SAP

NEXTLEVEL

Prework for **Joule Agent Discovery** and **Design Workshops**

Use Case Ideation Workbook

Powered by **AppHaus**Alliances **SAP Build**

What scenarios or processes in your company or area should be automated or streamlined?

- Think about **5 scenarios** you'd wish to automate or streamline.

- Describe each automation scenario idea by answering the 3 questions on the side.

- Use the **Agentic AI Use Case Ideation** cards to inspire scenario ideas that could benefit from agentic technology.

Agentic AI
Use Case Ideation Cards

What...
scenario or process do you need to automate or streamline?

Examples:

1. Resolution of customer complaints
2. Preparing a customer visit

Who...
will be helped with the automation? (team or role)

Examples:

1. Customer Service Employees
2. Sales Representatives

Why...
is the automation necessary?

Examples:

1. Improve customer satisfaction due to faster resolution of issues
2. Reduce prep time, uncover valuable insights, and boost meeting relevance

Think about **multi-step scenarios** with **high variability**, where results and decisions require **interpretation to be figured out** rather than being driven by clear rules, and that involve **updating, writing, and executing actions** in one or across multiple systems.

Use Case Ideation Cards
to inspire scenario ideas that could benefit from agentic technology

When do you need to manually **handle unpredictable situations and make smart adjustments** based on reasoning?

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.

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When do you need to manually **bridge gaps across different systems and domains?**

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.

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When do you need to manually create, refine or execute code or content in response to changing situations?

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.

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When do you need to manually process and interpret large amounts of unstructured data to decide next steps?
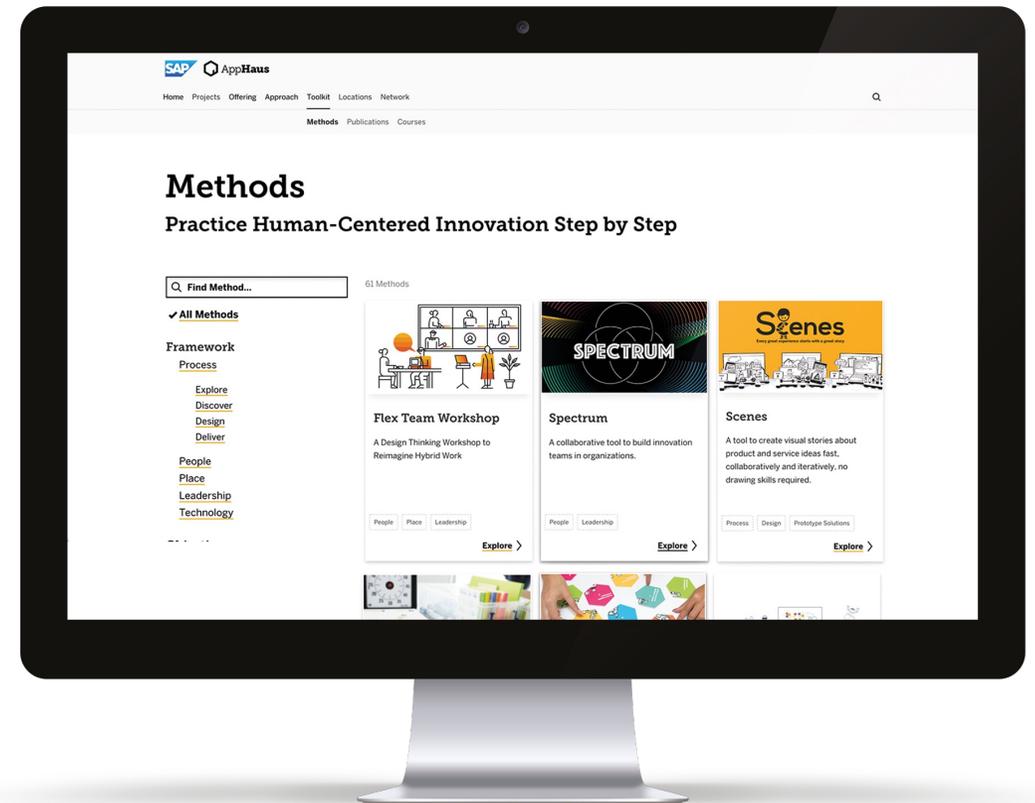
INTERPRETING LARGE AMOUNTS OF UNSTRUCTURED DATA
EXAMPLE SCENARIO

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.

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Practice Human-Centered Innovation

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