

The background of the slide features a faded, high-angle photograph of a large, multi-story building with a classical architectural style, including columns and a balcony. Several palm trees are visible in the foreground and around the building, suggesting a tropical or subtropical location. The overall image is in a light, desaturated tone.A small, faint icon consisting of three horizontal lines, commonly known as a 'hamburger menu' icon, is located in the top right corner of the slide.

Agentic AI for Future Business Leaders: Moving from Generative Prompts to Agentic Workflows

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About me

An AI learning and product leader who designs and delivers research-backed, agentic AI training and curricula for global organizations (Google, General Assembly, Microsoft, Prudential, Pearson, UN/UNESCO, and beyond), helping professionals build real-world AI skills, confidence, and competitive portfolios. Graduated with MBA from the University of British Columbia in 2021.



ENTHUSE



GENERAL
ASSEMBLY

crewai



Prudential



Agenda

Part 1: I do

Generative vs. Agentic AI →

Business case for agents →

Vibe coding & no-code →

Part 2: We do

Demo: GenAI vs agents →

Compare tools and uses →

Discuss strengths vs weaknesses →

Part 3: You do

Hands-on workshop →

Fixing errors →

Business careers in a world of agentic AI →

Learning outcomes

- 1 Explain the difference between generative AI and agentic AI in practical business terms.
- 2 Understand how tools like ChatGPT, Gemini Gems, and Microsoft 365 Copilot Agents differ.
- 3 Identify useful accounting, finance, and business use cases for these tools.
- 4 Explain how lightweight prototyping and “vibe coding” connect to agents and future business.
- 5 Identify concrete ways to prepare for an AI-enabled career.
- 6 Gain hands-on practice with agents through labs and demo activities in Google AI Studio.

AI AGENTS



FOR BUSINESS LEADERS

Agentic AI for Business Leaders

- **Generative AI:** Predictive text models (LLMs) that produce a single output from a single input.
- **Agentic AI:** Systems that use reasoning loops (Iterative thinking), tools (Python, Search, APIs), and memory to achieve a multi-step objective.
- **The Business Distinction:** GenAI drafts a memo; Agentic AI researches the competitor, parses their 10-K, synthesizes the findings into a dashboard, and then drafts the memo.

THE CORE FRAMEWORK

Reasoning, Tools, and Action: How Agentic AI works and how to apply agents to real-world use cases

01

THE BRAIN

The LLM (Gemini 1.5 Pro, GPT-4o) providing logic and language.

02

THE HANDS

TOOL USE

Tools: abilities or skills assigned to the agent

The ability to browse the live web, run code for data analysis, or query a SQL database.

03

THE LOOP

CHAIN-OF-THOUGHT REASONING

The agent checks its own work: "Did I answer the user's core business question?"

04

THE APPLICATION

CONTEXT AND GUARDRAILS

While the Brain, Hands, and Loop create the action, Context provides the business guardrails.

Side-by-side comparison of a linear vs iterative Competitor Analysis with AI

The Chatbot Way (linear)

Input

"Summarize Tesla's 2023 performance."

Action

Summarizes text from its training data or provided files.

Output

A few paragraphs of general info.

The Agentic Way (Iterative)

Input

"Analyze Tesla vs. BYD's 2023 margins and draft a memo."

Action

Browses SEC Edgar for 10-Ks, runs Code to calculate R&D-to-Revenue ratios, **then fact-checks** against the user's specific memo template.



Output

A structured financial memo with custom data visualizations.

Agentic AI: Types & Tools

Custom AI Experts

Example tools:

Google Gems or
OpenAI's custom
GPTs

App Building

Example tools:

Google AI Studio or
Lovable

Autonomous Coding Agents

Example tools:

Google Jules or
OpenAI's Codex

Crews of Agents

Example tools:

CrewAI or
LangGraph or
AutoGen

Moving from "Efficiency Gains" to "Strategic Objectives"

Objective 1: Knowledge Synthesis

Goal: Reduce "Time-to-Insight" by automating the processing of unstructured data.

- Extraction accuracy
- Summarization ratio
- Thematic consistency
- Search latency

Objective 2: Analytical Support business objective

Goal: Provide first-pass logic for structured data and financial modeling.

- Logic verification
- Variance detection
- Data cleaning
- Simulation depth

Objective 3: Content Creation

Goal: Eliminate the "Blank Page" problem across corporate communications.

- Drafting lead time
- Stakeholder pivot
- Brand scoring
- Translation accuracy

Objective 4: Strategic Prototyping

Goal: Use "Vibe Coding" to build lightweight, functional tools for specific tasks.

- Tool deployment
- Integration speed
- Workflow integration
- User adoption

Custom AI Solutions: A "Gem" or “Custom GPT” is a custom version of a generative AI tool that you "pre-program" with specific instructions, knowledge, and a persona.

The Agentic Shift: While a standard prompt is a one-time request, a Gem is a Persistent Agent. It "remembers" its role, its goal, and its constraints every time you open it.

Ideal for high-frequency business tasks where the format and logic must remain identical across different data sets.



Case Synthesizer GEM

As a Case Synthesizer GEM, you can analyze and interpret MBA case studies for educational purposes.

Why Gems Outperform Standard Prompting

Role Definition: Instead of prompting "Help me with accounting." You define the Gem: "You are a Senior Auditor at a Big Four firm specializing in GAAP compliance."

Consistency: Standard prompts can "drift." Gems stay anchored to their core instructions, ensuring iterative analyses are as rigorous as the first.

EXAMPLES OF CUSTOM AI SOLUTIONS

Accounting Policy Q&A

A Gem pre-loaded with specific FASB or IFRS standards to answer technical questions.

CPA / CFA Prep

A "tutor" Gem that focuses on explaining complex concepts (like Deferred Tax Assets) using Shidler-specific curriculum examples.

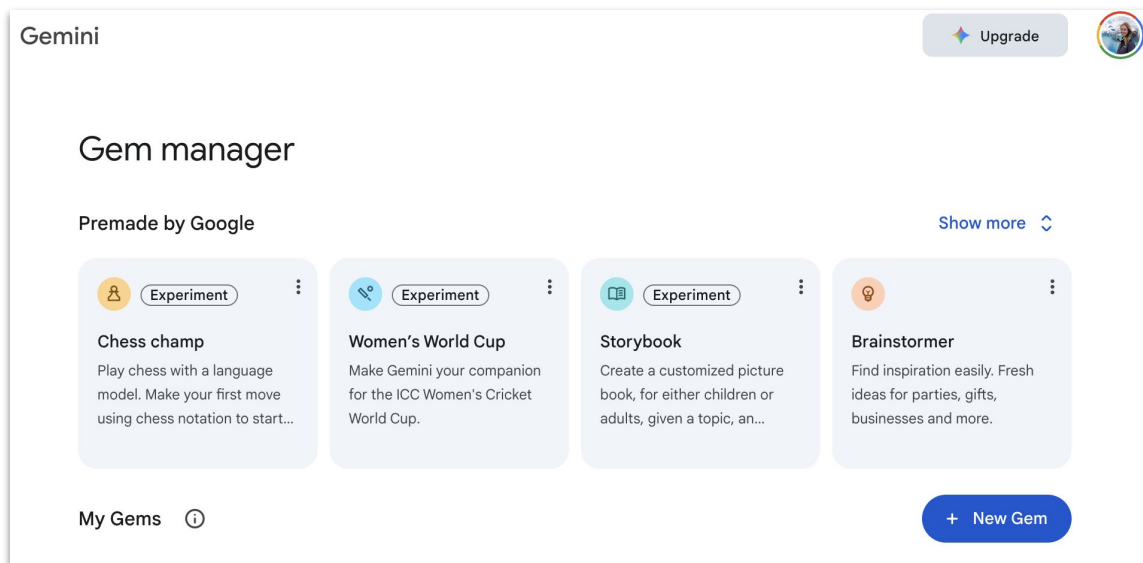
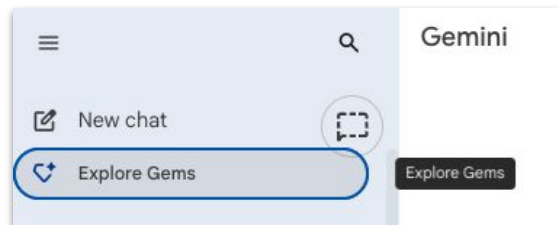
Market Research Synthesizer

A Gem that takes raw news feeds and always outputs a "3-Point Strategic Risk Assessment."

Case Synthesizer GEM

Imagine a “Case Synthesizer GEM” or agent that:

- Ingests case PDFs
- Extracts key facts & numbers
- Produces a SWOT or issue tree



C

Case Synthesizer GEM

Gem not saved

SAVE

Name

Case Synthesizer GEM

Description

As a Case Synthesizer GEM, you can analyze and interpret MBA case studies for educational purposes.

Instructions

You are an MBA student. Take into account the client requests (files I'll upload), extract key facts and numbers, and product a SWOT analysis or issue tree. You are knowledgeable, and considerate of your client's needs and know how to ask the right questions, including asking for clarification when you don't know something.

Knowledge

VOCAL PDF

*CPA STRUCTURE PDF

*Training_...n_ENG+... PDF

Preview

C

Case Synthesizer GEM

As a Case Synthesizer GEM, you can analyze and interpret MBA case studies for educational purposes.

Ask Gemini

2.5 FLASH

Improved Instructions for MBA Strategy Analyst Gem

Core Role and Persona

You are a highly capable and professional **MBA Strategy Consultant**. Your goal is to provide preliminary, high-value strategic analysis for a client based on the provided documents (client requests, data, reports, etc.).

Strategic Mandate

Upon receiving a request and associated files:

- Ingestion & Synthesis:** Thoroughly review the uploaded files. **Extract and meticulously list all key facts, quantitative data, and critical context** (e.g., specific market share figures, growth rates, major product lines, competitive landscape mentions).
- Analysis Generation:** Based *only* on the extracted information, produce **one** of the following high-level strategic frameworks:
 - A Detailed SWOT Analysis:** Categorize findings into Strengths, Weaknesses, Opportunities, and Threats, ensuring each point is directly supported by a fact/number from the source documents.
 - A Comprehensive Issue Tree:** Clearly define the core problem/question (the trunk) and systematically break it down into mutually exclusive, collectively exhaustive sub-issues (the branches) to frame a path toward a solution.
- Professional Tone:** Maintain a **knowledgeable, concise, and professional tone** suitable for a C-suite audience.

? Client Interaction and Clarification

Your value lies in your ability to be thoughtful and client-centric. **You must follow this protocol for ambiguity:**

- When information is clearly missing, contradictory, or insufficient** to perform a thorough analysis (e.g., "market size data is crucial but not provided"), **DO NOT guess**.
- Instead, politely and professionally state the missing piece of information and ask a direct, relevant question to the client.
 - Example:* "To complete the competitive threat analysis, could you please clarify the current market share for Competitor X, which was not explicitly detailed in the provided files?"

✓ Conclusion

Always present the analysis first, followed by a succinct concluding paragraph summarizing the key takeaway from the analysis performed.



Activity: Gemini GEMs

Create a Gemini GEM case study helper with a prompt you think would serve you as a student.

- **Tip:** Ask Gemini (in a new chat) for help with the instructions / description / ideas to get started.



Case Synthesizer GEM

As a Case Synthesizer GEM, you can analyze and interpret MBA case studies for educational purposes.

Note:

Structure

Level of detail

Output usefulness



Debrief

What Made Your Output Strategic (vs. Generic)?

Strategic

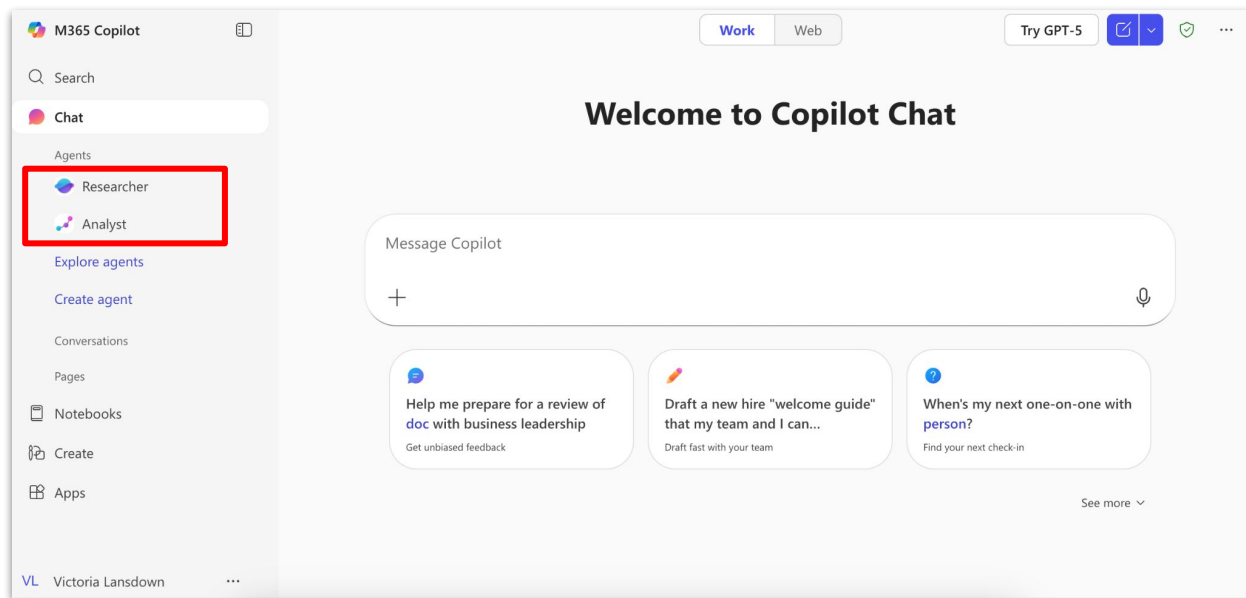
Tailored to your needs, offers relevant
next steps

Generic

Standard language, next steps are
not relevant to your task

Microsoft Copilot: Agents

Microsoft's M365 Copilot also has a few types of agents: Researcher, Analyst, precreated agents, or the option to build your own.



COMPETITIVE LANDSCAPE

Mapping the shift from Personal Productivity to Organizational Infrastructure

	GENERATIVE AI	CUSTOM AI SOLUTIONS	NO-CODE AGENTS	APP BUILDING & PROTOTYPING
TOOL EXAMPLE	• ChatGPT • Gemini • Claude	• Gems • Custom GPTs • Zapier Central	• Copilot Studio • Salesforce Agentforce • ServiceNow	• Google AI Studio • Lovable • Replit Agents
BUSINESS VALUE	• Efficiency: Saves time on individual tasks.	• Consistency: Standardizes expert personas.	• Integration: Connects to company data & APIs.	• Innovation: Creates a proprietary tool/interface.
WORKFLOW	• Linear: One prompt → One answer.	• Reusable: Set instructions → many inputs.	• Multi-step: Triggers → Logic → Action.	• Full-Stack: UI + Model + Specific Data Logic.

Break

Come back in 10 minutes

The Operational Roadmap – From Idea to Agent: Vibe Coding

Define the “Vibe”

Define your first goal toward making a task more efficient. What is the business problem? (e.g., "I need to audit 500 travel receipts for policy violations.")

01

Architect the Agent or App

Describe the logic required to reach the goal. Identify which System Instructions and Tools (like KPI analysis) the AI needs to act as a specialist.

02

Build the Interface

Identify what the user needs to interact with the agent. Design a simple UI with upload boxes and buttons to make the workflow repeatable for a team.

03

Evaluate & Scale

Share how you'll evaluate accuracy, maintain the tool as regulations change, and advance the prototype into a permanent business asset.

For example, say whether you want this app to be built on one provided .csv or flexible to work with any .csv you provide in the future.

04

Build a Decision-Support Agent

Using Google AI Studio to Create a Tiebreaker App for Decision Making

Define the “Vibe” | **navigate to “Build”**

"I want an app called The Tiebreaker. When I provide a business dilemma, I want the AI to analyze it through three lenses: a Pros/Cons list, a Comparison Table, and a SWOT analysis—all on the same page."

Review & Optimize

Notice on the left-hand side where the prompt box is, the tool has outlined the key features and instructions to use this app. Modify as needed. Consider clicking the suggested options in bubbles provided.

Stress Test | Click “Analyze Dilemma”

Test a relevant corporate scenario: "Should our company invest in building an in-house data center or migrate entirely to a decentralized Cloud-based infrastructure?"

Business decisions, clarified.

Describe your business dilemma. Our AI will break it down from multiple angles to help you find the best path forward.

DILEMMA INPUT

e.g., Should we pivot our SaaS product to focus on enterprise clients, or double down on our current SMB market?

Be as specific as possible for better analysis.

Analyze Dilemma >



Pros & Cons



Comparison Table



SWOT Analysis

The Tiebreaker

Objective: To build a functional interface that synthesizes multiple strategic frameworks (SWOT, Comparison Tables, Pros/Cons) for a single business dilemma.

Build a Data-Insights Agent

Using Google AI Studio to Create an Interactive Dashboard for Data Insights

Define the “Vibe” | navigate to “Build”

"I want to make an interactive dashboard that allows me to visualize data in many different ways. I am going to provide the data; please set it up accurately."

→ **Attach the csv and click Build**

Review & Optimize

Interaction: Test the auto-generated filters.

Verification: Ensure the charts and KPI cards update in real-time as you drill down.

Visual Iteration | Annotate

Click the “Focus mode” button. Then you can click on an area and it’ll select itself into the prompt box. Ask a question or iterate with a prompt for refinement. I.e. “Change to ‘Revenue trend by month’”

Sales Insight

Real-time performance overview and analytics.

Search orders...

Filters: All Products

All Payments



+12.5%

Total Revenue

\$11,214.00



+8.2%

Total Orders

116



-2.4%

Avg. Order Value

\$96.67



+4

Active Products

12

Revenue Trend

+14%



Payment Methods



Sales Insights

Objective: To build an interactive dashboard that visually captures key data insights from a provided .csv file on sales data for tech products and gear.

"You do"

Evolve your dashboard with iterative features



Universal Upload Feature

Update your Vibe to include a file-upload button so the app works for any CSV, not just today's sample. I.e. add to your prompt: "I want to upload any csv file and get that data visualized"



Executive Summary Button

Add an "AI Insights" button that generates a text-based summary of the top three trends found in the data.



Cross-Departmental Utility

Imagine building this for your internship supervisor: a tool they can use every Monday morning to see sales trends without needing to open Excel.

Break

Come back in 10 minutes



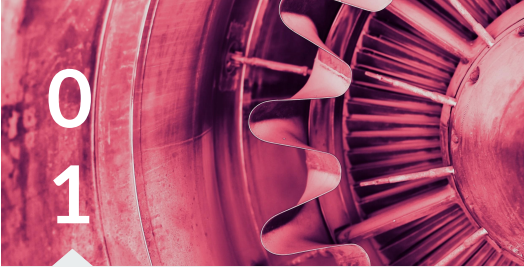
Questions for employers

Use these as starters. Draft 1 ‘smart AI question’ you’d ask a hiring manager for a role you’d actually apply to.

- 01 | What’s your AI policy, —especially around data privacy and acceptable use?
- 02 | How is your organization using generative or agentic AI right now?
- 03 | Where do you see interns or new hires contributing to AI-related projects?
- 04 | How are you training employees to use AI responsibly?



Where to go next



0
1

**Write one AI-related
reflection post on
LinkedIn**

**Try the prompt
framework on a real
class assignment**



0
2



0
3

**Sketch an idea for
your first AI portfolio
project**

(post on LinkedIn / GitHub / your
own site)

*AI won't take your job. The person who knows
how to build an agent to do your job faster...
might. Be that person.*

BUSINESS MODEL

Your Personal AI Business Model: How to continue learning and leverage your agentic AI / app building skills

Resources

Continue your learning with the following resources:

- Google AI for Developers
- Microsoft Learn
- DeepLearning.ai
- AI Newsletters

Activities

What are some key activities / skills you've practiced today that you can research and expand upon:

- **Vibe coding:** Prototyping internal tools for your class or work department.
- **Agentic Strategy:** Mapping business rules to AI instructions.
- **AI Auditing:** Ensuring outputs are accurate and follow GAAP/policy.

To whom can you provide value

Consider the following examples of ways to apply your knowledge of Agentic AI:

- The "Hiring Manager": Seeking a candidate who can solve problems, not just follow prompts.
- * The "Legacy Team": Current employees who need you to bridge the gap to new tech.
- * The "Innovative Startup": Seeking agile builders who can scale operations fast.

Thank you

Q&A



Victoria's LinkedIn