

AI Agents: Transforming Organizational Productivity in 2025

*A Strategic Roadmap for Intelligent Team
Augmentation*

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Lucas E. Wall

- **Entrepreneurship & Innovation**

- Founder of R.O.I. Checker, a business intelligence engine now hosted by the U.S. Small Business Administration, serving tens of thousands of small business entrepreneurs.
- CEO & Founder of [Almma.AI](https://chat.almma.ai), the first marketplace for AI, and AlmmaGPT, connecting businesses and individuals with AI-powered assistants.
- Author of *Your Bright Future with AI*, an Amazon bestseller in multiple categories including AI & Semantics, Business Software, Science & Technology, and praised by Kirkus Reviews.
- Nearly a decade at KPMG, where he founded a service line specializing in advanced financial modeling.

- **Academia & Education**

- Facilitator of finance, leadership, and innovation courses at eCornell, helping professionals worldwide upskill and excel.
- Professor of Finance at The Catholic University of America, shaping future business leaders through applied, innovative instruction.



CONTENT

- Effective Mental Model
- Case Studies
- How to Get Started

MENTAL MODEL for AI Agent Integration

Reframing AI: From Tool to Team Member

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PROOF POINTS: AI Agents in Action

Goldman Sachs Case Study

PROOF POINTS: AI Agents in Action

Shopify AI Integration

STRATEGY: The AI Integration Methodology

Criteria for Process Selection:

a) High-Impact Processes

- Directly linked to revenue generation
- Significant cost reduction potential
- Clear ROI measurement

STRATEGY: The AI Integration Methodology

Criteria for Process Selection:

b) Process Characteristics

- Highly repetitive
- Well-defined workflow
- Minimal ambiguity
- Clear ownership and accountability

STRATEGY: The AI Integration Methodology

Criteria for Process Selection:

c) Risk Management

- Processes where failure can be managed
- Iterative implementation
- Continuous monitoring and adjustment

TOOLKIT: Recommended Features

- Multiple-LLMs
- Privacy: IP ownership
- Chat, Thinking, and Reasoning
- Bank of Reusable Prompts w Variables
- AI Agents, Code Execution, RAG

Q&A

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