AN EXCLUSIVE AND VIBRANT COMMUNITY FOR IA, AI, AUTOMATION, TECHNOLOGY, AND BUSINESS & DIGITAL TRANSFORMATION LEADERS

AGENTS: TRANSFORMING ENTERPRISE COLLABORATION WITH AGENTIC AI

Presented by:

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GLOBAL PHARMACEUTICAL COMPANY

IA FORUM

Collectively Driving Digital Transformation Excellence

IA FORUM

SPEAKER BIO

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Doug Shannon stands at the forefront of digital transformation and enterprise automation, leveraging over two decades of IT and advanced technology experience. As a Global Intelligent Automation and GenAI Leader, Doug has established himself as a pioneer in driving innovation, operational excellence, and strategic vision across global organizations. Recognized among the Top 50 Intelligent Automation Leaders and twice awarded as a Top 25 Thought Leader in 2024, he continues to shape the future of intelligent automation and generative AI. Doug is also a proud member of the Forbes | Technology Council, contributing his expertise to a network of global technology leaders.

Doug's career is characterized by a unique ability to blend technical expertise with transformative leadership. He is the creator of groundbreaking frameworks such as the GAAA Model (Gauge, Analyze, Automate, Adapt) and the SODOTOLO Framework (See One, Do One, Teach One, Learn One), which empower organizations to evolve and sustain continuous growth. His leadership has propelled the development of self-healing automation systems and multi-agent frameworks, setting new benchmarks in digital transformation.

As the Global Intelligent Automation Manager, Doug oversees automation platforms and RPA frameworks across 66 countries. He spearheads initiatives that align technology with business goals, optimizing workflows, and driving sustainable growth. His innovative contributions include leading automation Centers of Excellence, collaborating with offshore teams, and integrating AI-powered solutions to enhance operational performance.

Doug's core competencies span Enterprise Robotic Process Automation (RPA), artificial intelligence (AI), agile project management, enterprise architecture, and risk analysis. His ACT Leadership Model (Alignment, Clarity, Transparency) exemplifies his ability to foster collaboration and inspire teams toward achieving shared goals.

Doug's influence extends beyond corporate boundaries. He serves as a Gartner Peer Community Ambassador, sharing insights with global thought leaders. As a council member for the VOCAL and Theia Institute, Doug contributes to shaping the future of AI ethics, cybersecurity, and customer-centric strategies. He also co-hosts *InsightAI*, a YouTube series offering expert perspectives on the latest AI innovations.

Agents: Transforming Enterprise Collaboration with Agentic AI

"The future of work isn't about machines replacing humans, it's about machines working alongside us to create something greater."
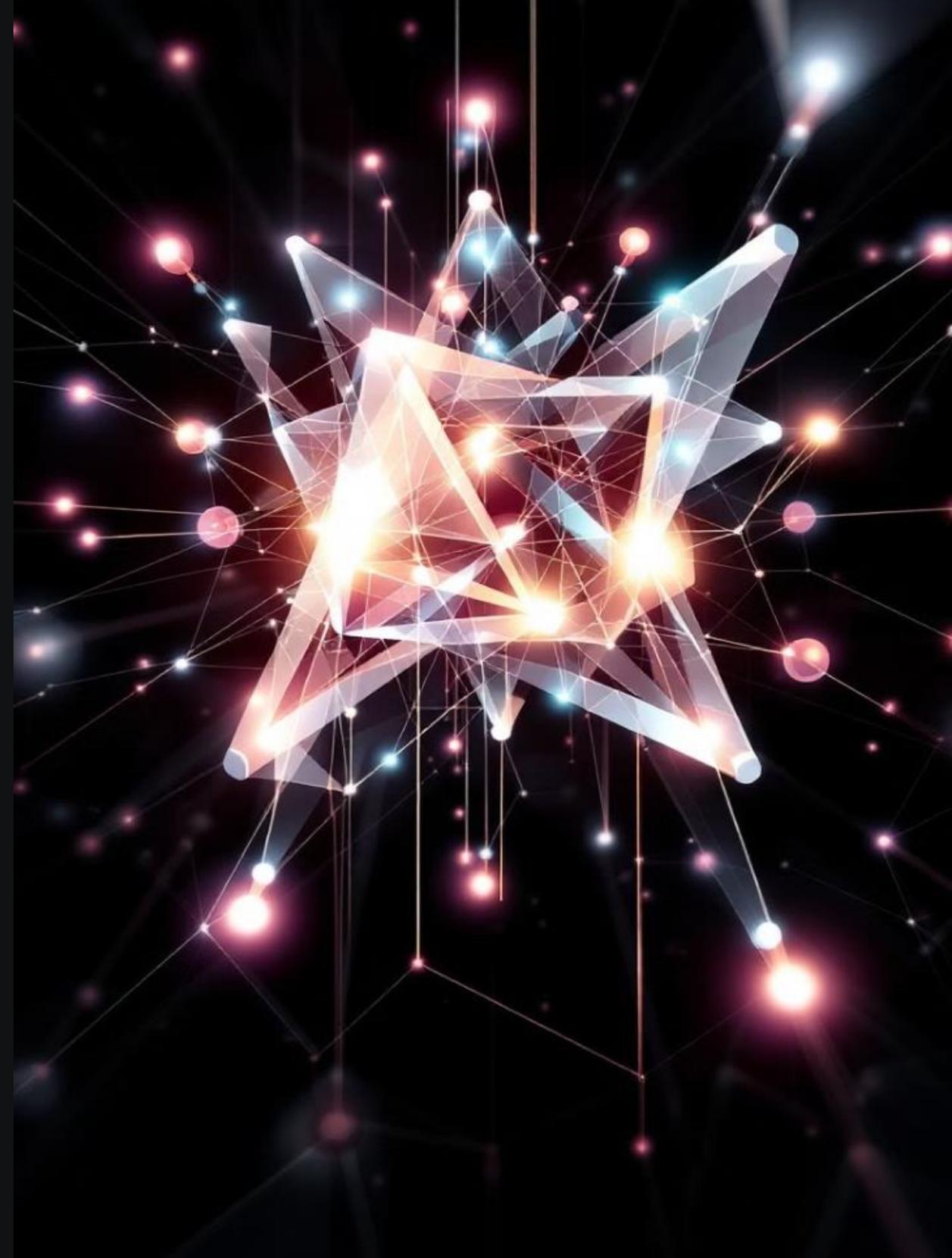
DOUG SHANNON

Global Intelligent Automation & GenAI Leader

| Top AI Voice | Top 25 Thought Leaders | Co-Host of Insight AI |

Gartner Peer Community Ambassador | Forbes Technology Council

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What Are Agents?

"Agent" can be defined in several ways. Some customers define agents as fully autonomous systems that operate independently over extended periods, using various tools to accomplish complex tasks. Others use the term to describe more prescriptive implementations that follow predefined workflows.

- Anthropic

Definition

Agents are autonomous systems that can **plan**, **act**, and **adapt** to achieve specific **tasks**, **goals**, or **objectives**.

Distinction

Workflows follow **predefined paths** using orchestrated LLMs and tools. Agents **dynamically decide** processes and actions to achieve objectives.

The Right Tools for the Right Tasks

1 **Workflows**

Are systems where LLMs and tools are orchestrated through **predefined** code paths.

2 **Agents**

Are systems where LLMs can **dynamically direct** their own processes and tool usage, maintaining control over how they accomplish tasks.
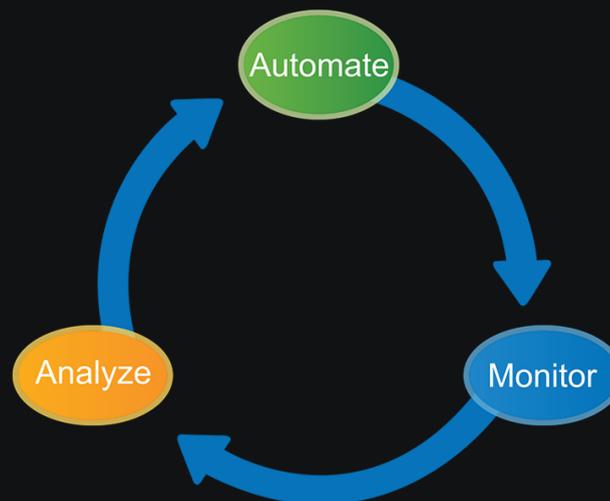
3 **The path ahead**

Balancing Autonomy with Oversight

👁 **Alignment, Oversight & Intervention**

Internal ownership.
Prevent errors, Ensure accountability, Maintain IP

💬 **Clarity, & Feedback Loops**

Improve agent behavior through real-world input.
Anomaly detection, Education, Data Filtering & Categorization

⊞ **Transparency , & Explainability**

Due Diligence, Auditable Processes, & Digital Twins.
Build trust with Visible & Explainable Decisions.

Finding the Bridge

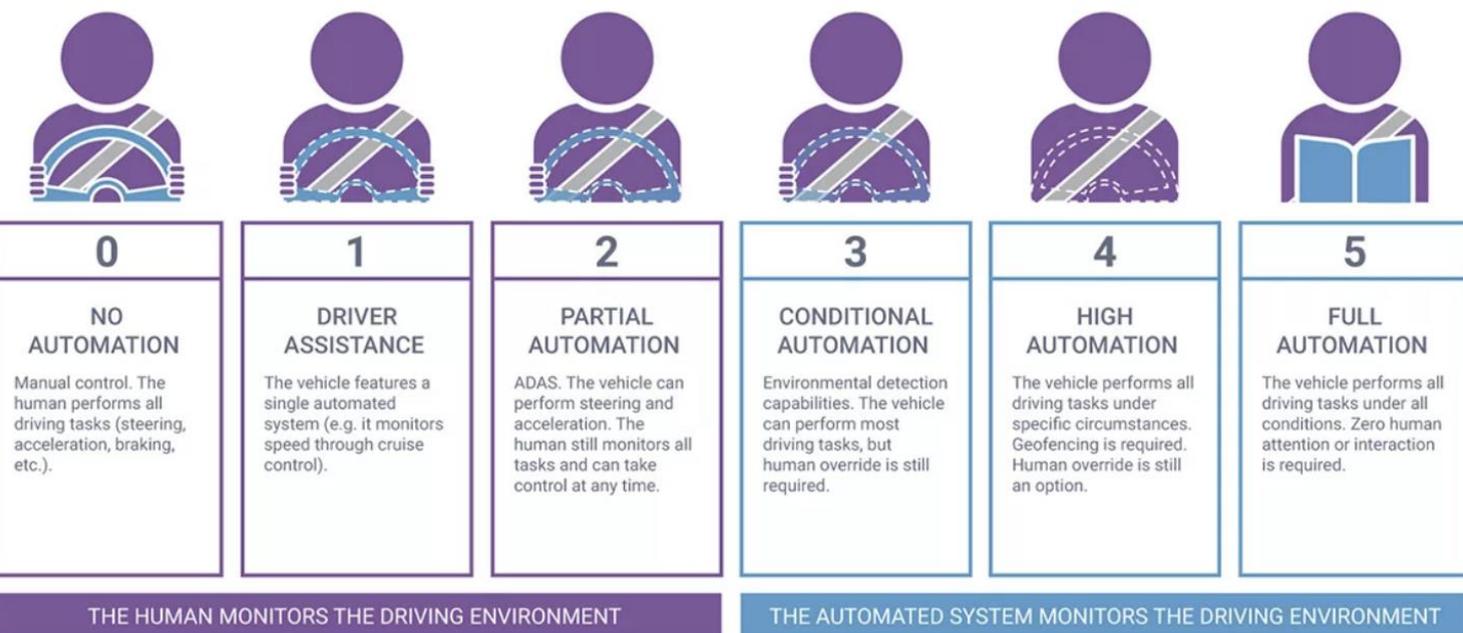## LEVELS OF DRIVING AUTOMATION

0 NO AUTOMATION	1 DRIVER ASSISTANCE	2 PARTIAL AUTOMATION	3 CONDITIONAL AUTOMATION	4 HIGH AUTOMATION	5 FULL AUTOMATION
Manual control. The human performs all driving tasks (steering, acceleration, braking, etc.).	The vehicle features a single automated system (e.g. it monitors speed through cruise control).	ADAS. The vehicle can perform steering and acceleration. The human still monitors all tasks and can take control at any time.	Environmental detection capabilities. The vehicle can perform most driving tasks, but human override is still required.	The vehicle performs all driving tasks under specific circumstances. Geofencing is required. Human override is still an option.	The vehicle performs all driving tasks under all conditions. Zero human attention or interaction is required.

THE HUMAN MONITORS THE DRIVING ENVIRONMENT | **THE AUTOMATED SYSTEM MONITORS THE DRIVING ENVIRONMENT**

https://www.sae.org/standards/content/j3016_202104/

Agentic
• Agentic behavior starts at **Level 1**, whereas **Agentic Agents** start at **Level 3** where they exhibit context awareness and decision-making.
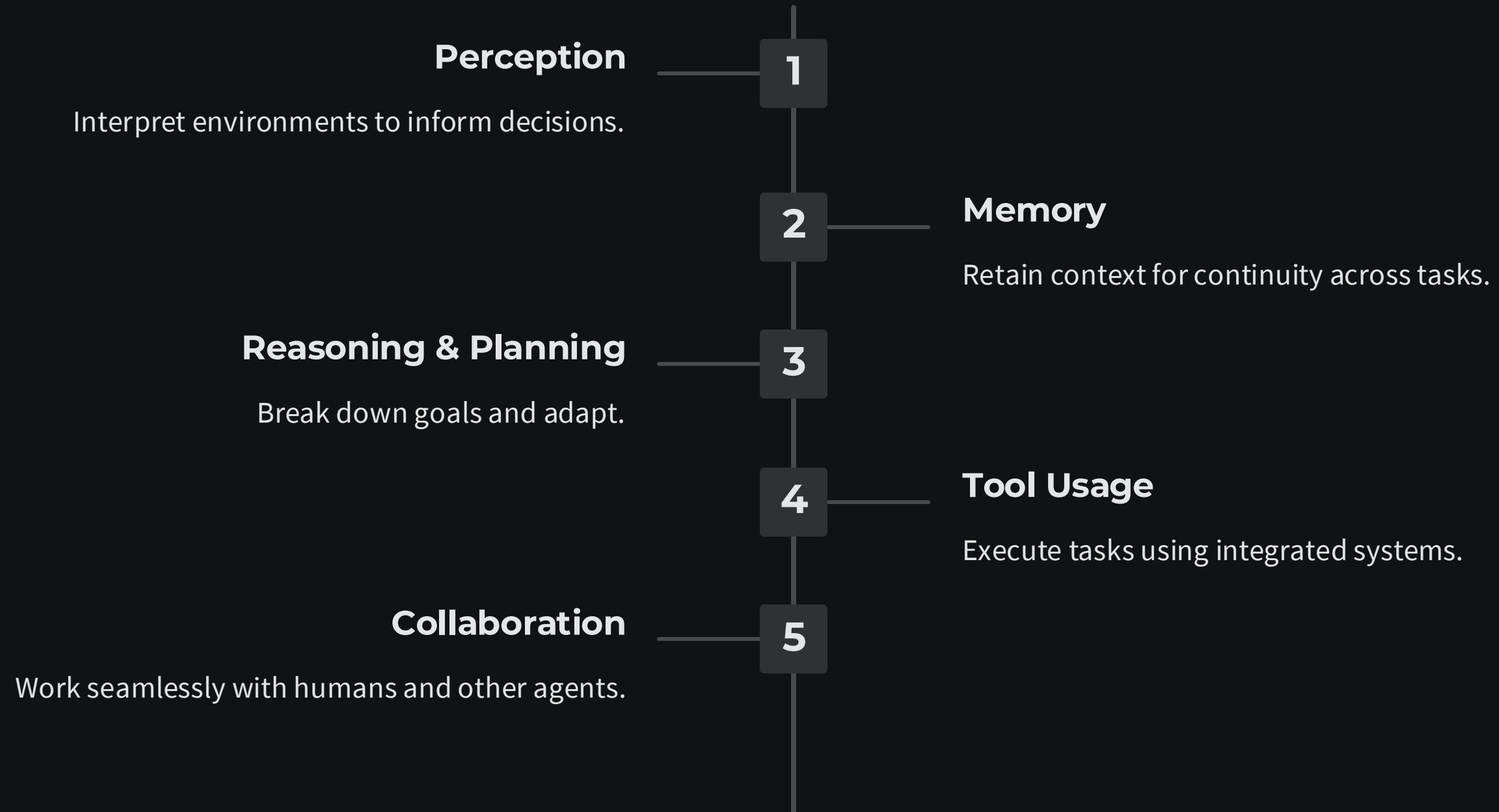
AI Agent
• AI Agents emerge at **Level 3.5 / 4.0**, where they exhibit Goal-driven understanding and more autonomy.

MAS – Multi Agent Systems / Frameworks
• Multi-agent frameworks exist at **Level 4.5 / 5**, where AI agents operate in a distributed, goal-driven manner, adapting to enterprise needs.

Level	Description	Human Involvement	Example
Level 0: No Automation	No agentic behavior. AI is purely reactive, requiring full human intervention.	100% human-driven	Traditional chatbots that only respond to direct inputs (e.g., basic FAQ bots).
Level 1: Assisted AI	AI provides basic assistance, but the human remains fully responsible.	Human in control, AI assists	AI-powered assistants like Clippy or early-generation voice assistants.
Level 2: Task-Automated Agents	AI performs specific tasks but still requires constant human supervision.	AI executes, human oversees	AI-driven RPA (Robotic Process Automation) tools that complete structured workflows but lack real-world adaptability.
Level 3: Context-Aware AI Agents	AI operates independently in defined scenarios, but hands control back to humans when needed.	AI can make decisions in controlled environments	Customer service bots that understand intent and switch to a human when queries exceed their scope.
Level 4: Goal-Driven AI Agents	AI autonomously achieves goals within pre-defined boundaries, only escalating complex cases.	AI-driven with human as fallback	Enterprise AI agents that autonomously optimize processes (e.g., supply chain AI managing inventory fluctuations).
Level 5: Fully Autonomous AI Agents	AI is completely self-sufficient, adapting dynamically and collaborating with other agents in a multi-agent framework.	No human intervention required	Autonomous enterprise AI that integrates with various systems, making strategic and tactical decisions without human input.

What Can AI **Agents** Do?

Perception — **1**

Interpret environments to inform decisions.

2 — **Memory**

Retain context for continuity across tasks.

Reasoning & Planning — **3**

Break down goals and adapt.

4 — **Tool Usage**

Execute tasks using integrated systems.

Collaboration — **5**

Work seamlessly with humans and other agents.

Where **Agents** Shine

1 — Customer Support

Automating inquiries, enabling resolutions, and integrating tools for personalized support.

Risk: - Prompt Injections

2 — Supply Chain Optimization

Monitoring logistics, predicting disruptions, and recommending actions.

Risk: - Data Poisoning

3 — Software Development

Solving GitHub issues autonomously using testing and feedback.
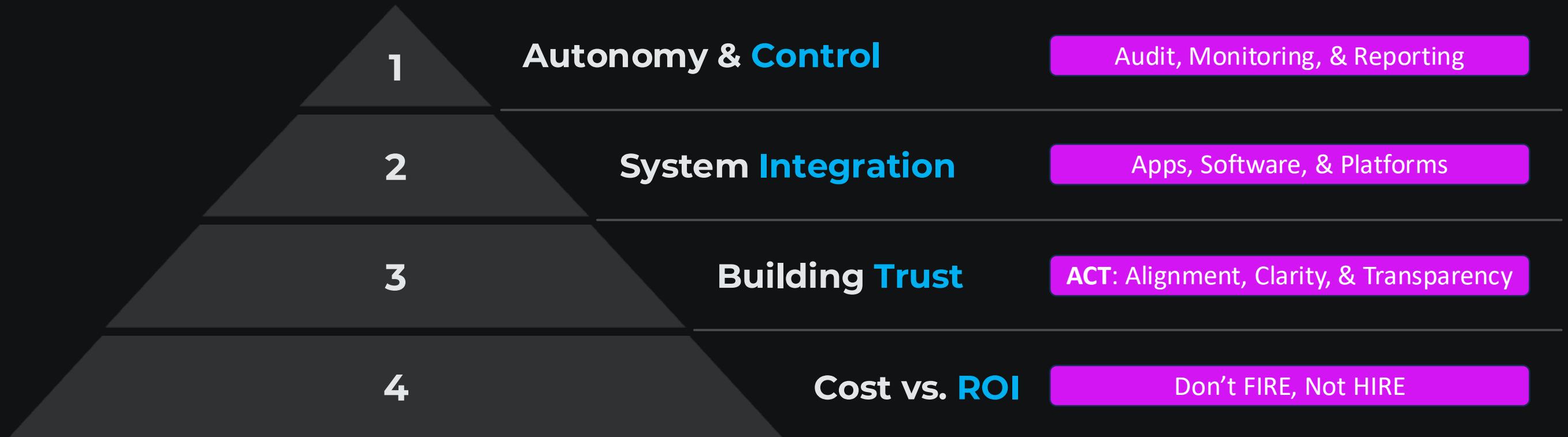
Risk: - Shadow AI

4 — Healthcare

Analyzing patient data for diagnostics, with doctors validating results.

Risk: - Lack of Governance

What's Holding Us Back?

1	Autonomy & **Control**	Audit, Monitoring, & Reporting
2	System **Integration**	Apps, Software, & Platforms
3	Building **Trust**	**ACT**: Alignment, Clarity, & Transparency
4	Cost vs. **ROI**	Don't FIRE, Not HIRE

Building a Collaborative Future

1

Train Employees

View AI as a partner, not a replacement.

Your Employees are your first Customer

2

Foster Trust

Transparent AI processes.

Enabling, Empowering, & Emboldening

3

Human-(IN)-The-Loop

Accountability and adaptability.

Collaboration, & Human-First approach

4

Evolve **Workflows -> Human**-(ON)-The-Loop

Maximize the strengths of humans and agents.

Roles, Group, & Org | **RBAC, CRUD**

AI

GenAI

Agentic AI

AI agents

Multi-Agent Systems/Frameworks

"The future is where AI enables humans to focus on vision while machines handle the complexity of execution. Together, we redefine what's possible."

Let's build the future together.

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