

AI in Action: A Business Use Case Cheat Sheet

Understand how assistants, agents, and custom AI solutions each drive business value—and where to start.

What’s the Difference?

Here’s a quick breakdown of the three main types of generative AI you can apply to your business:

AI Assistants

Embedded in tools like Microsoft Word, Outlook, and Teams, assistants help individuals work smarter. They summarize content, draft responses, surface insights, and automate routine tasks.

AI Agents

Agents act more like digital coworkers. They can automate multi-step workflows, trigger actions across systems, and collaborate with humans. Think help desk ticketing, routing approvals, or managing handoffs.

Custom AI Solutions

Built to fit your unique needs, these solutions go beyond what’s possible with out-of-the-box tools. Custom AI can analyze complex data, integrate with proprietary systems, or support niche use cases that give you a strategic edge.

Use Cases & Reflection Prompts

AI TYPE	COMMON BUSINESS USE CASES	THINK ABOUT THIS...
Assistants	• Draft emails or documents • Summarize meetings or threads • Suggest next steps or actions	Where are your teams bogged down with repetitive individual work?
Agents	• Triage and route tickets • Automate scheduling or approvals • Update records across systems	What multi-step processes take up too much time or create delays?
Custom AI	• Optimize delivery routes • Analyze complex reports and generate recommendations • Create customer-facing tools	Do you have a unique process that could become a competitive advantage if scaled?

What’s Your Opportunity?

You don’t have to choose just one. Most organizations benefit from using all three. But knowing where to start depends on your current needs, tools, and goals.

Need Help Putting AI to Work?

We help businesses understand and leverage AI tools like Microsoft Copilot, Power Platform, Azure AI, and more to solve real problems and drive meaningful transformation.

Book a free consultation to explore what’s possible for your business.