

# LEADING AI AUTOMATION: AT SCALE

How to implement automation for  
internal business processes.

Nate Amidon



**FORM 100 CONSULTING**  
DEPENDABLE. DEDICATED. DISCIPLINED

# What You'll Learn Today

1. Simple AI tools and capabilities that already exist
2. A set of principles we use with clients that lead to success
3. Lightweight sustainment framework to ensure value sticks

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1. Simple AI tools and capabilities that already exist
2. A set of principles we use with clients that lead to success
3. Lightweight sustainment framework to ensure value sticks

**Don't need to be an AI expert! – Stick around for the case study**

# Form100 Consulting



- Nate Amidon, CEO Form100 Consulting
- Premium staffing and execution partner
- Military Leaders embedded with client teams
- Founded on military-grade execution with focus on Alignment, Communication, and Clarity

# Problem: Everyone Wants AI

**'AI is no longer optional,' Microsoft President tells managers**

**'Core priority' | Meta to formally review employees' AI performance from 2026**

AI EFFECT









**Shopify CEO says staffers need to prove jobs can't be done by AI before asking for more headcount**

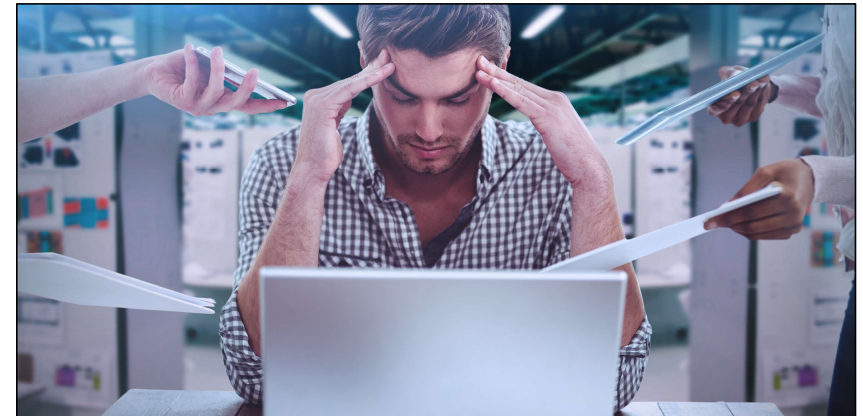
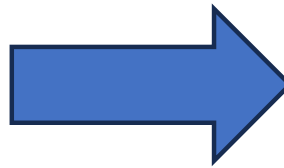
**Duolingo's CEO outlined his plan to become an 'AI-first' company. He didn't expect the human backlash that followed**

**KPMG to include AI performance reviews**

From 2026, the company's staff will be assessed on how well they have met the company's AI objectives during their performance reviews.

# Problem: No real strategy to do it

Who are we? 	CEOs! 
What do we want? 	AI! 
AI that does what? 	We don't know!!! 
When do we want it? 	NOW!!! 

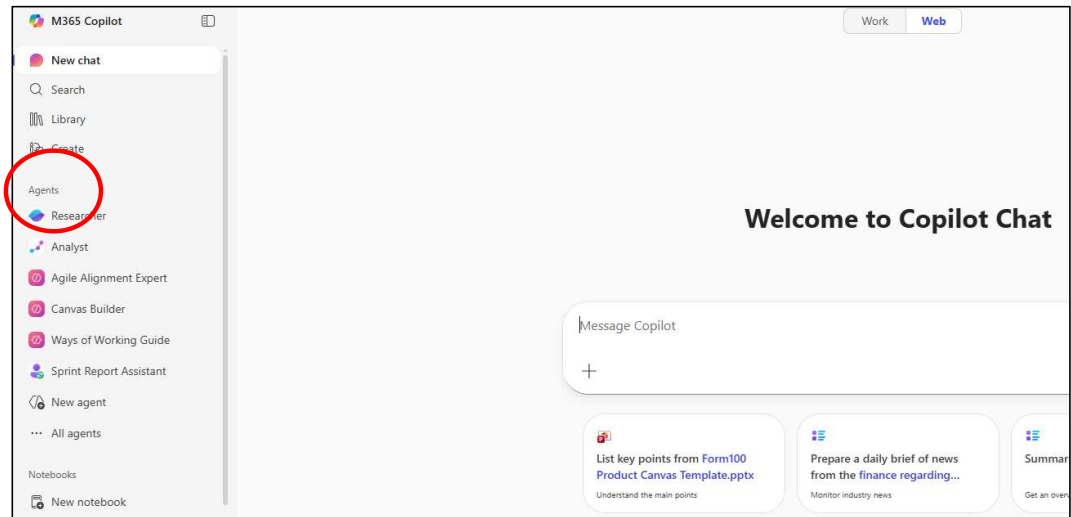
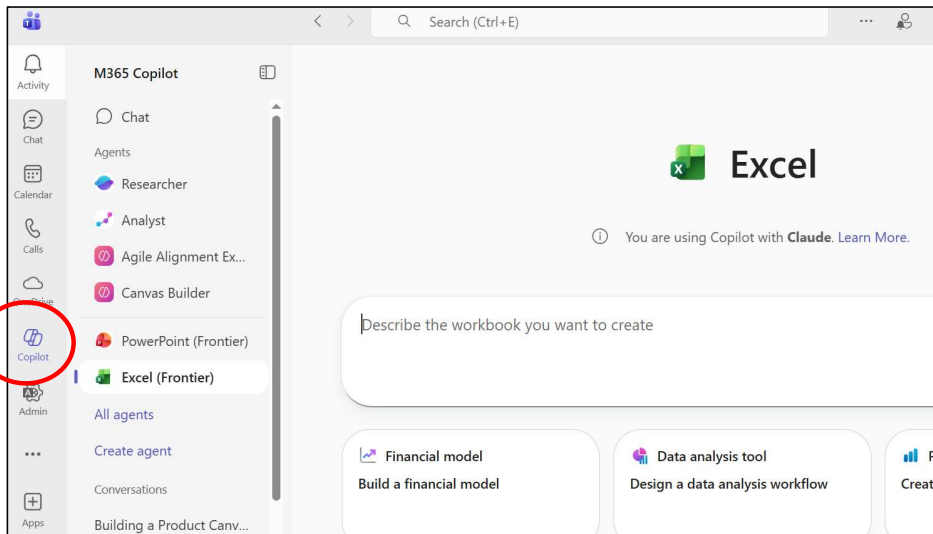


**You can:** implement valuable automation strategies

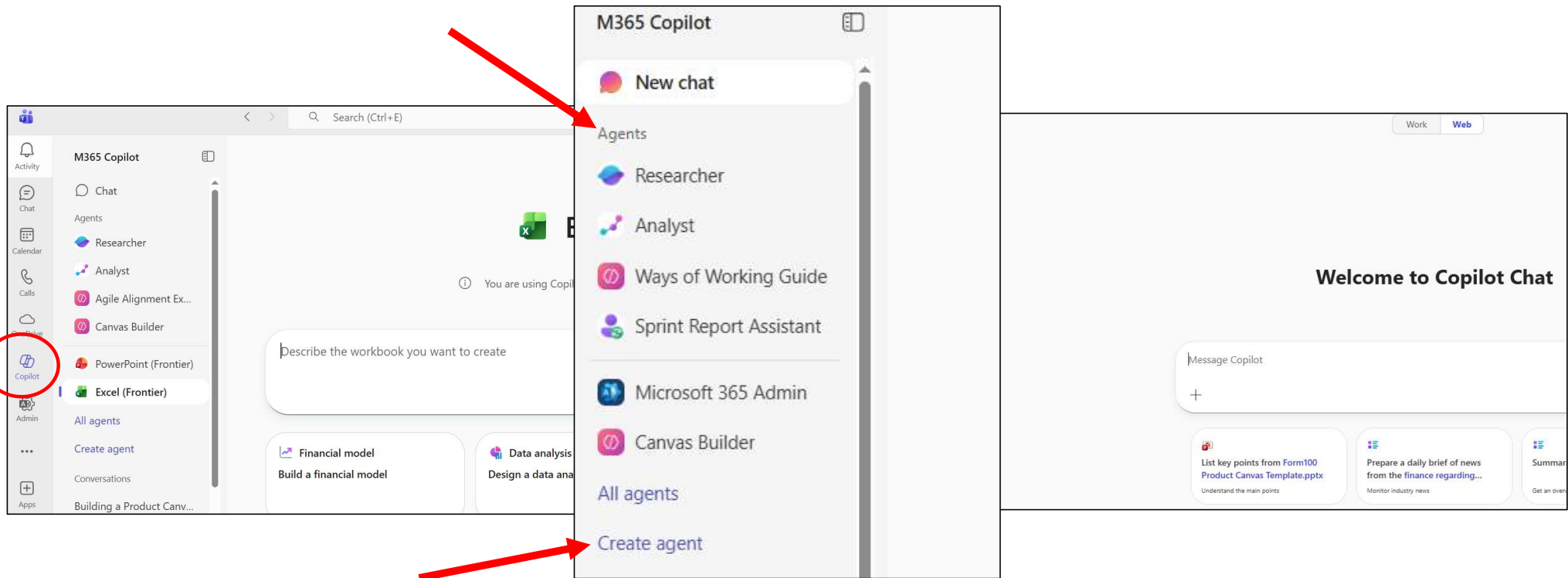
**Without:** being an engineer, dedicating a lot of resources, or using a third-party

# Automation Tools

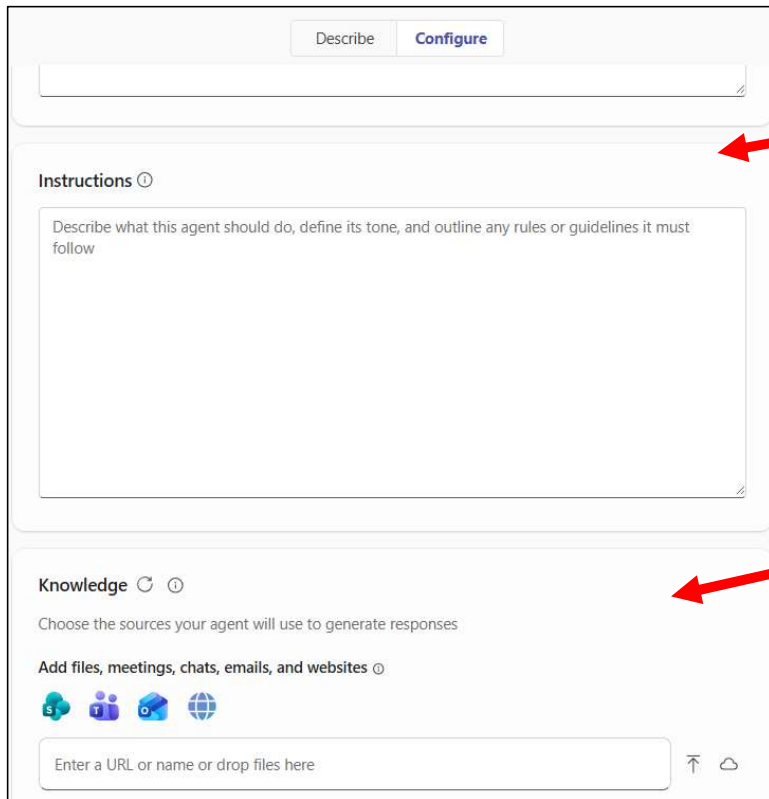
# M365 CoPilot "Agents"



# M365 CoPilot "Agents"



# M365 CoPilot “Agents”



The screenshot shows the configuration interface for an M365 CoPilot Agent. At the top, there are two tabs: "Describe" and "Configure". Below the tabs is a text input field. The main section is titled "Instructions" and contains a text area with the placeholder text: "Describe what this agent should do, define its tone, and outline any rules or guidelines it must follow". Below the "Instructions" section is the "Knowledge" section, which includes a sub-header "Knowledge" and a description: "Choose the sources your agent will use to generate responses". Underneath, it says "Add files, meetings, chats, emails, and websites" and shows icons for OneDrive, Teams, Outlook, and a globe. At the bottom of the "Knowledge" section is a text input field with the placeholder "Enter a URL or name or drop files here" and two small icons (up and down arrows).

Instructions



Knowledge

# M365 CoPilot "Agents"

Describe Configure

Instructions

Describe what this agent should do, define the steps it should follow

Ways of ...

Sprint Report Assistant

Microsoft 365 Admin

Share

Edit

Uninstall

Knowledge

Choose the sources your agent will use to generate responses

Add files, meetings, chats, emails, and websites

Enter a URL or name or drop files here

Instructions

Knowledge



# M365 CoPilot “Agents”

## What They Are

- Pre-prompted LLM chats
- Efficiency and Standardization tools
- Easy to create and share

## What They Are Not

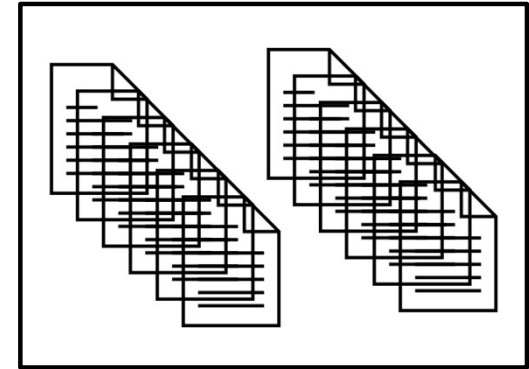
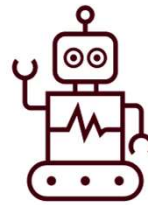
- Fully automated solutions
- Connect with multiple external systems
- 100% Accurate



# Two Types of M365 Agents

## Information Agents

- Chat bot on source material
- Constrained to source material



# Two Types of M365 Agents

## Information

- Chat bot
- Binary, c

Knowledge  

Choose the sources your agent will use to generate responses

Add specific websites 

Enter a URL or name or drop files here  

Search all websites 

**Only use specified sources **

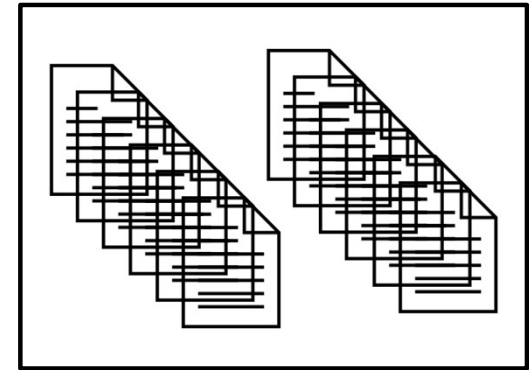
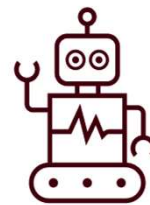
Reference people in organization 



# Two Types of M365 Agents

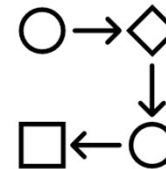
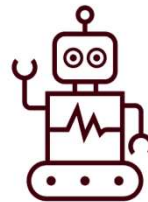
## Information Agents

- Chat bot on source material
- Binary, constrained to source material

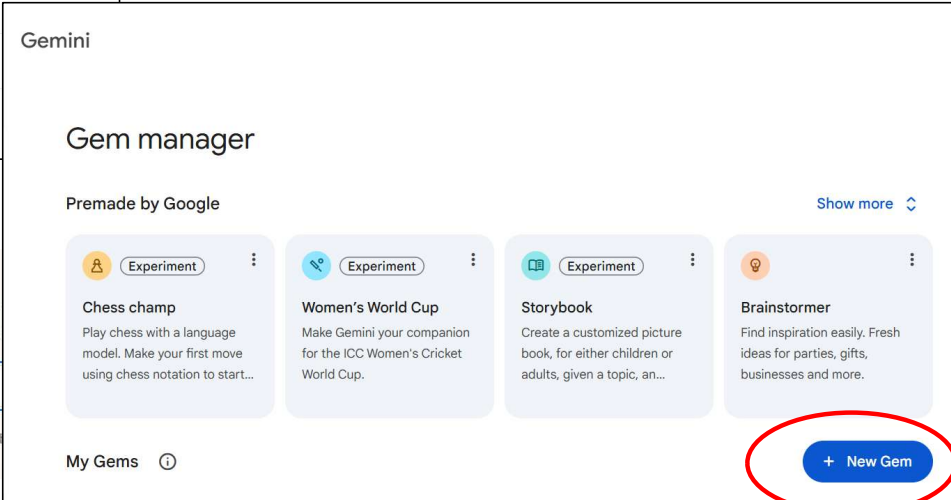
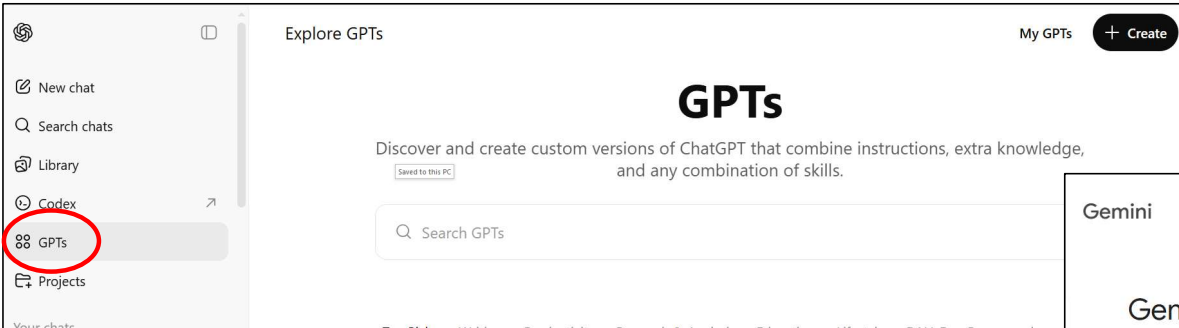


## Process Agents

- Trained on a process
- Uses internet and source material
- Speeds up process



# Chat GPT "GPTs" & Gemini "Gems"



The **Process** of Implementing  
Automation

is More Important than the  
**Automation**

# Form100 Automation Philosophy

## Key Components of an Automation Strategy

1. **Enhance, Not Replace Humans:** AI is a tool to make us better
- 2.
- 3.
- 4.

# Form100 Automation Philosophy

## Key Components of an Automation Strategy

1. **Enhance, Not Replace Humans:** AI is a tool to make us better
2. **Valuable:** Everything ties to business outcomes
- 3.
- 4.

# Create a Value Definition

- **Valuable:** Every automation proposal needs to have an associated business case which ties expected benefit to systematic value. We use Lean and Kaizen principles to understand the full system before automating steps to ensure the automation will add value.

## Value Definition

Save Team Member Time or Improve Process Quality  
and  
Doesn't Create System Bottlenecks

# Create a Value Stream Map

- **Valuable:** Business process that uses Lean and automation

associated value. We system before value.

40th Anniversary Edition

Eliyahu M. Goldratt and Jeff Cox

# THE GOAL

A PROCESS OF ONGOING IMPROVEMENT

Required reading for Amazon's management.

Dr. Goldratt has been described by Fortune as a "guru to industry" and by Business Week as a "genius". His book, The Goal, is a gripping fast-paced business novel.

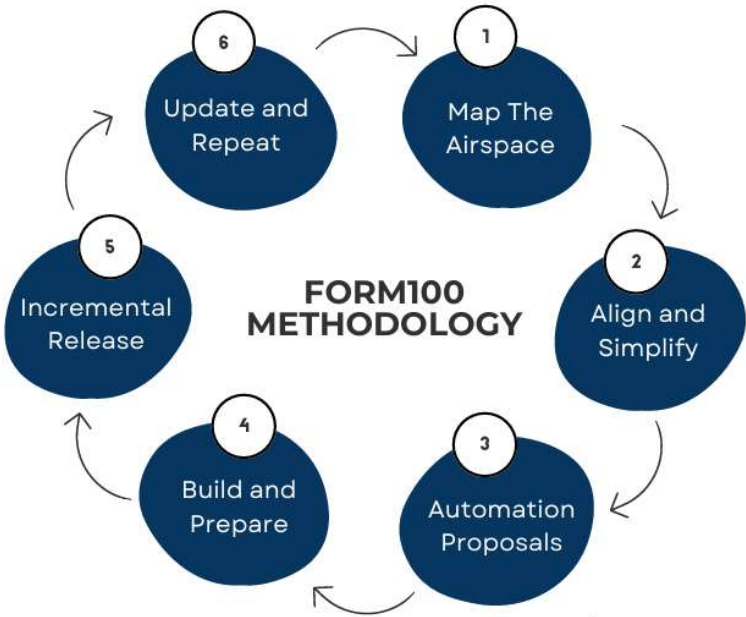
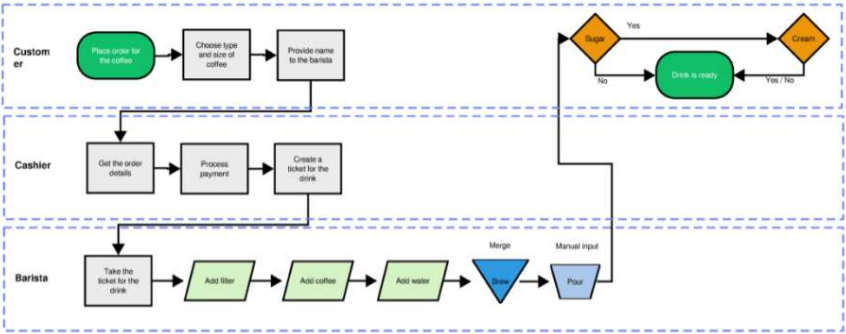
"A factory may be an unlikely setting for a novel, but the book has been wildly effective..."  
Tom Peters

THE BEST-SELLING BUSINESS NOVEL THAT INTRODUCED THE THEORY OF CONSTRAINTS AND CHANGED HOW AMERICA DOES BUSINESS

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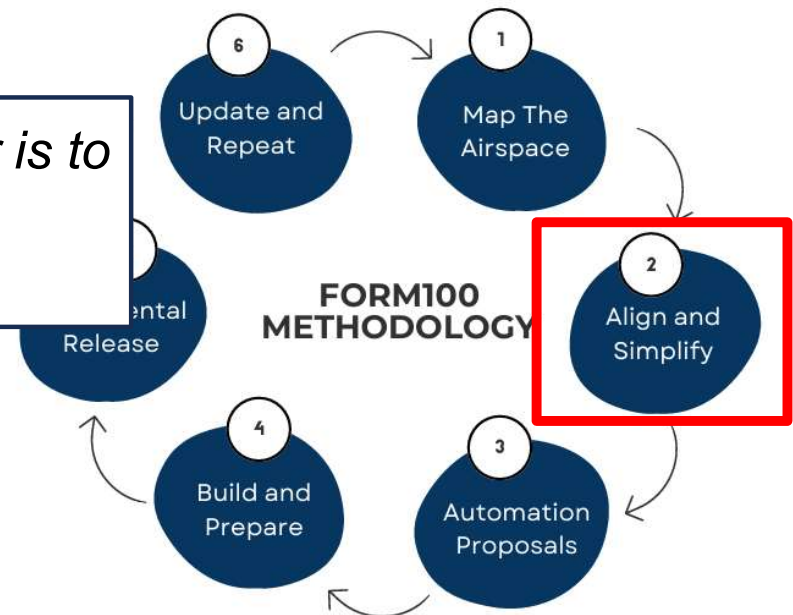
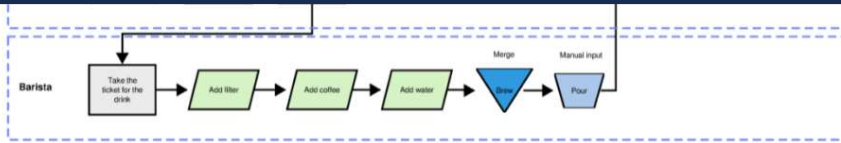
Save 10% on Quality

# Find Value



# Find Value

*“The most common error of a smart engineer is to optimize a thing that should not exist”*  
– Elon Musk



# Agent Canvas

Agent Name: <Name>

<p><u>Requesting Org &amp; Primary Users</u></p> <ul style="list-style-type: none"> <li>Who is Requesting an agent?</li> <li>Who will use the agent?</li> </ul>	<p><u>Problem Statement</u></p> <ul style="list-style-type: none"> <li>What problem(s) does this automation solves?</li> </ul>	<p><u>Success Statement</u></p> <ul style="list-style-type: none"> <li>How do we know this automation will be successful?</li> <li>"Imagine what success looks like"</li> <li>List out specific KPIs that connect to success statement.</li> </ul>	<p><u>Business Value</u></p> <ul style="list-style-type: none"> <li>How does this provide systematic value?</li> <li>Save Time? Improve Quality? Drives Alignment?</li> </ul>	<p><u>Data Sources</u></p> <ul style="list-style-type: none"> <li>What is the source data the agent will use?</li> <li>Where is data located?</li> <li>How is it configured?</li> </ul>
<p><u>External Teams</u></p> <ul style="list-style-type: none"> <li>What other organizations or systems are required to make this agent work.</li> </ul>	<p><u>Assumptions on Use</u></p> <ul style="list-style-type: none"> <li>Assumptions on use?</li> <li>Assumption on Source Data (rights, changing)?</li> <li>Regulatory Assumptions?</li> <li>Assumptions on Value?</li> </ul>	<p><u>Change Management / Implementation Plan</u></p> <ul style="list-style-type: none"> <li>Initial User Roll Out Plan?</li> <li>Data Governance?</li> <li>Feedback checkpoints?</li> <li>Training Required?</li> </ul>	<p><u>In Scope / Out Of Scope</u></p> <ul style="list-style-type: none"> <li>Define the boundaries.</li> <li>What is in scope for this effort?</li> <li>What is out of scope?</li> </ul>	<p><u>Safety/Security/Human Oversight</u></p> <ul style="list-style-type: none"> <li>Data Security Considerations?</li> <li>What human oversight is required?</li> <li>Who has access to the data?</li> </ul>

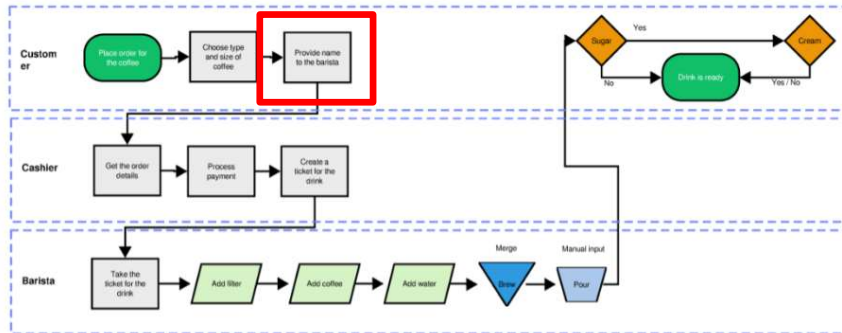
# Form100 Automation Philosophy

## Key Components of an Automation Strategy

1. **Enhance, Not Replace Humans:** AI is a tool to make us better
2. **Valuable:** Everything ties to business outcomes
3. **Incremental:** Don't try and build JARVIS
- 4.

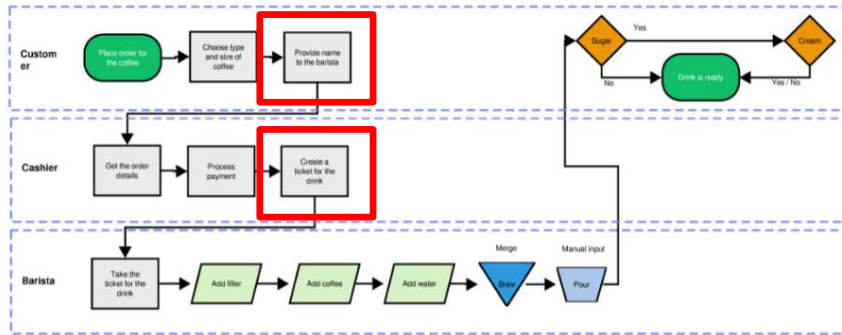
# Start Small and Simple

Pick one step in a larger process – high value & easy to implement



# Start Small and Simple

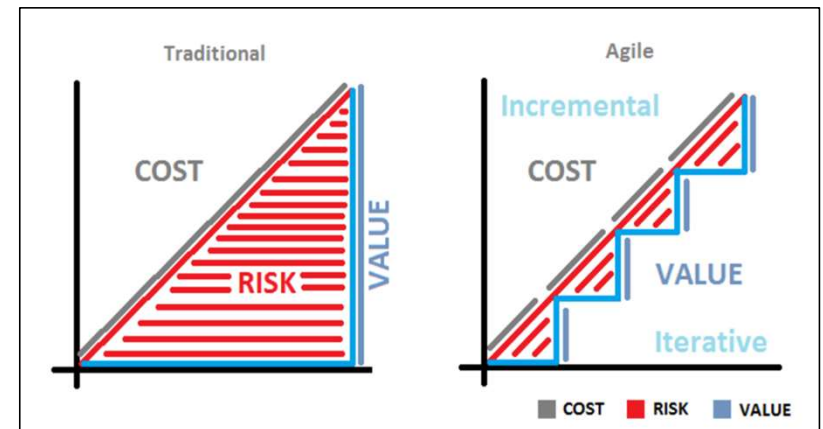
Implement that step, gain feedback – then pick the next one



# Automation is a Software Product

## Create and release automation in an Agile way

- **Tight Feedback Loops:** Release small pieces of value to small subset of users.
- **Change Management:** Automation not used by people isn't value.
- **Capture New Capabilities:** Ability to incrementally add additional value.



# Form100 Automation Philosophy

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1. **Enhance, Not Replace Humans:** AI is a tool to make us better
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3. **Incremental:** Don't try and build JARVIS
4. **Sustainable:** Needs to adapt and stay relevant

# Automation Sustainability

Value needs to adapt to changing business conditions

- **Process Integrity:** Agent changes with the business
- **Source Information:** Documentation as Data
- **Agent Management:** How do you validate they are still relevant?



# Automation Sustainability

## Sustainment Framework

### Agent Canvas:

Ensure a valid business case before starting

### Agent Tracker:

Keep tabs on what agents are in your org

### Agent User Guide:

Share how the agent works so it stays relevant

### Agent Checklist:

Review agents on a cadence to ensure value

# Case Study

# Case Study: Product Management

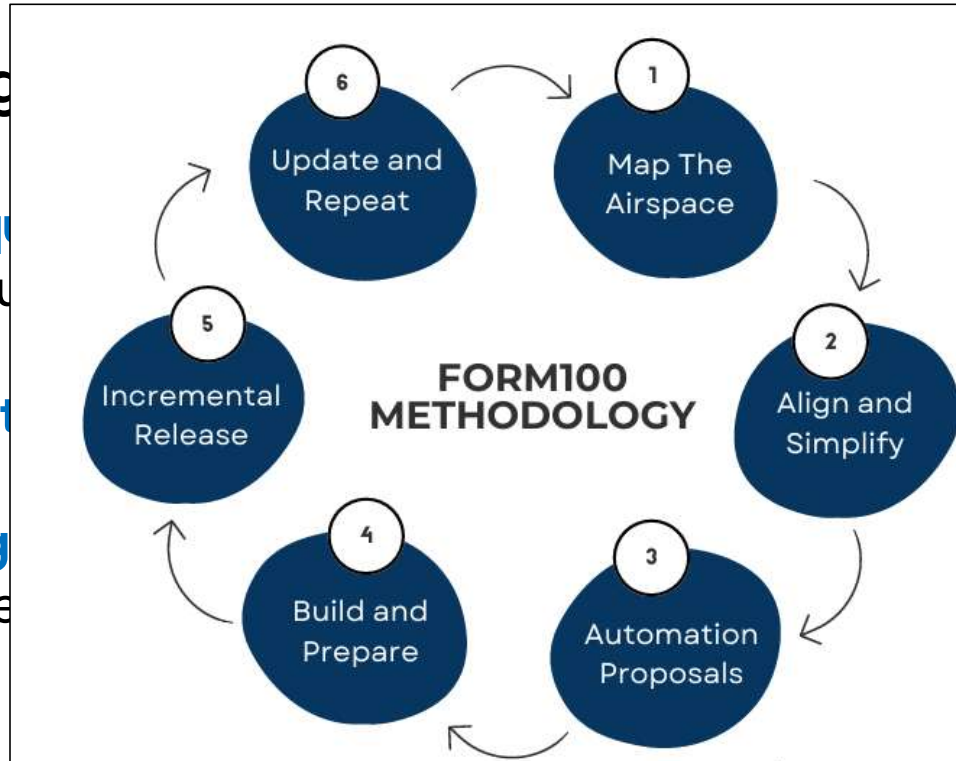
## Product Management Team Overwhelmed

- **Too Many Requirements:** Multiple stakeholders and channels to provide requests
- **Difficulty Prioritizing:** Apples to Apples comparison difficult
- **Product to Engineering Communication:** Requirements to the team doing the work was strained

# Case Study: Product Management

## Product Management

- **Too Many Requests** to provide requirements
- **Difficulty Prioritizing**
- **Product to Engineering** team doing the



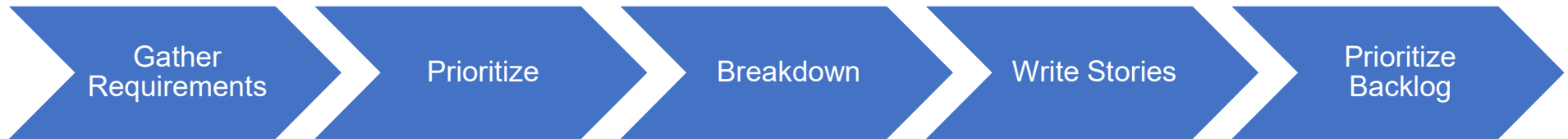
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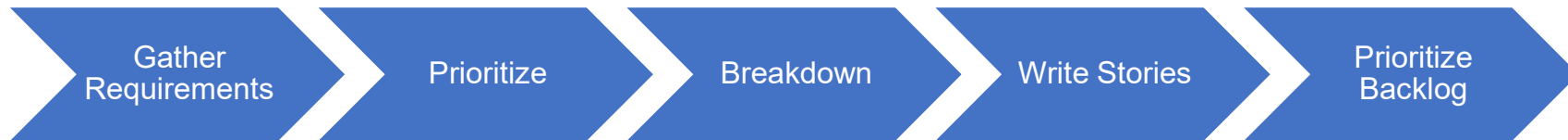
to the

# Case Study: Mapped the Process

## Product Management Idea to Ready Process

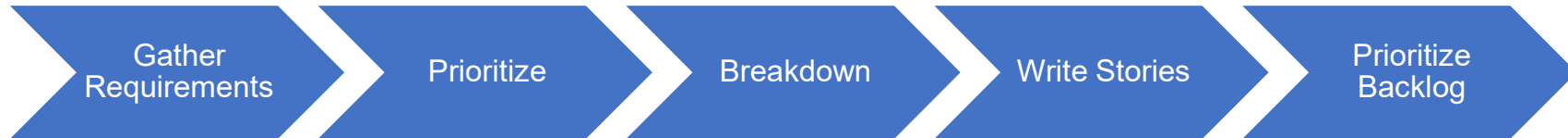


# Case Study: Align and Simplify



- **Added Requirement Standard:** One template for prioritization
- **Implemented Story Mapping:** Engineering & Product Collaboration Session
- **Created User Story Standard:** Standard way for better requirements

# Case Study: Automation Proposals



Agent Name: <Name>				
<b>Business Use &amp; Success Cases</b>	<b>Custom Processes</b>	<b>Business Objectives</b>	<b>Business Value</b>	<b>Business Risks</b>
<ul style="list-style-type: none"> <li>Who is focused on agent?</li> <li>Who will use the agent?</li> </ul>	<ul style="list-style-type: none"> <li>What problems does this automation solve?</li> </ul>	<ul style="list-style-type: none"> <li>How do we know this automation will be successful?</li> <li>Thoughts on what success looks like? Can we quantify this? How critical to success statement?</li> </ul>	<ul style="list-style-type: none"> <li>How does this provide systematic value?</li> <li>How? Time? Improved Quality? Other? Engagement?</li> </ul>	<ul style="list-style-type: none"> <li>What is the current state the agent will solve?</li> <li>Where is most success?</li> <li>How to measure success?</li> </ul>

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<ul style="list-style-type: none"> <li>What other organizations or systems are impacted by this agent work?</li> </ul>	<ul style="list-style-type: none"> <li>Assessments on use?</li> <li>Assessments on current state</li> <li>Why? Why change?</li> <li>Dependencies? Interdependencies?</li> <li>Assessments on when?</li> </ul>	<ul style="list-style-type: none"> <li>How do we know this agent will be successful?</li> <li>Thoughts on what success looks like? Can we quantify this? How critical to success statement?</li> </ul>	<ul style="list-style-type: none"> <li>Before the launch?</li> <li>What is the budget for this agent?</li> <li>Timeline?</li> <li>What is our ROI?</li> </ul>	<ul style="list-style-type: none"> <li>Data Security, Confidentiality?</li> <li>What is the current state the agent will solve?</li> <li>Where is most success?</li> <li>How to measure success?</li> <li>Who has access to this data?</li> </ul>

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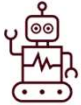
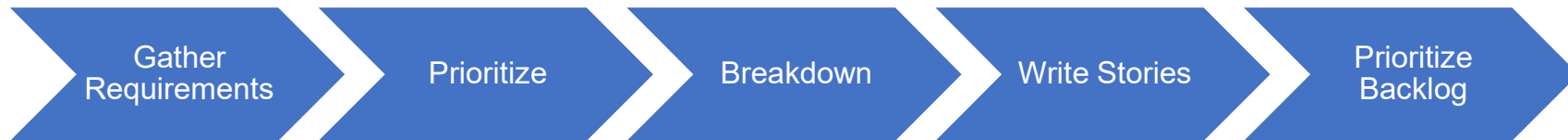


**Value Definition**

Save Team Member Time or Improve Process Quality  
and  
Doesn't Create System Bottlenecks

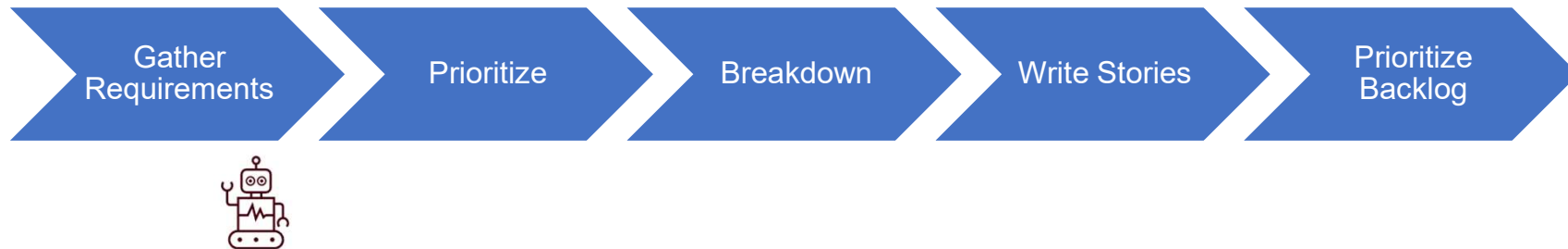


# Case Study: Build and Prepare



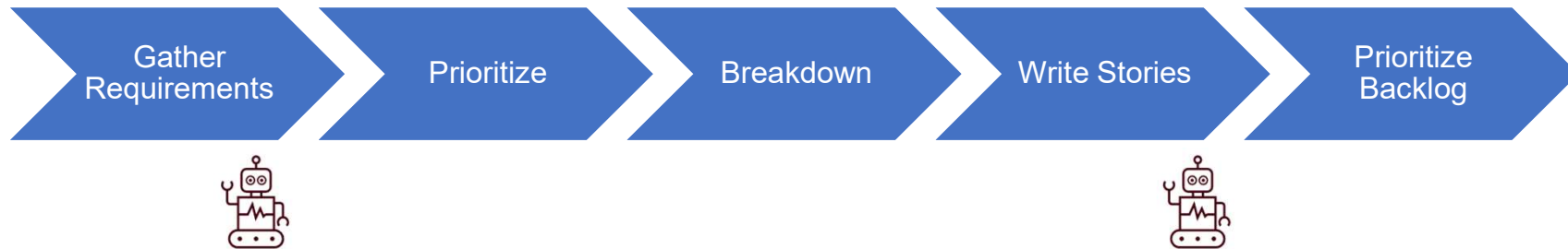
- **Single M365 Copilot Agent:** Standard Requirement Template
- **Process Documentation:** Clean and organized source process documentation
- **User Guide and Target User:** Change Management for success

# Case Study: Incremental Release

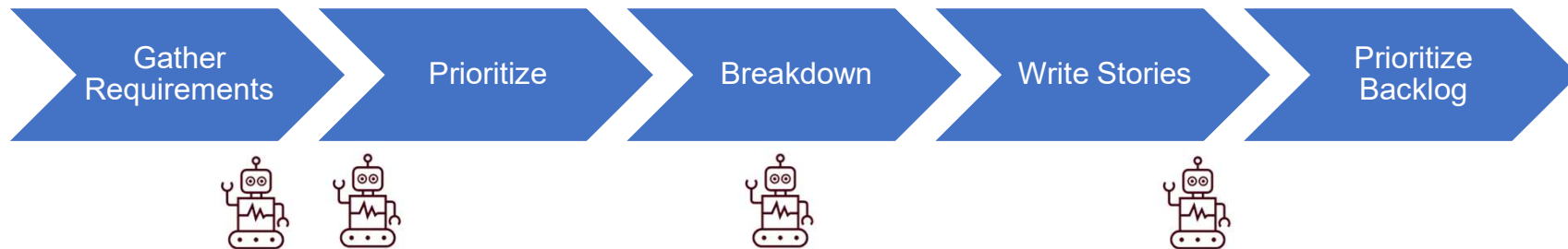


- **One User:** Gain Feedback and update agent
- **Release to Team:** Embed into the team's process

# Case Study: Update and Repeat



# Case Study: Update and Repeat



## Result:

- **30 hours/week:** Small time savings over large team
- **Improved Delivery:** Better requirements to engineering team
- **Automation Strategy:** Process to continue automation and capture future capabilities.

# Wrap Up

**You can:** implement valuable automation strategies

**Without:** being an engineer, dedicating a lot of resources, or using a third-party

The **Process** of Implementing  
Automation

is More Important than the  
**Automation**

# Thank You!

Nate Amidon

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