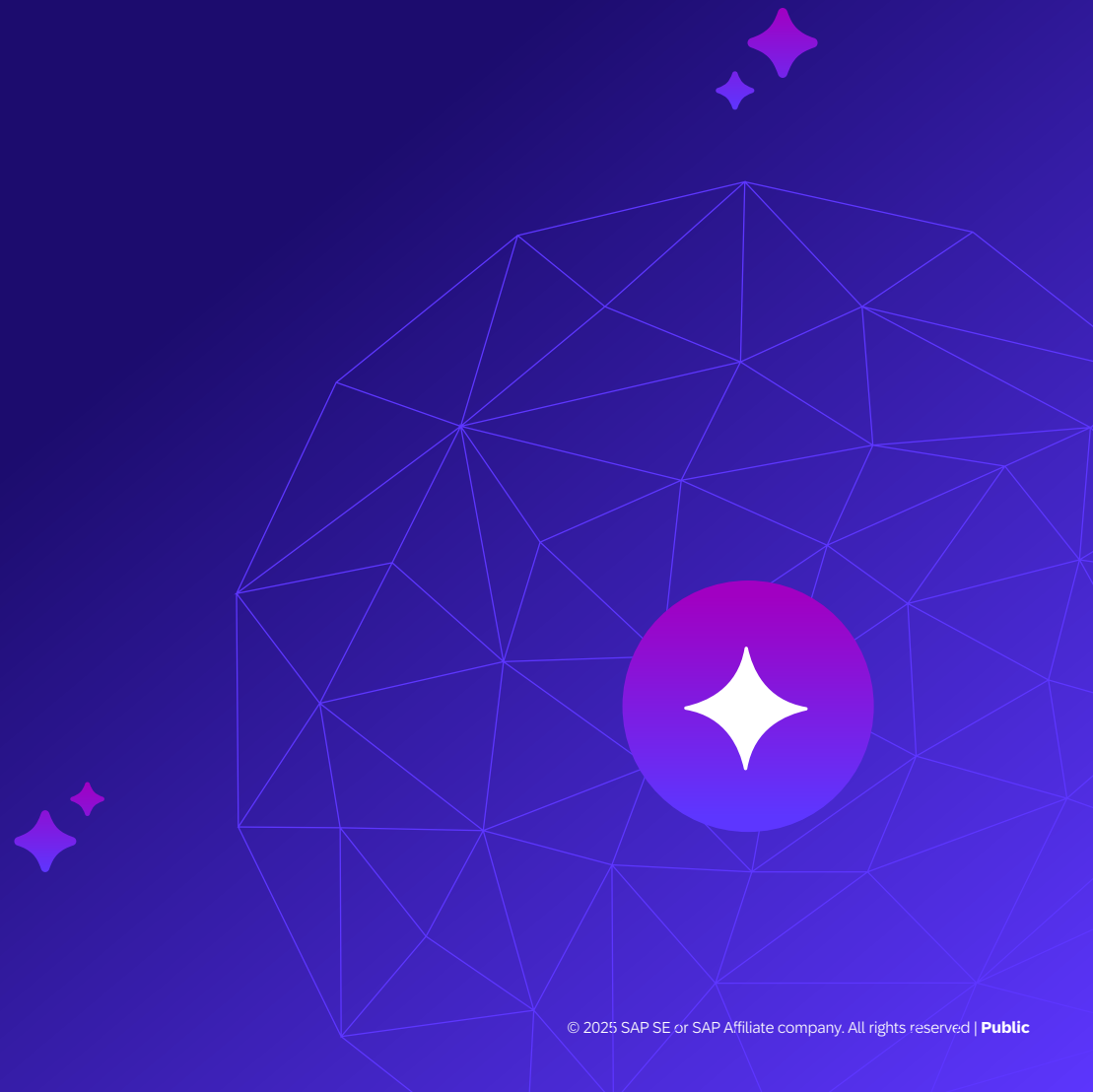
Joule Agent Discovery Workshop

Prework Package

V1

July 2025



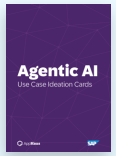
1.

Ideate
Agentic
Scenarios

15 min Individually

What activities and processes in your company or area should be automated or streamlined to improve efficiency?

- Check the **Agentic AI Use Case Ideation** cards for inspiration.



- Think about an activity or process that fit to 1 or more of the questions in the cards and describe it in the provided template on page 5.

Activity / process to streamline

Number: 1

We need to automate / streamline ...

Example: Resolution of customer complaints

Resolution of customer complaints.

(Activity / process to streamline)

WHAT

to help ...

Example: Customer service agents, escalation managers

Customer service employees, escalation managers.

(Area / Role(s))

WHO

to ...

Example: achieve faster resolution of customer issues, improve satisfaction and reduce churn.

Achieve faster resolution of customer issues, improve satisfaction and reduce churn.

(Objective(s))

WHY

Characteristics

How complex is this activity or process?

Very Simple — Very complex

How variable and unpredictable are the next steps?

Always Fixed — Highly Variable

Why?

involves multiple factors, such as issue severity, customer history, and policies.
Solutions rquire many steps and may need escalation

What changes?

The team handling the issue, the need for negotiation or escalation, additional steps for verification, time to process

How much human judgement is needed to decide next steps?

Clear Rules Exist — Reasoning needed

How much time or effort could be saved if automated?

Not much — Some — A lot

What criteria are important?

Simple issues follow clear rules, but most of them are depentent on type of complaint, customer status, issue severity, customer responses and required approvals.

Why?

Moderate to complex cases (e.g., escalations, policy exceptions, disputes): can take a day to weeks, allowing customer service employees to focus on the conceptualization of new personalized services

AppHaus apphaus.sap.com/toolkit/methods

Use Case Ideation Cards

to identify activities that could benefit from agentic technology

What activities involve **handling unpredictable situations and making smart adjustments** based on reasoning?

AppHaus SAP

HANDLING UNPREDICTABLE SITUATIONS AND MAKING SMART ADJUSTMENTS

EXAMPLE SCENARIO

Resolving Invoice Processing Issues

You are a finance manager, and a **supplier invoice fails to process**, but **it's unclear why**. You must check payment details, verify discrepancies in contract terms, review approvals, and **decide whether to escalate or override the issue**—all while ensuring payments stay on track. Every step **requires judgment** to balance compliance, risk, and business continuity.

What activities require manually **bridging gaps across different systems and domains?**

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BRIDGING GAPS ACROSS DIFFERENT SYSTEMS AND DOMAINS

EXAMPLE SCENARIO

Managing Shipment Delays

You are a logistics manager, and a shipment is delayed. You must update the tracking system, e-mail the customer, adjust delivery schedules, and inform the warehouse—all by **switching between different platforms and sending manual updates**. The process is slow, and delays keep piling up.

Use Case Ideation Cards

to identify activities that could benefit from agentic technology

What activities involve manually **creating, refining or executing code or content** in response to changing situations?

AppHaus SAP

CREATING, REFINING OR EXECUTING CODE OR CONTENT DYNAMICALLY

EXAMPLE SCENARIO

Personalizing on-boarding training

You are an HR manager onboarding new hires. You review employee profiles and training progress data daily. When you see differences in their learning needs, you **manually compile a request to adjust their personalized learning paths and content in your corporate learning system**. This multi-step process is slow and error-prone.

What activities require manually **processing and interpreting large amounts of unstructured data** to decide next steps?

AppHaus SAP

INTERPRETING LARGE AMOUNTS OF UNSTRUCTURED DATA

EXAMPLE SCENARIO

Processing Insurance Claims

You are an insurance claims manager handling **hundreds of claim emails daily**. Each contains unstructured details about accidents and damages. Your team reads through every email, extracts relevant details, and manually **converts that information into a structured claim format**. This manual process is slow, prone to errors, and delays the overall claims processing cycle.

Activity / process to streamline

Number:

We need to automate / streamline ...

Example: *Resolution of customer complaints*

(Activity / process to streamline)

WHAT

to help ...

Example: *Customer service agents, escalation managers*

(Area / Role(s))

WHO

to ...

Example: *achieve faster resolution of customer issues, improve satisfaction and reduce churn.*

(Objective(s))

WHY

Characteristics

How complex is this activity or process?
1 (very simple) - 5 (very complex)

1 2 3 4 5
Very Simple — Very complex

How variable and unpredictable are next steps?
1 (always fixed) - 5 (highly variable / unpredictable)

1 2 3 4 5
Always Fixed — Highly Variable

Why?

What changes?

How much human judgement is needed to decide next steps?
1 (none: only clear rules) - 5 (a lot: only human reasoning)

1 2 3 4 5
Clear Rules — Reasoning

How much time / effort could be saved if automated?
1 (not much) - 5 (a lot)

1 2 3 4 5
Not much — A lot

What decision criteria are important?

Why?

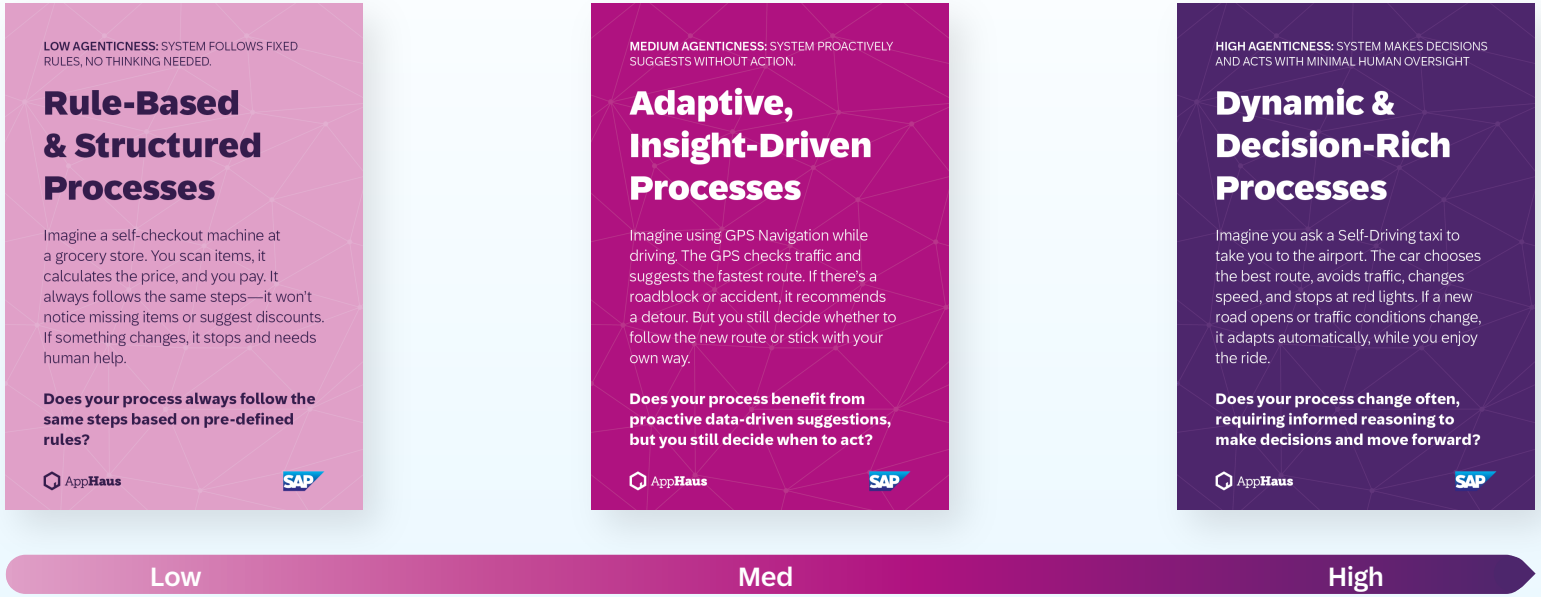
2.

Prioritize Use Case Ideas

02 min Individually

What is the expected agentic potential for this activity?

- Check the decision cards provided and decide the expected agentic potential for the activity you described.



Agentic Potential Decision Cards

Where would you position your automation idea?

LOW AGENTICNESS: SYSTEM FOLLOWS FIXED RULES, NO THINKING NEEDED.

Rule-Based & Structured Processes

Imagine a self-checkout machine at a grocery store. You scan items, it calculates the price, and you pay. It always follows the same steps—it won't notice missing items or suggest discounts. If something changes, it stops and needs human help.

Does your process always follow the same steps based on pre-defined rules?

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MEDIUM AGENTICNESS: SYSTEM PROACTIVELY SUGGESTS WITHOUT ACTION.

Adaptive, Insight-Driven Processes

Imagine using GPS Navigation while driving. The GPS checks traffic and suggests the fastest route. If there's a roadblock or accident, it recommends a detour. But you still decide whether to follow the new route or stick with your own way.

Does your process benefit from proactive data-driven suggestions, but you still decide when to act?

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HIGH AGENTICNESS: SYSTEM MAKES DECISIONS AND ACTS WITH MINIMAL HUMAN OVERSIGHT

Dynamic & Decision-Rich Processes

Imagine you ask a Self-Driving taxi to take you to the airport. The car chooses the best route, avoids traffic, changes speed, and stops at red lights. If a new road opens or traffic conditions change, it adapts automatically, while you enjoy the ride.

Does your process change often, requiring informed reasoning to make decisions and move forward?

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Low Med High

Agentic Potential Decision Cards

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Rule-Based & Structured Processes

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LOW AGENTICNESS
EXAMPLE ACTIVITIES AND PROCESSES

Invoice Processing: Matching invoices to payments based on set rules.

Simple Data Entry & Validation: Entering structured information into systems.

Customer Support Ticket Routing: Assigning inquiries based on fixed categories.

Low agenticness in a nutshell

- The **steps and rules don't change**—there's nothing to "think" about.
- **No complex decisions**—just follow instructions.
- **Accuracy and consistency** are more important than adaptability.

Agentic Potential Decision Cards

MEDIUM AGENTICNESS: SYSTEM PROACTIVELY SUGGESTS WITHOUT ACTION.

Adaptive, Insight-Driven Processes

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MEDIUM AGENTICNESS
EXAMPLE ACTIVITIES AND PROCESSES

Customer Feedback Analysis: AI detects sentiment and suggests improvements.

Prioritizing Sales Leads: AI ranks leads, but the salesperson picks who to contact.

Restocking Inventory: AI predicts items to run out, but a manager approves the order.

Medium agenticness in a nutshell

- AI thinks: it **analyzes data and suggests ideas**, but does not act on its own.
- A **human reviews AI's suggestions**, selects the best option, and takes action.
- The **process changes**, so AI adapts but remains a support tool.

Agentic Potential Decision Cards

HIGH AGENTICNESS: SYSTEM MAKES DECISIONS AND ACTS WITH MINIMAL HUMAN OVERSIGHT

Dynamic & Decision-Rich Processes

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HIGH AGENTICNESS
EXAMPLE ACTIVITIES AND PROCESSES

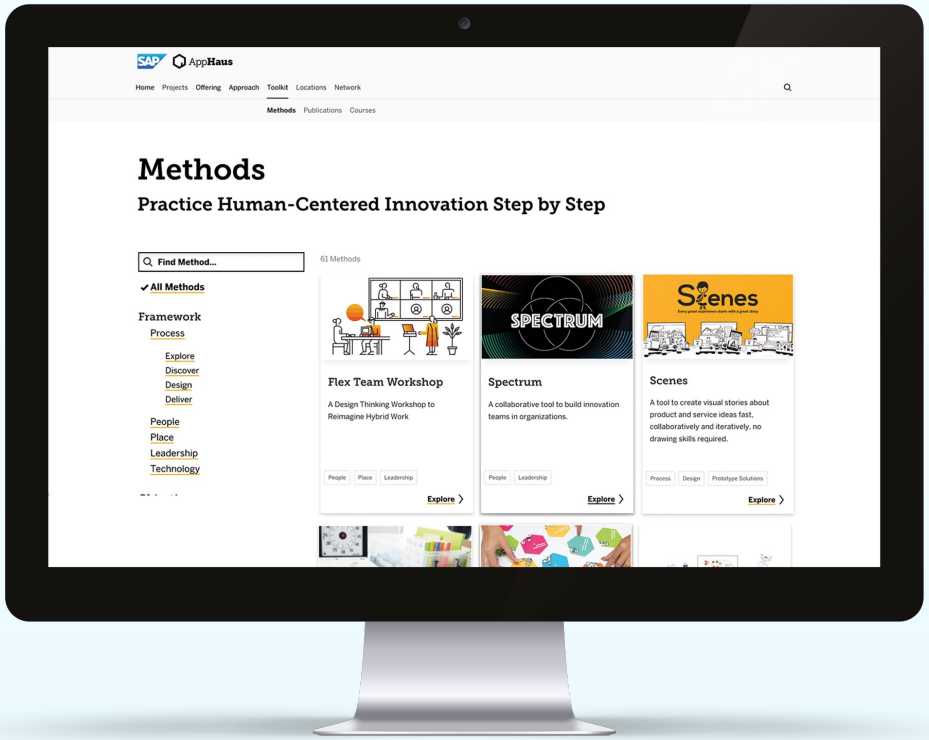
Personalized Shopping: AI learns what you like and automatically shows the best choices.

Marketing Optimization: AI refines campaigns in real-time based on evolving user behaviors.

Fraud detection: AI monitors transactions and blocks suspicious ones in real-time.

High agenticness in a nutshell

- The **process changes frequently** and is **unpredictable, requiring reasoning** to determine next steps.
- **AI analyzes, decides, and takes action** independently, but **with human supervision**.
- **AI learns** what works best and **adapts**



Practice Human-Centered Innovation

https://apphaus.sap.com/toolkit/methods