



AI in 2026: The Automation Age

From Experiment to Enterprise: Your Strategic Playbook for the Year Ahead



Insights from Erik Martinez & Patrick Barry

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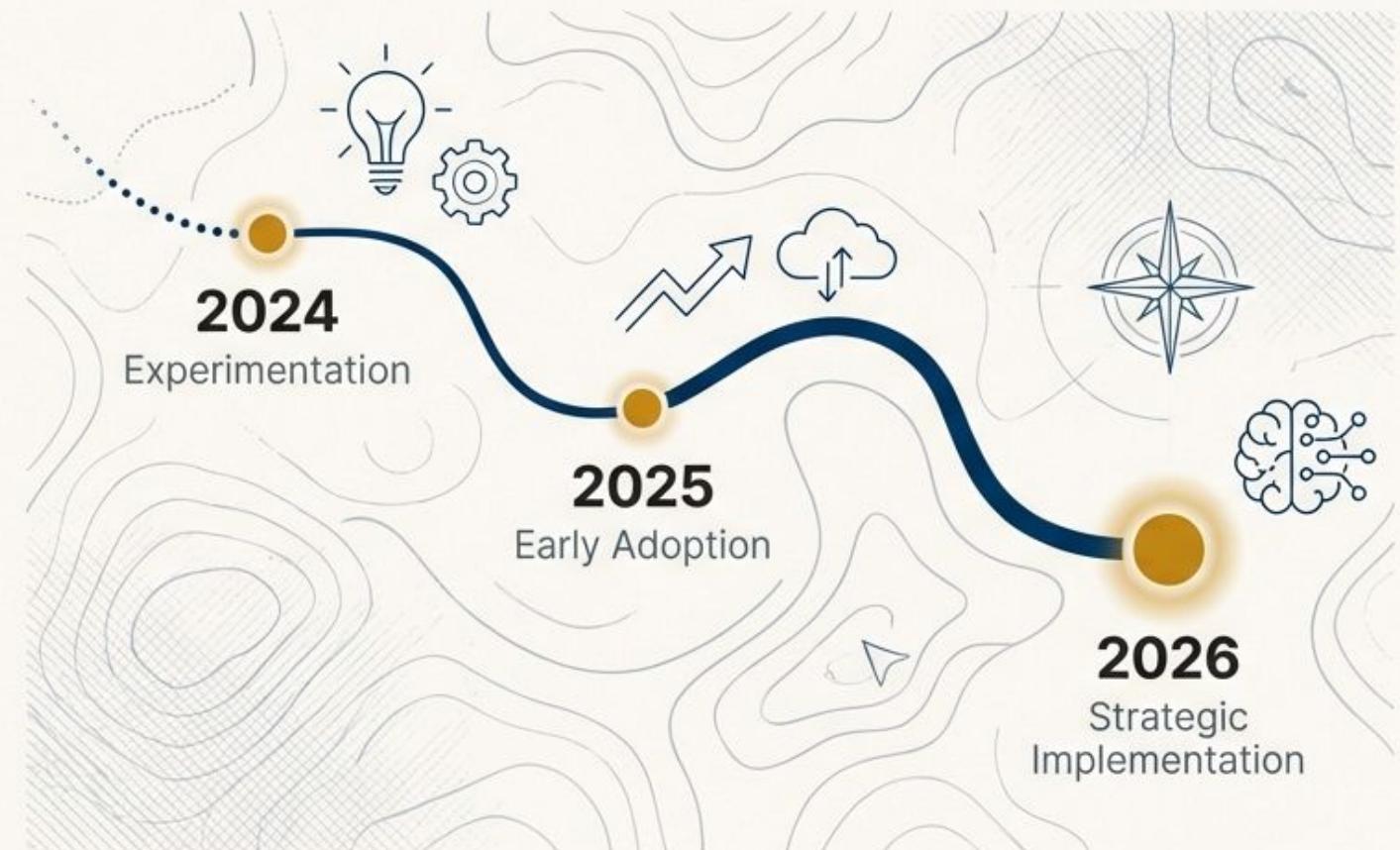
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AI has moved from experiment to essential business tool.

2025 was the year AI became real for many businesses. We've seen it reshape workflows and create new opportunities.



2026 will be the year of automation.

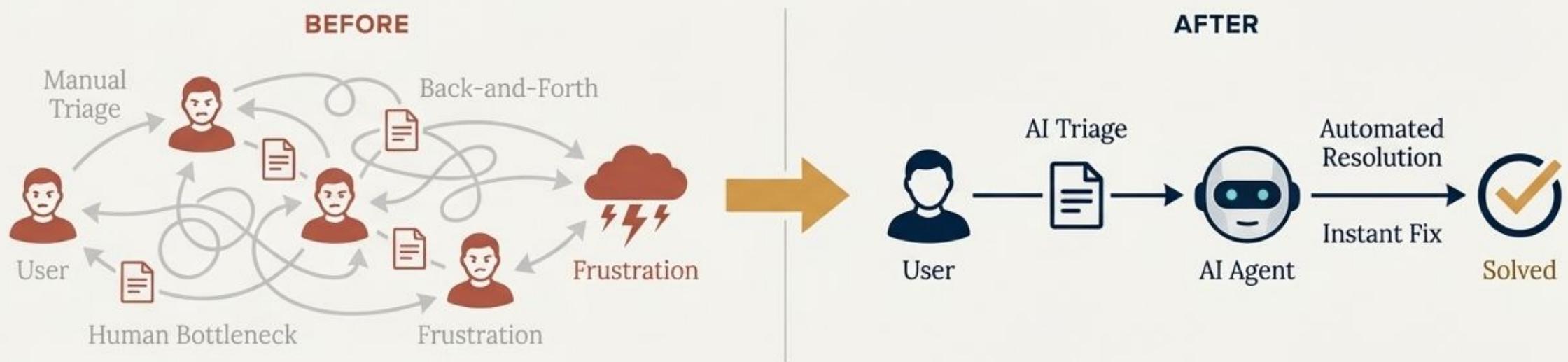
The focus is shifting from exploring possibilities to implementing intelligent systems that handle real work. For advanced companies, this means managing AI agents as “digital employees.”



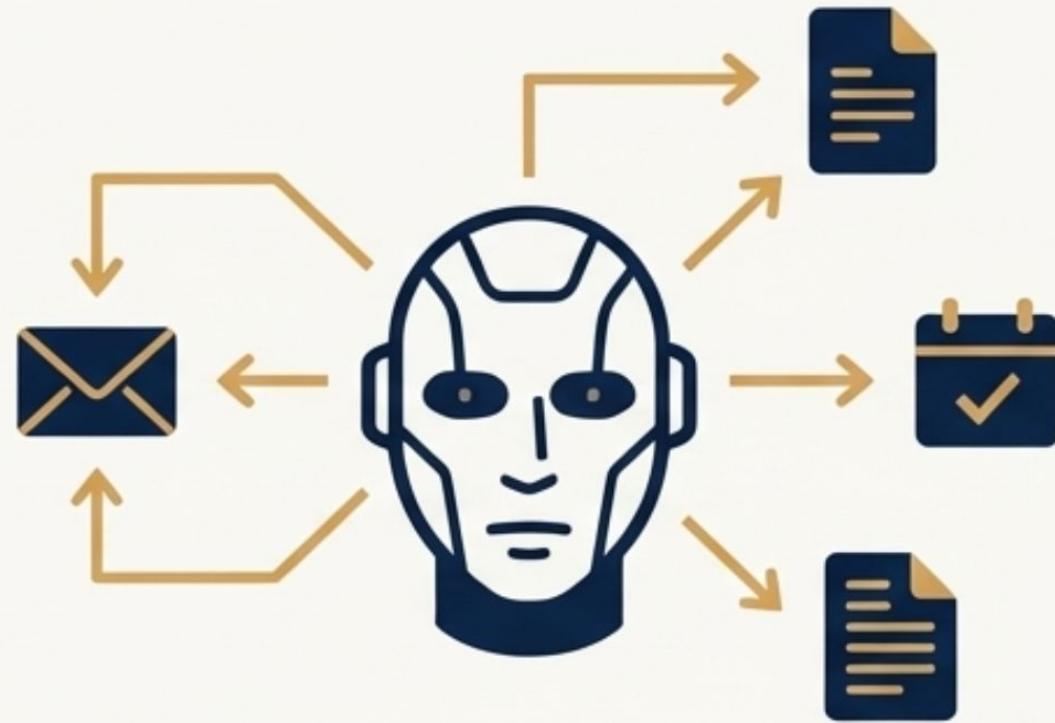
SO WHAT: IMPLICATIONS FOR YOUR BUSINESS

The Opportunity: Redefining Everyday Workflows

The rise of agents and automation presents a clear opportunity to solve long-standing friction points and unlock new levels of efficiency and clarity.

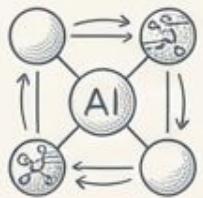


What is an AI Agent?



Where automation will have the greatest impact.

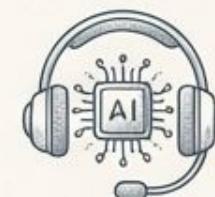
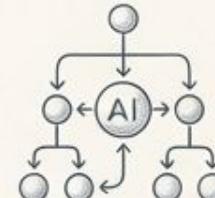
Digital-First Businesses (Agencies, SaaS, E-Retail)



- **Multi-Agent Systems:** An agent writes ad copy, which is then sent to a legal agent for automated compliance checks in a continuous loop.
- **Agentic Shopping:** Consumers will use personal agents to research and buy products, forcing businesses to rethink how information is structured on their websites for bot-to-bot communication.



All Businesses



- **Internal Communication:** Using AI to distill complex project updates and ensure crystal-clear understanding across teams, improving efficiency and clarity.
- **Automated Help Desks:** Agents handling common IT issues like password resets, routing only complex problems to human staff.

Multi-Agent Workflow Example

An Ad Agency Workflow



1. Writing Agent

Generates 50 social media ad variations based on a creative brief.

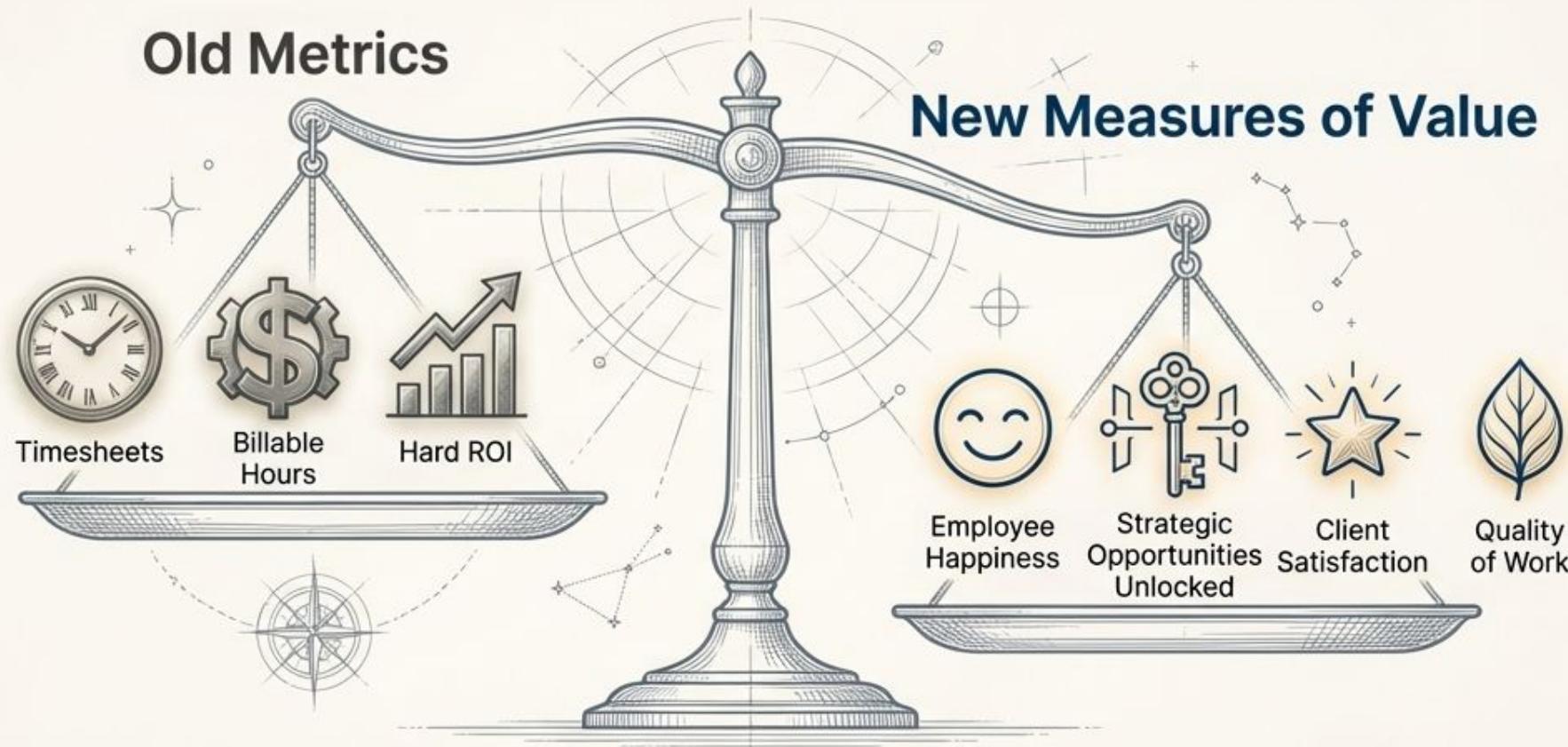


2. Legal Agent

Reviews all 50 ads against internal compliance and privacy policies.



The ROI of AI is shifting from hard metrics to human experience.



The biggest risk may already be inside your organization.



- A major healthcare company discovered its employees were all using **ChatGPT** on their own, despite having no internal AI policy.
- This creates **massive data privacy risks** when proprietary information is entered into public models.
- Without a policy, you have no control over what data leaves your organization.

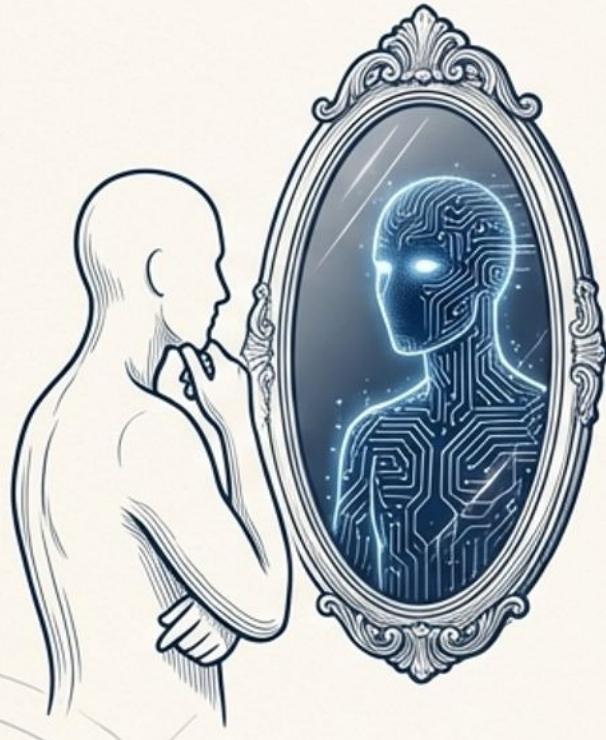
The Question for Leaders: Do you have a written AI policy that tells your team what they can and can't use, and what they can and can't do with it?

Shadow AI

When employees use personal or unapproved AI tools (like ChatGPT on their phones) for work-related tasks without company oversight.

Don't train your AI to be your echo chamber

The Blind Spot



We celebrate when an AI 'sounds just like me.'

But if the AI is only trained on your style and perspective, it will inherit all your inherent weaknesses and blind spots.

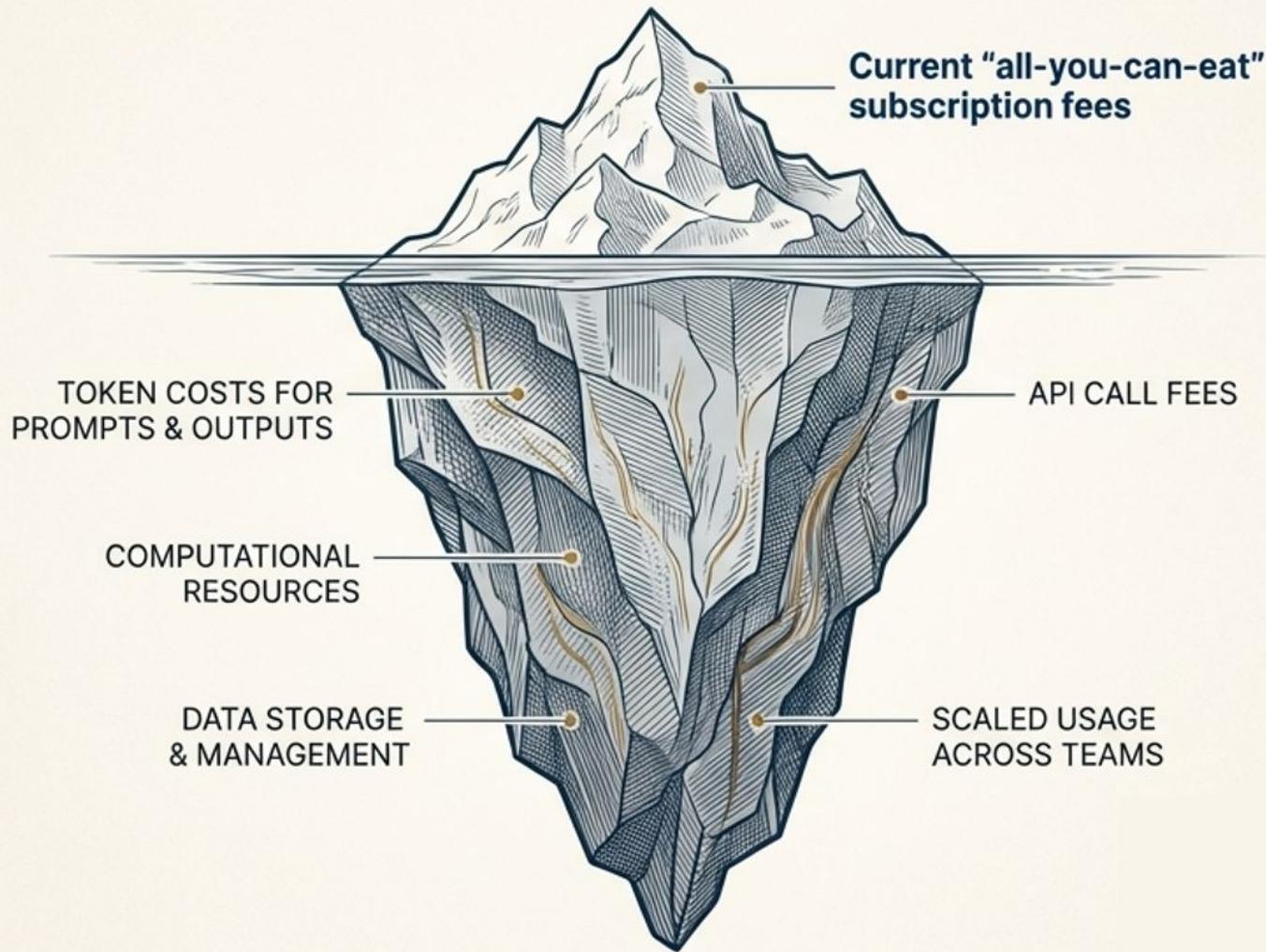
Perfection is not the goal.

The Strategic Solution



- Use it to challenge your assumptions.
- Ask it to find holes in your logic.
- Prompt it to think like a competitor, a skeptical client, or a mentor with a different perspective.

The hidden cost of AI is about to become very visible.



The current feel of AI tools is misleading. As usage scales, the cost of "tokens"—the units of data processed by AI models—will become a significant line item.

Key Concepts



Token Costs: Every prompt you send and every answer you receive has an associated computational cost.

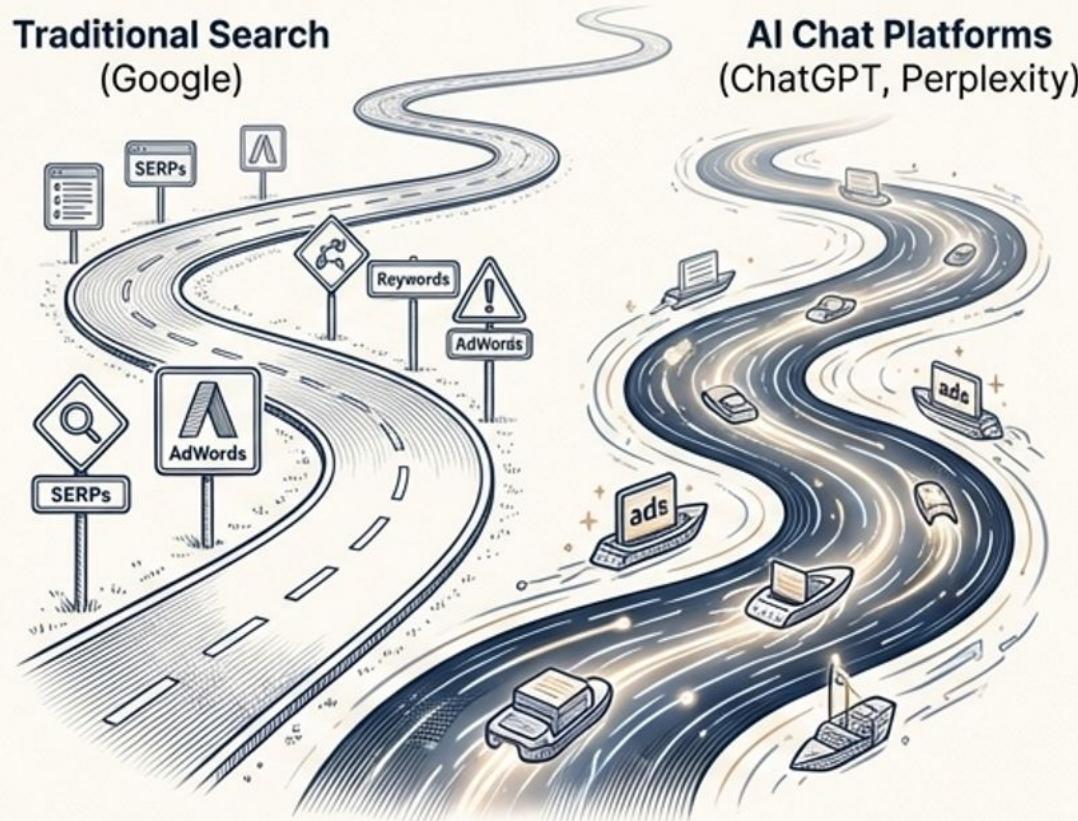


Prompt Optimization: A new, critical skill will be writing prompts that deliver the desired result with the lowest possible token cost.

The next marketing frontier: The AI ad platform

The Impending Shift

Platforms like ChatGPT, with their massive audiences, are expected to launch advertising platforms in 2026. Perplexity is already doing it.



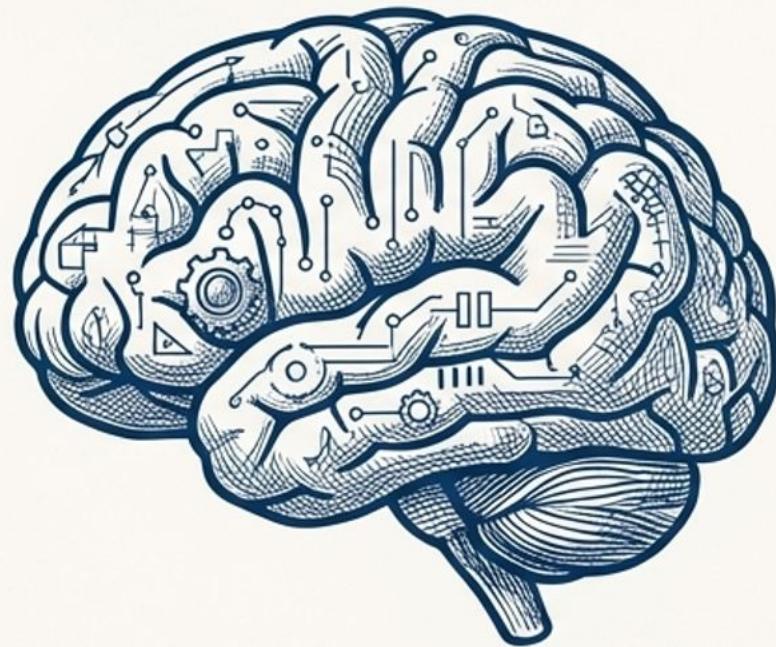
Why This Matters

- This creates an entirely new channel for reaching customers, separate from traditional search engines.
- Unlike Google, these platforms don't have decades of experience in building an ad ecosystem. The rules will be new and unpredictable.

The Strategic Question

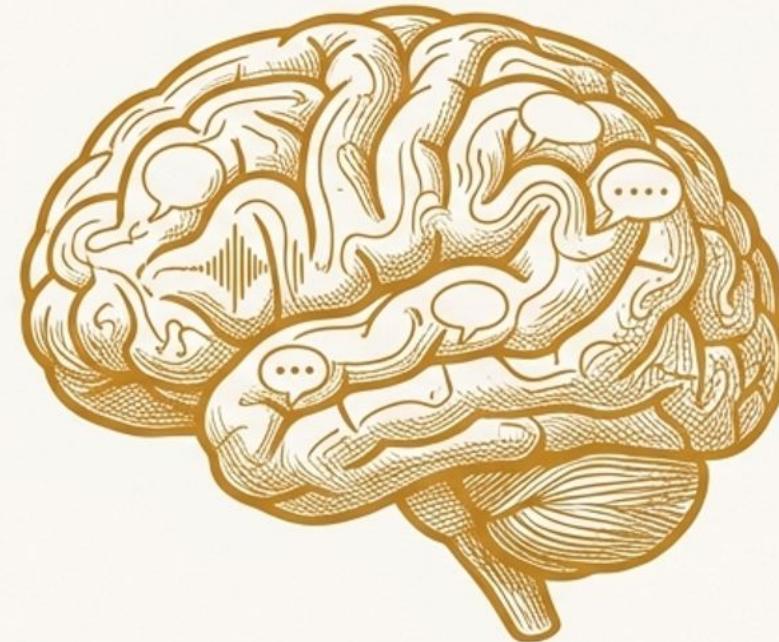
Are your marketing and ad-buying teams prepared for this shift? They will need to re-evaluate budgets and learn how to operate in a completely new environment.

Success requires more than tools. It requires new skills.



1. The Hard Skills

- **Prompt Engineering:** Learning frameworks to get consistent, high-quality outputs.
- **Data Hygiene:** Understanding that AI is only as good as the data it's given ("Garbage in, garbage out").



2. The Human Skills

- **Critical Thinking & Problem Solving:** The future of interaction is voice. The ability to articulate complex ideas will be more valuable than typing speed.
- **Humanities & Linguistics:** Understanding language, history, and context creates better prompts and better outcomes.

Your roadmap begins here: Three actions to take now.

1



Start with Your Core Tools.

Before buying a dozen new AI apps, master the capabilities within your existing ecosystem (Google Workspace, Microsoft Copilot). They are smarter and more integrated than you think. Avoid “willy-nilly buying.”

2



Invest in AI Literacy Training.

Implement a structured training program. Start by surveying your team to understand their current usage and fears. Teach them basic prompting and establish a clear AI policy.

3



Document Your Workflows.

You can't automate what you don't understand. Begin the critical process of documenting the daily tasks of your team. This will reveal the true pain points and the highest-impact opportunities for automation.

Step 2: Invest in AI Literacy for Everyone

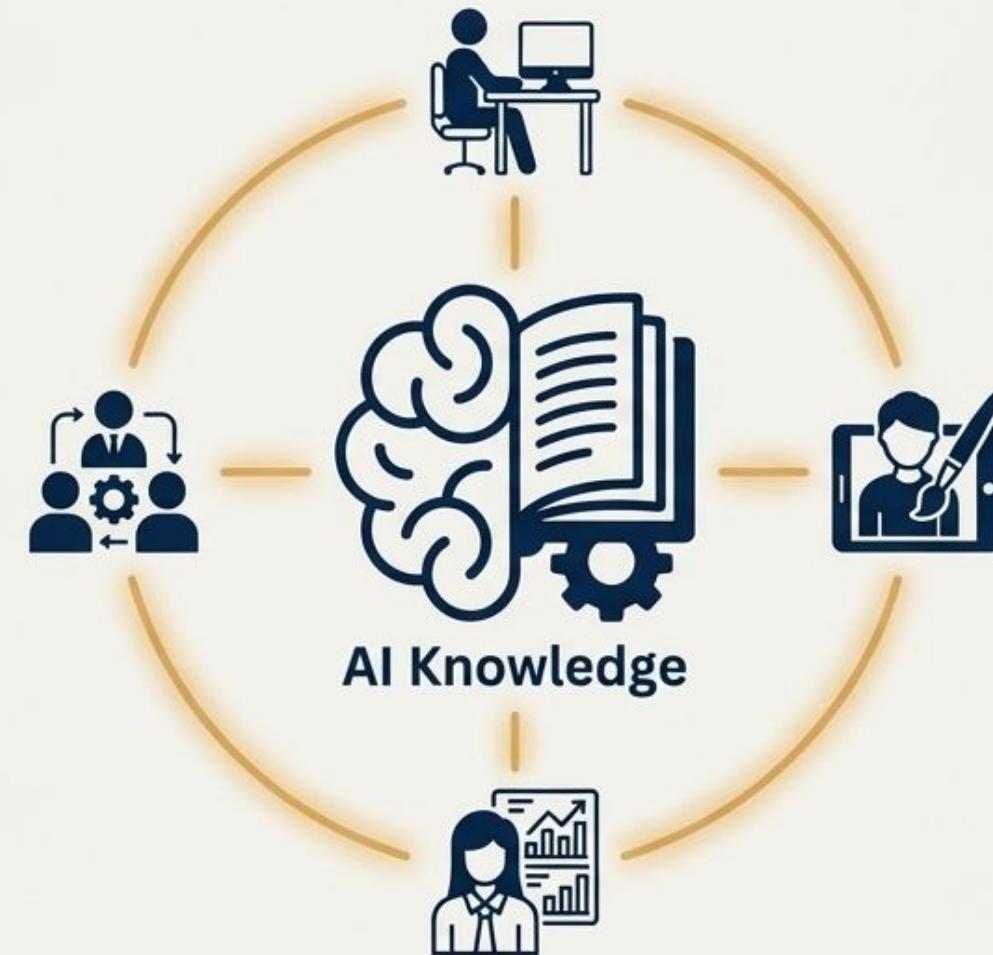
Providing access to tools is not enough. A formal investment in basic training is essential to empower your team, ensure consistent usage, and get real value from the technology.

The 'Why'

Explain the company's goals for AI and address fears head-on.

Critical Thinking

Teach team members how to evaluate AI output, spot errors, and have a “conversation” with the AI to refine results.



Core Skills'

Cover basic prompting, the use of advanced frameworks, and the importance of data cleanliness.

Relevance

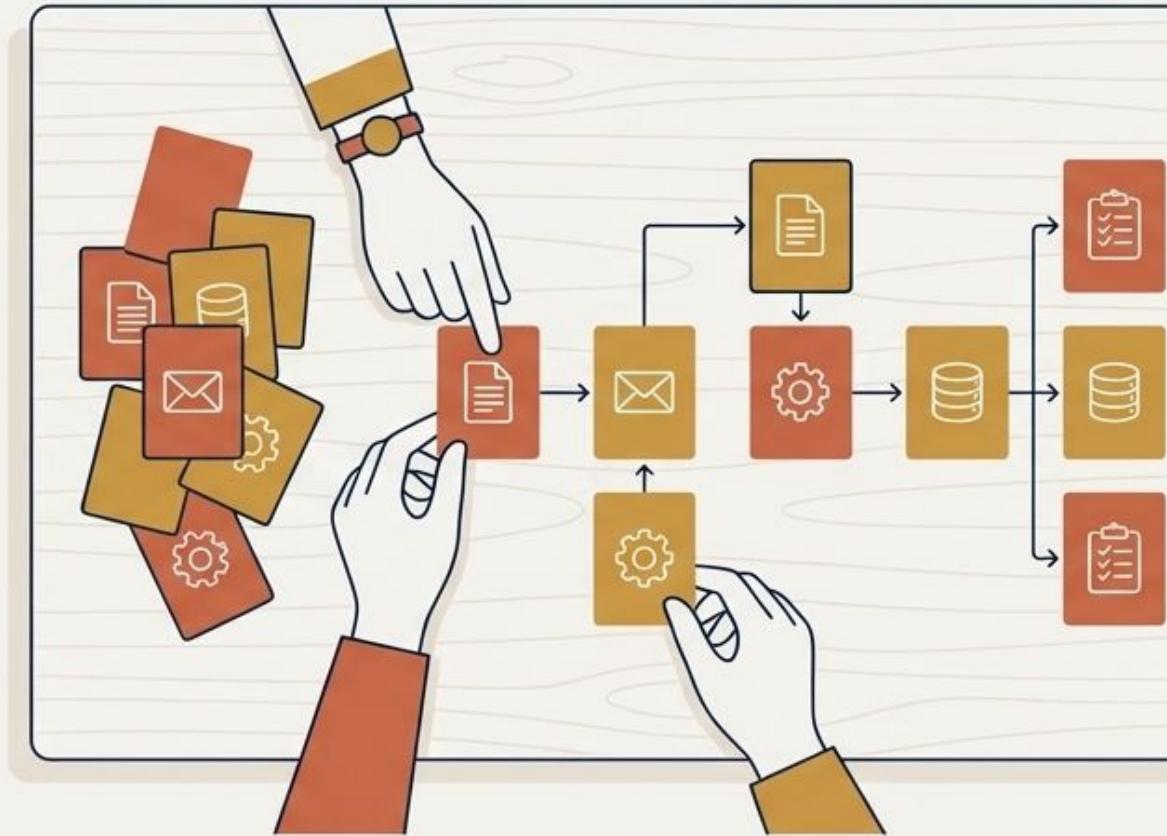
Connect the training directly to their daily jobs to answer the “What's in it for me?” question.

Step 3: Document Your Workflows

You cannot automate what you don't understand. Before you touch any AI tool, the single most critical starting point is to map out your team's daily work.

How to Start

- Ask your team members to document their primary functions and the step-by-step processes involved.
- Break down complex tasks into their smallest constituent parts.
- By understanding how the pieces fit together, you can identify the bottlenecks, pain points, and repetitive tasks that are the perfect candidates for your first automation projects.



Step 4: Find and Automate Your First Win

Don't try to boil the ocean. The best way to build momentum and prove value is to start small. Identify one painful, time-consuming, and repetitive task, and make it your mission to automate it.



The Sales Deck Slide

⌚ Time Before AI: ~60 minutes

⌛ Time After AI: ~5-10 minutes

Pat built an agent to create a personalized sales slide for each new prospect, saving an hour of research and writing per client.



The Podcast Guest Research

⌚ Time Before AI: 2-3 hours

⌛ Time After AI: ~30 minutes

Erik built an agent to research guests and draft interview questions, turning hours of prep work into a 30-minute task.

Small wins add up quickly, saving valuable time that can be reinvested in more strategic work.

Bonus: Prompt Framework #1

R = Role
A = Action
C = Context
E = Execution

Role: You are a marketing director (**action**) who is working on a postcard mailing for a garden statuary & home decor company.

Context: The company has never executed a direct mail campaign and needs some help coming up with the wireframe of the postcard. The postcard will be a 5x8 and will be delivered via first class mail.

The company will be offering a 15% discount for through December 17, 2025 for any new customers coming on file. They would like the front of the card to have their logo, an emotional hook, a headline with a call to action, a primary hero image, a QR code, and a mention of the promotion.

On the back side of the postcard the company will need to ensure that they are leaving enough room for the mailing address and postal indicia required by the USPS. They would also like 4 images across the top of representative product and on the left side they would like a secondary headline with a call to action , the logo, the QR code, the promotion and the expiration date.

Execution (Output): Create the wireframe, draft the headlines and secondary headlines for the 5x8 postcard to the context window.

Bonus: Prompt Framework #2

C = Context
R = Role
I =
Interview
T = Task

Turn your task into a strategic exercise by combining your previous prompt with Role & Context and add these two steps to your prompt.

Interview: Interview me, ask me one question at a time, up to three questions to gain deeper context.

Task: What are the three high-impact non-obvious strategies I can use for this scenario?

Source: *Geoff Woods, author of the AI-Driven Leader*

Resources

Resources

AMI AI & Automation Peer Group:

- Meets the 3rd Wednesday of every month for 90 minutes via Zoom
- Provide practical automations
- Share knowledge & collaborate with other AMI Agencies
- Reach out to Drew: drew@agencymanagementinstitute.com for more information

Reach out to Pat and Erik:

Pat:

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<https://www.linkedin.com/in/erikmartinez/>

A wide-angle photograph of a forest in autumn. The trees are heavily laden with leaves in shades of red, orange, and yellow. A winding path or stream bed in the center foreground is covered with fallen leaves. In the background, rolling hills or mountains are visible under a blue sky with wispy white clouds.

Questions?



Thank You

