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Password: `dust seven line highest`

(include the spaces between words)

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Design It!

Identifying & Planning AI Agent Use Cases

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What if you want to do the same prompt many times?

Agents.

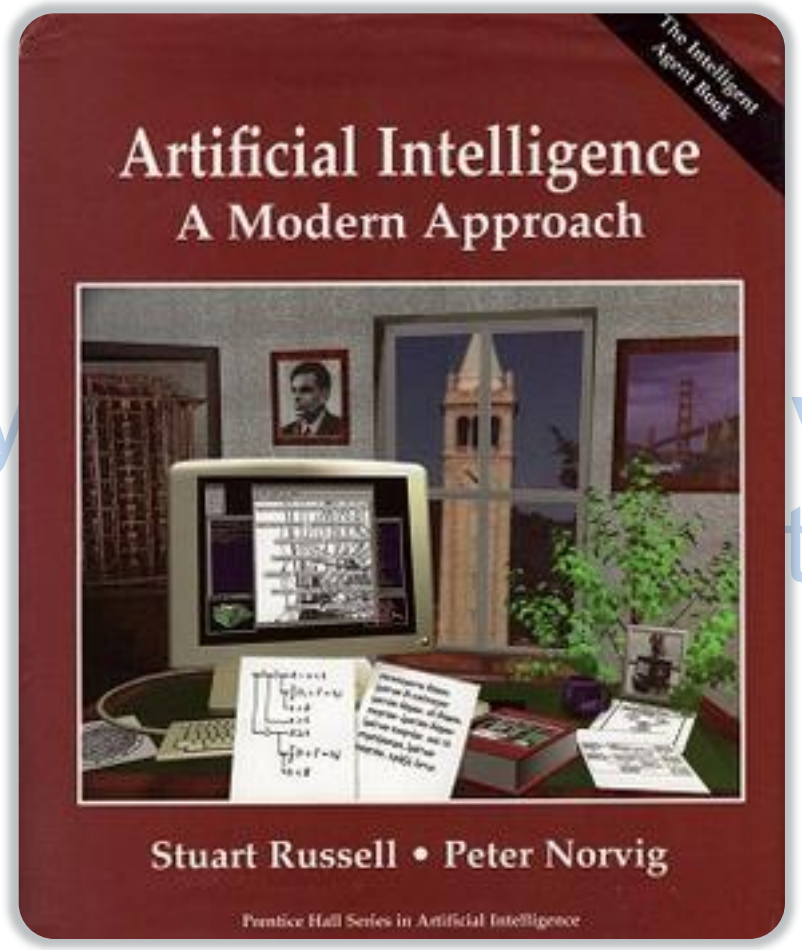
What we are doing today:

- ☑ Learning what agents are
- ☑ Identifying opportunities

What we are not doing today:

- ✗ Learning how to build agents

Anything that perceives its environment and acts on it



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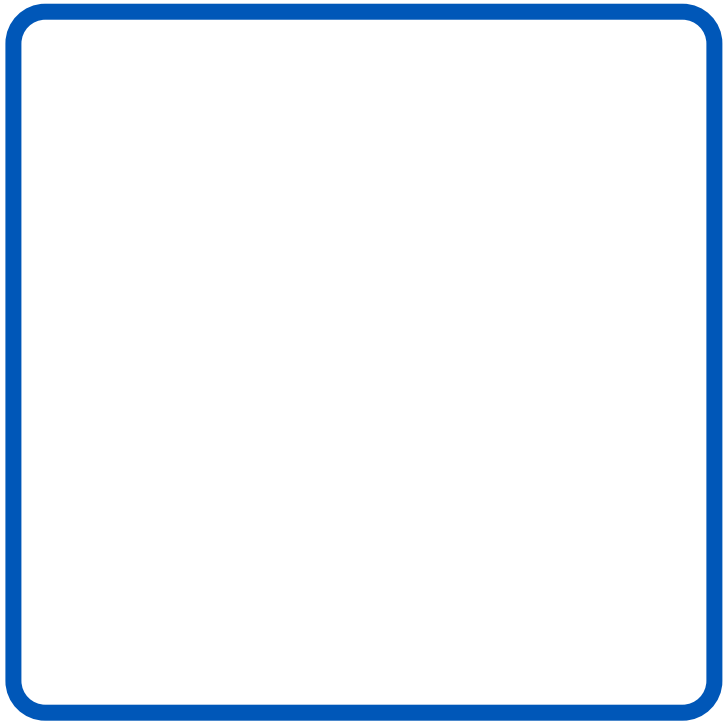
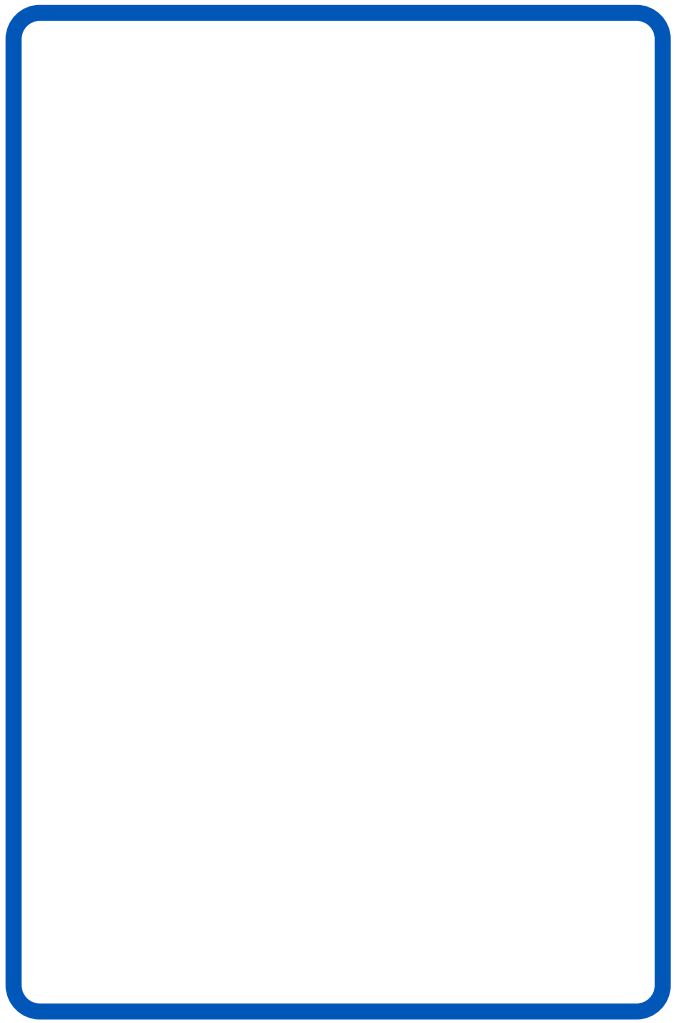
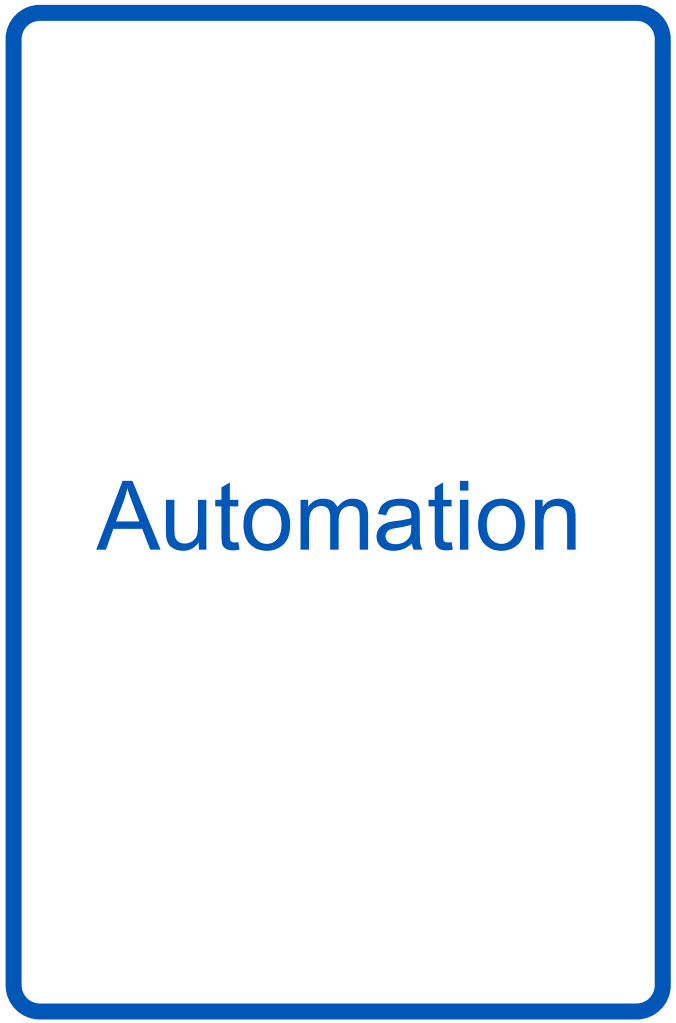


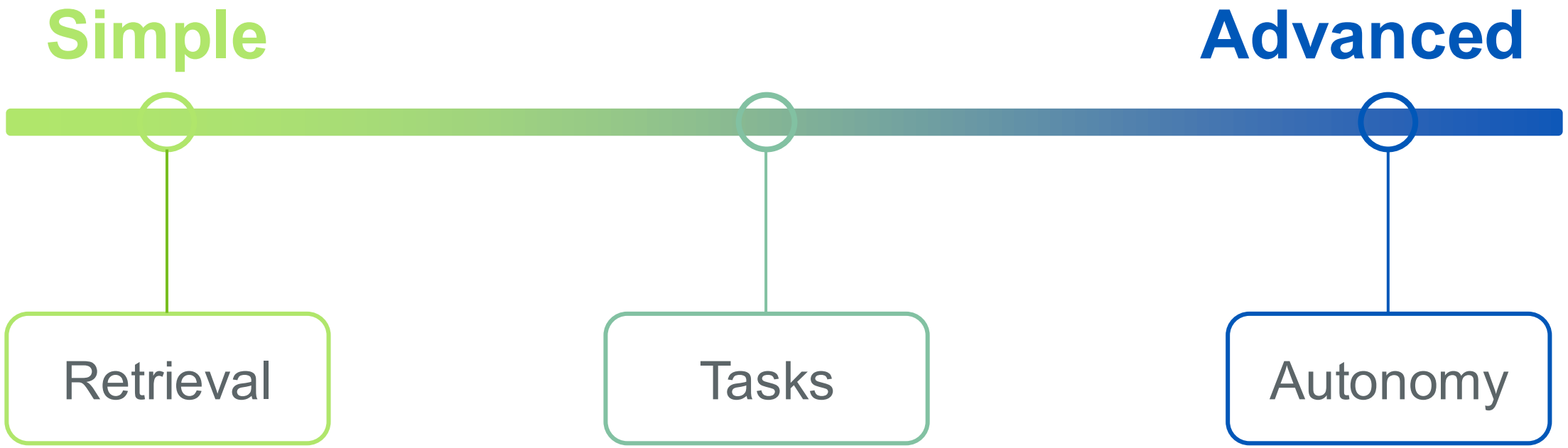


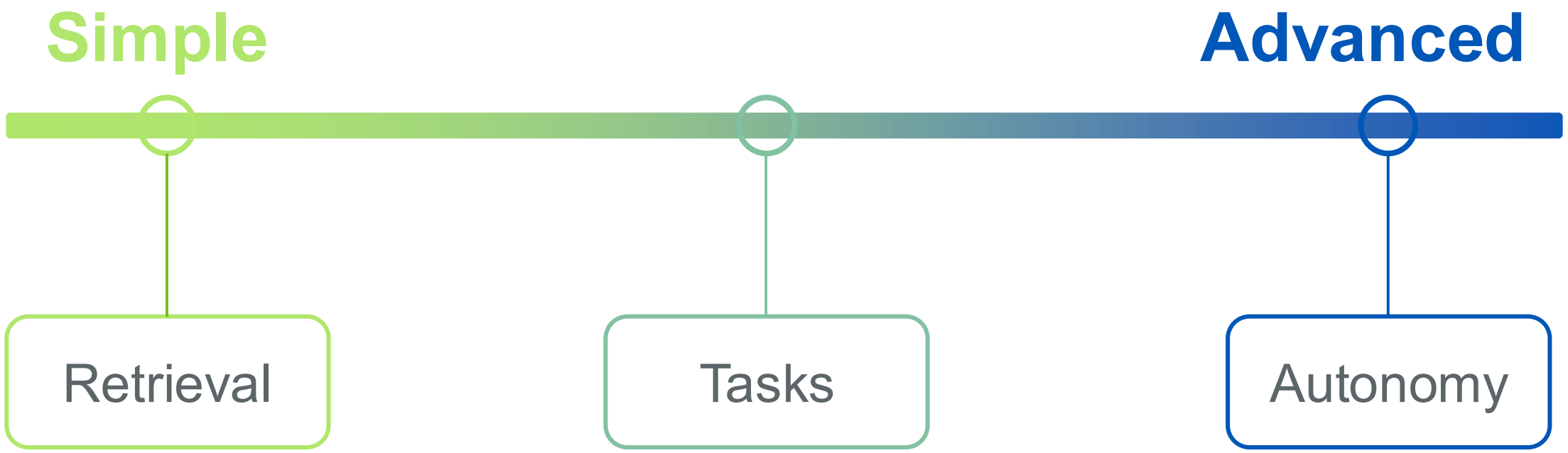

Agents


Automation

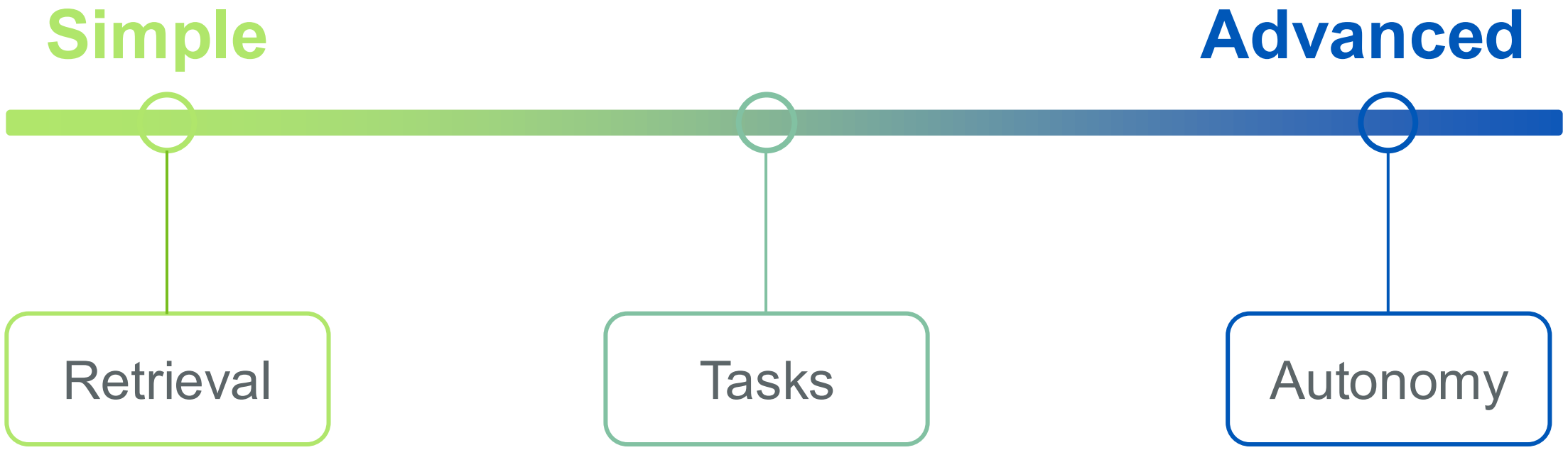
Non-deterministic

Deterministic


Simple
Advanced
Retrieval
Tasks
Autonomy



Build a chatbot that is aware of donor information and can answer questions for team members


Simple
Advanced
Retrieval
Tasks
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Build a chatbot that is aware of donor information and can answer questions for team members
Automate the generation of donor thank you letters based upon their most recent donation and referencing how they've engaged with the organization

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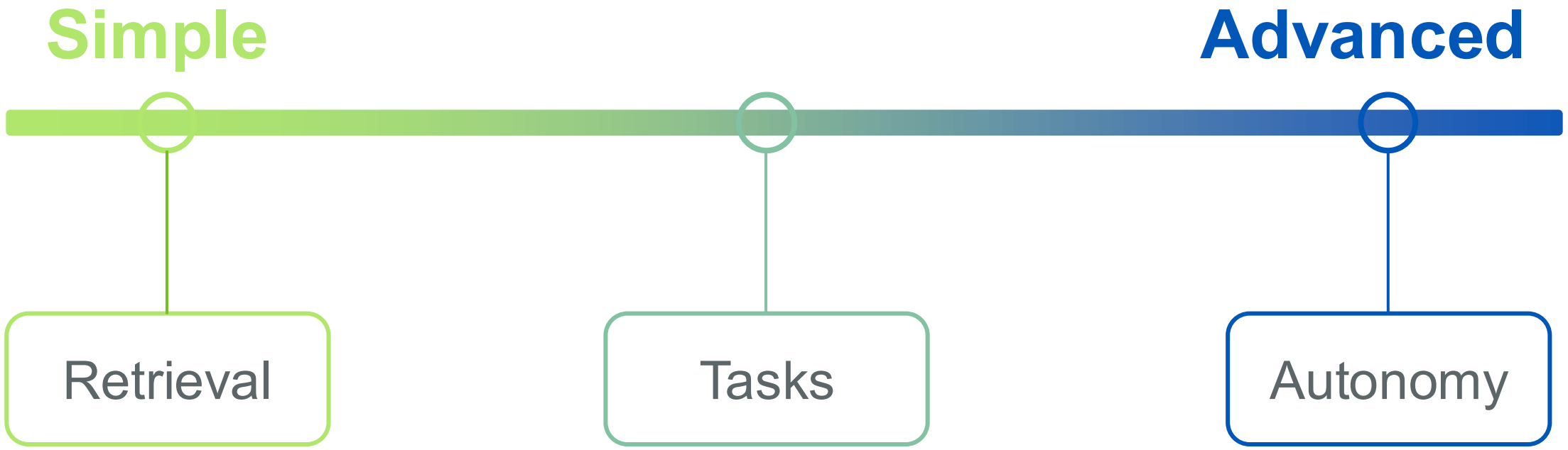
Simple
Advanced
Retrieval
Tasks
Autonomy
Build a chatbot that is aware of donor information and can answer questions for team members
Automate the generation of donor thank you letters based upon their most recent donation and referencing how they've engaged with the organization
Identify and engage with lapsed donors in order to re-engage them via personalized outreach

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It *could* be an agent if…

It *could* be an agent if…

1. The work is in the right shape

- ☑ Repeatable task
- ☑ Steps are clear and specifiable
- ☑ Inputs are available in systems
- ☑ Task has a clear “done” definition

It *could* be an agent if…

1. The work is in the right shape
2. The risk is appropriate

- ☑ Impact is low or moderate
- ☑ High stakes final determinations made by humans
- ☑ Doesn’t touch money
- ☑ Start with “draft” or “prepare” steps

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It *could* be an agent if…

1. The work is in the right shape
2. The risk is appropriate
3. You can put guardrails around it

- ☑ Permissions locked down
- ☑ Human in the loop
- ☑ Audit logs
- ☑ Fallback plan
- ☑ Prompt injection protection

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It *could* be an agent if…

1. The work is in the right shape
2. The risk is appropriate
3. You can put guardrails around it
4. The data supports it

- ☑ Data is clean and consistent
- ☑ Sensitive data is controlled

It *could* be an agent if…

1. The work is in the right shape
2. The risk is appropriate
3. You can put guardrails around it
4. The data supports it
5. You can measure and improve it

- ☑ Baseline metrics
- ☑ Understand ROI
- ☑ Owner identified

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How have we done this?

Nonprofit PolicyBuilder

Welcome to the Computer Use Policy Digital Workbook

Developed by Tech Impact, this tool leverages over a decade of industry experience to help you assess and document your organization's technology practices to auto-generate a customized Computer Use Policy.

WE FOCUS ON FOUR KEY AREAS

A strong Computer Use Policy is essential for nonprofit organizations to protect sensitive data, ensure compliance, and promote responsible technology use across their teams. This workbook cover policy elements that include:

Acceptable Use

Covers how employees can responsibly use their organization's tech, data, and resources.

Bring Your Own Device

Governs how employees can use their personal devices, such as smartphones, laptops, or tables for work purposes.

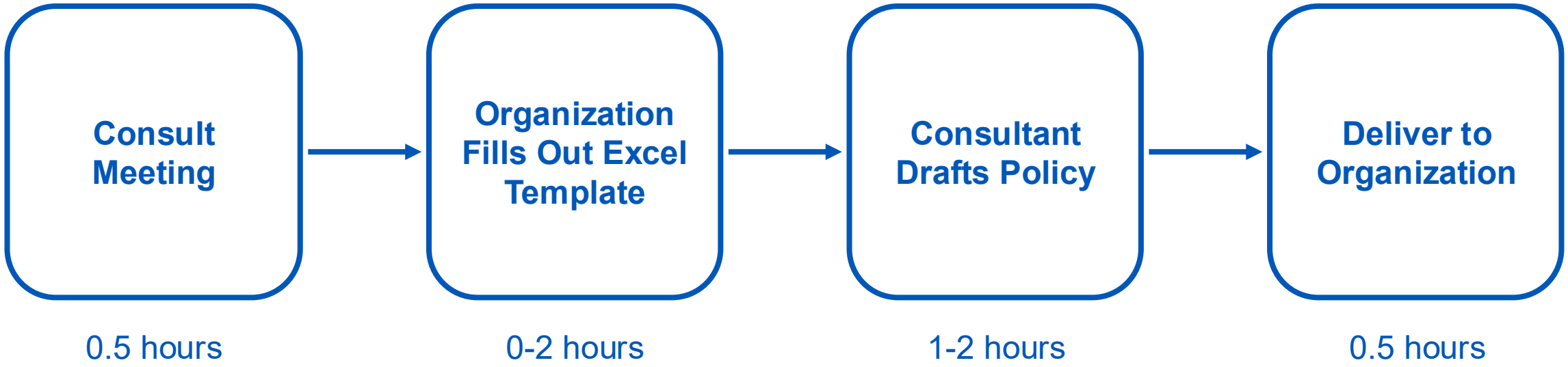
Data Security

Protects sensitive information, including donor records, client data, and organizational assets, from unauthorized use.

Artificial Intelligence

Ensures ethical and transparent use of artificial intelligence that aligns with organizational mission and values.

Before Agents



Total Time
2-5 hours

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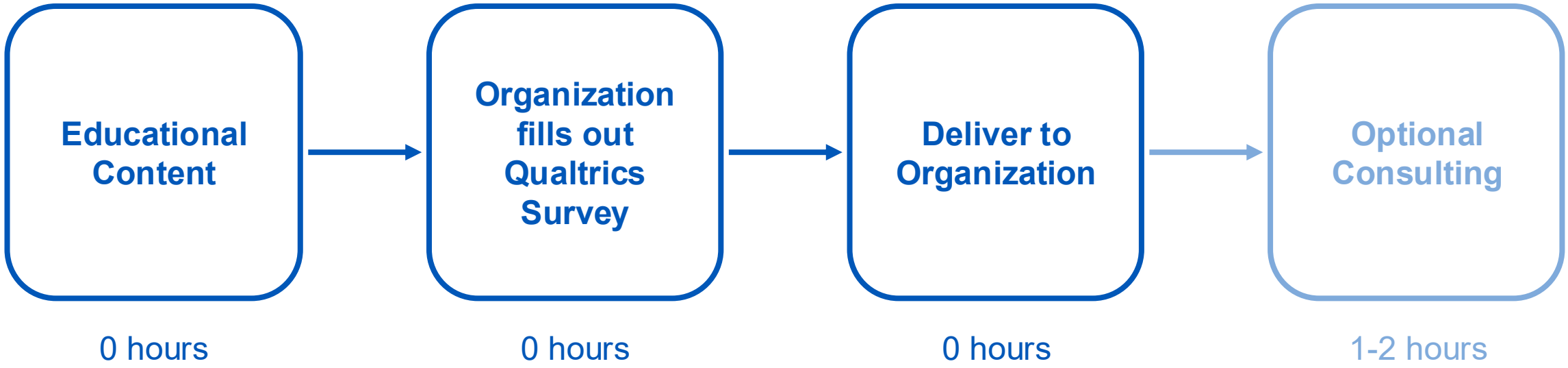
After Agents



Total Time
0 hours

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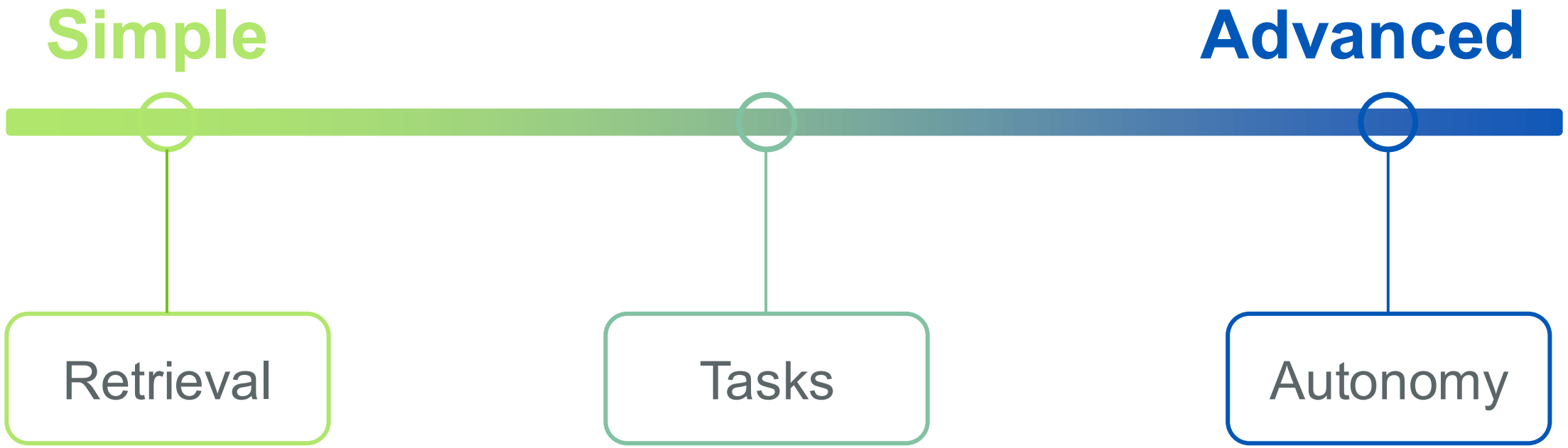
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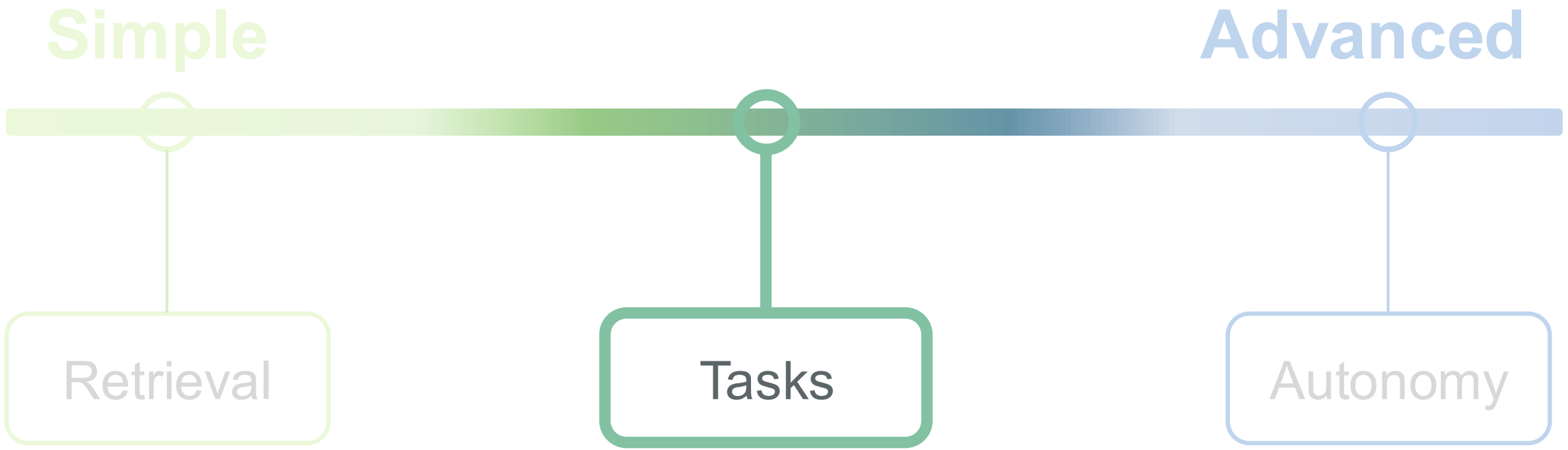

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Use it for free:

techimpact.org/policybuilder

How can you do this?

1. Identify opportunities
2. Map logic & requirements
3. Prioritize
4. Build & iterate

1. Identify opportunities
2. Map logic & requirements
3. Prioritize
4. Build & iterate

1 Identify opportunities

What are tasks that you or your team performs regularly?

List at least three opportunities on your own.

1 Identify opportunities

For each opportunity:

1. What current level of effort does this require?

2. By saving this level of effort, what additional value would this allow us to create?

1 Identify opportunities

Share opportunities in groups.

Look for areas of overlap. Can anything be combined?

Are the additional opportunities that emerge?

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Share your ideas

app.vibe.us

2 Map logic & requirements

Pick one opportunity to start with.

Think about how you would explain to a new hire or an intern how to do that work.

You’re going to map that logic out.

2 Map logic & requirements

1. What triggers this workflow happening?
2. Is there additional information to reference to guide decisions?
3. What are the decision points to consider?
4. What is the end product that should be produced?
5. Are there places where a supervisor should give feedback?

3 Prioritize

Data Lab team will review opportunities and find time to meet with your teams to talk through them.

We'll align on opportunities that are at the intersection of feasible and valuable.

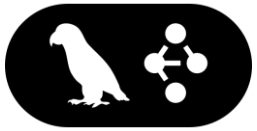
4 Build & iterate

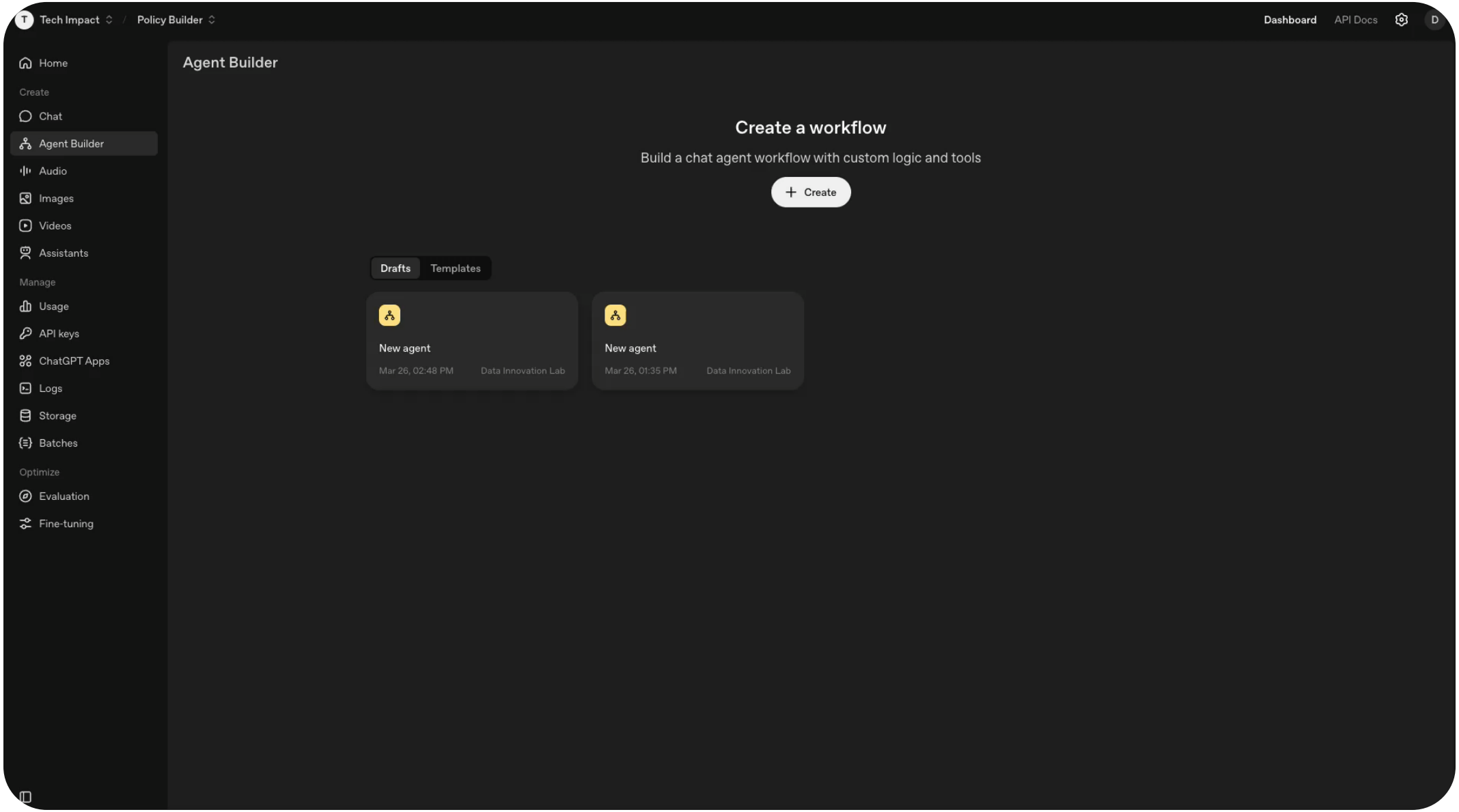
Once we select opportunities, we'll add them as projects in our sprints.

Expect MVPs to start

How do we build agents?

Consider tools like…

Business User Tools	Orchestration Tools	Enterprise Cloud Platforms	Engineering Frameworks
			
			


Tech Impact
Policy Builder
Dashboard
API Docs
D
Home
Create
Chat
Agent Builder
Audio
Images
Videos
Assistants
Manage
Usage
API keys
ChatGPT Apps
Logs
Storage
Batches
Optimize
Evaluation
Fine-tuning
Agent Builder
Create a workflow
Build a chat agent workflow with custom logic and tools
Create
Drafts
Templates
New agent
Mar 26, 02:48 PM
Data Innovation Lab
New agent
Mar 26, 01:35 PM
Data Innovation Lab

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