AI's Role in Agency Evolution:

From Operations to Engagement

Most Of Us Are Accidental Owners

-    Agency Management Institute

Agenda

↦ Identifying AI Opportunities

↦ AI Tools for Enhanced Processes

↦ Cultivating Engagement Through AI

↦ Innovating Onboarding with AI

↦ Custom GPTs for Operations

Identify Opportunities

- ↦ Identify the top 3 most common types of project
- ↦ Export your project plans into excel
- ↦ Identify task that can be tackled via AI
- ↦ Make notes of the AI tools to use and est. time

Template for Use

Task Name	Task Details	Estimated Time (Human)	Estimated Time AI	Tool (s) to Use	Notes
Industry Research		*5*	*2.5*	*Perplexity and ChatGPT*	*Use Perplexity first to identify sources and then use ChatGPT to synthesize and pull out key facts*

AI Tools for Agency Back Office

Key

$ < $50/month

$$ $50 - $125

$$$ $125-$250

$$$$ $250+

$ unknown

There are some data concerns that need to be looked into further

Very secure tool that ensures either your data not training other models or indemnity on copyright

Details around security are not publicly available.

1. Perplexity

Direct and Follow-Up Questioning: Users can directly ask any question and follow up for deeper insights, mimicking a conversation with a well-informed friend. This approach removes barriers to information access, allowing for a more natural interaction.

Comprehensive and Contextual Answers: Leveraging advanced NLP, Perplexity AI provides accurate, comprehensive answers across a wide range of queries. It synthesizes complex information into coherent responses and offers concise summaries when needed.

Real-Time Web Search and Diverse Source Access: It stands out for its ability to perform real-time web searches, delivering current information from a vast array of sources, including academic journals, news articles, and online forums.

Advanced Large Language Model Integration: By integrating OpenAI's GPT technology, Perplexity AI understands and generates text akin to human conversation, making it exceptionally adept at handling nuanced inquiries.
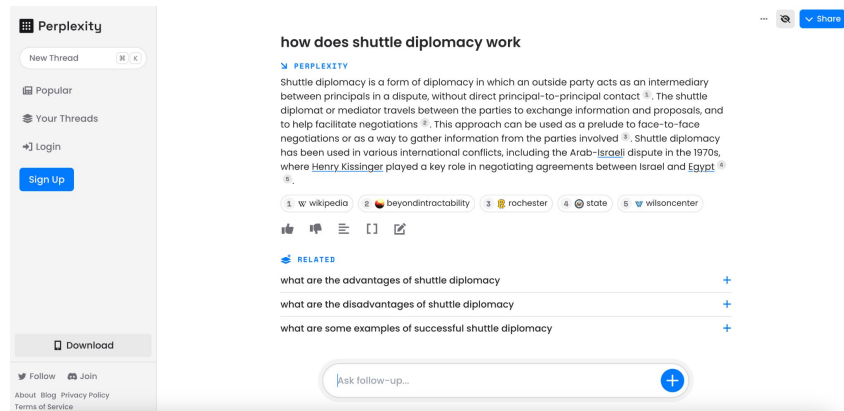
2. Scribe AI

Auto-Capture for Processes: It captures steps of a process on web, desktop, or mobile, turning them into guides.

Guide Customization: Users can edit guides, add branding, create GIFs, and format text, with AI assistance for titles and descriptions.

Sensitive Information Redaction: Supernormal integrates with popular meeting platforms like Google Meet, Zoom, and Microsoft Teams for seamless operation.

Sensitive Information Redaction: It offers automatic, manual, and admin-enforced options to redact sensitive data.

Sharing Options: Guides can be shared via links, email, embedded in other platforms, or exported as PDFs and HTML/Markdown.

Insights and Feedback: The tool provides insights on guide views and completions, along with options for receiving feedback.
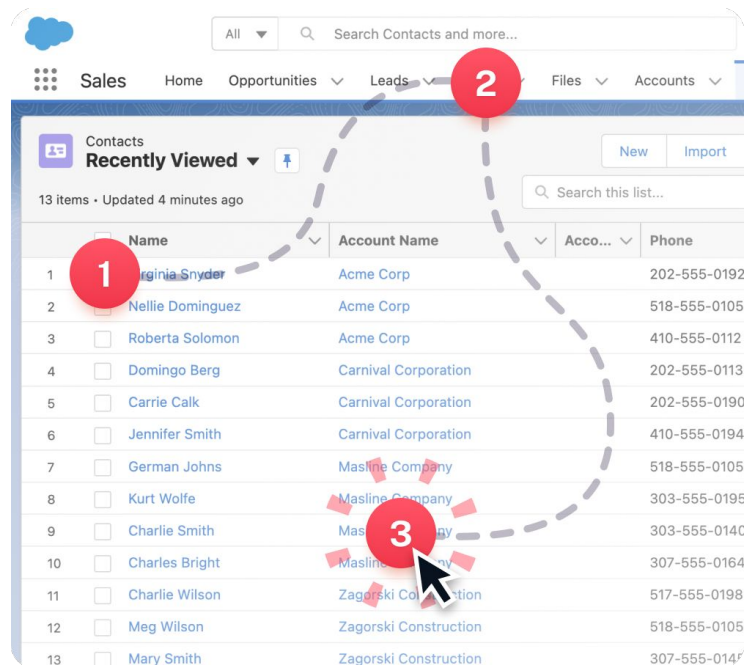
3. Potis

Automated Behavioral Interviews: Utilizes behavioral case structured interviews to assess candidates on real scenarios, making it hard to prepare and cheat.

Anti-Cheat Assessment: Ensures candidates cannot simply prepare for interviews, enhancing the authenticity of the evaluation.

Clear and Bias-Free Talent Scoring: Offers detailed insights on each candidate's strengths and weaknesses based on hard and soft skills.

Efficiency for Recruiters: Reduces routine tasks like pre-screening calls and creates more time-efficient processes.

Cost Reduction for Businesses: Significantly lowers hiring costs by optimizing the screening process and improving job description quality.

Lead product designer

You are better
72%

Your results relative to other participants who interviewed for the **Lead Product Designer** position at all the companies on our platform.
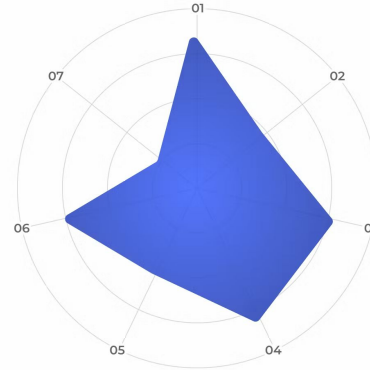
Skill tree | Strengths | Weakne...

01. **Technical Skills:** 09 | 10
- Software development methodologies (e.g., Agile, Scrum, Waterfall)
- Programming languages, databases, and other relevant technologies
- Software testing and quality assurance
- Software architecture and system design

02. **Project Management Skills:** 07 | 10
- Project planning and scope management
- Time management and scheduling
- Risk management
- Cost and budget management
- Quality management
- Resource allocation
- Vendor management

03. **Leadership Skills:** 02 | 10
- Team building and leadership
- Conflict resolution and negotiation
- Decision-making

Disclamer
We believe that candidates always need feedback. The results are personal to you and are not a final evaluation of the interview. The final decision rests with the employer. The results will help you know your strengths and plan further training

$$

(radar chart axes labeled 01–07)

4. Detangle AI

Summary Generation: Provides concise summaries to quickly grasp the content of legal documents.

Clarification on Legal Terms: Explains complex legal jargon in simpler terms.

Favor Scale Analysis: Indicates which party benefits more from the document's terms.

Highlighting Potential Issues: Identifies clauses that might be problematic.

Financial Implications Overview: Emphasizes monetary aspects within the document.

5. Stampli

AI-Powered AP Automation: Centralizes communication, documentation, and workflows in one place.

Billy the Bot™: Advanced AI that adapts to unique AP processes, automating tasks to eliminate manual ERP work.

Invoice Processing: Automates capture, coding, approvals, and more for efficient and accurate AP processes.

Centralized Collaboration: Focuses all invoice collaboration, interactions, and workflows on top of each invoice for streamlined operations.

Vendor Management: Manages vendor onboarding, information, and documentation to strengthen compliance and relationships.

Invoice Management from Stampli
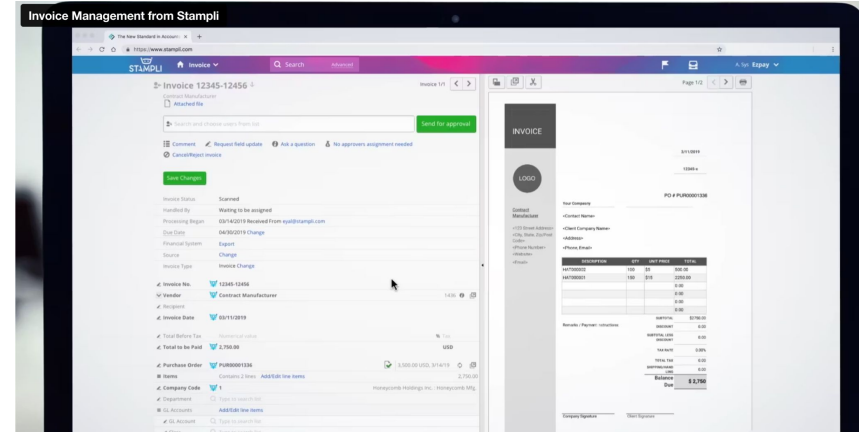
6. Taskade

AI Workflow Generator: Customizes templates for various projects, streamlining creation and content generation.

AI Writing and Task Assistant: Facilitates brainstorming and outlining tasks, adaptable to specialized roles.

Autonomous AI Agents: Uses GPT-4 Turbo for research and task completion, currently in beta.

AI Prompt Templates: Provides over 1000 templates for various workflows.

Document Summarization with AI: Converts documents into projects with AI assistance.
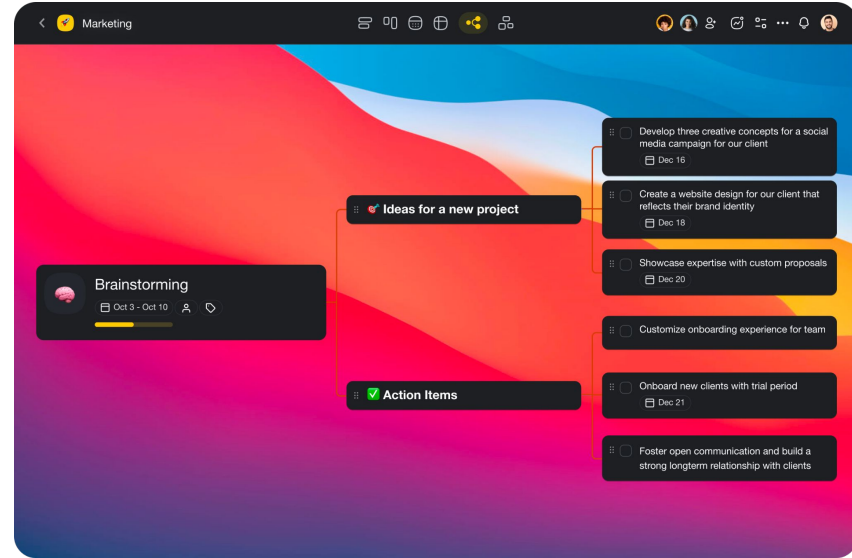
7. Glean

Deep Learning Models: Enhances understanding of company data and user inquiries for accurate information retrieval.

Knowledge Graph: Creates a contextual framework connecting people, content, and interactions within the enterprise.

Semantic Search Capabilities: Employs vector search and language models for intuitive natural language query responses.

Personalized Results: Tailors search outcomes based on individual user activities and relationships.

Data Governance: Ensures secure, permissions-aware access to company information, safeguarding data integrity.
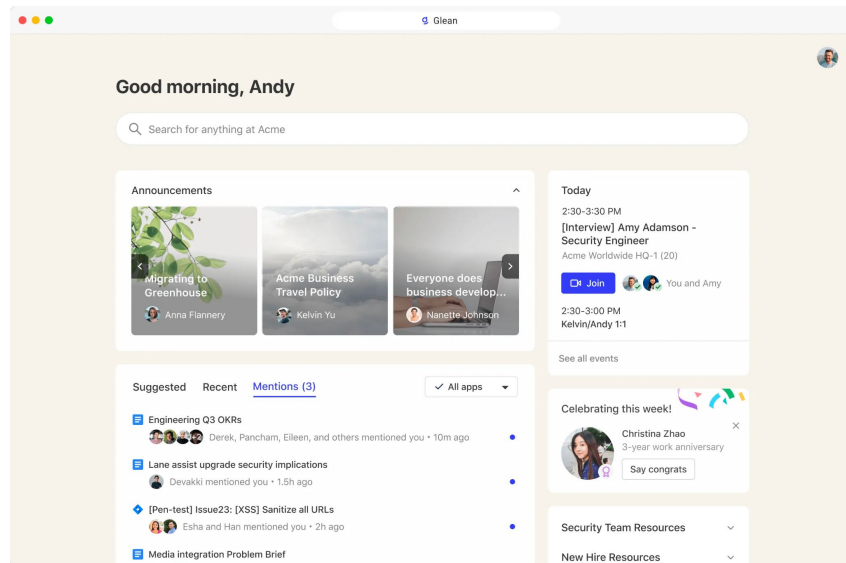
7. Booke AI

Auto-Categorization and Transaction Fixing: Booke AI automates transactions categorization and fixes uncategorized transactions, enhancing efficiency.

Intelligent AI-Assistant: Provides expert reconciliation assistance and suggestions, improving accuracy in bookkeeping.

Invoice & Receipt OCR: Utilizes AI to extract data from invoices, bills, and receipts in real-time, speeding up transaction processing.

Inconsistencies Detection: Detects and helps to fix discrepancies in the books, ensuring accuracy.

Integration with Accounting Software: Offers seamless two-way integrations with platforms like Xero, QuickBooks, or Zoho Books
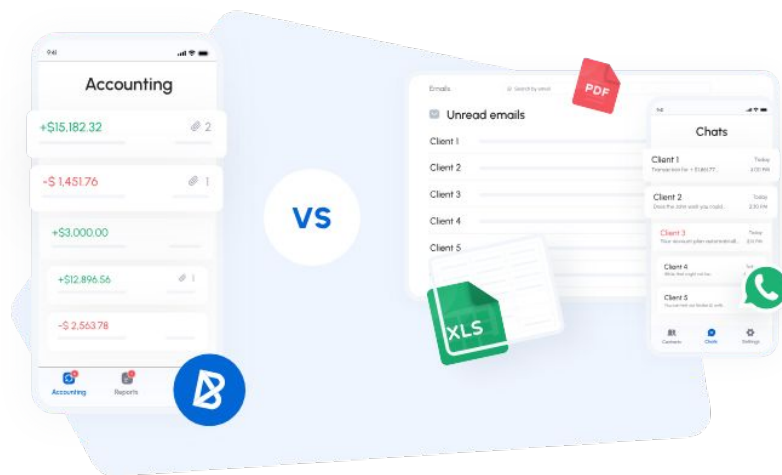
8. Motion AI

**Automated Scheduling:** Motion creates personalized daily schedules by prioritizing and time-blocking tasks on your calendar.

Task Prioritization: The tool automatically identifies the most critical tasks to work on at any given moment.

Project Management: It organizes complicated projects into optimized plans, allowing you to focus on execution.

Deadline Tracking: Motion proactively alerts you to upcoming deadlines, helping prevent missed tasks.

Calendar Syncing: Combines all work and personal calendars into one master calendar for better organization.

Motion automatically builds your schedule
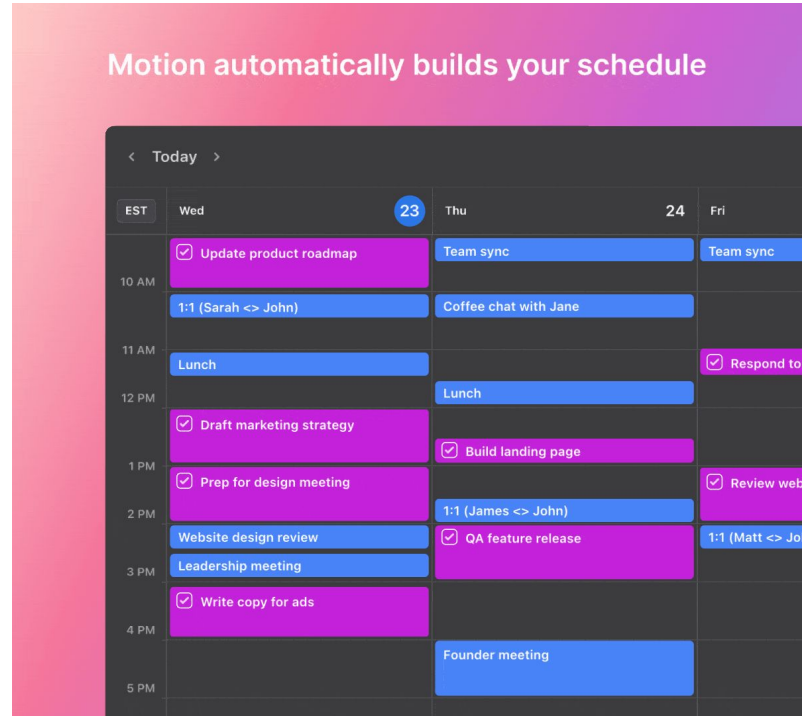
9. Dropbox DASH (beta)

Universal Search: Seamlessly integrates with apps like Google Workspace, Microsoft Outlook, and Salesforce to provide a comprehensive search experience.

AI-Driven Answers: Allows users to ask questions and receive concise summaries from their documents and connected apps.

Desktop Search Capabilities: Searches through desktop files, browser tabs, emails, and calendar events.

Smart Organization: Automatically creates Stacks, which organize related files, links, and app information.

Centralized Dashboard: Offers a snapshot of daily schedules, project files, and priorities.
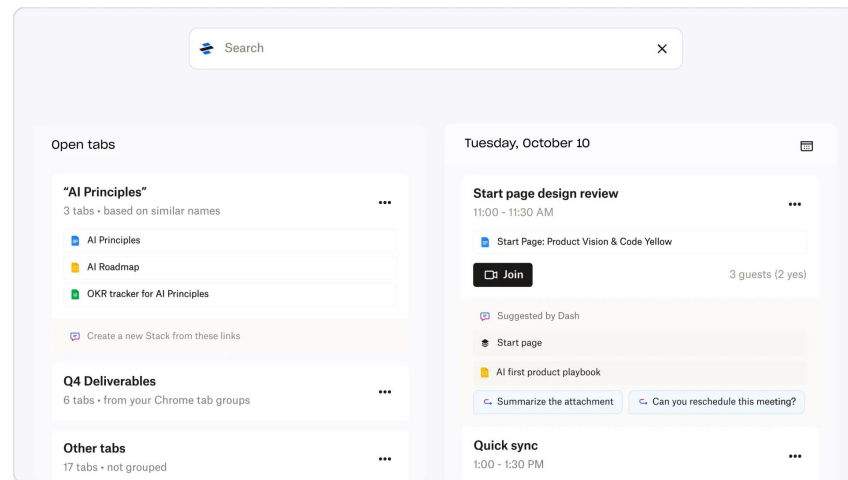
10. Feedback by AI

Idea Evaluation: Analyzes the potential of business ideas using AI.

Market Fit Analysis: Assesses how well an idea fits within the current market.

Improvement Suggestions: Provides AI-driven feedback on how to refine your idea.

Competitive Analysis: Evaluates your idea against existing market competitors.

Engagement Strategies: Suggests methods to increase customer engagement and interest.

Leveraging AI for Employee Development

AI in Performance Reviews

↦ **1–1 Meetings**
- Keep a single document for each employee to record all of you one-on-one notes in for the entire year.

- Leverage AI to provide and identify trends:
    · Based on our discussions what type of projects does employee "x" seem to be most excited about. What are some commonalities between these projects?
    · What are some of the most common challenges does "x" seem to have?
    · As we think about professional development what are some things we should focus on?

↦ **Annual Reviews**
- Annual reviews can become overwhelming for managers so leverage AI to help synthesize your notes and provide them your 1–1 document as well as your organization's performance template

Other Applications of AI in Employee Opps

↦ **Leverage AI to Help Build Job Descriptions**
  • Leverage several publicly available job descriptions and share those along with your organization's brand voice guidelines to write job descriptions (not just important for new hires)

↦ **AI to Assist in Writing Interview Questions**
  • Use AI to help you write and develop questions specific to the job description helping cut back on all the awkward silence.

↦ **Identify Trends in Employee Surveys**
  • Typically we ran quarterly employee pulse surveys to understand sentiment but it was often difficult to piece through open ended questions. Ask AI to help identify trends in these reports.

How to Use AI To Streamline Onboarding

Employee Onboarding

↦   **1) Document Your Processes**
- • Use tools like Scribe to help create knowledge documents that can be used for employee training or professional development.

↦   **2) Create a Custom Onboarding Job**
- • Use AI to help you write and develop questions specific to the job description helping cut back on all the awkward silence.

↦   **3) Identify Trends in Employee Surveys**
- • Typically we ran quarterly employee pulse surveys to understand sentiment but it was often difficult to piece through open ended questions. Ask AI to help identify trends in these reports.

Custom GPTs to Make Agency Operations Less Painful

Custom GPT Ideas for Operations

Policy Development

Idea: Guide on HR policies and best practices.
Uses: Crafting employee manuals, revising workplace rules, compliance advice.
Instruction: Create a remote work policy covering team communication and availability norms.
Uploads: Existing HR policies, compliance needs, mission/values documents.

Org Process GPT

Idea: A chatbot that answers employee questions
Uses: Onboarding, process adherence, initial guidance.
Instruction: How do I kick-off a project?
Uploads: job descriptions, project templates, FAQs, time tracking guidelines

Cost Cutting Advisor

Idea: Streamlining costs and operational efficiency.
Uses: Spending audits, budget realignments, resource distribution enhancements.
Instruction: Analyze cost-saving opportunities in my amex report.
Uploads: Financial records, process mappings, efficiency improvement manuals.

QUESTIONS?

Thank you!