



# AI Momentum Summit

## Building Your AI Business Case

Nathan Lasnoski  
Chief Technology Officer  
Concurrency

# Let's Connect



**Nathan Lasnoski**

CTO @ Concurrency | Top Executive AI  
Speaker, C-Suite, Board-Advisor, Keynote S...



Tech Strategy



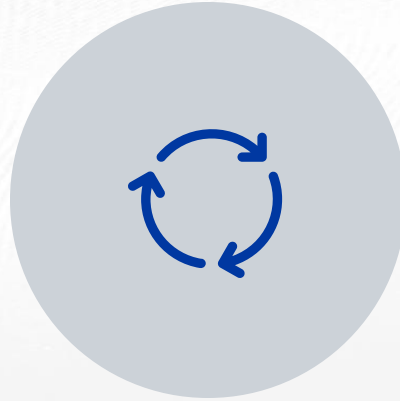
Life's Adventure

**Concurrency**

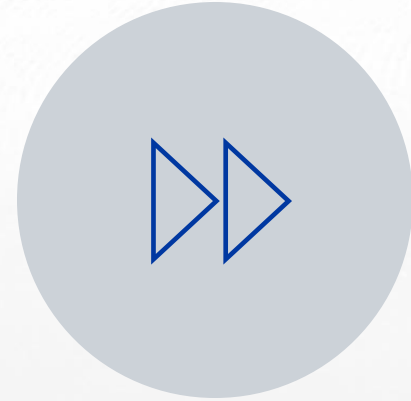
# Outcomes of this Discussion



PROVIDE A FRAMEWORK TO USE  
WHEN THINKING ABOUT AI



WHERE AND HOW TO LOOK



BUILDING YOUR ROI FOR  
SUCCESS

# World Economic Forum Tech Impact

AI and information processing technologies (big data, VR, AR etc.)	80	81	84	92	73	91	93	64	95	89	99	87	98	91	66	69	79	91	73	87	92	100
Biotechnology and gene technologies	13	22	41	6	18	7	7	3	3	11	9	3	13	63	3	0	14	7	4	5	6	5
Energy generation, storage and distribution	38	49	57	60	64	20	59	88	16	44	28	55	11	24	79	86	60	30	31	38	56	34
New materials and composites	20	63	30	52	76	11	28	36	9	19	11	57	2	24	66	51	61	22	42	33	31	16
Quantum and encryption	7	8	8	17	12	9	21	7	26	5	41	4	24	11	0	6	3	17	8	7	8	29
Robots and autonomous systems	53	68	59	73	48	55	69	48	53	58	48	58	51	59	48	40	71	50	38	71	66	58
Satellites and space technologies	7	7	14	25	3	11	10	2	5	21	20	8	9	7	0	3	8	6	0	3	17	39
Semiconductors and computing technologies	7	26	19	38	18	23	55	19	18	28	36	25	20	20	28	14	19	22	15	13	20	34
Sensing, laser and optical technologies	17	30	32	40	12	16	38	14	6	25	11	21	9	31	21	9	23	17	15	18	25	16

Accommodation, food, and leisure  
Advanced manufacturing  
Agriculture, forestry, and fishing  
Automotive and aerospace  
Chemical and advanced materials  
Education and training  
Electronics  
Energy technology and utilities  
Financial services and capital markets  
Government and public sector  
Information and technology services  
Infrastructure  
Insurance and pensions management  
Medical and healthcare services  
Mining and metals  
Oil and gas  
Production of consumer goods  
Professional services  
Real estate  
Retail and wholesale of consumer goods  
Supply chain and transportation  
Telecommunications

Share of employers  
0 50 100

Source

World Economic Forum, Future of Jobs Survey 2024.

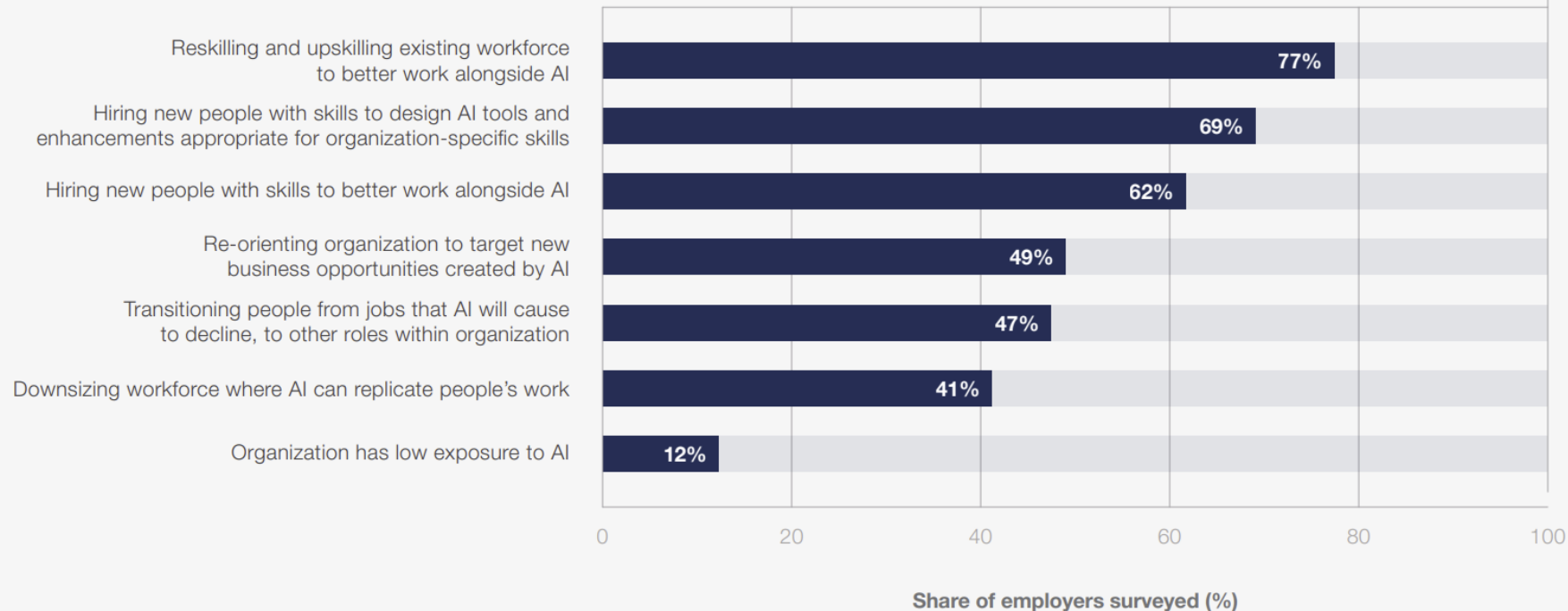


# World Economic Forum Jobs Report

FIGURE 4.14

## Workforce strategy in response to AI, 2025-2030

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence.

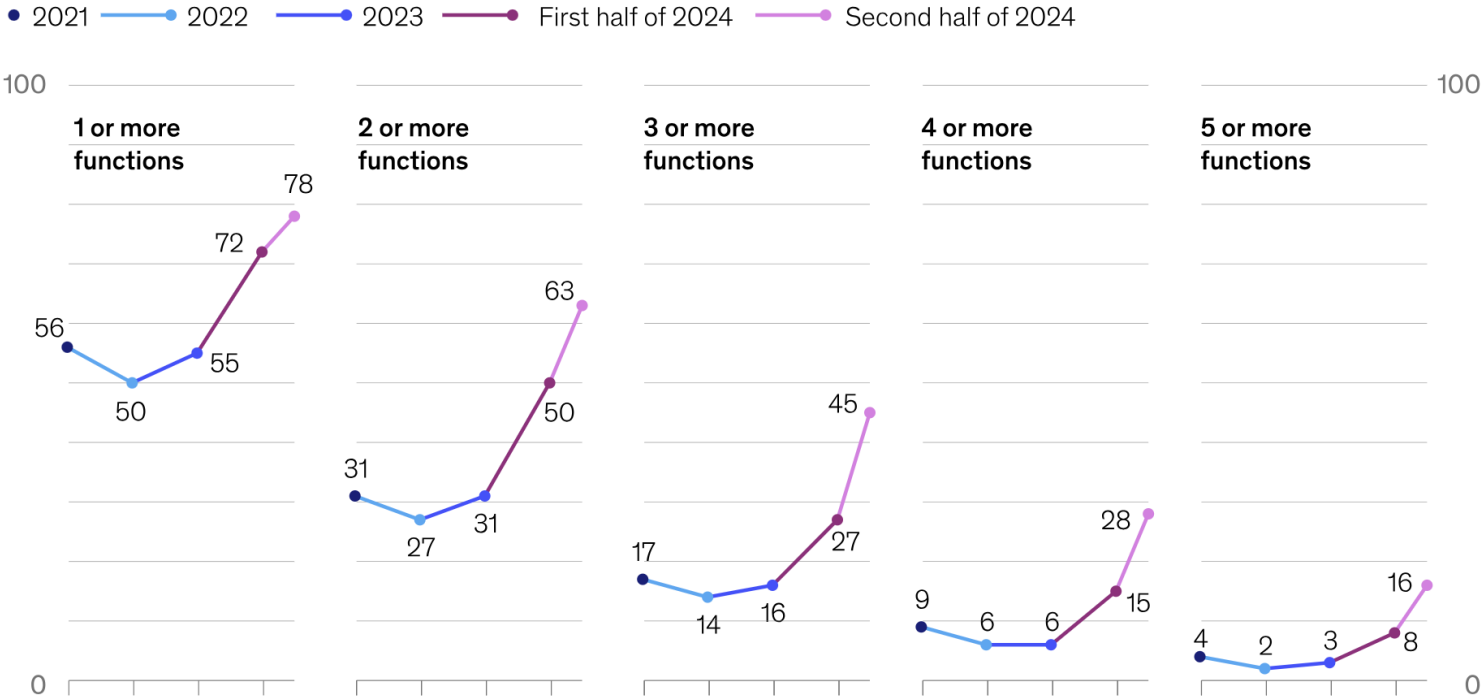


Source

World Economic Forum, Future of Jobs Survey 2024.

Organizations are increasingly using AI in multiple functions.

Business functions at respondents' organizations that are using AI,<sup>1</sup> % of respondents



<sup>1</sup>In 2021, n = 1,843; in 2022, n = 1,492; in 2023, n = 1,684; in Feb–Mar 2024, n = 1,363; in July 2024, n = 1,491. The survey question asks about 11 functions: HR; IT; manufacturing; marketing and sales; product and/or service development; risk, legal, and compliance; service operations; software engineering; strategy and corporate finance; supply chain/inventory management; and other corporate functions (eg, knowledge management).  
Source: McKinsey Global Surveys on the state of AI, 2021–24

# AI Use for Job Functions

Leveraging Gen AI across at minimum 1 job function is already well over the majority

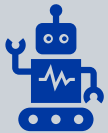


# Domains of Impact to Consider



## **Commodity**

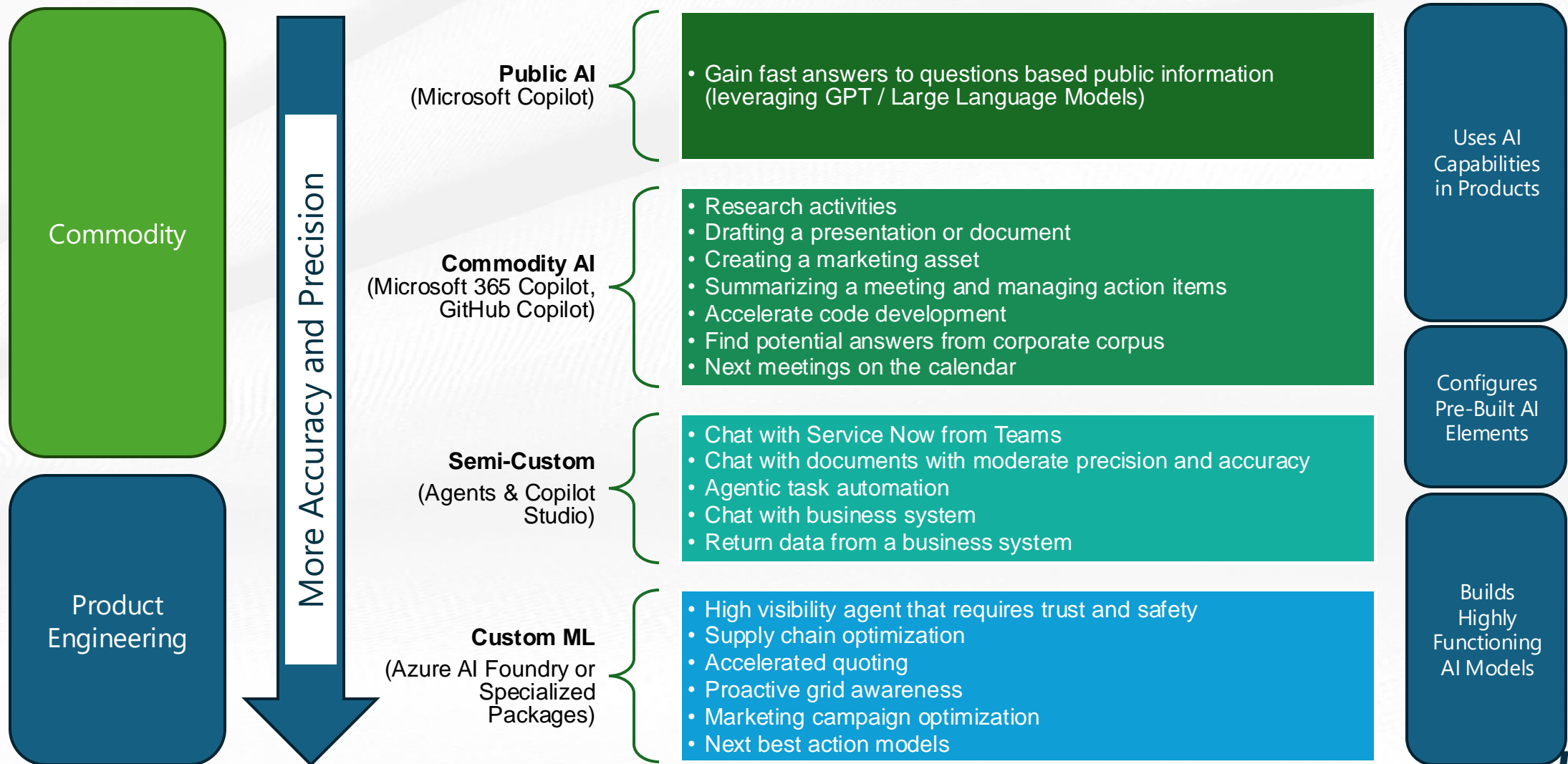
(creating impact from AI products, such as M365 Copilot or Copilot Studio)



## **Product Engineering**

(creating direct ROI from data-enabled journeys with direct payoff)

# Places for AI and Example Use Cases



# What is an AI Agent?

# What is an AI Agent?



Communication



Perception



Reasoning



Learning



Memory



Action

What tasks might we  
delegate to an AI Agent?

# Things an AI Agent Might Do



Answer if a client has paid their bill and notify



Return the right time for inventory level changes



Order inventory based on instructions



Automate onboarding activities



Look for quality errors in manufacturing and trigger a review



Create a proposal from a request from a client



Analyze and sort incoming AP/AR



Prepare a Next Best Action with a customer

A walk through ten agents  
being used today

# Take Action from Meetings



Join late? Ask what happened already



Not sure what someone said? Ask for Copilot to repeat it



Need to know what questions *haven't* been asked?



Summarize the meeting and tune the action items



Follow-up on the action items



Answer questions from several interactions with a client



Copilot has been instrumental in driving tangible benefits, such as with SOP creation. We've now begun to use it for more generalized personal and team productivity, including uncovering information across the enterprise.

Frank Biondolillo, Emerging Technology Analyst, Eaton



Reduced time to create 1,000 SOPs by 83%



Saved 650 hours, ~1/3 of a full-time workload

Acceptance Rate (by count)

Over the last 28 days

27.02%

Total count of Suggestions  
(Prompts)

Over the last 28 days

21666

Acceptance Rate (by lines)

Over the last 28 days

21.15%

Total Lines of code  
Suggested

Over the last 28 days

39088

Acceptance rate by count (%)



# Human Resources Requests

3/24 9:56 PM

If I'm a [REDACTED] employee, what numbers should I know about for our health plan?

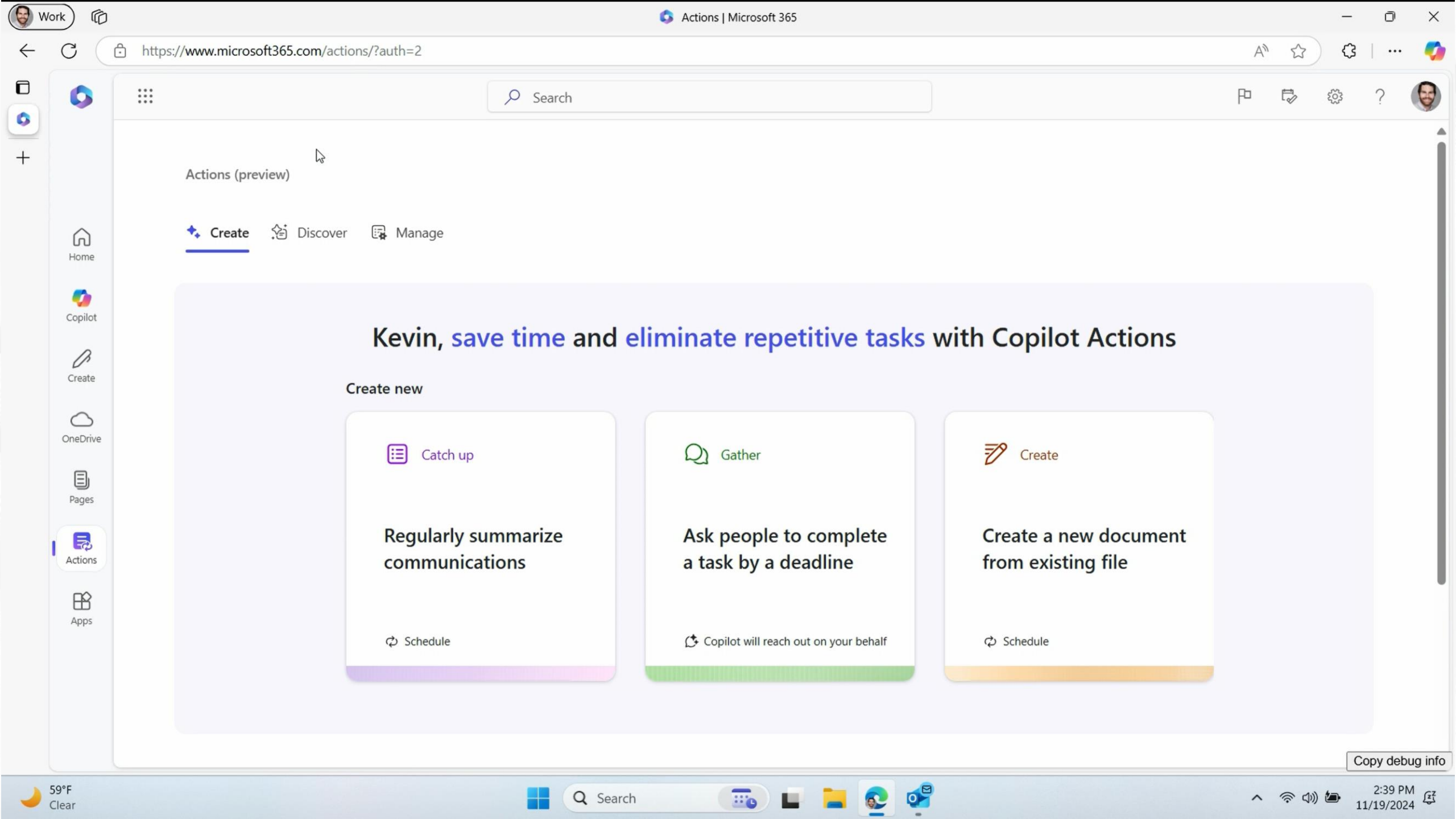
[REDACTED] Demo 3/24 9:56 PM



As a [REDACTED] employee, there are several important numbers to know about for your health plan. These numbers can help you understand your coverage and make informed decisions about your healthcare. Here are some key numbers to keep in mind:

1. **Deductibles:** Deductibles are the amount of money you must pay out of pocket before your health insurance starts covering your expenses. The deductible amount may vary depending on whether you are in-network or out-of-network. For example, in-network deductibles for employees are \$500 [1](#).
2. **In-Network Providers:** In-network providers are healthcare professionals, hospitals, and facilities that have an agreement with your health insurance plan to provide services at a discounted rate. It's important to know which providers are in-network to maximize your coverage and minimize your out-of-pocket expenses. Overlake is an in-network institution [23](#).
3. **Co-pays:** Co-pays are fixed amounts that you pay for certain healthcare services, such as doctor visits or prescription medications. These amounts are typically lower than the full cost of the service and can vary depending on the specific service and your health plan. Be sure to check your plan documents for the co-pay amounts for different services.
4. **Out-of-Pocket Maximum:** The out-of-pocket maximum is the maximum amount you will have to pay for covered healthcare services in a given year. Once you reach this limit, your health insurance will cover 100% of the remaining costs. It's important to know your out-of-pocket maximum to budget for healthcare expenses and understand when your insurance will start covering all costs.

Remember to refer to your specific health plan documents for the most accurate and up-to-date information about your coverage and benefits. [123](#).



Actions (preview)

Create Discover Manage

# Kevin, save time and eliminate repetitive tasks with Copilot Actions

Create new

Catch up

Regularly summarize communications

Schedule

Gather

Ask people to complete a task by a deadline

Copilot will reach out on your behalf

Create

Create a new document from existing file

Schedule

# Purchase Order Matching

Ability to clear individual files

Action buttons

CLIENT MASK

Purchase Order

PO 38436.pdf

Sales Order Ack.

4560975-STR.pdf

Clear files

Run

Document info results

Download CSV

Label	Purchase order	Sales order ack.	Match
Billing address	400 PILOT COURT WAUKESHA, WI 53188	400 PILOT COURT WAUKESHA, WI 53188 United States of America	True
Freight	DELIVERED, FREIGHT INCL	Prepaid	
Order number	0000038436	38436	True
Shipping address	400 Pilot Court Waukesha, WI 53188 USA	400 PILOT COURT WAUKESHA, WI 53188 United States of America	True

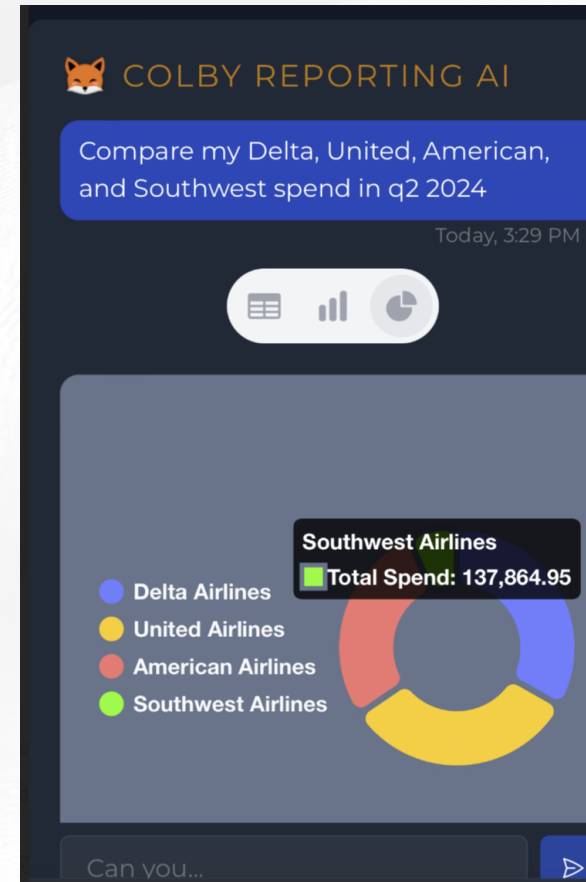
Product match results

Line	Label	Purchase order	Sales order ack.	Match
	Order date	31-01-2024	31-01-2024	True
1	Alloy	17-4 ph	17-4	True
1	Alloy AI	17-4PHSS	17-4	
1	Description	round 4.00" d x 17.00l 17-4phss condition a - astm-a564, ams 5643	4" round bar rt 17-4 cond. a (+.062)(-0) p/n 1217-17.00 wo: 153521 cut 17.0 in band saw +1/8" -0"	
1	Dimension AI	4.00" d x 17.00l	4" round bar, cut 17.0 in	
1	Dimensions	4.00" d x 17.00l	4" round bar, cut 17.0 in	
1	Form	Round Bar	round bar, cond. A	True
1	Form AI	Round	round bar, cond. A	
1	Qty	1.000	1.00	True
1	Unit price	332.020	332.02	True

Concurrency

# Returning Answers from Data

- Provides managed travel recommendations
- Customers have questions about portfolio of travel
- Self-service interface to provide clear answers



COLBY REPORTING AI

Compare my Delta, United, American, and Southwest spend in q2 2024

Today, 3:29 PM

Airline Company	Total Spend
Delta Airlines	692,895.63
United Airlines	674,698.12
American Airlines	583,490.70
Southwest Airlines	137,864.95

Today, 3:29 PM

Based on the SQL query and results

Can you...

The image shows a mobile app interface for 'COLBY REPORTING AI'. It displays a table with the total spend for four airlines: Delta Airlines (692,895.63), United Airlines (674,698.12), American Airlines (583,490.70), and Southwest Airlines (137,864.95). The interface includes a search bar, a menu icon, and a 'Can you...' prompt at the bottom.

# Automating Quoting

- Requests come in through email for various parts
- Sales rep previously would search, validate SKU, availability, and create quote
- Automation saves hours per quote by finding part, validating availability, and creating quote

The screenshot shows an email interface. The email is from Ken Ullsperger (UK) to Ken Ullsperger. The subject is "dfgd". The email body contains a list of parts and their quantities:

Part Description	Quantity
5005 sheet Clear film	
.125 x 48 x 96	11
.125 x 48 x 120	12
.125 x 48 x 130	13
6061 Angle	
1 x 1 x .125	14
2 x 2 x .125	15
1.25 x 1.875 x .125	16

Below the email body are "Reply" and "Forward" buttons.

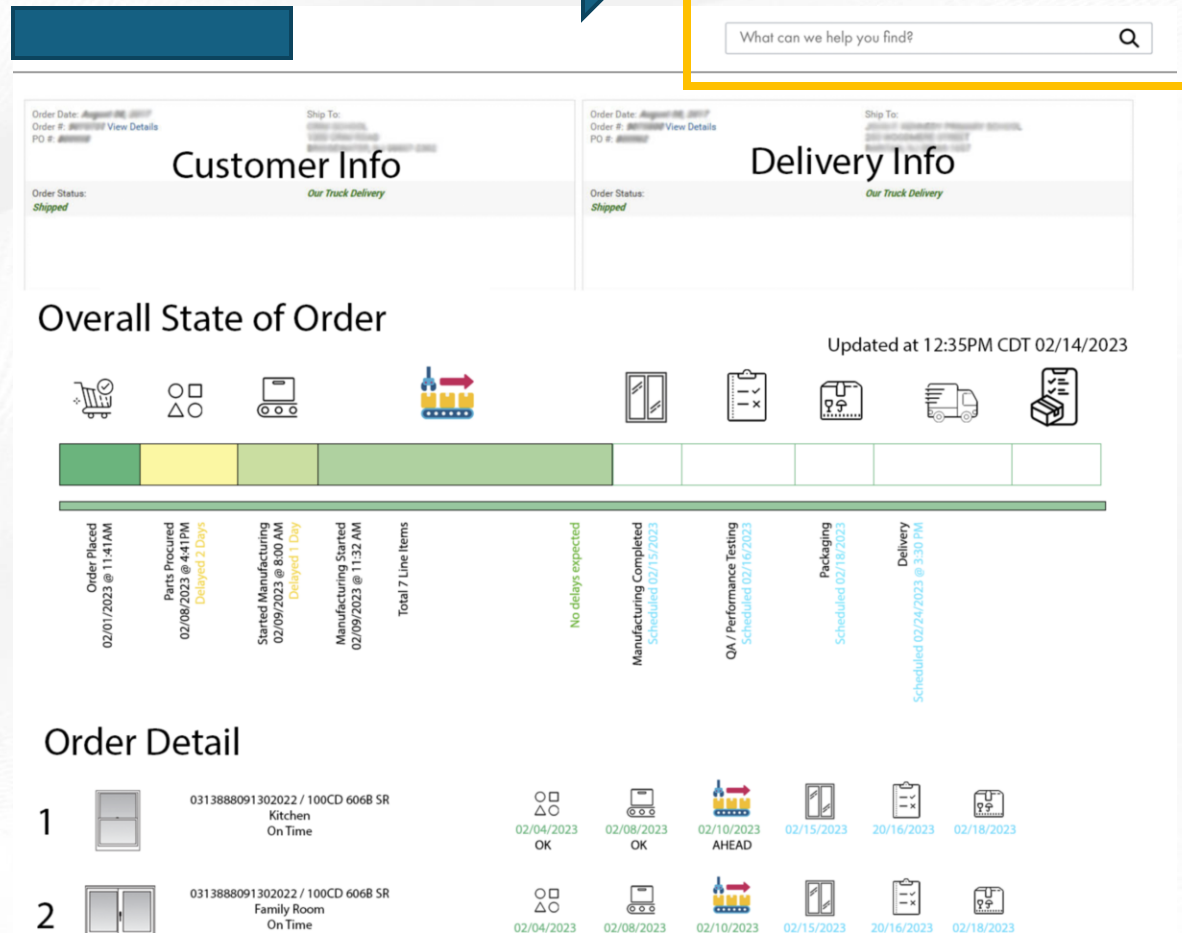
On the right side, there is a "SKU Selection" panel. It has a search bar at the top. Below it, there are tabs for "SKU" and "Freeform". The "SKU" tab is selected. Below the tabs, there is a checkbox for "Show non-IQ items". Below that, there is a list of SKUs with their descriptions and status. The list is as follows:





SKU	Description	Status
163001802	SHT 5005 H34 ANQ .125 X 48 X 96	Active in
163001803	SHT 5005 H34 ANQ CLR FLM .125 X 48 X 96	Active in
163000478	SHT 5005 H34 ADZ CLR FLM .125 X 48 X 96	Active in
100022303	SHT 5005 H14 AAQ 55HX .125 X 48 X 96	Inactive
100022304	SHT 5005 H14 AAQ 55HX CLRFLM .125 X 48 X 96	Inactive


Below the list, there are fields for "Enter Fastpath", "Quantity" (11), "UOMs" (PC), and buttons for "Approve" and "Feedback". Below these are "Metal Attributes" with a dropdown for "Product" (Aluminum) and a dropdown for "Form" (Sheet). Below that are fields for "Grade" (5005), "Gauge" (0.125), "Width" (48), "Nom. Length" (96), "Protection", "Finish", "Temper Condition", and "Hardness".

# Where's my order?


Query Driven Experience








Viewing Bribery First Pass Review Version 1




Responsiveness



Rationale

The document includes communication between BigThorium employees and Robert Williams, a city official from Atlantis, which is relevant to the investigation. The discussion pertains to nuclear waste management strategies, which could be part of BigThorium's process for bidding on contracts. Additionally, Sarah Thompson, who is involved in coordinating incentives, is CC'd in the email, which could be relevant to the bribery investigation.



Considerations

The primary focus of the document is on nuclear waste management strategies rather than direct evidence of bribery or gift-giving. The mention of Robert Williams and Sarah Thompson is incidental and does

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Dear Howard,

Thank you for y  
the sustainable

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# You treat, we chart

Instantly generate full, clinically-validated notes for all acute encounters

vituity®



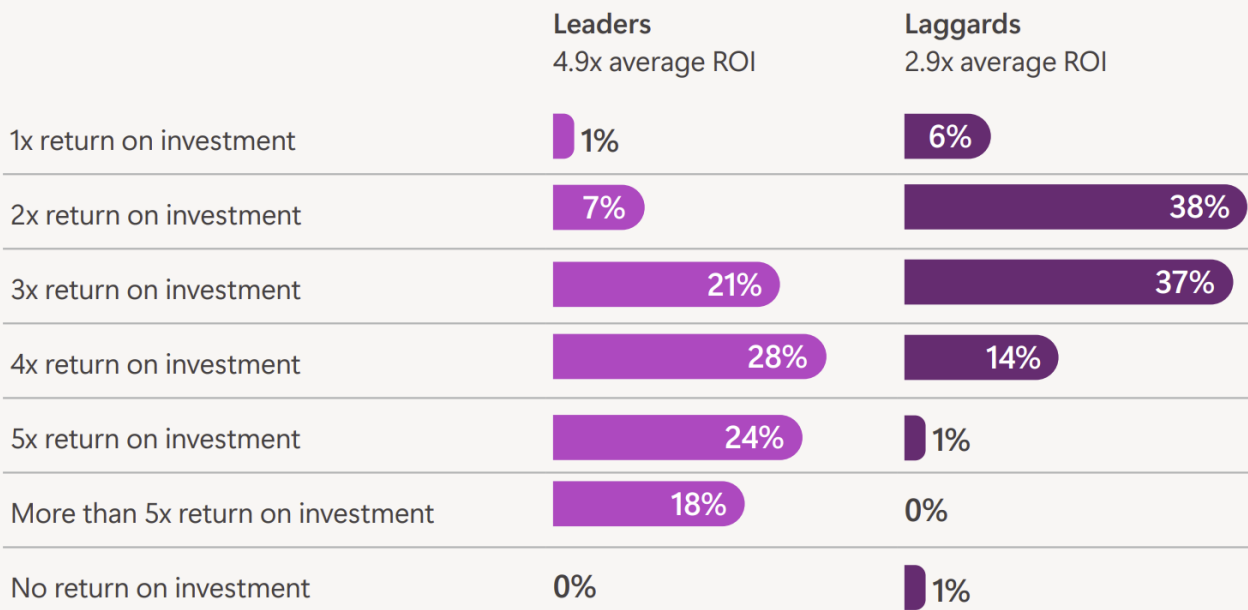
A screenshot of the vituity patient chart interface. The interface is divided into two main sections: a left sidebar and a main content area. The sidebar contains a 'Home' button and a 'Patients' button. The main content area is titled '76/Female/English' and shows a 'Summary' tab. Below the tab, there is a 'Transcript summary' table with the following data: Age/Gender/Language: 76/Female/English, Mode of Transport: Click to add, and Historians: Patients. To the right of the main content area is a 'Patient chart' section with a 'Regenerate chart' button and a 'HISTORY OF PRESENT ILLNESS:' section. The history section contains a paragraph of text: 'A 76-year-old female with a past medical history significant for SVT since 2016, diabetes, and cancer presented to the Emergency Department. History provided by the patient. She complains of a rapid heart rate that began earlier today. She describes the sensation as a racing heart and notes that it has been persistent since onset. She denies any specific aggravating or relieving factors. She rates the severity of her symptoms as significant, given her presentation to the ED.'

How do I build the ROI for  
my company that people  
will support?

# Leaders' AI investments are paying off and the difference between leaders and laggards is stark

AI leaders realize a higher ROI, a greater number of organizational impact areas and monetization avenues from AI initiatives, and are more prepared to unlock AI capabilities.<sup>14</sup>

What would you estimate your organization's ROI is for every \$1 spent of AI projects or initiatives?  
(percentage of respondents)



Source: IDC InfoBrief: sponsored by Microsoft, 2024 Business Opportunity of AI, IDC# US52699124, November 2024.

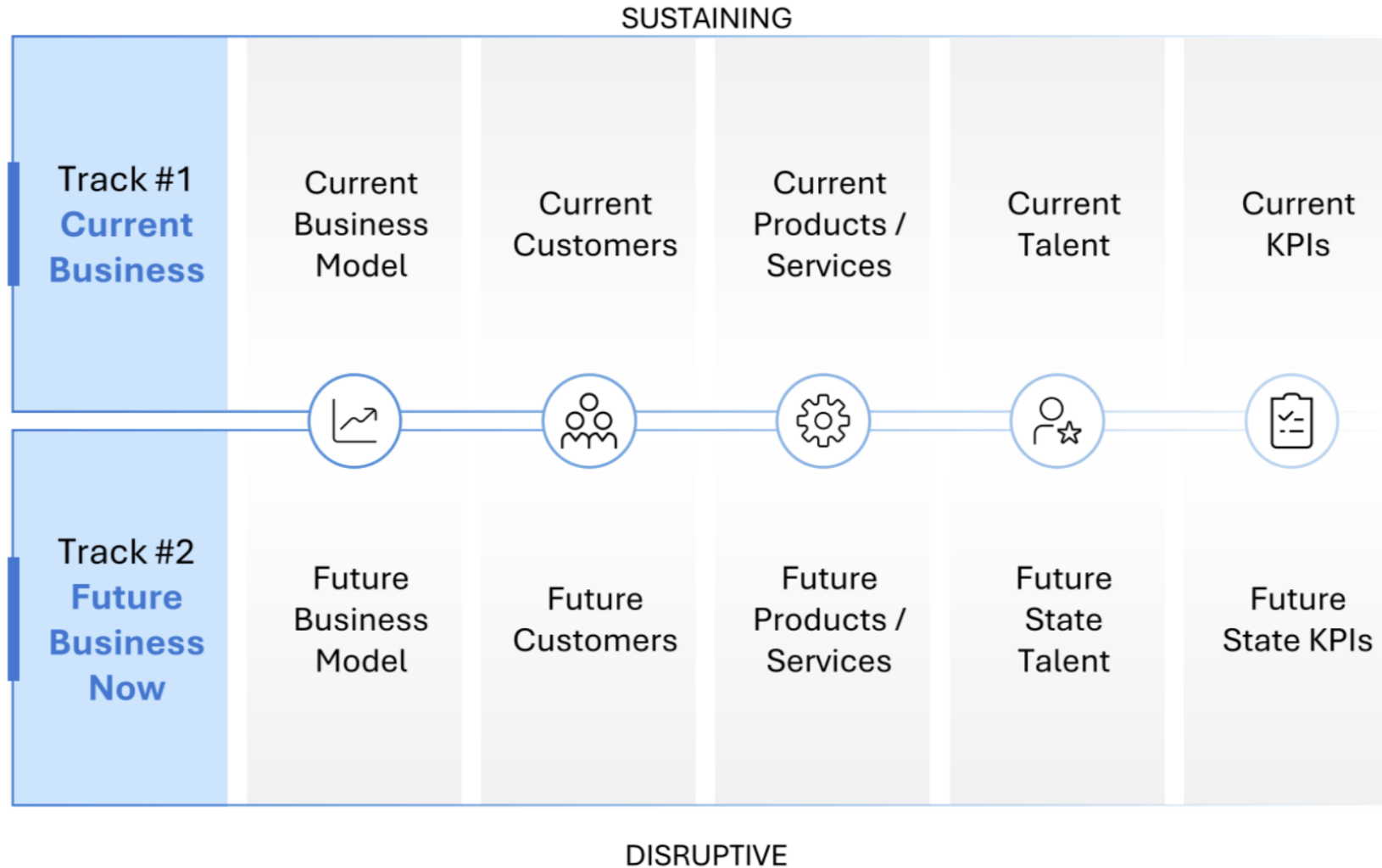
# Be a leader, not a laggard

Performance of leaders outpaces the those that follow at a distance

Technology moves too fast to simply sit and wait – or be directionless and focusing on governance alone



# Two Track Transformation Program



# Organizing Strategy and Opportunity Mapping

## #1. Strategy and Opportunity Mapping

### • Actions

- Executive Envisioning
- Ideation and Mapping
- Strategy and CoE

### • Best For

- Don't know the WHY or the WHAT
- Just getting started
- Need to align business and tech

### Case Study – Fox World Travel

Provided organization-wide brainstorming and engagement that lead to the creation of “Colby”, a multi-function customer-facing agent that interacts with the core travel management business system

## Workshop #1 CoE Kickoff and Strategic Team

- Executive Leadership Message
- State of the State
- State of AI in the Industry
- Examples of Value from Similar Businesses
- Action to Form Functional Team(s)
- Homework Assigned to Teams (offline)



## Workshop #2 Brainstorming for Each Functional Domain\*

- Establish alignment goal to be achieved
- Each attendee brings value creation opportunities
- Context of value creation is around possible futures
- Capture of ideas and building of idea registry
- Rough prioritization of ideas from each session



## Deep Dive Workshops #3

- Deep dive into each prioritized idea
- Includes Solution Architect from Concurrency

- Deep dive into each prioritized idea
- Includes Solution Architect from Concurrency

# How to evaluate ideas



Category



Idea



Quantity



Impact



Value



Effort



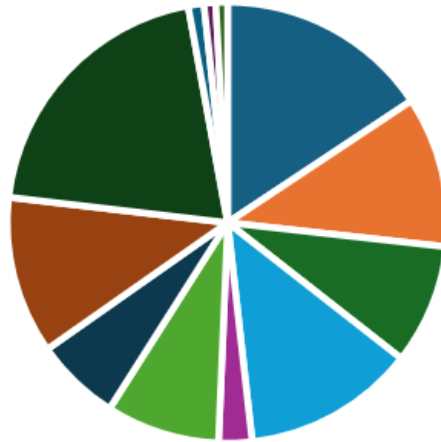
Calc

# Traps to Avoid

- Not having executive support before you start
- Getting overly onerous about commodity use case ROI
- Hinging all bets on one project working out
- Expecting immediate payback
- Focusing just on “use cases” and not on the future

# General Spread for Manufacturing

Manufacturing Use Cases



- Customer Service
- Demand and Inventory
- Engineering
- Human Resources
- Legal
- Manufacturing
- Marketing
- Operations
- Sales and Quoting
- Sales Automation
- Supply Chain
- (blank)

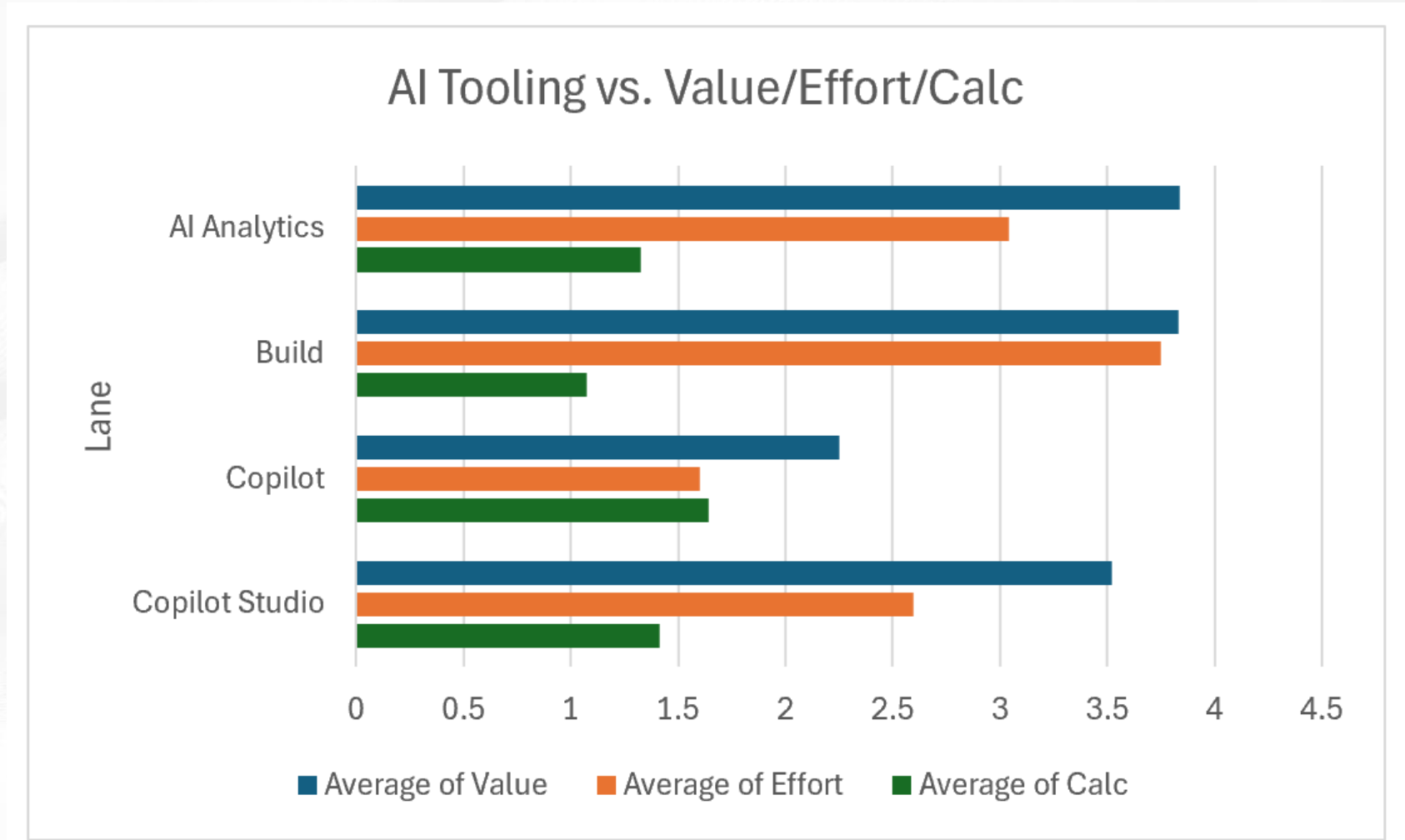
# Sorting ideas on calc

Category	Idea	Notes	Impact	Lane	Value	Effort	Calc
Operations	Meeting Summarization	Clear benefit on optimizing meeting outcomes	Take action from meetings, summarization, etc.	Copilot	3	1	3
Engineering	Meeting transcription & summaries	Creates a record while allowing focus on participation	Focus on output from meetings	Copilot	3	1	3
Manufacturing	Meeting Summarization	Clear benefit on optimizing meeting outcomes	Record and take actions on meetings	Copilot	3	1	3
Sales and Quoting	Meeting Summarization and follow up actions	Clear benefit on optimizing meeting outcomes	Enable all sales people with meeting summarization and actions	Copilot	3	1	3
Customer Service	Meeting Summarization	Clear benefit on optimizing meeting outcomes	Meeting summarization	Copilot	3	1	3
Customer Service	Tech and Customer Service Agent	Reduce phone calls and talk times with internal use. Current team could increase bandwidth for other sales/service related tasks.	Can we drive excellent customer service?	Copilot Studio	4	2	2
Human Resources	HR Chat function	Consistent and efficient benefit question answering	Easy answers to HR questions and ramping new employees in the HR team, maintaining reliable body of knowledge	Copilot Studio	4	2	2
Human Resources	Creating forms and letters for various tasks	Consistent and efficient forms distribution for benefits and term packets	Automate forms and letters to distribute information as necessary	Copilot Studio	4	2	2
Sales and Quoting	Sales data analytics by product	Understanding trends and areas not easily seen - call to action	Create sales action plan based on framework	AI Analytics	4	2	2
Sales and Quoting	Sales data analytics by customer	Helping to understand unseen opportunities/chainging the game with our customers	Create sales action plan based on framework	AI Analytics	4	2	2
Sales and Quoting	Sales data analytics by buying group	Seeing the bigger picture	Create sales action plan based on framework	AI Analytics	4	2	2
Sales and Quoting	Contract Review	Saving time on contract review	Automate contract review	Copilot Studio	4	2	2
Human Resources	HR Internal Agent	Quickly answer HR related question based on all our plan/policy documents.		Copilot Studio	4	2	2
Human Resources	Policy, JD,and job posting Creation	Consistent and Efficient creation of these documents	Accelerate HR job posting activities	Copilot	2	1	2
Sales and Quoting	Creating effective presentations	Saving time, making our presentations more impactful	Accelerate presentation creation	Copilot	2	1	2
Demand and Inventory	Forecasting	Use AI to evaluate historical information and create forecasts for sales and cash. Currently this is a manual exercise for all.	Better understand estimated cash forecast	AI Analytics	5	3	1.666666667

# Sorting ideas on value

Category	Idea	Notes	Impact	Lane	Value	Effort	Calc
Demand and Inventory	Forecasting	Use AI to evaluate historical information and create forecasts for sales and cash. Currently this is a manual exercise for all.	Better understand estimated cash forecast	AI Analytics	5	3	1.666666667
Demand and Inventory	Dynamic Capacity Planning	Be able to dynamically adjust sequence capacity, as well as recommend employee assignments based on certifications and training needs	Optimize the resources in assembly (staff) for necessary production jobs. This is the hardest struggle day-to-day - do we have the right resources for the day. Need to have the right 50 bodies to do the work. Manage the unpredictability of "call-ins" for reallocation of resources	AI Analytics	5	3	1.666666667
Operations	Sustainability Documents	Fill out forms we receive from customers regarding sustainability efforts.	Filling out 5 - 10 forms a day on sustainability documents. Time to fill out the bill of materials, the sourcing of materials, etc. Need to go get the information and fill out the diverse form. These are project-based.	Copilot Studio	5	3	1.666666667
Manufacturing	Capacity Planning	Fill capacity based off demand and resources, this will keep leadtimes in check	Predictive understanding of filling available capacity	AI Analytics	5	3	1.666666667
Sales and Quoting	Customer Service	Read incoming orders and translate to an order creation	English words to an item number or order (quote comes from AutoQuote, but need to decipher it into the system)	Build	5	3	1.666666667
Customer Service	External Facing Customer Service	Create an AI agent to allow customers to get answer to their own questions - external facing	Enable external customers to answer questions	Copilot Studio	5	3	1.666666667
Sales and Quoting	Bots to help customers find solutions quickly	developing a more impactful interface to help our customers find the right solution	Enable self-service customer service, starting internal, the moving to external	Build	5	3	1.666666667
Operations	PO/Order Entry	Integrated system that processes the entire product offering and provides CS an order entry they can validate.		Build	5	3	1.666666667

# Interesting Comparison on Types



# Typical Justification Models

- Justify Commodity AI in the aggregate
  - Copilot
  - Copilot Studio / Low Code Agents
  - Other Commodity Platforms
- Justify “AI Analytics” but aim for specific targets
  - Inventory & Demand
  - Pricing
  - Customer Next Best Action
- Justify “Build” based on adding value to customers
  - Customer Advisory
  - End Customer Support
  - Market Disruption

## Practical impacts of generative AI

A [study](#)<sup>15</sup> of over 6,000 employees using Microsoft 365 Copilot in their day-to-day work revealed some surprising changes in the work dynamic.

- **Employees are becoming liberated from email.** With the introduction of Copilot, employees use email summaries to reduce the time spent keeping up with their inboxes.
- **Meetings focus on value creation.** Using Copilot tends to focus meetings on collaborative work and reduce the overall time employees spend in meetings.

- **People collaborate more with AI and each other.** As employees become comfortable using generative AI, they create more documents with AI assistance, co-edit documents with colleagues, and comment on content more frequently.

The AI Data Drop provides ongoing insights into the practical applications and benefits of generative AI adoption. Keep up with the latest information from [Microsoft WorkLab's AI at Work](#).

## Where work is headed

See real-world company data on how Copilot is starting to reshape the workday



Time reading email

↓ -31%

Copilot helped employees at a consumer goods company spend less time reading email.



Time in meetings

↓ -16%

At one consulting company, people with access to Copilot spent less time in meetings.



Word file co-creation

↑ 58%

People using Copilot at a law firm produced more content.

# Commodity AI pays off

General, everyday performance improvements are meaningful

Those that say, “time savings isn’t quantifiable” are simply bad managers

# How to measure it



## Commodity

Review tools like Copilot Analytics of GitHub Copilot Analytics  
Correlate job performance against AI usage  
Record real ROI from each agent that hits the idea registry



## AI Analytics

Track real change in inventory, staffing, or material  
Track pricing optimization or win rates  
Track understanding of customer and next win



## Build

Measure revenue increase and retention  
Measure time-to-quote and win rate  
Measure share of wallet

Let's fill one out!

# Our Results

# Questions?

# Next Steps

- **Executive AI Envisioning Session** – Bring Concurrency experts to your office to define a Roadmap for AI-driven transformation at the leadership level.
- **Microsoft Licensing Review** – Meet with our CTO Nathan Lasnoski to ensure you're maximizing value and efficiency with a tailored licensing assessment.
- **Bring the Event to You!** – We will present any topic/topics from our event at your organization.

Milwaukee AI Momentum Summit






# *Concurrency*

# Thank you!

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and industry updates! @Concurrency, Inc

