

Resources —

Getting Started with AI Automation Using Make

Notes for coding along live today - Everything you need to code along with us is in [this folder](#). Please download all the files and consult the instructions below.

How to create a Make account

- Go to <https://www.make.com/en> and sign up for free
- Free plan: up to 1,000 credits/month and 2 active scenarios
- Paid plans: start at \$9/month and include more credits, modules, and active scenarios

Employee NPS Responses

This will serve as our employee database. Before the session, please upload the file to your Google Drive account and save it as a Google Sheets file. Inside the document, you'll also find instructions on how to create the Google Form.

Blueprints

We'll upload these JSON files together during the webinar and connect the tools step by step:

- Step 1 - Traditional Automation
- Step 2 - Expand to AI workflows
- Step 3.1 - Orchestrate with AI agents - Get Answers
- Step 3.2 - Orchestrate with AI agents - Get Manager Info
- Step 3.3 - Orchestrate with AI agents - Send Manager Email

Other Files

We'll create the AI Agent and its connection together.

- AI Agent: will be used for the system prompt of our NPS Insight Agent.
- NPS Report Email Example: will be provided to the AI Agent.

Tools to be used:

- Google Workspace: Gmail, Forms, and Spreadsheets
- AI Models: OpenAI and Gemini.
 - If you don't have an AI model account, you can use Make AI Toolkit. All handled by Make. Bear in mind this will consume your Make account credits.

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