

# Agentic AI Canvas

Title: **Agentic AI Canvas Guide**

Date:

Company Name:

Designed For:

Designed By:

Version:



## Use Case

Define the process or task you would like to automate.

- Focus on business-critical areas that require efficiency, scalability, or adaptability.
- Consider time-consuming, repetitive processes or decision-making bottlenecks that slow operations.
- Think beyond automation—where can AI provide insights or intelligence beyond human capability?

### Guiding Questions:

- What are the most time-consuming or error-prone tasks in your business?
- Where does manual decision-making slow down efficiency?
- Can AI introduce predictive intelligence or real-time adaptability?



## Problem Statement

Identify the inefficiencies, costs, or risks that automation can solve.

- Define the core challenge that automation will address.
- Frame the problem in terms of business impact, not just technology.
- If multiple departments struggle with the same issue, it may have high automation value.

### Guiding Questions:

- What operational issues increase costs or reduce productivity?
- Are there risks (security, compliance, customer churn) that AI can mitigate?
- How does this problem impact customer experience or business outcomes?



## Goals

Define the business objectives that automation should achieve.

- Goals should support structured, intelligent workflows rather than isolated tasks.
- These goals set the stage for Agentic AI, where automation shifts from following fixed rules to adapting dynamically based on data and inputs.
- Instead of focusing on specific tasks, the system should be designed to continuously learn, make decisions, and respond to changing conditions.

### Guiding Questions:

- How does automation align with business growth and efficiency goals?
- Can this AI-driven system adapt and improve rather than just automate?
- Will this reduce operational overhead while improving decision-making?



## Target Outcome

Set measurable success metrics tied to the goal.

- Define clear, quantifiable success metrics (e.g., efficiency gains, cost savings, revenue growth).
- Consider both internal benefits (e.g., streamlined workflows, reduced errors) and external value (e.g., customer satisfaction, faster response times).
- Ensure AI's role in decision-making and execution is measurable over time.

### Guiding Questions:

- What KPIs (Key Performance Indicators) will determine success?
- Will success be measured by cost reduction, speed, or accuracy?
- How will AI's impact grow over time as it improves and learns?



## Business Impact & ROI

Quantify expected benefits and returns.

- Direct savings – Lower operational costs, labour reduction, reduced cloud spending.
- Strategic advantages – Increased scalability, faster execution, improved decision-making.
- Future impact – AI's continuous learning should create compounding value over time.

### Guiding Questions:

- What is the financial impact of automation?
- How much time, money, and effort will AI save per month or year?
- What is the break-even point for AI investment?
- How does this change competitive positioning in the industry?



## Workflows

Identify processes that need improvement or automation. Each workflow should include:

### Each workflow should include:

- **Name:** What is being improved or automated?
- **Goal:** What is the purpose of this workflow?
- **Data:** What information is required to function effectively?
- **Actions:** What steps are required to improve efficiency, eliminate bottlenecks, or enhance decision-making?
- **Governance:** What rules, policies, or guardrails must be enforced?

### Guiding Questions:

- What are the most inefficient or time-consuming workflows in your business?
- Where does manual effort or decision-making cause delays?
- Are there existing governance policies that must be considered?
- How can this workflow be improved, automated, or optimized?



## Key Stakeholders & Actors

Who interacts with or benefits from the system?

- Identify the people responsible for decision-making, implementation, and oversight.
- Define how different stakeholders interact with AI-generated outputs.
- Ensure key roles are aligned with business goals.

### Guiding Questions:

- Who makes business decisions related to automation?
- Who maintains, monitors, and improves the AI system?
- What cross-functional teams need to collaborate on AI adoption

### Example Roles

- Consumers – End-users who interact with AI-driven systems and benefit from automation.
- Business & Strategy – Cx leaders, finance teams.
- Governance & Compliance – Security, compliance officers.
- Technical – AI engineers, Devs.
- Operations – Product owners, project managers.



## Challenges & Constraints

Anticipate technical, regulatory, and operational limitations.

- Resource & Skills – AI & DevOps engineers, security experts, cloud specialists.
- Coordination – Collaboration between IT, security, finance, and business teams.
- Budget – Upfront investment in AI tools, development, and maintenance.
- Flexibility to Fail – AI workflows need room for iteration, testing, and adaptation.
- Compliance – Regulatory adherence for security, data protection, and industry standards.

### Guiding Questions:

- What skills and expertise are needed to implement and maintain AI?
- Will AI require ongoing adjustments and training to stay effective?
- Are there security and compliance concerns limiting AI's autonomy?
- What budget is required, and how does AI prove its ROI?



## How AI Can help

Now that you've defined your workflow, you can explore how AI Agents and Agentic AI can enhance your automation efforts. This section is about envisioning possibilities, not technical details.

### Guiding Questions:

- Where can AI improve decision-making?
- How can AI accelerate processes?
- What tasks can AI augment to support human efforts?
- How might AI enhance customer experience or engagement?
- In what ways could AI reduce errors or increase consistency?

### Potential AI Contributions:

- Learn and adapt continuously
- Predict future trends and issues
- Understand and generate human-like content (text, images, audio, video)
- Spot patterns in large datasets
- Use data to drive informed decisions and efficiency
- Coordinate and collaborate with agents or humans
- Autonomously operate 24/7 with minimal human intervention

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## Use Case

Define the process or task you would like to automate.



## Problem Statement

Identify the inefficiencies, costs, or risks that automation can solve.



## Goals

Define the business objectives that automation should achieve.



## Target Outcome

Set measurable success metrics tied to the goal.



## Business Impact & ROI

Explore how AI Agents and Agentic AI can enhance your automation efforts.



## Workflows

Identify processes that need improvement or automation. Each workflow should include:

### Workflow 1:

- **Goal:**
- **Actions:**
- **Data:**
- **Governance:**

### Workflow 3:

- **Goal:**
- **Actions:**
- **Data:**
- **Governance:**

### Workflow 2:

- **Goal:**
- **Actions:**
- **Data:**
- **Governance:**

### Workflow 4:

- **Goal:**
- **Actions:**
- **Data:**
- **Governance:**



## Key Stakeholders & Actors

Who interacts with or benefits from the system?



## Challenges & Constraints

Anticipate technical, regulatory, and operational limitations.



## How AI Can help

Explore how AI Agents and Agentic AI can enhance your automation efforts. Start with "AI can".

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## Workflows

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Each workflow should include:

### Workflow 1:

- Goal:
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- Actions:
- Data:
- Governance:

### Workflow 4:

- Goal:
- Actions:
- Data:
- Governance:

# Agentic AI Canvas

Title:

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Version:

**Section Name:**

**Section Name:**

# Agentic AI Canvas

Title: X Management Automation

Date: 2025-03-06

Company Name: The Birdski Company

Designed For: BlueBird Marketing Team

Designed By: Robert G

Version: BueBird\_1.1



## Use Case

Define the process or task you would like to automate.

### Automating X Account Management

We're struggling to manage our X account with over 10k followers. While we invest effort in content curation and engagement tracking, our current scheduling app lacks personalization and has limitations. To stay competitive, our goal is to automate tweet generation, optimize our content, and monitor trends by combining relevant news with our brand messaging in an engaging, human-like tone.

- **Automate tweet creation:** Generate tweets using trending news, custom input, and past engagement data.
- **Dynamically format tweets:** Create single tweets, threads, polls, and quote tweets to maximize engagement.
- **Optimize & learn:** Analyze performance, test formats, and refine phrasing over time.
- **Adapt tone & style:** Customize tone (e.g., witty, authoritative, empathetic, humorous) based on sentiment analysis and audience preferences.
- **Human-in-the-loop notifications:** Alert the team for manual intervention on critical replies or trending topics.



## Problem Statement

Identify the inefficiencies, costs, or risks that automation can solve.

Our X management is very manual, and we're stretched thin trying to keep up. We lack the time and scale to fetch trending news, weave in our brand's story, and craft tweets that grab attention. Our team pours 20+ hours a week into creating and watching posts, but we still miss chances to jump on hot industry topics or keep our voice steady and fun. It's dragging down our engagement, making us less relevant, and slowing everything else we do.



## Goals

Define the business objectives that automation should achieve.

1. Automate daily engagement with human-like, brand-consistent tweets reflecting trending news and custom content.
2. Optimize phrasing, timing, and topics for maximum reach and relevance using a customized, engaging tone.
3. Continuously improve performance through engagement analysis and audience feedback.



## Target Outcome

Set measurable success metrics tied to the goal.

1. Increase tweet engagement rate by 50% (e.g., likes, retweets, comments).
2. Reduce manual content creation effort by 66% (e.g., from 15 to 5 hours/week).
3. Reduce unfollow rate by 10% with personalized, timely, and tone-appropriate tweets.
4. Automate response notifications for 90% of high-engagement interactions (e.g., 100+ retweets).



## Business Impact & ROI

Explore how AI Agents and Agentic AI can enhance your automation efforts.

- **Efficiency Gains:** Automates content sourcing and tweeting, saving 10+ hours/week (\$25K/year for a 3-person team at \$50/hour).
- **Cost Savings:** Cuts reliance on managers for routine posts and news curation.
- **Revenue Growth:** 50% engagement boost drives visibility, potentially adding 5% conversions (\$50K/year).
- **Scalability:** Delivers 50+ daily tweets reflecting news and brand voice without added staff.



## Workflows

Identify processes that need improvement or automation. Each workflow should include:

### Workflow 1: Fetching Trending News

- **Goal:** Source relevant trending news from the web and blend it with custom brand content for tweet generation.
- **Actions:** Search web for trending news (e.g., "AI breakthroughs" for a tech brand), rank by relevance to audience/industry, integrate with custom input (e.g., "Our take on today's AI news"), draft tweets reflecting brand voice.
- **Data:** Web search results (e.g., news APIs, Google Trends), industry-specific feeds, custom content (e.g., blog posts, promotions), brand guidelines.
- **Governance:** Filters out unreliable sources; ensures news aligns with brand values and avoids sensitive topics.

### Workflow 2: Tweet Generation & Scheduling

- **Goal:** Automate tweet creation and scheduling with a customized, engaging tone.
- **Actions:** Draft single tweets, threads, and polls in a tailored tone (e.g., witty for tech-savvy followers), schedule at peak engagement times.
- **Data:** Trending news, custom content, historical engagement, audience sentiment.
- **Governance:** Enforces brand tone guidelines; flags drafts for review if tone deviates.

### Workflow 3: Engagement Monitoring & Learning

- **Goal:** Track tweet performance and refine content/tone for better results.
- **Actions:** Analyze trends weekly, adjust tone (e.g., more humor if it drives retweets), prioritize top formats (e.g., polls).
- **Data:** Likes, retweets, comments, impressions, sentiment feedback.
- **Governance:** Protects data privacy; avoids biased tone adjustments.

### Workflow 4: Audience Interaction & Notifications

- **Goal:** Ensure timely human responses to high-engagement tweets.
- **Actions:** Detect spikes (e.g., 100+ retweets in 5 minutes), notify team within 5 minutes for manual reply.
- **Data:** Mentions, comments, tagged responses.
- **Governance:** Prevents automated replies; prioritizes human moderation for sensitive interactions.



## Key Stakeholders & Actors

Who interacts with or benefits from the system?

- **Business & Strategy:** Marketing Manager aligns tweets with goals; Brand Strategist ensures tone and content consistency.
- **Governance & Compliance:** Social Media Compliance Officer enforces policy and brand standards.
- **Technical & Development:** AI Developer builds news-fetching and tone-customization models; Engineer optimizes engagement tools; Data Analyst tracks KPIs.
- **Execution & Operations:** Social Media Manager inputs custom content and reviews 10% of tweets manually.

### Interactions:

- Social Media Manager provides custom content; AI Developer refines tone based on performance.



## Challenges & Constraints

Anticipate technical, regulatory, and operational limitations.

- **Resources & Skills:** Needs AI developers for web search and tone customization, plus engineers for system optimization.
- **Coordination:** Marketing and tech teams must sync on news sources, custom content, and tone preferences.
- **Budget:** \$12K initial investment (news APIs, tools, setup); \$3K/year maintenance.
- **Flexibility to Fail:** Early tweets may miss tone mark or news relevance, requiring a 1-month tuning phase.
- **Compliance:** Must meet X policies, copyright laws for news, and enterprise branding standards.



## How AI Can help

Explore how AI Agents and Agentic AI can enhance your automation efforts. Start with "AI can".

- **AI can** keep getting smarter daily, learning what your audience loves so your tweets hit the mark.
- **AI can** spot hot trends before they blow up, grabbing the perfect news to share with your followers.
- **AI can** craft tweets that sound like those of a real person—witty, friendly, or with whatever vibe best suits the message.
- **AI can** dig through tons of data to find what's worked before, like that one poll that got everyone talking.
- **AI can** pick the best times and topics so your tweets land when people are ready to engage.
- **AI can** work alongside your team, drafting ideas while you focus on the big picture.
- **AI can** keep the X party going 24/7, posting and tweaking without you lifting a finger.



# Agentic AI Canvas

**Title:** Ultimate Sales Teammate

**Date:** 2025-03-06

**Company Name:** The Big Equipment Tech

**Designed For:** SaleAlpha Team

**Designed By:** Robert G

**Version:** Alpha\_1.2



## Use Case

Define the process or task you would like to automate.

### Automate Sales Support

Our company's Salesperson Team is overwhelmed with selling enterprise equipment like routers. They are spending a lot of time chasing leads, creating pitches, and finding answers, and we don't want to add another subscription or expense for a new SaaS. Instead, we are automating these tasks by prioritizing leads that show the strongest buying signals, generating pitches that address customer needs effectively, tracking deals to ensure they progress smoothly, and providing immediate answers to technical questions. We aim to maintain a personal touch and keep our approach sharp for our team.

- **Prioritize leads:** Rank prospects using buying clues and what's sold before.
- **Generate pitches:** Whip up custom proposals and emails that fit each client.
- **Track deals:** Watch progress and nudge with the next best move.
- **Answer tech Qs:** Give quick, spot-on replies to gear questions.



## Problem Statement

Identify the inefficiencies, costs, or risks that automation can solve.

Sales support for our team is a total grind. We're stuck in a rut doing everything ourselves. We're scrambling to pick the best leads, write winning pitches, and keep deals alive, but there's never enough time. The Salesperson Team clocks 20+ hours a week chasing data and answers, missing big fish and chances to shine. It's bogging us down, losing sales, and running us ragged. We tried SaaS solutions, but they all became too complex and unmanageable.



## Goals

Define the business objectives that automation should achieve.

1. Automate lead management and pitch creation to save time while keeping interactions personal and relevant.
2. Optimize deal progression by identifying key moments and actions to close sales faster.
3. Continuously improve sales strategies using real-time customer data and past performance insights.



## Target Outcome

Set measurable success metrics tied to the goal.

1. Increase close rate by 30% by targeting high-potential leads effectively.
2. Reduce time spent on pitch preparation by 50% (e.g., from 10 to 5 hours/week).
3. Shorten sales cycles by 20% (e.g., from 12 to 9 weeks) with timely follow-ups.
4. Boost customer satisfaction with 90% of technical queries answered instantly and accurately.



## Business Impact & ROI

Explore how AI Agents and Agentic AI can enhance your automation efforts.

- **Efficiency Gains:** Automates repetitive tasks, saving 15+ hours/week (\$45K/year at \$60/hour per salesperson).
- **Cost Savings:** Reduces reliance on additional support staff for research or tech queries.
- **Revenue Growth:** 30% more closed deals could add \$300K/year (assuming \$1M annual quota per salesperson).
- **Scalability:** It handles 2x many leads without extra effort, boosting pipeline capacity for the team.



## Workflows

Identify processes that need improvement or automation. Each workflow should include:

### Workflow 1: Lead Identification & Prioritization

- **Goal:** Automate the ranking of prospects to focus the Salesperson Team on high-potential leads.
- **Actions:** Scan CRM for buying signals, fetch prospect details, score leads (e.g., "80+ if budget > \$100K"), and store ranked leads in a prioritized database.
- **Data:** CRM data (e.g., website visits, email opens), past sales history, company size, budget signals.
- **Governance:** Ensure data privacy (e.g., GDPR), limit scoring to verified sources, and flag outliers for manual review.

### Workflow 2: Pitch Generation & Personalization

- **Goal:** Generate tailored pitches quickly to match client needs and boost close rates.
- **Actions:** Trigger on lead readiness, fetch client insights, search for similar winning pitches, draft custom proposals/emails, validate content, schedule delivery at optimal times.
- **Data:** Prioritized leads (from Lead db), client needs (CRM notes), past pitch success (Engagement db), product specs.
- **Governance:** Enforce brand tone, ensure compliance with sales policies, cap 10% for human review.

### Workflow 3: Deal Tracking & Optimization

- **Goal:** Monitor deal progress and suggest next steps to shorten sales cycles.
- **Actions:** Start on client response, track interactions, analyze progress, recommend actions (e.g., "Call in 2 days"), update deal insights database.
- **Data:** Pitch responses (e.g., email replies), interaction logs (calls, meetings), sales milestones, past deal patterns.
- **Governance:** Protect client data, limit suggestions to team-approved actions, log all recommendations.

### Workflow 4: Technical Q&A Support

- **Goal:** To build trust and speed deals, provide instant, accurate answers to client tech questions.
- **Actions:** Detect questions, fetch answers from docs, generate human-like responses, notify team for complex issues.
- **Data:** Client queries (e.g., "Router latency?"), product documentation, knowledge base, past Q&A logs.
- **Governance:** Ensure accuracy (90%+ match to specs), avoid proprietary data leaks, escalate 10% to experts.



## Key Stakeholders & Actors

Who interacts with or benefits from the system?

- **Business & Strategy:** Sales Manager aligns AI with quotas; Product Specialist ensures equipment accuracy.
- **Governance & Compliance:** Legal Counsel ensures contract compliance; Data Officer protects client data.
- **Technical & Development:** AI Developer builds lead scoring and pitch models; Sales Engineer integrates product specs.
- **Execution & Operations:** Salesperson Team uses AI tools; CRM Manager oversees data flow.



## Challenges & Constraints

Anticipate technical, regulatory, and operational limitations.

- **Resources & Skills:** Needs AI developers and sales experts for setup.
- **Coordination:** Sales and tech teams must align on data and tools.
- **Budget:** \$20K initial investment (CRM integration, AI tools); \$3K/month maintenance.
- **Flexibility to Fail:** Early pitches may miss the mark, needing 1-month tuning.
- **Compliance:** Must meet data privacy (e.g., GDPR) and contract standards.



## How AI Can help

Explore how AI Agents and Agentic AI can enhance your automation efforts. Start with "AI can".

- **AI can** keep learning what makes a lead hot, so you're always chasing the right deals.
- **AI can** spot when a big sale's about to pop, giving you a heads-up to jump in fast/.
- **AI can** write pitches that feel like they're from you—sharp, tailored, and ready to win.
- **AI can** dig up past deals that crushed it, like that router pitch that sealed the deal.
- **AI can** figure out the perfect moment to nudge a client, keeping the sale cycle moving smoothly.
- **AI can** toss you killer ideas and drafts so you can charm the room.