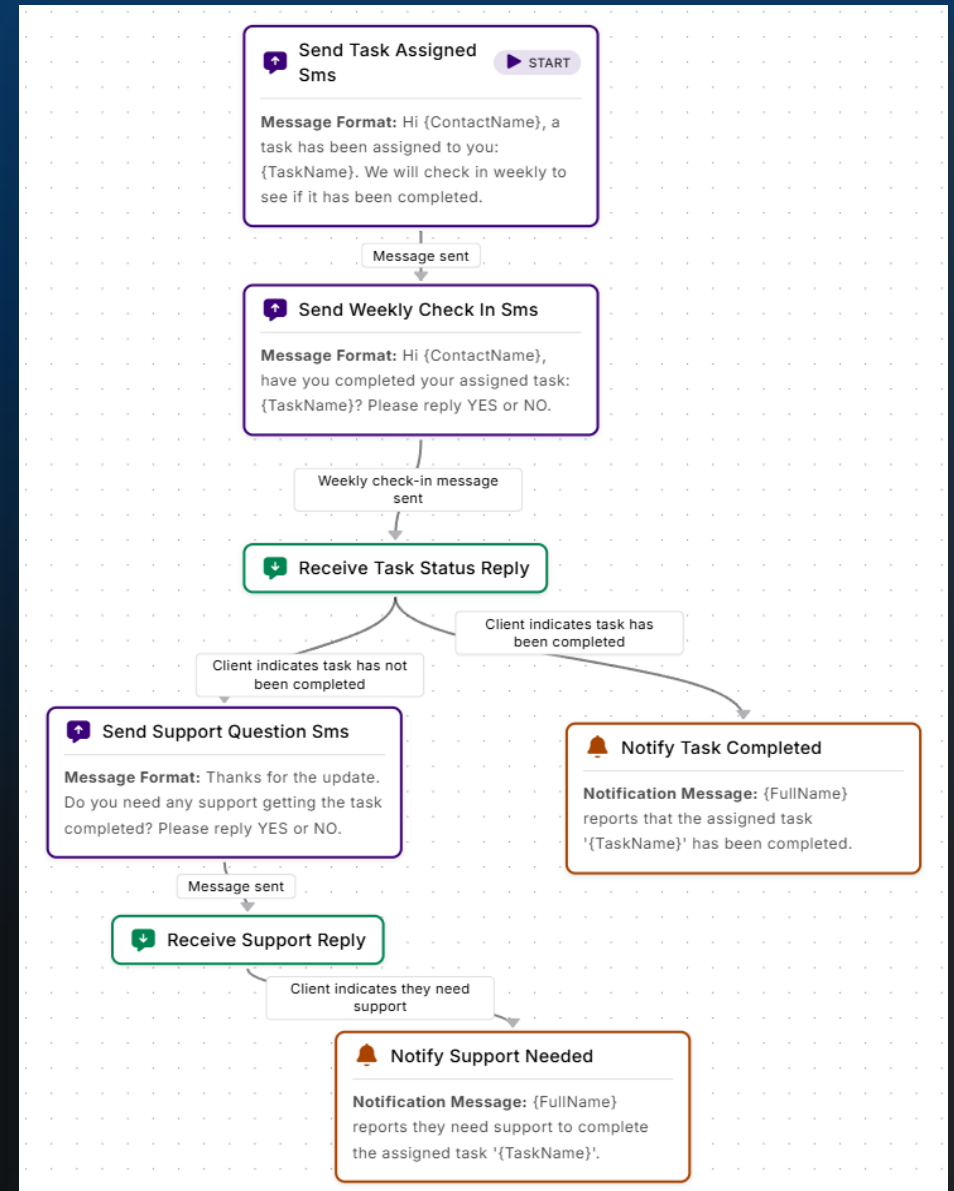
What Case Amplify Does

Automated Workflows

Organizations design their own automated flows using a growing library of actions. We provide the building blocks, they shape the process to fit their needs.

The Result

Routine check-ins, follow-ups, and reminders happen automatically. Case workers step in when needed, but can otherwise focus on higher-impact work.



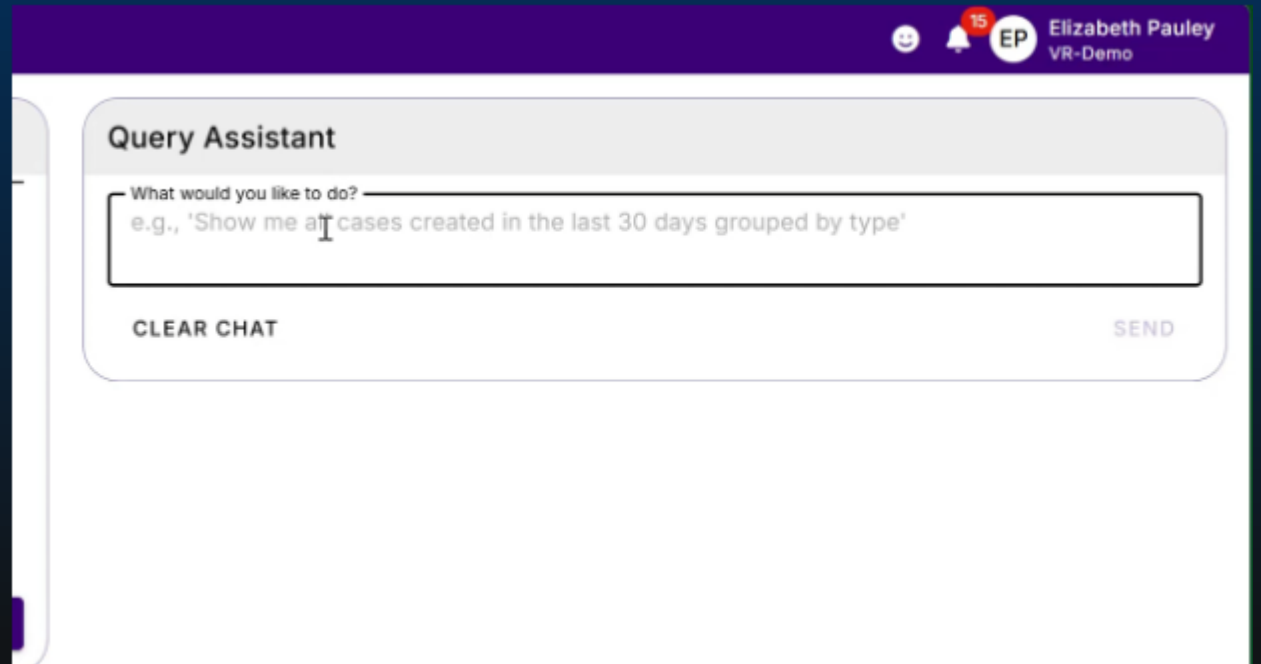
What Case Amplify Does

Customized Reports

Case workers and administrators generate reports by simply describing what they need. The system translates these requests into real-time data queries.

★ The Result

Reports for compliance, audits, or daily needs in seconds. Case workers and administrators get the data to make informed decisions and track performance – no technical skills required.



The screenshot shows a web interface for the 'Query Assistant'. At the top right, there is a purple header bar with a user profile for 'Elizabeth Pauley VR-Demo' and a notification badge with the number '15'. Below the header is a white chat area. The title 'Query Assistant' is at the top of the chat area. A text input field contains the prompt 'What would you like to do?' followed by an example query: 'e.g., 'Show me all cases created in the last 30 days grouped by type''. Below the input field are two buttons: 'CLEAR CHAT' on the left and 'SEND' on the right.



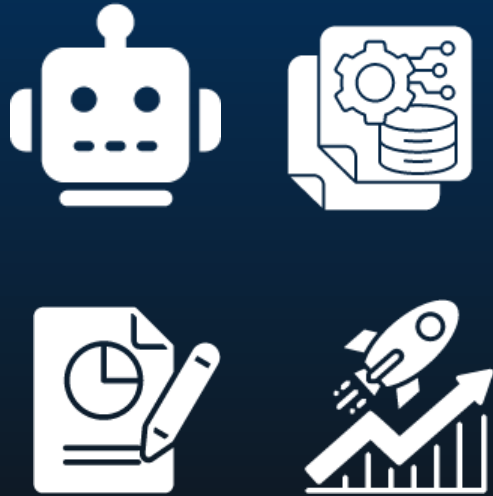
[Click to watch the demo on YouTube](#)

Takeaways

- Designed to work alongside people, these tools support work without replacing the human role
- Built-in guidance helps less experienced team members ramp up faster and work with confidence
- Repetitive tasks like data entry and paperwork are handled automatically, freeing time and attention
- Workflows shift toward what matters most: relationships, tailored support, and thoughtful decisions



IntelliTect



AI Next Steps

What can I do next with our organization.

Wendy Corbin

AI Capability Accelerator

Transform how your organization works with practical, production-ready AI. IntelliTect helps you move beyond experimentation to real outcomes by designing, building, and operationalizing AI solutions that integrate directly into your workflows. From intelligent agents to data pipelines and governance, we bring the technical depth and delivery discipline required to make AI reliable, secure, and useful at scale.



Strategy, Readiness & Use Case Design

- Assess data, systems, and AI readiness across the organization
- Identify high-value use cases aligned to business outcomes
- Define AI roadmap, architecture, and governance approach



AI Solution Development & Integration

- Build AI-powered applications, copilots, and agents
- Integrate with Azure OpenAI, Microsoft Copilot Studio, and enterprise systems
- Design structured workflows for automation, decision support, and content generation



Data, Infrastructure & Governance

- Implement data pipelines to support AI workloads
- Ensure security, compliance, and responsible AI practices
- Establish monitoring, evaluation, and continuous improvement processes



Workforce Enablement & Adoption

- Train teams on practical AI usage across roles
- Develop internal champions and scalable adoption models
- Embed AI into daily workflows to drive sustained value

Challenges Addressed

- Unclear AI strategy or lack of actionable use cases
- Fragmented tools and disconnected data
- Concerns around security, compliance, and reliability

Key Benefits

- Faster time-to-value from AI investments
- Reduced manual effort and improved decision-making
- Scalable, secure AI embedded into real work

Ready to accelerate your AI capabilities? Contact us to see how IntelliTect can turn AI into real, measurable outcomes.



Thank You!

To schedule a FREE one-hour AI consultation, please contact Wendy Corbin at **Wendy@IntelliTect.com**

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