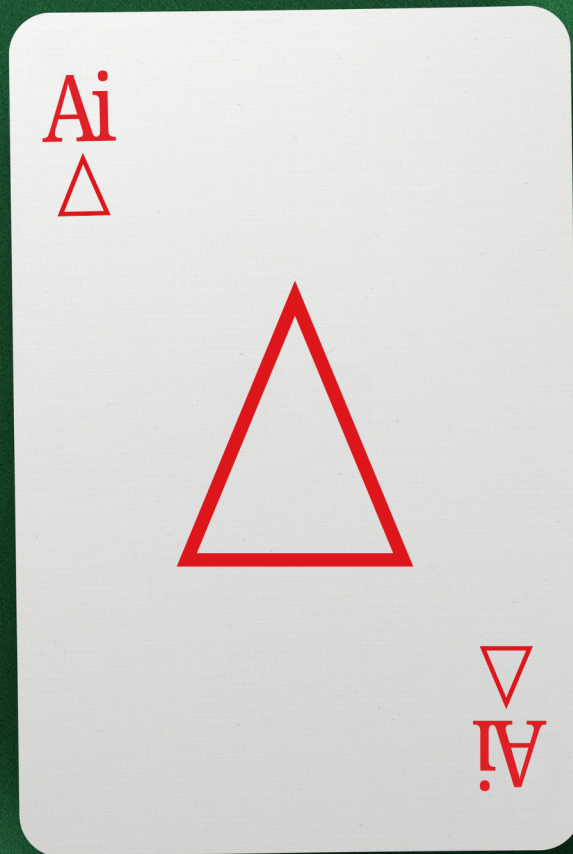


# ACING AGENTIC WORKFLOWS



DR. F. BLINDENBACH



# Acing Agentic Workflows

Dr. F Blindenbach

This book is available at <https://leanpub.com/acingagenticworkflows>

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# Introduction

This book is about making the best use of Generative AI and other AI-powered solutions—not just adopting technology for the sake of it, but using it to make work more impactful, effective, and profitable.

I first became interested in this topic when I learned that only 10–20% of AI pilot projects result in actual working solutions. That struck me as a major problem, especially considering the disruptive potential of AI and the competitive advantage it offers to early adopters.

So, I set out to understand what was going wrong. In 2025, the problem isn't the technology. Generative AI isn't perfect, but that's not why so many pilots fail. The real issues are unrealistic expectations, misalignment between teams, and lack of user adoption. In other words, preventable problems.

That said, fixing these problems isn't as simple as just trying harder. The real challenges are cultural and managerial. That's why this book is for anyone looking to execute a successful AI strategy and who is willing to do things differently.

## What Are Agentic Workflows?

Before I dive in, let's make sure we're on the same page about what agentic workflows are. Agentic workflows are software solutions that use AI to take over relatively simple tasks from humans—things like processing data, generating summaries, or drafting responses based on predefined prompts.

From a technology standpoint, these are all solvable problems. Yet, bringing these solutions to life is often a managerial challenge, not a technical one. That's why this book isn't about AI technology or AI agents—it's about making AI work and transforming organizations.

Generative AI has the potential to be as transformative as the steam engine in terms of technological and economic impact. Now is the time for organizations to learn how to develop and implement these solutions effectively.

## The Five Key Players

To make this book practical and to ensure the human aspect is properly addressed, I will focus on five key stakeholders who play crucial roles in adopting AI within any organization. These are the people you'll likely recognize in your own workplace:

- *Bailey the Boss (CEO)*
- *Drew the Department Head*
- *Ira from IT (or Innovation)*
- *Taylor the Young Talent*
- *Vic the Vendor*

Let's meet each of them.

### Bailey the Boss

Bailey is the CEO, the grand strategist, the fearless leader—or at least, that's how he sees himself. He thrives on bold moves, big visions, and making sure his firm is always ahead of the competition. Luck played a big role in his success, but he'd never admit it. He trusts his instincts, loves big ideas, and despises getting bogged down in operational details.

Since last year, Bailey is pushing hard for AI adoption. At first, he was highly skeptical, but now he is convinced it will revolutionize their industry. Over the past 12 months, he has spent a lot of money on AI tools in an effort to catch up. To his frustration, only 10% of employees are currently using the expensive tools he championed. Now, he's caught between the pressure from the board to justify skyrocketing IT costs and his own gut feeling that AI is the future. If only he could get his people on board.

### Drew the Department Head

Drew is the linchpin between leadership's grand vision and the messy reality of day-to-day operations. She earned her position through years of hard work, expertise, and sheer perseverance. A master of her craft, she knows exactly how things get done and how much effort every so-called "innovation" requires to get from idea to results.

She's seen technology fads come and go, and while she's open to change, she doesn't have the patience for disruptions that don't clearly make life easier. Generative AI? Maybe useful for automating emails and generating reports, but she's not convinced it's worth reworking everything she's spent years perfecting. Her main frustration is that someone like Bailey has no idea or appreciation for how much effort change really takes.

## **Ira from IT (or Innovation)**

Ira is the steady hand behind the firm's digital evolution—a quiet force who balances innovation with security and stability. Over the course of her career, she's navigated every major technological shift, from the dawn of personal computing to the rise of the cloud, and now, the tidal wave of AI.

She believes in Generative AI's potential—but she also knows that most executives don't truly understand what they're asking for when they demand it.

Just a year ago, her focus was on blocking unauthorized use of AI tools. Now, Bailey is urging her to embed AI across every business function and operation. Ira is exhausted, overwhelmed, and increasingly wary of bold promises that gloss over the messy, resource-intensive reality of implementation.

She controls the IT budget, but the board holds the purse strings. That leaves her constantly squeezed between sky-high expectations and constrained resources. The firm has spent a lot on tools, but if it had been up to her, it is not how she would have approached things. As, not surprisingly, adoption challenges are mounting. What makes the current AI frenzy even more maddening is the assumption that it will cut costs and save time. It means she's being asked to deliver more, faster, and cleaner, with less.

## **Taylor the Young Talent**

Taylor is an ambitious, restless newcomer who thrives on learning, moving fast, and making an impact. She's impatient, eager to prove herself, and completely comfortable using Generative AI for everything—from summarizing reports to generating client emails.

Unlike the old guard, she doesn't fear AI taking jobs—she fears being stuck doing meaningless work when AI can handle it. She grew up in a world of



instant answers and has little patience for long meetings, hour-long training sessions, or outdated processes.

Taylor doesn't read manuals; she figures things out as she goes. She's willing to put in extra hours—if the work is engaging. If it's not? She's already looking for her next career move.

## **Vic the Vendor**

Vic is a smooth-talking sales rep who sells AI solutions for a living. He's charming, persistent, and laser-focused on one thing: hitting his sales quota. Making clients happy is great, but closing deals is his top priority.

He knows that selling directly to Ira, the IT head, is tough. IT departments have strict budgets and long approval cycles. So instead, he is reaching out to his old friends like Taylor and fellow alumni like Drew. If he can get them excited, getting executive buy-in becomes much easier.

Vic isn't just selling AI—he's selling dreams of efficiency, transformation, and competitive advantage. He genuinely believes in his product, but he also knows that half of the AI projects he's sold will never make it past the pilot phase. That's not his problem, though—he's on to the next deal.

## **Bringing AI to Life in an Organization**

Each of these characters is based on real people I've worked with, making them as realistic as possible. As you read this book, I encourage you to think of actual individuals in your organization who fit these roles. It will make the insights more relevant and the recommendations more tangible.

That leaves me to put their stories into context. For that purpose, I have created a fictional organization called Vic Titious, named after Vic Titious, who founded the firm more than 75 years ago. Since, it has grown into a professional services firm with 750 employees and \$100M in revenue. It's a strong, established company, but like many firms, it faces challenges in keeping up with change.

For simplicity, Vic Titious is modeled after a combination of law firms, engineering firms, and healthcare organizations. You can swap in your own company's name and details as you go.

## The Five Parts of This Book

This book is structured as a five-part journey, guiding you through the process of successfully implementing AI-powered workflows:

1. The Power & Costs of Agentic Workflows
2. Prioritizing Projects
3. Developing Solutions
4. Delivering Value and ROI
5. People-Driven Innovation & Transformation

Let's get started.

# Introduction

Large-scale initiatives are often resource-intensive and slow to deliver results. By the time momentum builds, leaders may have left or priorities may have shifted. Without deep engagement from those doing the work, these efforts risk fizzling out or, worse, generating fatigue and cynicism.

That's why a different approach matters: scouting for ideas across the organization.

In professional service firms like Vic Titious, expertise is distributed. The best ideas for where Generative AI could deliver real value often live at the edges - buried in the workflows of client service, research, or operations. Encouraging these ideas to surface can uncover opportunities that leadership would never identify on their own.

But inclusivity isn't without challenges.

When everyone is invited to contribute, the volume of input can overwhelm existing systems. Good ideas can get lost. Efforts may duplicate or compete. And without a clear, intentional process for capturing, prioritizing, and supporting ideas, the result feels chaotic - not innovative.

That's where Bailey's real opportunity lies - not as the inventor, nor as the judge of every idea - but as the architect of an environment where smart ideas rise and gain traction.

He doesn't need to launch a sweeping firm-wide transformation.

Instead, he can articulate a clear vision for the outcomes they want to achieve with AI - for the firm, and for their clients - and invite others to help shape how they get there. By balancing top-down direction with bottom-up discovery, Bailey could do more than just look like a visionary.

He might actually become one.



# **Drew's Challenge: Driving Today's and Tomorrow's Revenues**

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# Discussion Questions

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## 3. Set Clear, Time-Limited Expectations

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# Discovery-Driven Planning

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## Step 1: Reverse Income Statement

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# Affordable Loss Principle

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## Step 2: Affordable Loss for the Pilot

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### Scope within the \$50K Cap:

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### Budget Breakdown:

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