

Joule Agent Discovery Workshop

Pework Instructions

V1

July 2026

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Ideate automation scenarios

 Variable  Individually

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

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



- Think of as many scenario ideas as possible and describe each one using the provided template (one scenario per sheet).
- Leave the agentic potential blank for now.

Automation Scenario

We need to automate / streamline ...

Example: Resolution of customer complaints

Resolution of customer complaints.

(Scenario / 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

Agentic potential:

Characteristics

How complex and variable is this scenario / process?

1 (very simple) - 5 (very complex)



Why?

Involves multiple factors, such as issue severity, customer history, and policies. Steps vary depending on context. It might require many steps and escalation.

How much are decisions and outcomes based on rules vs. judgement?

1 (only clear rules) - 5 (only human judgement)



Why?

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

How much system interaction is involved?

1 (minimal: read-only) - 5 (extensive: read/write/execute)



Why?

In complex cases, customer and booking data needs to be gathered from multiple systems and updated in multiple systems.

How much business value would this automation bring?

1 (only minimal) - 5 (game changer)



Why?

Could save weeks in moderate to complex cases (e.g., policy exceptions, disputes), allowing customer service employees to focus on the conceptualization of new personalized services.

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.

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.

Use Case Ideation Cards

to inspire scenario ideas that could benefit from agentic technology

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.

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.

Automation Scenario Characteristics Explained

Complexity / Variability

Think about how many steps, factors, and variations are involved. Complex scenarios have multiple, variable steps and involve multiple influencing factors that vary depending on situation and context.

System Interaction

Evaluate whether the scenario mainly involves viewing and analyzing information (minimal interaction), or requires extensively updating, writing, and executing actions in one or across multiple systems.

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Rules vs. Judgement

Ask yourself whether results and decisions can be consistently dictated by clear and fixed rules, or whether they require human judgement and interpretation to figure them out.

Business Value

Consider how much improvement the automation would deliver: from modest efficiency gains to major impact (e.g., significant time savings, operational improvements, or strategic benefits).