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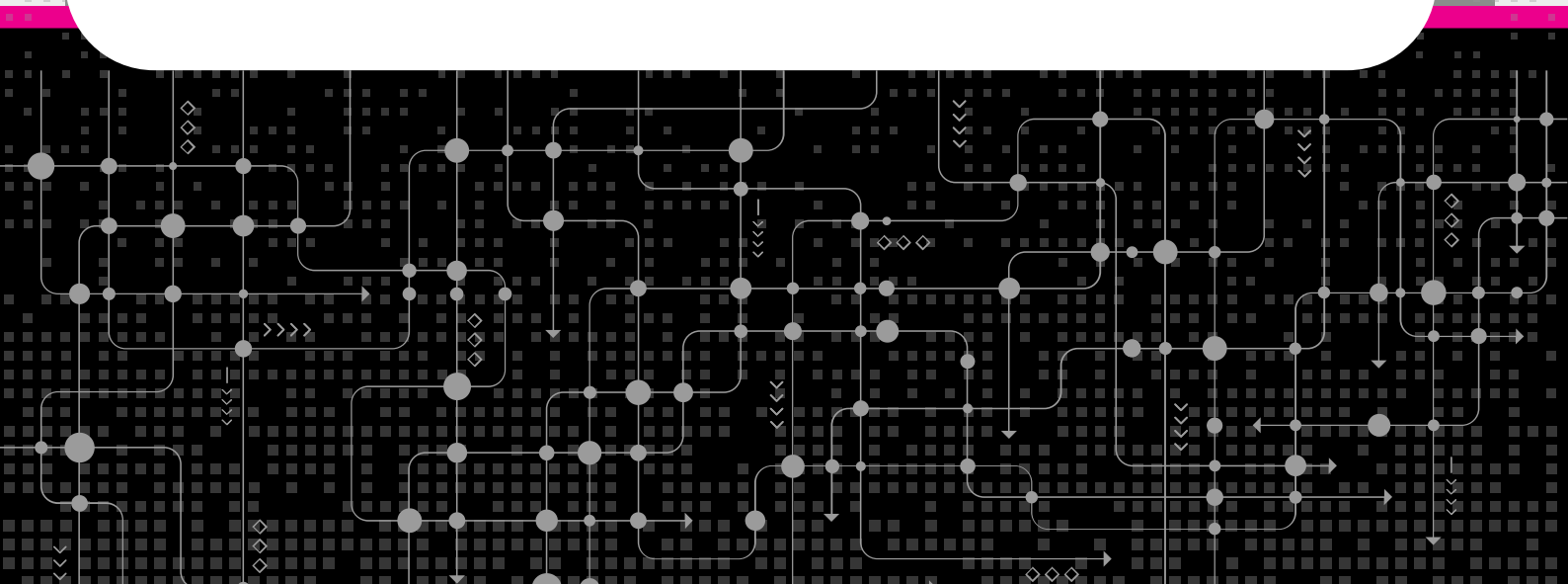
FROM OVERWHELM TO ACTION:

A PRACTICAL GUIDE TO GETTING STARTED WITH INTELLIGENT AUTOMATION



WELCOME TO YOUR INTELLIGENT AUTOMATION JOURNEY

This workbook is designed to help you transform business challenges into opportunities for intelligent automation. At TomorrowZone, we believe AI isn't just about technology—it's about solving real business problems. Our goal is to make AI accessible and practical, so you can free your team to focus on what matters most: innovation, strategy, and high-value work.

Instead of starting with the technology, let's begin by identifying the areas in your business where automation can have the greatest impact. Ready to move from overwhelm to action? Let's begin.

Introduction: What is AI?

At TomorrowZone, we like to think of AI as “Intelligent Automation”—a practical tool that enhances the way you work by making business processes faster and more efficient. AI, or artificial intelligence, is a branch of computer science focused on building systems that can perform tasks typically requiring human intelligence, such as problem-solving, learning, and decision-making. Machines can do this on large data sets at high speed. But don’t let that technical definition intimidate you.

AI isn’t about replacing people, it’s not reserved for tech experts, and it’s not futuristic or far out of reach. It’s already here, embedded in many of the tools you use every day, ready to help you automate repetitive tasks and streamline operations. The true power of AI lies in how it frees up your time. How it enables you to focus on strategy and innovation.

This workbook will guide you step by step through simple, practical ways to start using AI to transform your business, one task at a time.

Step 1: Focus on the Business Problem, Not the Technology

Innovation begins by asking better questions, not downloading more apps. Before diving into automation or AI, it's crucial to focus on the challenges your business is facing. Technology is only useful when it's solving the right problems.

The smartest way to start your AI journey and identify use cases? Crank up your curiosity and ask better questions, *"What's slowing us down?"* instead of *"What's the latest tool we could use?"*

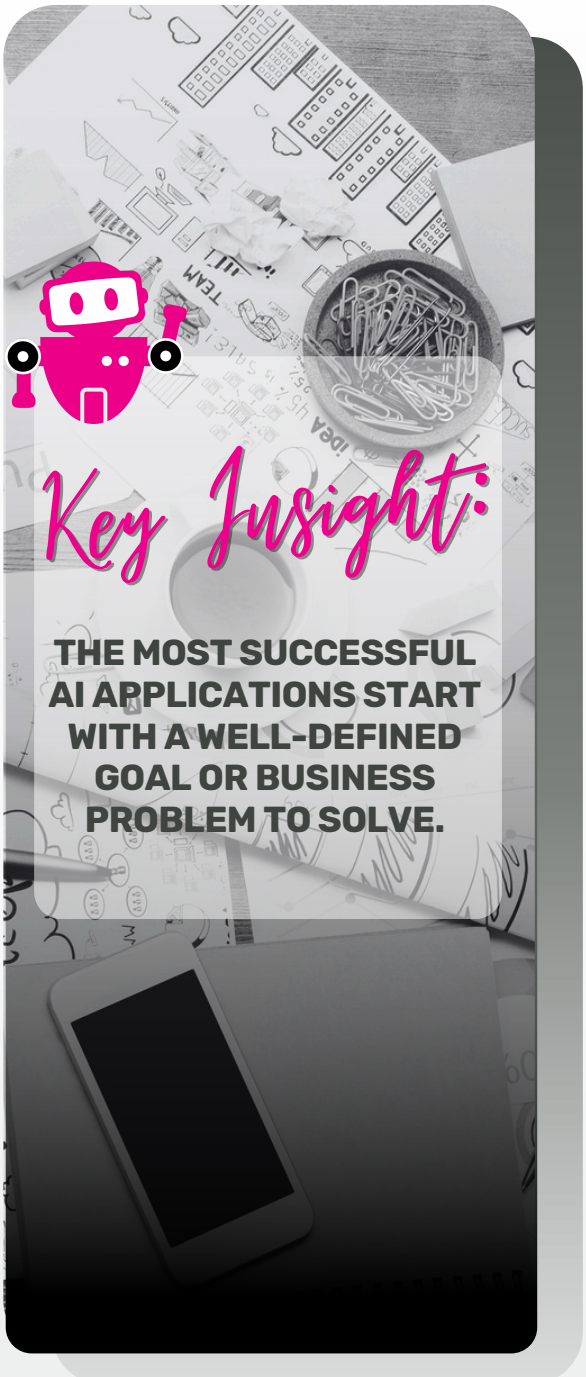
Exercise 1: Identify Your Top 3 Business Challenges

Write down the top three pain points your business is currently facing. These could be bottlenecks, repetitive manual tasks, or processes that take too much time.

Example:

- Our team spends too much time manually entering data into our CRM.
- Customer onboarding takes too long because of paperwork.
- We struggle with getting accurate insights from our sales pipeline.

Next, write down how solving each of these challenges could positively impact your organization. Would it save time? Improve accuracy? Increase team morale?



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Exercise 1: Identify Your Top 3 Business Challenges

List the top three pain points your business is currently facing:

1 _____

2 _____

3 _____

How would solving each of these challenges positively impact your organization?

1 _____

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2 _____

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3 _____

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Step 2: Reframe AI as a Tool to Augment Human Capabilities

You don't need to build AI from scratch, it's capabilities are likely already in your office. AI isn't about replacing humans or jumping on the latest tech bandwagon. It's about using intelligent automation to streamline processes, solve problems, and unlock greater potential in your business. Many AI capabilities are already embedded in tools you use every day—so start there.

Reframing the question: Ask, *"What can we do with what we already have?"* rather than *"What new software do we need to buy?"*

Exercise 2: Discover AI Capabilities in Existing Tools

Recognize Intelligent Automation capabilities that may be present in the tools you already use. (Note: often these common platforms will require additional subscription levels to access more powerful intelligent automation capability.)

Example:

- You may be using Salesforce, but not fully utilizing Einstein AI for predictive sales insights.
- Your Microsoft Suite has automation features in Excel and Teams, but you haven't explored them deeply.

List any AI-powered platforms or tools your team already uses (e.g., Microsoft, Salesforce, or HubSpot, ClickUp, ZohoOne, etc.). When is the last time you looked at your platform provider's feature list to see the latest capabilities? Do these tools have automation features you're not using to their full potential?



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Exercise 2: Discover AI Capabilities in Existing Tools

List any AI-powered platforms or tools your team already uses:

1 _____

When is the last time you looked at your platform provider's feature list to see the latest capabilities?

2 _____

Do these tools have automation features you're not using to their full potential?

3 _____

Step 3: Take Control - Set Time Aside for AI Exploration

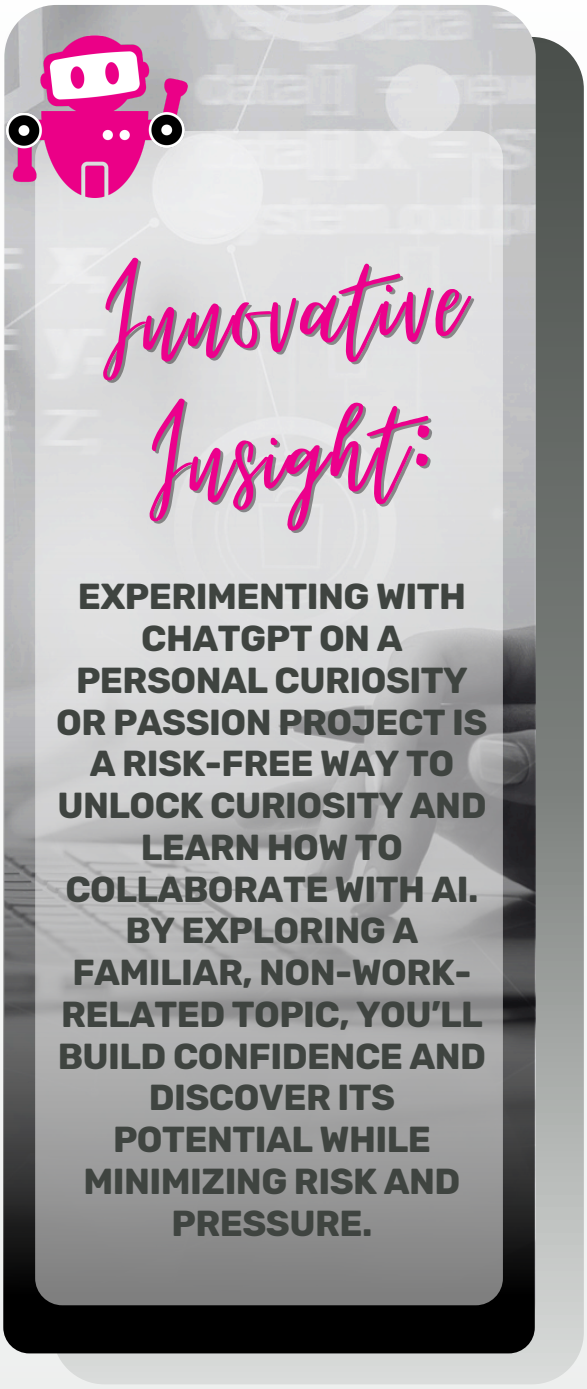
The most productive meeting on your calendar might be with yourself. You don't need hours of deep dives to start your automation journey. Setting aside just 20 minutes a couple times a week for AI exploration can lead to significant breakthroughs. In that small window, you can experiment with tools, ask questions, or research automation ideas that could transform how you work. The key is organization and consistency—return on those 20-minute sessions will add up faster than you think.

Exercise 3: Schedule 20 Minutes of AI Exploration

Reading about AI, listening to livestreams or podcasts about AI are great ways to engage in passive learning, but what really accelerates your understanding of AI is ACTIVE learning. Whether it's exploring features in a tool you already use or testing out new automation ideas in generally available AI applications like Chat GPT, the goal is to build a habit of carving out time for regular exploration and experimentation.

Example:

- Get started with Chat GPT, get an account. (Follow your company's policies and guidelines. If accessing generative AI tools like Chat GPT is not allowed in your corporate environment, then you must honor that and use a personal device and email to create an account and access this tool).
- Use ChatGPT to plan a vacation, party, or meal plan. Something fun and risk-free.
- Watch a 10-minute tutorial on a new AI tool or feature you've heard about.



Exercise 3: Schedule 20 Minutes of AI Exploration

- **Pick one day in the week and block out 20- 30 minutes on your calendar as a “learning appointment” to explore AI tools or concepts**
- **Pick another day in the week and block out 20 minutes on your calendar as an “application appointment” to experiment with applying what you learned in the learning appointment.**
  - **Action: Brainstorm and write down potential uses for capabilities you are learning about.**
  - **Action: try using intelligent automation capabilities for small low stakes task.**

Write down potential uses for capabilities you are learning about:

1 _____

Step 4: Map Out Where Automation Can Deliver the Biggest Impact

The most impactful automation is where the pain is the greatest. Now that you've identified key business challenges, and explored the possibilities for what AI tools can do, it's time to prioritize where automation can deliver the most value. Don't overcomplicate things—small, incremental improvements can have a big impact over time. Start with processes that are repetitive and manual.

Exercise 4: Identify Opportunities

List out the key **low risk** processes in your business that are manual, repetitive, or slow. Rank these areas based on their potential for automation.

Which tasks, if automated, would save the most time or reduce errors?

Example:

- Data entry for customer onboarding (high impact, repetitive).
- Note taking and summarization of meetings (medium impact, repetitive).
- Managing internal project timelines (low impact, manual but not critical).



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Exercise 4: Identify Opportunities

List out the key low risk processes in your business that are manual, repetitive, or slow. Rank these areas based on their potential for automation.

1 _____

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Which tasks, if automated, would save the most time or reduce errors?

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Step 5: Track Your Progress and Celebrate Small Wins

Progress is momentum, not perfection. Getting started with intelligent automation doesn't have to be overwhelming. By starting with small, focused changes, you can build momentum. Don't wait until you've automated everything. This is both a learning and practical application journey. Celebrate each incremental step – it's the progress that matters, not doing it all at once.

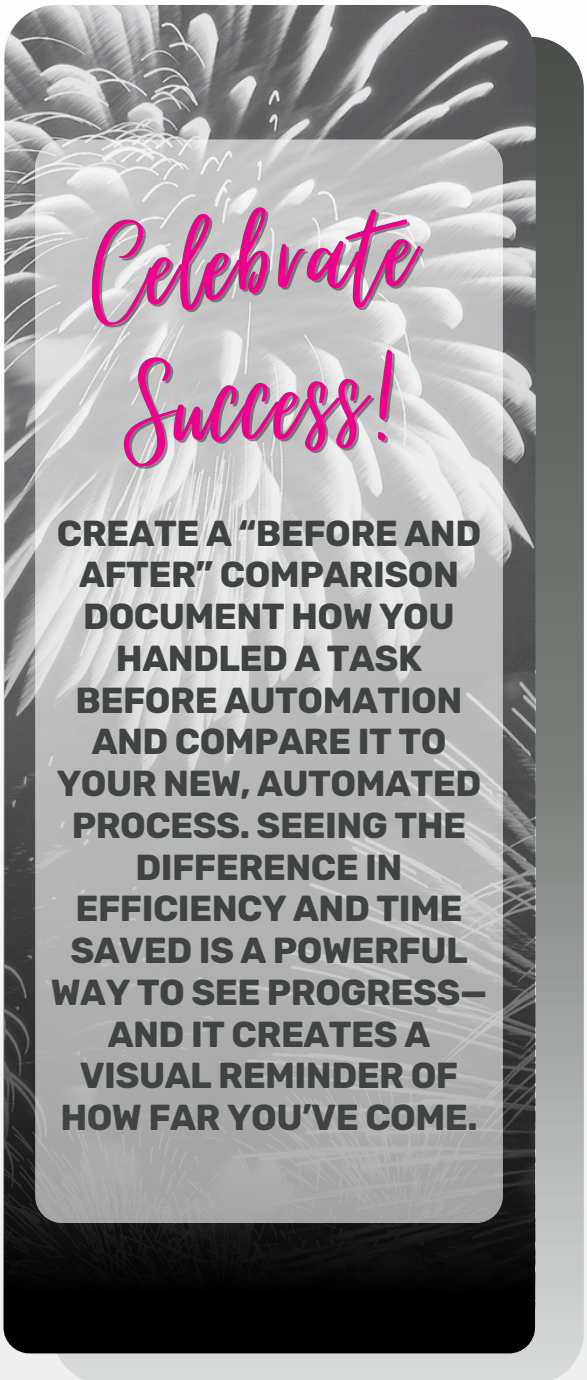
Exercise 5: Celebrate the Wins and Track Time Savings

At the end of each week, write down one task you've automated and the time it saved, or something you learned about AI. Did automating this task improve accuracy, enhance your thinking, or free up time for more strategic work? Did you or your team learn more about what AI can or cannot do?

Example:

Reflecting on your AI progress could look like this:

- I automated data entry for customer onboarding and saved 3 hours per week.
- Automating meeting scheduling saved 1 hour per week across the entire team.
- I learned that generative AI, like CHAT GPT is better at content creation than math for certain tasks.



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Exercise 5: Celebrate the Wins and Track Time Savings

What task did you automate this week?

1 _____

How Much time did it save?

2 _____

Did automating this task improve accuracy, enhance your thinking, or free up time for more strategic work?

3 _____

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Did you or your team learn more about what AI can or cannot do?

4 _____

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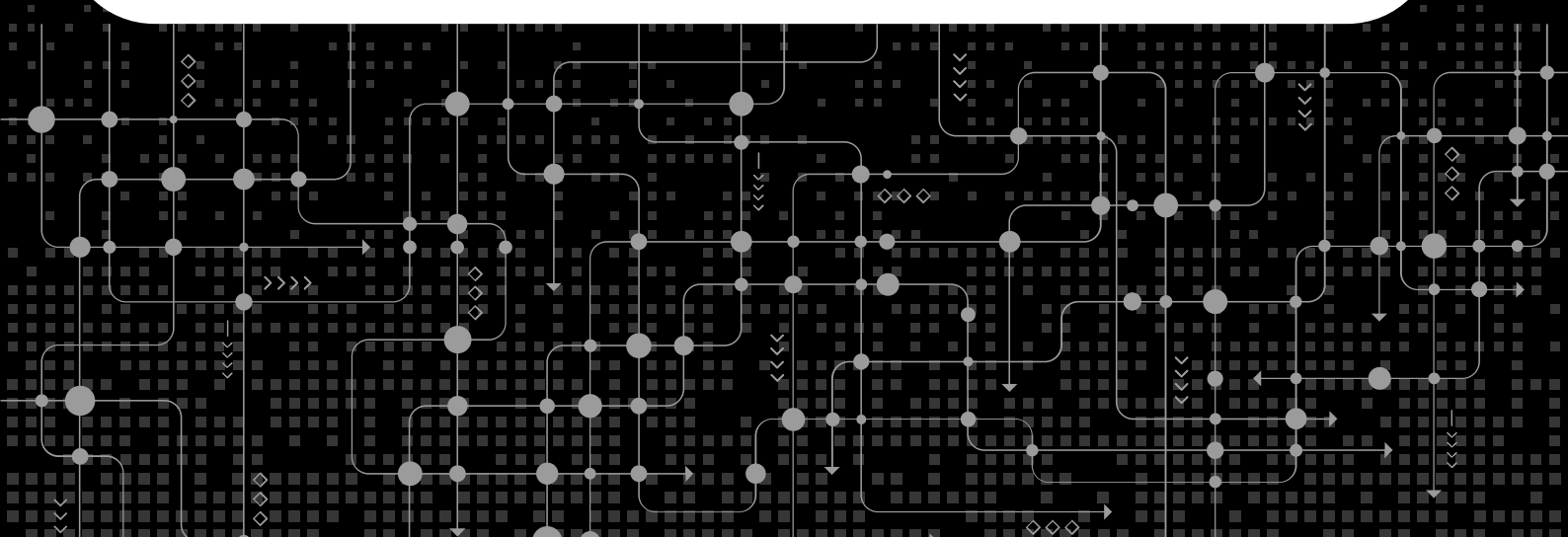
FINAL THOUGHTS:

STAY CURIOUS AND KEEP EXPERIMENTING

REMEMBER, THE JOURNEY OF INTELLIGENT AUTOMATION IS ABOUT CONTINUOUS LEARNING.

Dedicate 20 minutes a couple times a week to exploring new automation tools or trends. Keep asking, "How can we make this process faster or more efficient with AI?" Every small step you take brings you closer to creating a future-ready business.



NEED MORE GUIDANCE?

Ready to go deeper? Join our ***Intelligent Automation Catalyst Workshop***, where we'll help you map your AI opportunities and build a clear action plan tailored to your business.

CONTACT US AT CATALYST@TOMORROWZONE.IO TO LEARN MORE.

INTELLIGENT AUTOMATION CATALYST



- **Boost AI understanding.**
- **Map high value use cases.**
- **Develop a focused AI roadmap.**

READY TO TRANSFORM HOW YOU WORK?

AUTOMATE THE MUNDANE. AMPLIFY THE STRATEGIC.

CONTACT US FOR A DEMONSTRATION OF THE
INTELLIGENT AUTOMATION CATALYST EXPERIENCE.

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EMPOWERING LEADERS TO SHAPE THE FUTURE OF DIGITAL INNOVATION.

TOMORROWZONE'S INTELLIGENT AUTOMATION CATALYST WORKSHOP

is more than just a learning experience—it's your team's launchpad into the future. Imagine stepping into a transformative journey where AI isn't something to fear but a superpower that will propel your organization forward.

In this workshop, we'll demystify AI and automation, guiding your team through real-world applications that drive impact. No tech-heavy jargon, just practical insights that meet you where you are. We'll help you unlock the hidden potential in your business, map the areas with the highest value for applying intelligent automation, and co-create a tailored roadmap so you know the exact next steps to generate momentum.

WHAT YOU'LL EXPERIENCE:

- **AI Opportunity Mapping**: We'll guide your team through a structured process creating a clear, visual map revealing which parts of your business are ripe for AI-driven improvements.
- **Hands-On Learning**: Your team will actively engage in expertly facilitated practical exercises, exploring over 70 AI capabilities, and applying them to your unique business challenges.
- **Real Impact**: By the end, you'll have a prioritized map of AI opportunities and a customized action plan to begin transforming your business immediately.

This isn't about passive learning or exploring hypothetical ideas. It's about **taking action** today to prepare team and your business for a more awesome future.

ARE YOU READY TO BEGIN?

Join the leaders who are already using intelligent automation to drive innovation and future-proof their organizations. **Contact TomorrowZone** to learn more and schedule your team's AI Catalyst Workshop. Together, we'll unlock new possibilities and pave the way for a more awesome future.