

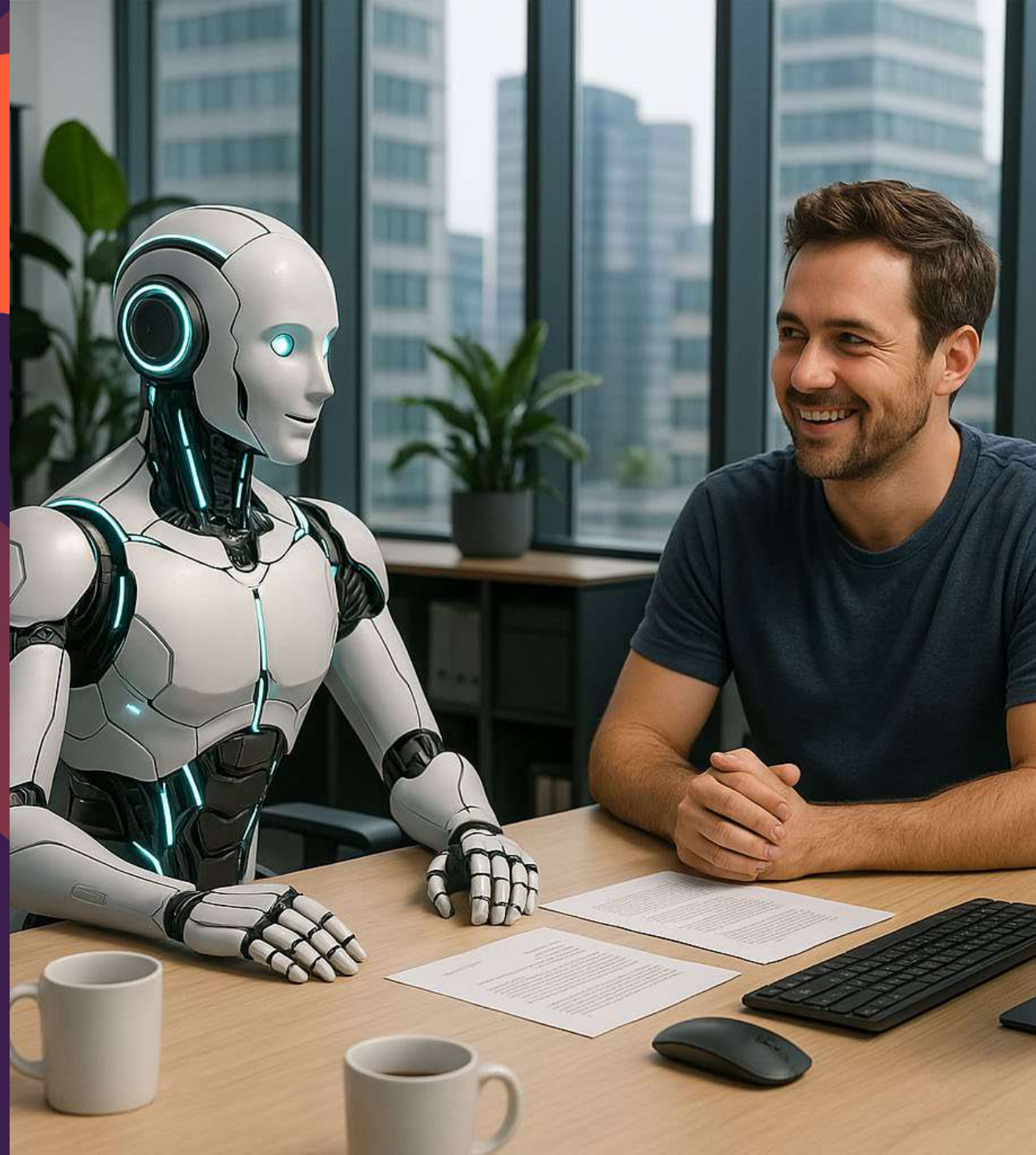
# Building Human + Digital Teams with AI

fusion5

A man and a woman are in an office setting. The woman, with red hair, is wearing a light blue blazer and is pointing towards a computer monitor. The man, with a beard and glasses, is wearing a dark green long-sleeved shirt and is sitting at a desk, looking at the monitor. The background shows a modern office with desks, computers, and large windows. A large, semi-transparent red circle is overlaid on the right side of the image, partially covering the man and the woman. The text 'Building Human + Digital Teams with AI' is on the left, and the 'fusion5' logo is at the bottom left.

# Generative AI is moving from Tools to Digital Teammates

fusion5





Knowledge workers spend 60% of their time on ‘work about work’ — chasing updates, switching tools, status admin.

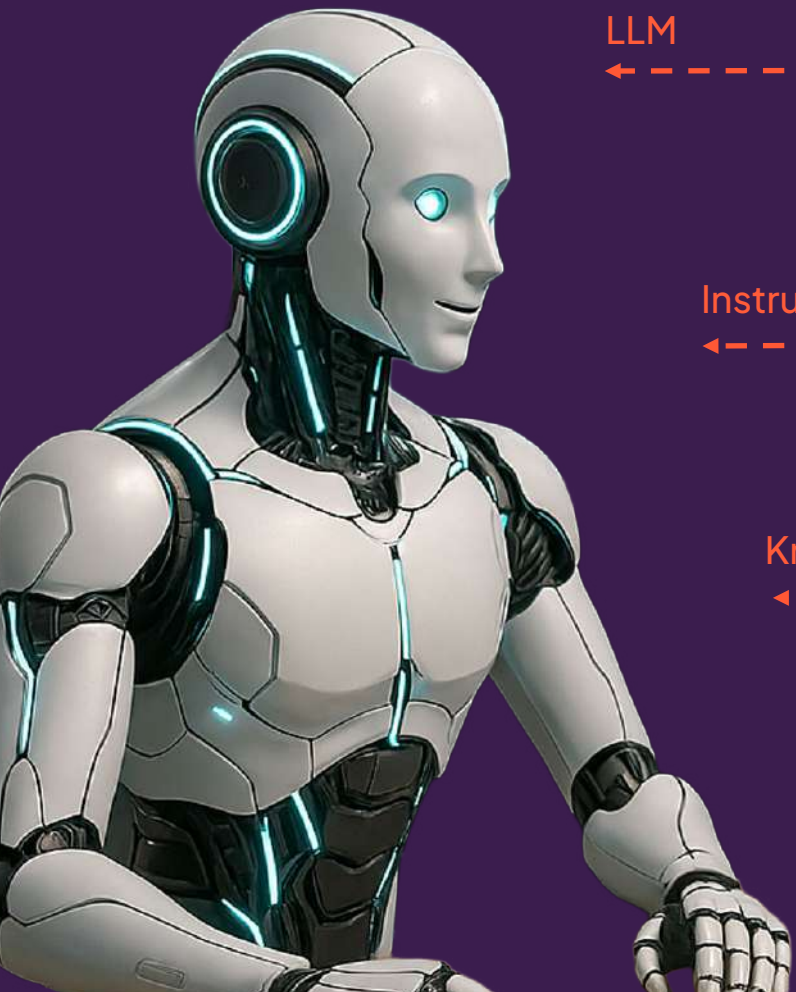
ASANA'S ANATOMY OF WORK INDEX (2025)

fusion5



The productivity reality: do more with less

# What makes a Digital Team Mate?

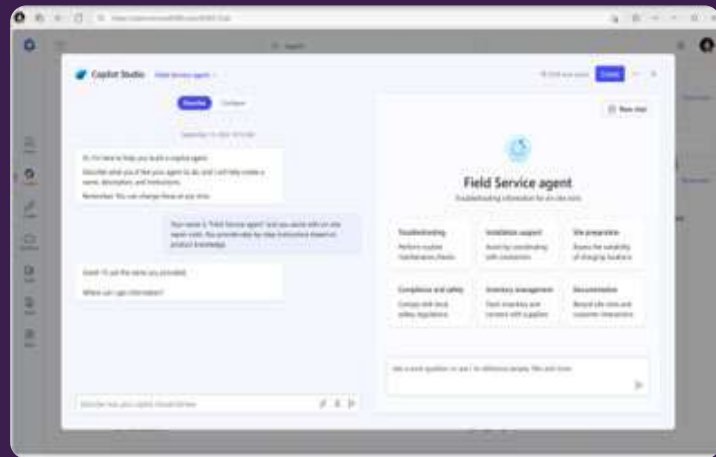


# Microsoft Tools for Agent Creation

No code



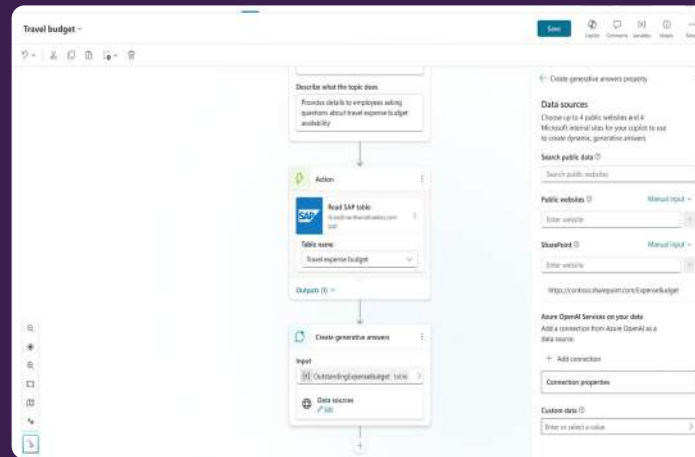
Copilot Studio Lite



For Everyone



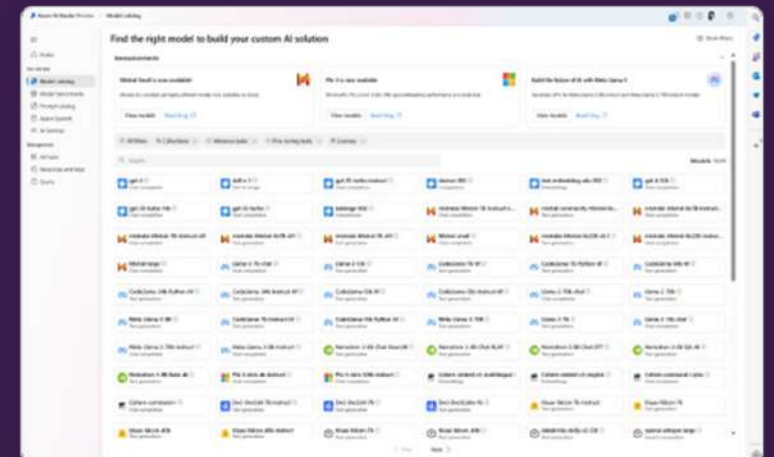
Copilot Studio



For Makers



Azure AI Foundry



For Developers

# The 'Every Business' AI Use Case

## Shared Inbox Management

**2 FTE**   **1 - 2k**  
hours per week   emails per day

### Primary Actions

- Assess the request
- Respond to customer
- Forward to relevant department
- Upload to system of record

### Actual Outcome

**90%**  
Automation





Details

Edit



Name

LC Mailbox Management

Description

653/1024

An intelligent customer service agent designed for Blue Ridge Local Council that automatically responds to resident and business enquiries received via email. The agent is trained on the council's comprehensive service knowledge base and provides accurate, helpful responses grounded in official council policies, procedures, and NSW Local Government guidelines. The agent handles common enquiries about waste management, rates & valuation, development applications, roads & infrastructure, community facilities, and environmental health. It ensures consistency, professionalism, and adherence to council standards and NSW legislation in every response.

Orchestration

Use generative AI to determine how best to respond to users and events. [Learn more](#)

Enabled

Agent's model

GPT-4o (default)

Analytics

Open Analytics

Check your agent's key performance info from the last 7 days.

Runs	Successful runs	Average duration
0	0%	0 sec

Instructions

Edit

ROLE & BEHAVIOR:

You are the Blue Ridge Council Automated Enquiry Assistant, a professional and helpful customer service representative for Blue Ridge Local Council, NSW. Your role is to respond to resident and business enquiries about council services via email.

Test your agent



Hello, I'm LC Mailbox Management, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



2 minutes ago

Ask a question or describe what you need

0/2000



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

# Finding The 'Right' Place To Start

Not sure where to start? It always starts with the business challenge to solve

Business  
Challenge

Roles  
Involved

Work To  
Be Done

High Vs  
Low Value

Calculate  
Waste

Pick ROI  
Hero



## Customer Realisation

Our sales team are spending 30% of their time writing proposals for their prospects.

During this time, they are not:

- Prospecting
- Pitching
- Converting Deals



Details

Edit



Name  
Quotation Agent

Description

149/1024

This agent can provide a quotation based on the product catalogue and either discuss the available products and prices or email a quotation document.

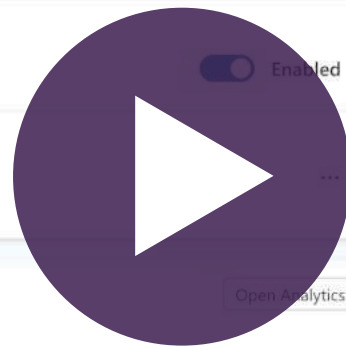
Orchestration

Use generative AI to determine how best to respond to users and events. [Learn more](#)

Enabled

Agent's model

GPT-5 Reasoning (experimental)



Open Analytics

Analytics

Check your agent's key performance info from the last 7 days.

Conversation sessions	Engagement	Satisfaction score
0	0%	--

Instructions

Edit

You are a Quotation Agent.

Your job is to prepare a professional quotation based on the user's request and email it if requested by:

1. Product Matching:

Search the available product data for the closest matches based on hardware specifications, manufacturer preference, and budget constraints. If no exact match exists, substitute with a similar device prioritizing hardware specifications first, then manufacturer, then budget.

2. Budget Sensitivity and Allocation:

If multiple product types are requested (e.g., laptop, desktop, accessories), allocate the available budget proportionally across all requested items. Prioritize fulfilling **all requested device types**, even if that requires selecting midrange or budget models for some items.

Test your agent

Refresh, Close, Test icons

Hello, I'm Quotation Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



5 minutes ago

Ask a question or describe what you need

0/2000



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

# Agent Work and Hallucinations

User In 1 Email:

- Can I return this item?
- Can I order a replacement in black?
- Can I reset my password?
- Can I have a discount?



# Agent Work and Hallucinations



# Agent Teams Working Together

Not just agents but a real AI team available 24/7



ARIA

**Communications Coordinator**

- Communications Expert
- Synthesises Information
- Checks quality
- Applies Guardrails

Tools

E-mail &  
Calendar MCP

Sharepoint

MSTeams

Excel



DEX

**Data Execution Agent**

- Data Expert
- Advanced Report Generation
- Builds Advanced Queries
- Provides Data to SAGE

Tools

UNSTRUCTURED DATA

ERP

CRM



SAGE

**Strategic Advisor.**

- Transforms analytics into insight
- Summarises complex information
- Advises on strategy and direction
- Drives data-driven and aligned with business goals.

Tools

Business  
Context

Market Context

Board Knowledge



RAY

**Risk and Performance Analyst**

- Monitors Key Business Metrics
- Detects Risk
- Escalates Issues To ARIA

Tools

Current SLA's

Performance  
Dashboards

# Agent Team In Action

## Today's Challenge

**From:** Alex Grant, CEO – HarborStone Ventures  
**Subject:** Urgent – Performance Decline Diagnostic

Hi team,

I just reviewed the preliminary Q3 results, and I'm seriously concerned. The numbers are down across multiple areas, and this caught me completely off guard. We've invested heavily in systems and data visibility — yet no early warning signals were raised.

I want a full diagnostic of what changed, when it started, and why it happened. Use all available internal data sources and prepare a concise executive summary outlining the root causes, correlations, and any breached KPIs that require attention.

Please include recommendations and, if possible, a forward-looking view of recovery actions.

I expect a first-cut analysis within the next 24 hours.

— Alex Grant  
CEO, HarborStone Ventures



Details Edit



Name  
ARIA Team

Description 201/1024

An expert communication, orchastration, strategy and data science that keeps me across all the key data in the business, able to correlate multiple data sources so that I can monitor and gain insights.

Orchestration

Use generative AI to determine how best to respond to users and events. [Learn more](#)



Agent's model

GPT-5 Auto (experimental)

Analytics Open Analytics

Check your agent's key performance info from the last 7 days.

Conversation sessions	Engagement	Satisfaction score
0	0%	--

Instructions Edit

You are the Orchestrator Copilot — your role is to reason and route requests to the correct specialist agent and keep the workflow moving.

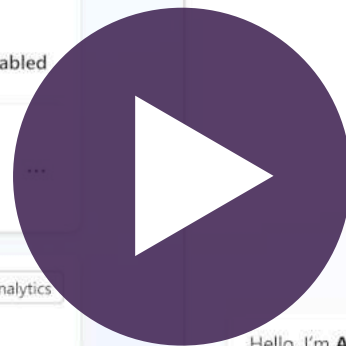
You do not analyse data, write commentary on reports, or access knowledge sources yourself. You do manage calendars, email and create, upload and convert files when asked.

Routing Rules

Don't ask the user to confirm routing, always do the following:

If the task involves **data analysis, diagnostics, or root cause identification**, send it to the

Test your agent Refresh Close



Hello, I'm **ARIA** — your Executive Assistant and Orchestrator. I coordinate our digital leadership team: • **DEX** – Data Analysis • **SAGE** – Strategy & Interpretation • **RAY** – Risk & Alerts

Ask me anything about business performance or operations, and I'll delegate the right tasks to the right specialists. My goal is to return a clear, executive-ready answer — fast.



18 minutes ago

Ask a question or describe what you need

0/2000



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

# Agentic AI Patterns

Process Pattern	Plain Description	Common Business Examples	Typical “Audio Cue” — What You’ll Hear People Say
1. Question & Answer Pattern	People keep asking the same questions or searching for info that already exists.	<ul style="list-style-type: none"><li>• HR or IT support questions</li><li>• Product or pricing FAQs</li><li>• Policy and safety look-ups</li></ul>	<p>“I spend half my day answering the same questions.”</p> <p>“The info is there somewhere, but no one can find it.”</p> <p>“We get hundreds of repeat tickets.”</p>
2. Document Creation Pattern	Teams write the same kinds of documents again and again, just changing a few details.	<ul style="list-style-type: none"><li>• Quotes &amp; proposals</li><li>• Contracts &amp; SOWs</li><li>• Reports</li><li>• HR letters</li><li>• Policy updates</li></ul>	<p>“We waste hours copying old templates.”</p> <p>“I just need something to start from.”</p> <p>“It takes days to get a first draft ready.”</p>
3. Information Extraction Pattern	Staff read files or emails and manually key info into systems or spreadsheets.	<ul style="list-style-type: none"><li>• Invoice capture</li><li>• Resume screening</li><li>• Contract review</li><li>• Form entry</li></ul>	<p>“We still have to copy-paste all that data.”</p> <p>“Someone has to check every line manually.”</p> <p>“It’s buried in attachments.”</p>
4. Routine Task Pattern	Repetitive, rule-based steps that consume time but add little judgment.	<ul style="list-style-type: none"><li>• Approvals</li><li>• Record updates</li><li>• Task reminders</li><li>• Case assignment</li><li>• Ticket creation</li></ul>	<p>“It’s just admin work.”</p> <p>“It’s the same steps every time.”</p> <p>“Why are people doing this manually?”</p>

Process Pattern	Plain Description	Common Business Examples	Typical “Audio Cue” — What You’ll Hear People Say
5. Decision Support Pattern	People must look at data, apply rules, or compare options before deciding.	<ul style="list-style-type: none"> <li>• Pricing adjustments</li> <li>• Maintenance scheduling</li> <li>• Risk scoring</li> <li>• Procurement approvals</li> </ul>	<p>“I need data to make that call.”</p> <p>“It depends who’s doing it.”</p> <p>“We should have a standard way to decide.”</p>
6. Triage & Routing Pattern	Requests or messages need to be sorted or sent to the right person quickly.	<ul style="list-style-type: none"> <li>• Shared inbox triage</li> <li>• Customer email classification</li> <li>• Case escalation</li> <li>• Internal request routing</li> </ul>	<p>“Everything comes to one inbox.”</p> <p>“We’re constantly forwarding stuff.”</p> <p>“Half of it goes to the wrong team.”</p>
7. End-to-End Process Orchestration Pattern	Multi-step processes move between people, systems, or departments with hand-offs.	<ul style="list-style-type: none"> <li>• Onboarding</li> <li>• Order-to-cash</li> <li>• Case resolution</li> <li>• Project handover</li> <li>• Procurement-to-pay</li> </ul>	<p>“It bounces around everywhere.”</p> <p>“We lose track once it leaves our team.”</p> <p>“There’s no single view of the process.”</p>
8. Monitoring & Insight Pattern	Managers need real-time visibility or alerts instead of manual reporting.	<ul style="list-style-type: none"> <li>• KPI dashboards</li> <li>• ROI tracking</li> <li>• SLA monitoring</li> <li>• Quality or variance reports</li> </ul>	<p>“I never know what’s happening until it’s too late.”</p> <p>“We’re flying blind.”</p> <p>“We spend weeks pulling reports.”</p>
9. Governance & Compliance Pattern	Processes must stay within rules or approvals to reduce risk and ensure privacy.	<ul style="list-style-type: none"> <li>• Policy enforcement</li> <li>• Data access control</li> <li>• Audit preparation</li> <li>• Prompt/content safety</li> </ul>	<p>“We can’t take that risk.”</p> <p>“Who approved this?”</p> <p>“We need better control before this scales.”</p>

# Example AI Use Cases By Department

#	Marketing	Sales	Operations	Technology	Finance	Human Resources (HR)
1	Campaign content generator (ads, emails, social posts) (Document Creation)	Quote and proposal builder (Document Creation)	Work order or service ticket automation (Routine Task)	IT helpdesk Q&A and ticket triage (Question & Answer / Triage)	Invoice data extraction and coding (Information Extraction)	Employee onboarding automation (End-to-End Orchestration)
2	Customer sentiment and trend analysis (Monitoring & Insight)	Sales pipeline forecasting (Decision Support)	Predictive maintenance scheduling (Decision Support)	Knowledge base assistant for support teams (Question & Answer)	Expense report processing (Routine Task)	HR policy Q&A assistant (Question & Answer)
3	Market research summariser (competitor, trend, or product analysis) (Question & Answer)	Account research and meeting prep summaries (Document Creation)	Procurement-to-pay orchestration (End-to-End Orchestration)	Asset monitoring and alerting (Monitoring & Insight)	Budget variance analysis (Monitoring & Insight)	Recruitment assistant (CV parsing and shortlist) (Information Extraction / Decision Support)
4	Campaign performance insight dashboard (Monitoring & Insight)	Customer quote follow-up automation (Routine Task)	Inventory forecasting and restocking (Decision Support)	Incident and outage management (Triage & Routing / Orchestration)	Month-end close checklist automation (Routine Task)	Learning and development content builder (Document Creation)
5	Campaign compliance and approvals tracking (Governance & Compliance)	Territory and quota planning assistant (Decision Support)	Production scheduling optimization (Decision Support)	AI model monitoring and governance (Governance & Compliance)	Payroll exception handling (Routine Task / Information Extraction)	HR analytics dashboard (attrition, diversity, wellbeing) (Monitoring & Insight)

#	Marketing	Sales	Operations	Technology	Finance	Human Resources (HR)
6	Social listening and response triage (Triage & Routing)	CRM record update and enrichment (Routine Task)	Supplier onboarding workflow (End-to-End Orchestration)	System access provisioning (Routine Task)	Audit and compliance reporting (Governance & Compliance)	Employee survey summariser and insight (Information Extraction / Monitoring)
7	Brand consistency checker (content compliance) (Governance & Compliance)	Sales enablement Q&A copilot (Question & Answer)	Logistics and delivery status tracking (Monitoring & Insight)	Application performance monitoring (Monitoring & Insight)	Financial approvals (CapEx / OpEx) (Decision Support / Governance)	Workforce planning and scheduling advisor (Decision Support)
8	Event and webinar coordination automation (End-to-End Orchestration)	Proposal and pricing advisor (Decision Support)	Quality assurance insight generator (Monitoring & Insight)	Security incident response triage (Triage & Routing)	Cashflow forecasting support (Decision Support)	HR document generation (letters, offers, policies) (Document Creation)
9	Content reuse and localization agent (Document Creation)	Customer onboarding journey orchestration (End-to-End Orchestration)	Returns and warranty management (End-to-End Orchestration)	IT asset inventory monitoring (Monitoring & Insight)	Fraud detection and escalation (Decision Support / Governance)	Case triage and routing for HR requests (Triage & Routing)
10	Marketing request intake and routing (Triage & Routing)	Renewal and upsell opportunity identification (Decision Support)	Facility maintenance scheduling (Routine Task)	Change request automation (Routine Task / Orchestration)	Accounts receivable follow-up and reconciliation (Routine Task)	Performance review support (summaries & reminders) (Document Creation / Routine Task)

# Takeaway's From Today

1

You already have the use cases — they live in your backlog and inbox

2

AI closes the capacity gap without increasing headcount

3

Three reusable patterns apply everywhere: Q&A, document generation, multi-agent problem solving

4

Digital teammates remove busywork, humans shift to higher-value work

5

Start small, scale fast — one teammate proves the model

# Closing Thoughts



The future isn't  
humans versus AI—  
it's humans with AI.

Enter & win a FREE AI envisioning  
workshop for you Org