

# AI & the Future of Automation

**Hosted By:** Our Circle Mortgage  
**Presented By:** Zinc Online Solutions

# Today's Agenda:

1. History of AI
2. The AI of Today
3. What are AI Agents
4. Current Business Operations
5. A Day in the life of
6. Automated Workflows
7. AI Workflows works for you

# History of Artificial Intelligence

AI didn't start with computers, it started as a goal: creating "intelligence" through repeatable methods. For centuries we've used formulas, checklists, and decision trees to imitate judgement, from navigation and finance to lending and risk.

Computers didn't invent the idea—they scaled it.

1960s



## Rule-Based

Calculators were "AI" before we ever called it AI.

They followed strict repeatable rules:

**input → procedure → output,**

Early expert systems worked the same way. Humans encoded knowledge as "**if-then**" logic.

1980s



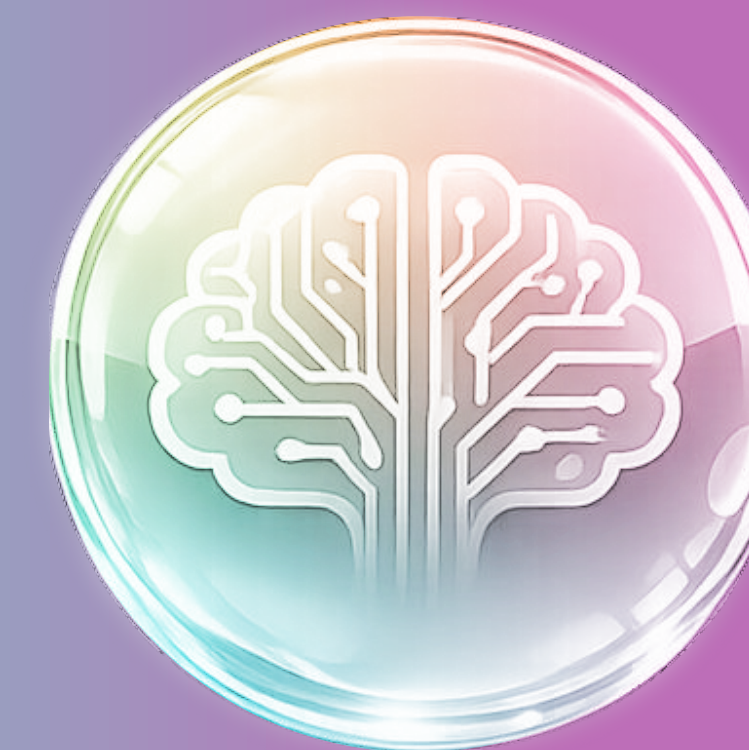
## Machine Learning

Machine learning scaled past hand-written rules. Instead of telling software every step, we **fed it examples** and let it **learn patterns**.

Think of Tesla's Self Driving.

This system uses **data and feedback** to learn patterns and recommend actions.

2010s



## Generative AI

Generative AI is machine learning scaled to language and reasoning. Trained on massive text, it learns how humans write, summarize, and answer questions.

That makes it useful for drafting, summarizing, and guiding workflows.

# AI of Today & how most people use it.

- 1. Writing and Editing Text**
2. Research and Learning
3. Work and Productivity
4. Content Ideas and Creativity

EMAILS,  
RESUMES,  
COVER LETTERS

## Sample Email Template (Daily Update)

**Subject:** Daily Update - Tasks Completed on February 23, 2026

Hi [Manager's Name],

I hope you're doing well. Here's a quick summary of what I accomplished today:

- Completed [specific task #1, e.g., the Q1 budget variance analysis and prepared the summary slide deck for tomorrow's review meeting]
- Resolved [specific task #2, e.g., all 12 high-priority support tickets assigned yesterday, with detailed notes added to the CRM]
- Finalized and submitted [specific task #3, e.g., the updated vendor contract draft to Legal for review]
- [Add 1-4 more bullets as needed; focus on outcomes/results where possible, e.g., "Reduced processing time by 30% by automating X report"]

Everything is on track with [relevant ongoing]

Ask Anything



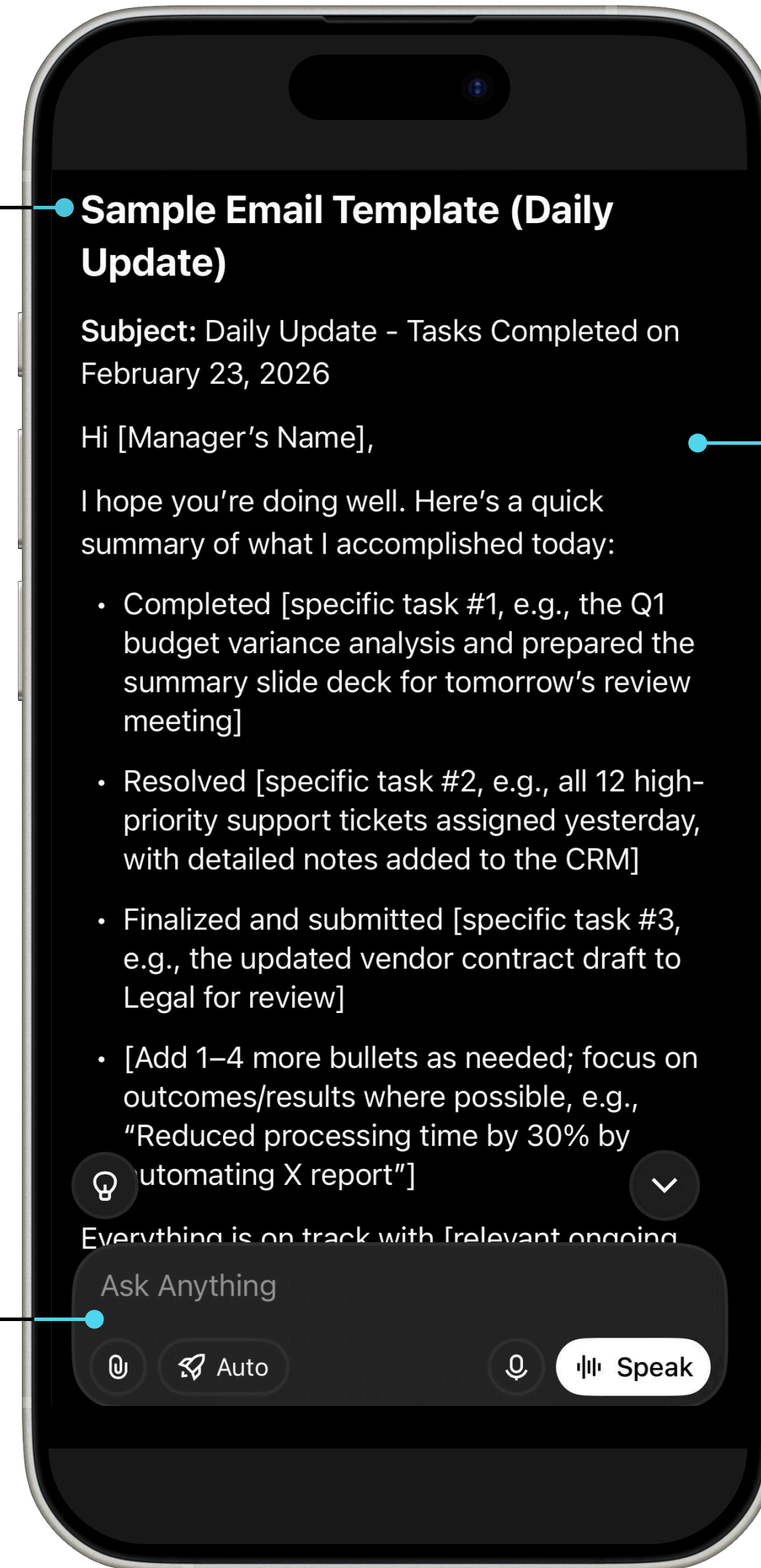
Auto



Speak

FIXING GRAMMAR,  
TONE, OR MAKING  
TEXT SOUND MORE  
PROFESSIONAL

SOCIAL MEDIA  
CAPTIONS  
AND POSTS



# AI of Today & how most people use it.

1. Writing and Editing Text
2. **Research and Learning**
3. Work and Productivity
4. Content Ideas and Creativity

EXPLAINING  
TOPICS IN  
SIMPLE TERMS

QUICK  
RESEARCH  
SUMMARIES  
INSTEAD OF  
GOOGLING

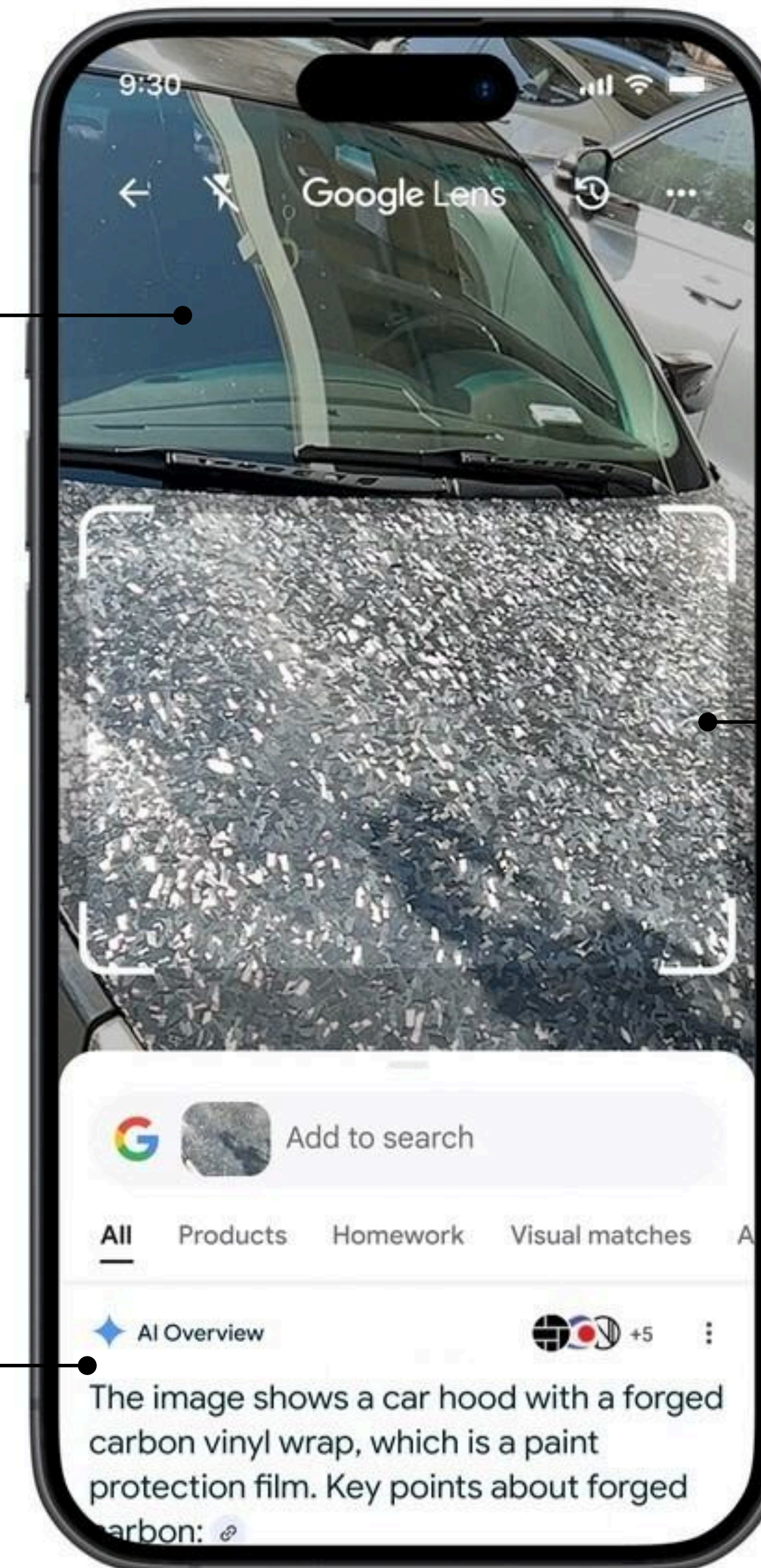


IMAGE IDENTIFICATION  
AND RECOGNITION

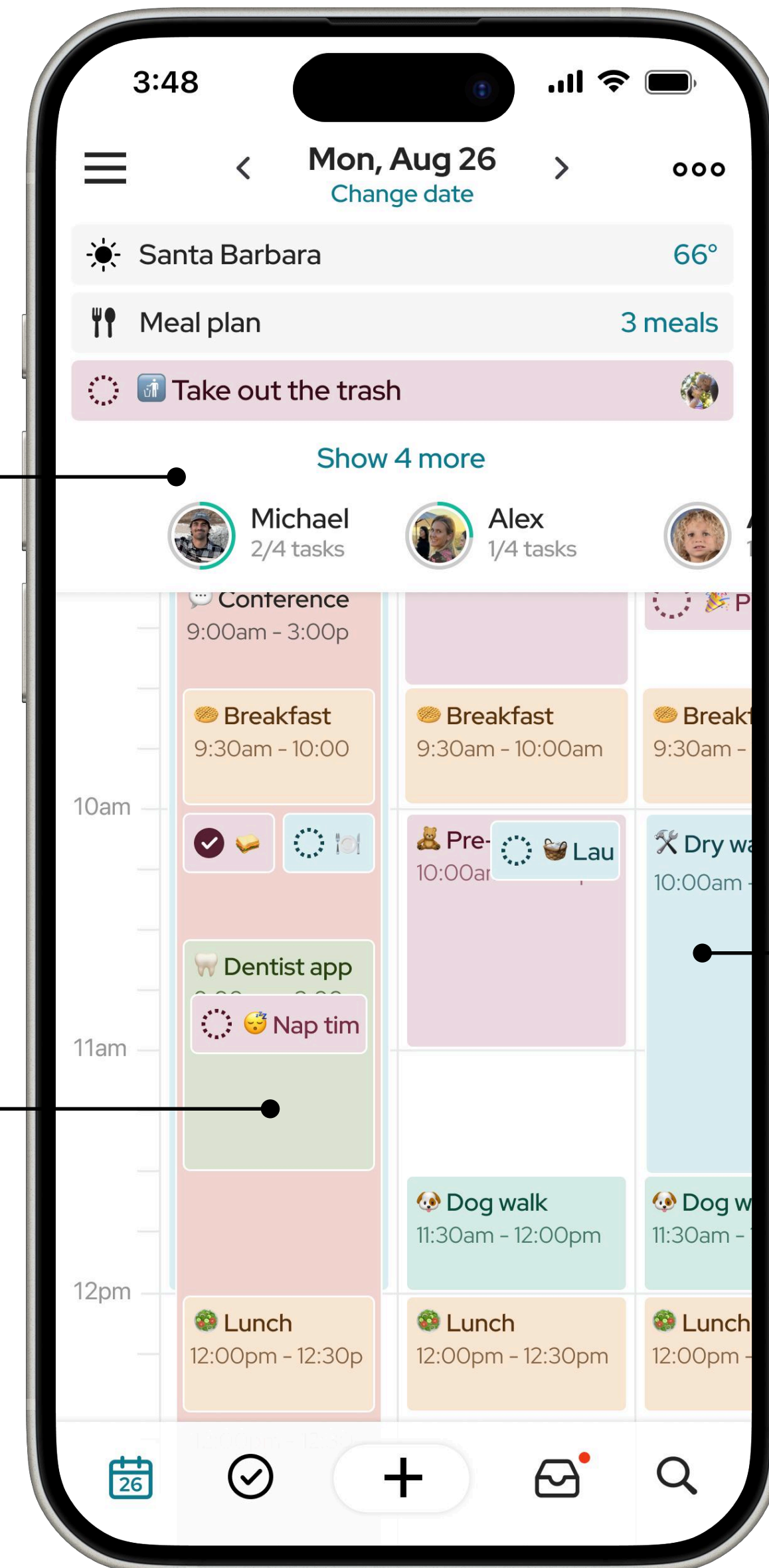
# AI of Today & how most people use it.

1. Writing and Editing Text
2. Research and Learning
3. **Work and Productivity**
4. Content Ideas and Creativity

CREATING TO-DO  
LISTS AND  
SCHEDULES

SUMMARIZING  
LONG  
DOCUMENTS  
OR MEETINGS

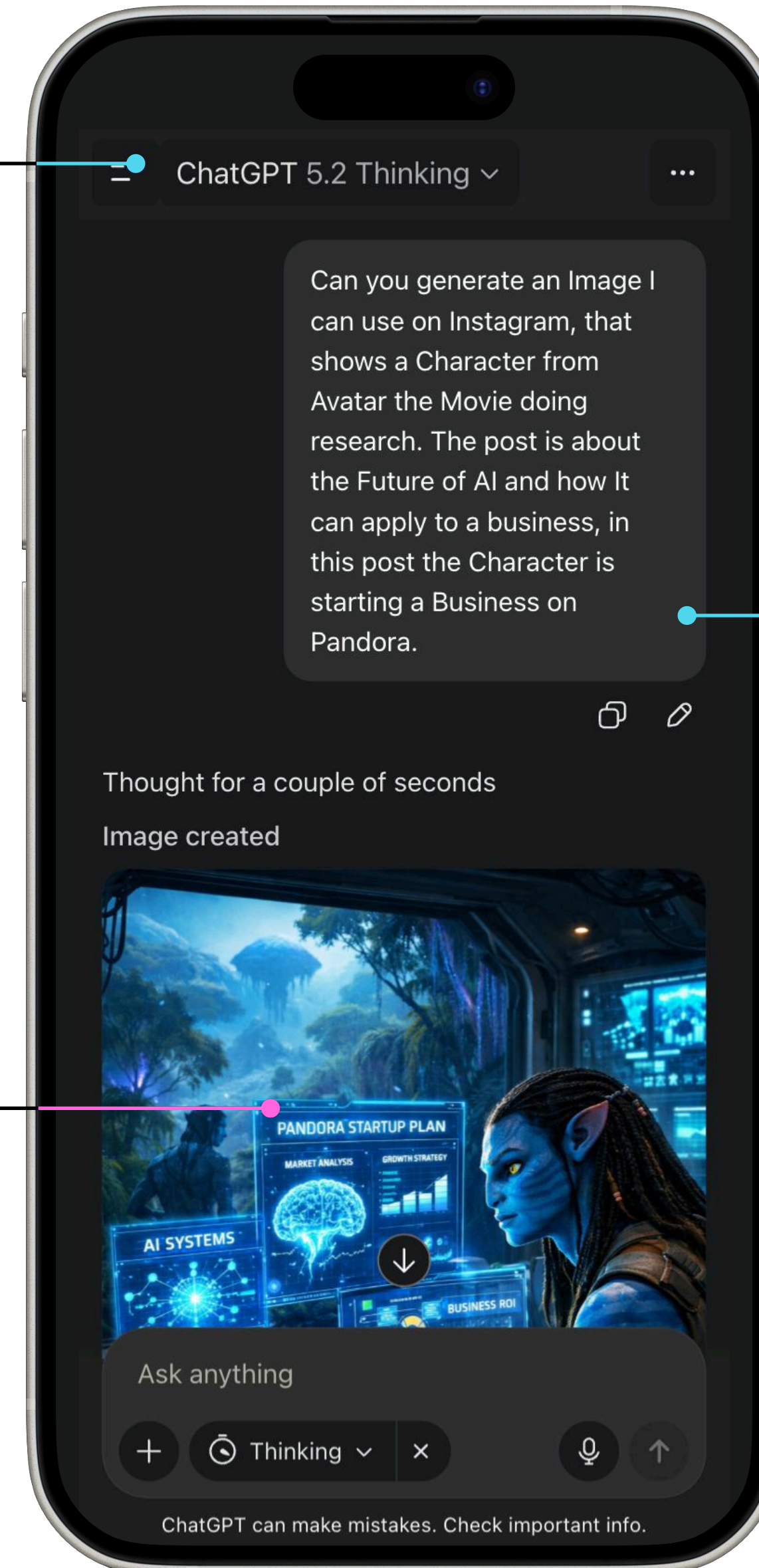
DRAFTING  
PROPOSALS OR  
PRESENTATIONS



# AI of Today & how most people use it.

1. Writing and Editing Text
2. Research and Learning
3. Work and Productivity
4. **Content Ideas and Creativity**

WRITING  
STORIES,  
POEMS, OR  
SONG LYRICS



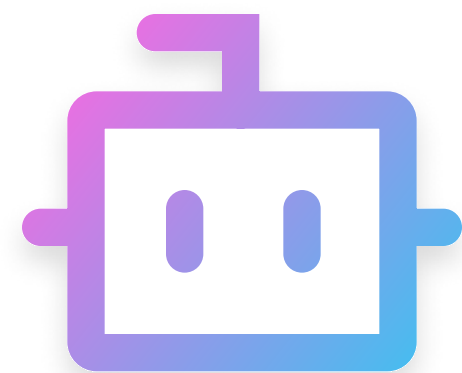
BRAINSTORME IDEAS  
FOR POSTS, BLOGS,  
OR VIDEOS

GENERATING  
IMAGE PROMPTS  
OR DESIGNS

But that's too  
Basic.

WHAT ELSE CAN IT DO?

# Introducing, AI Agents.



Not “*robots*”  
Not “*magic*”  
they are...

## ● AI THAT CAN TAKE ACTIONS

AI agents do more than answer questions. Think of it as an assistant that can actually move work forward. They can complete steps for you, like sending a message, creating a task, updating a CRM, or organizing documents.

## ● WORKFLOW MANAGERS

Most real work takes multiple steps across multiple tools. A workflow manager helps the agent follow the process: collect the right info, make decisions, and take next steps. This is what turns a simple chat into a repeatable system.

## ● AGENTS WITH RULES

Agents do not run wild. They can require approvals for sensitive steps, keep a record of what was done, and limit themselves to certain boundaries. The goal is speed and consistency without losing control.

# Common tools used to complete the work.

Im sure **most of us here** use a  
**combination** of these **apps** to  
complete your **day to day tasks**.

What if we can **close a few tabs** and  
let an **AI Agent take over?**



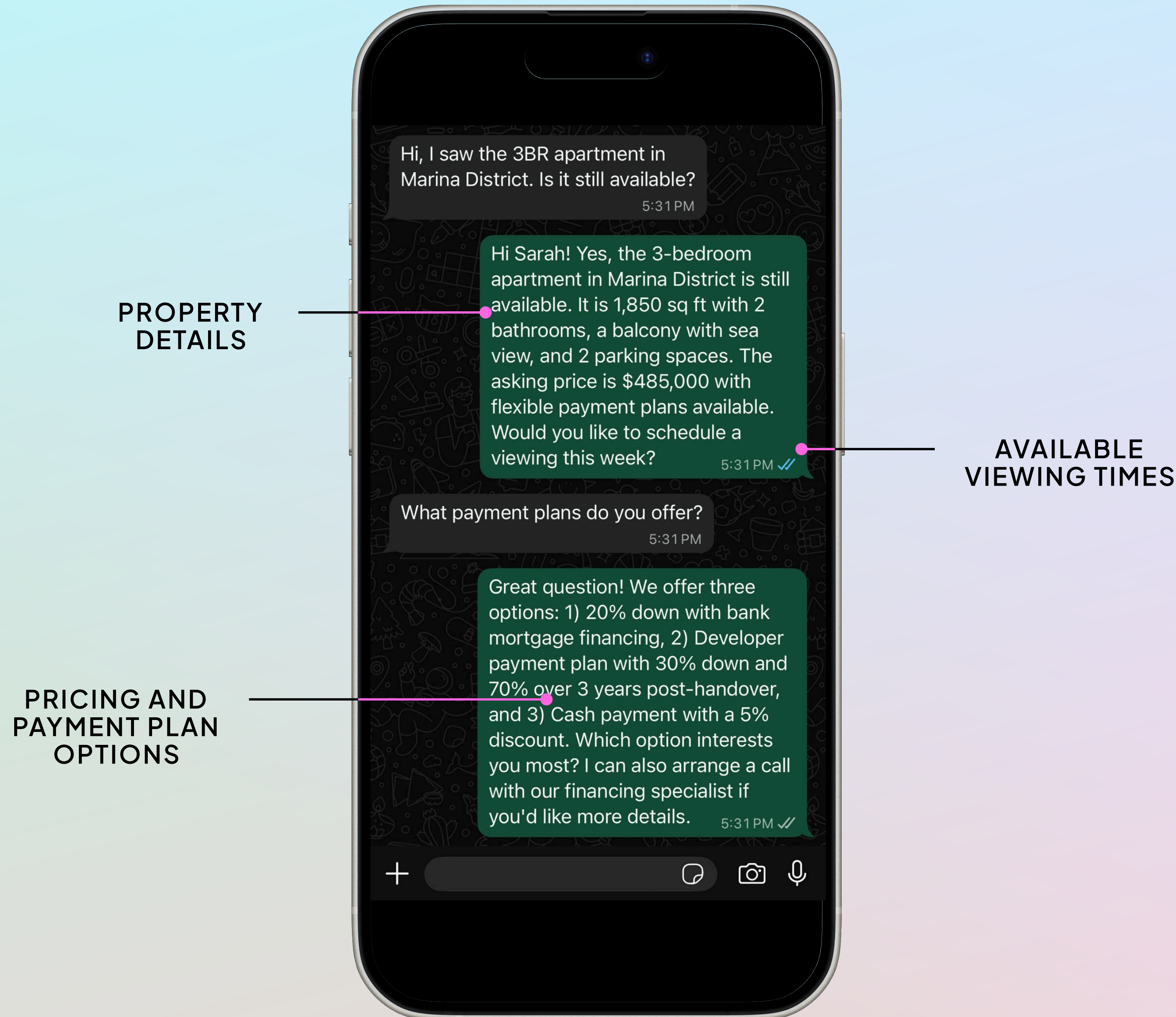
# Agents that can Connect

An **AI agent** is not a simple **chat bot**. They can **connect to your apps** and go to work.

They are trained assistant that can hold **real conversations**. It answers questions instantly, asks the right follow-ups, and keeps the conversation moving toward a clear next step.

It also **connects to other tools** behind the scenes. That means it can check availability from your calendar, schedule an appointment, log the lead, and even send reminders, while **staying consistent** with your brand and your rules.

But it's **not just a chat**.  
It can take action.



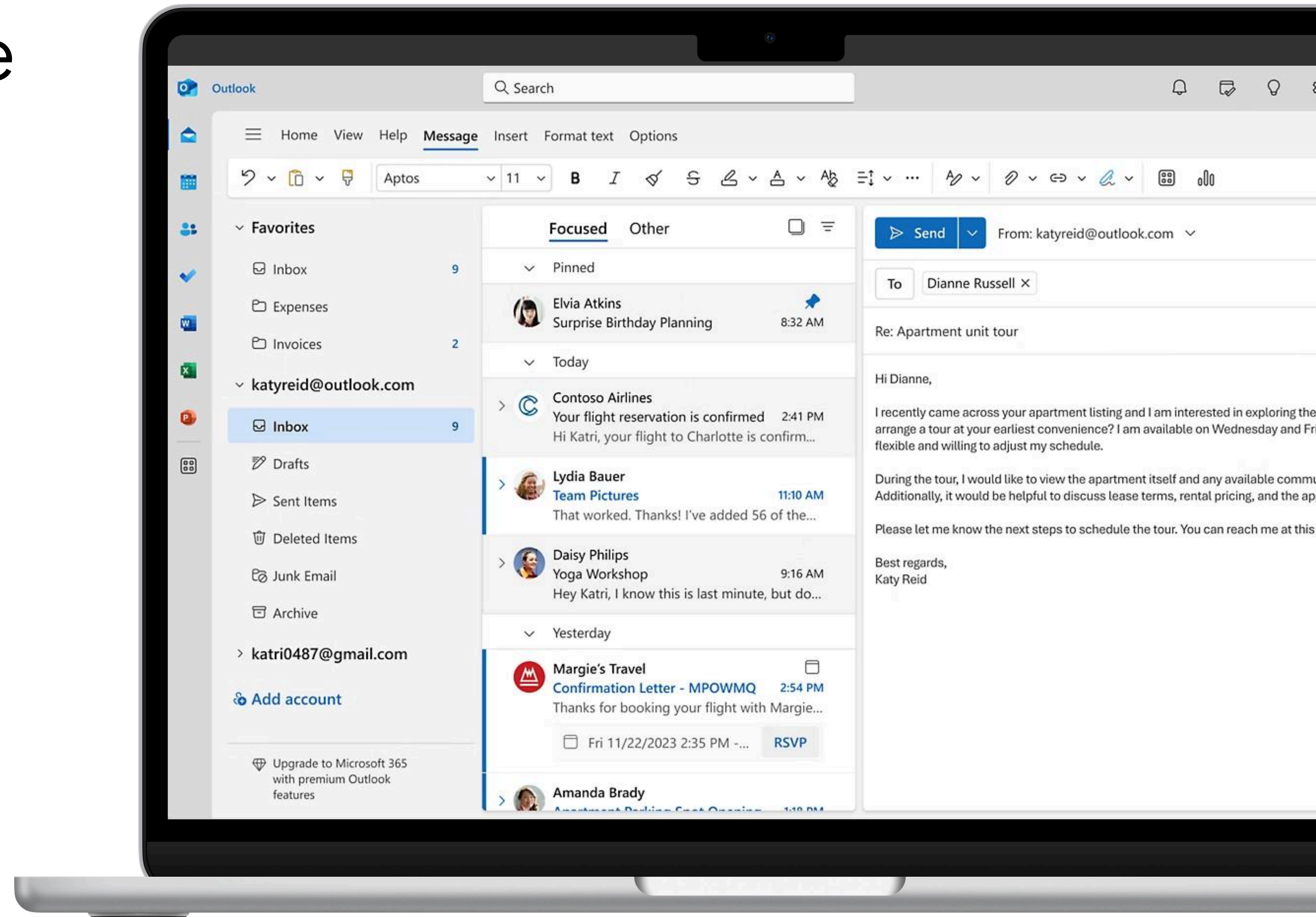
# Agents will do the hard work for you

## AI Agents act like a digital assistants...

that can **read messages**, understand what the sender needs, and **respond automatically**. They can monitor an inbox all day, **organize incoming emails**, and pull out key details so **nothing gets missed**.

When **action is needed**, they can handle the next step. That might be **sending a reply**, scheduling a meeting, sending a follow-up, updating your CRM, or **routing the message** to the right person.

With **clear rules and examples** from past conversations, they stay consistent and on-brand, which improves response times and **saves hours** of manual work each week.



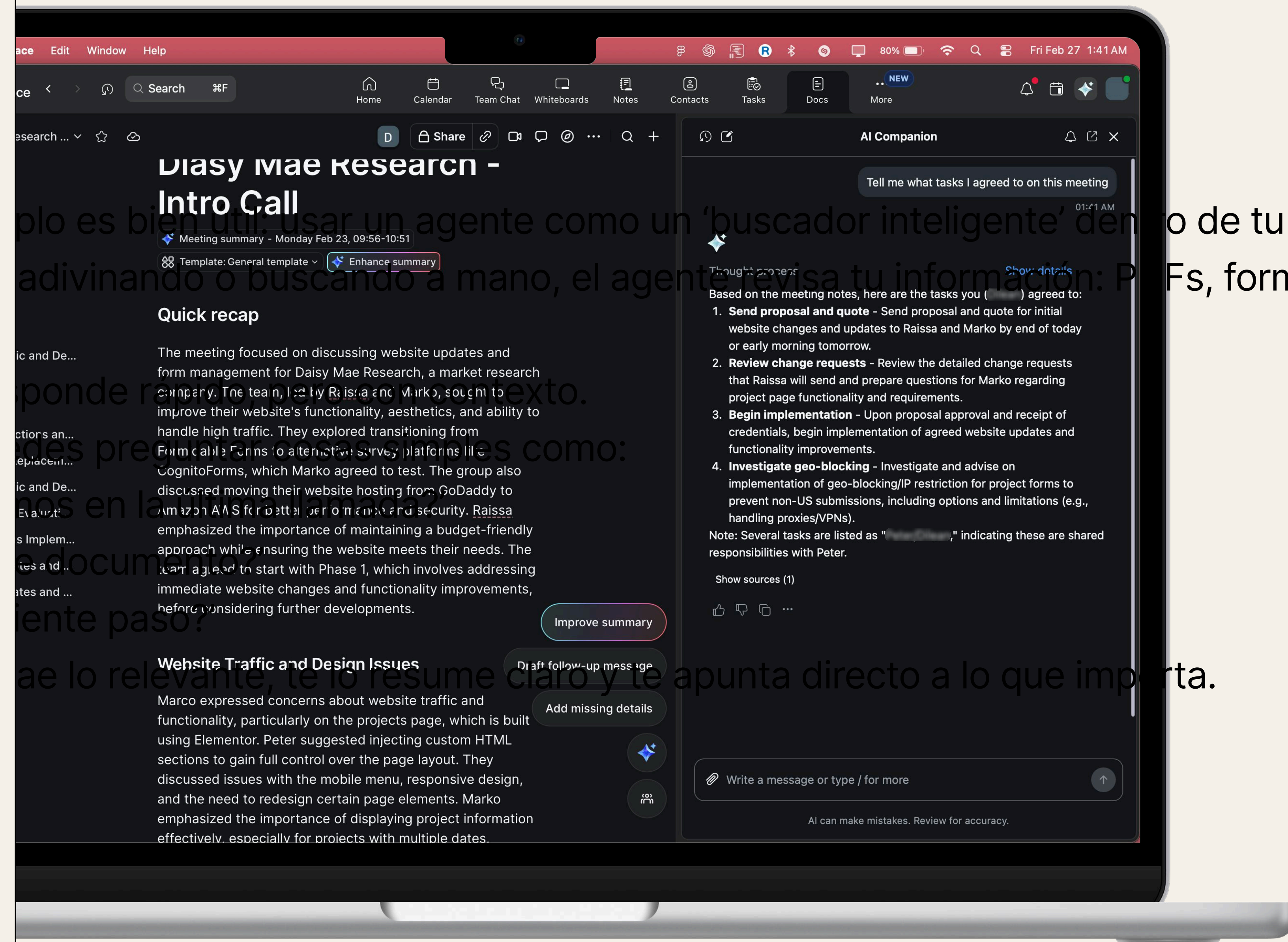
# Agents can answer business questions.

An AI Agent can act like a **searchable helper** for your business. Instead of guessing, it looks at the **information you already have**, like PDFs, forms, notes, and past emails, then **answers questions using that content**.

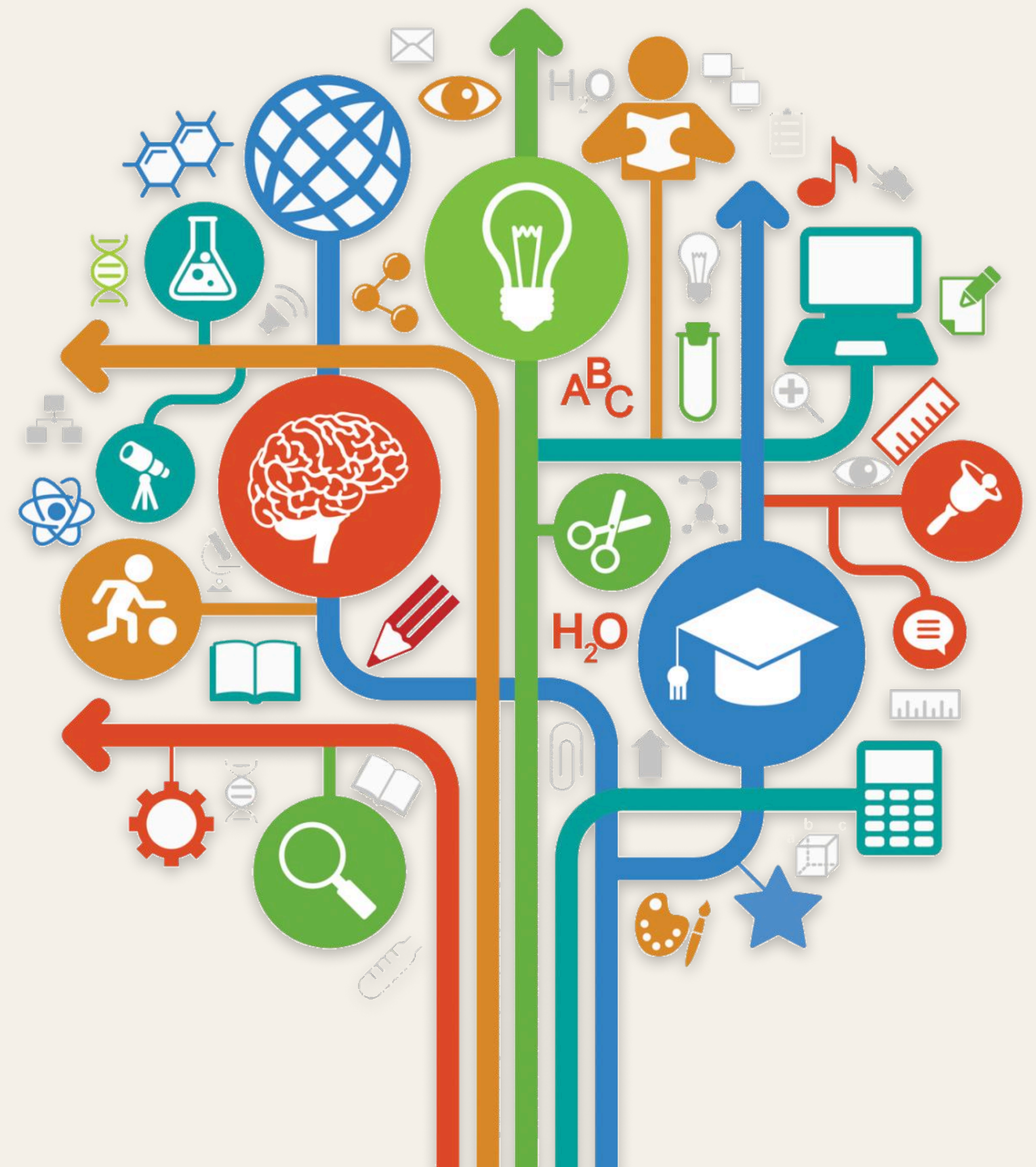
That means **you can ask simple things** like,

- “What did we agree on last call?”
- “Where is that document?”
- or “What is the next step?”

The agent **pulls the relevant details** fast, summarizes them clearly, and **points you to what matters**.



# How do AI Agents fit into your business?

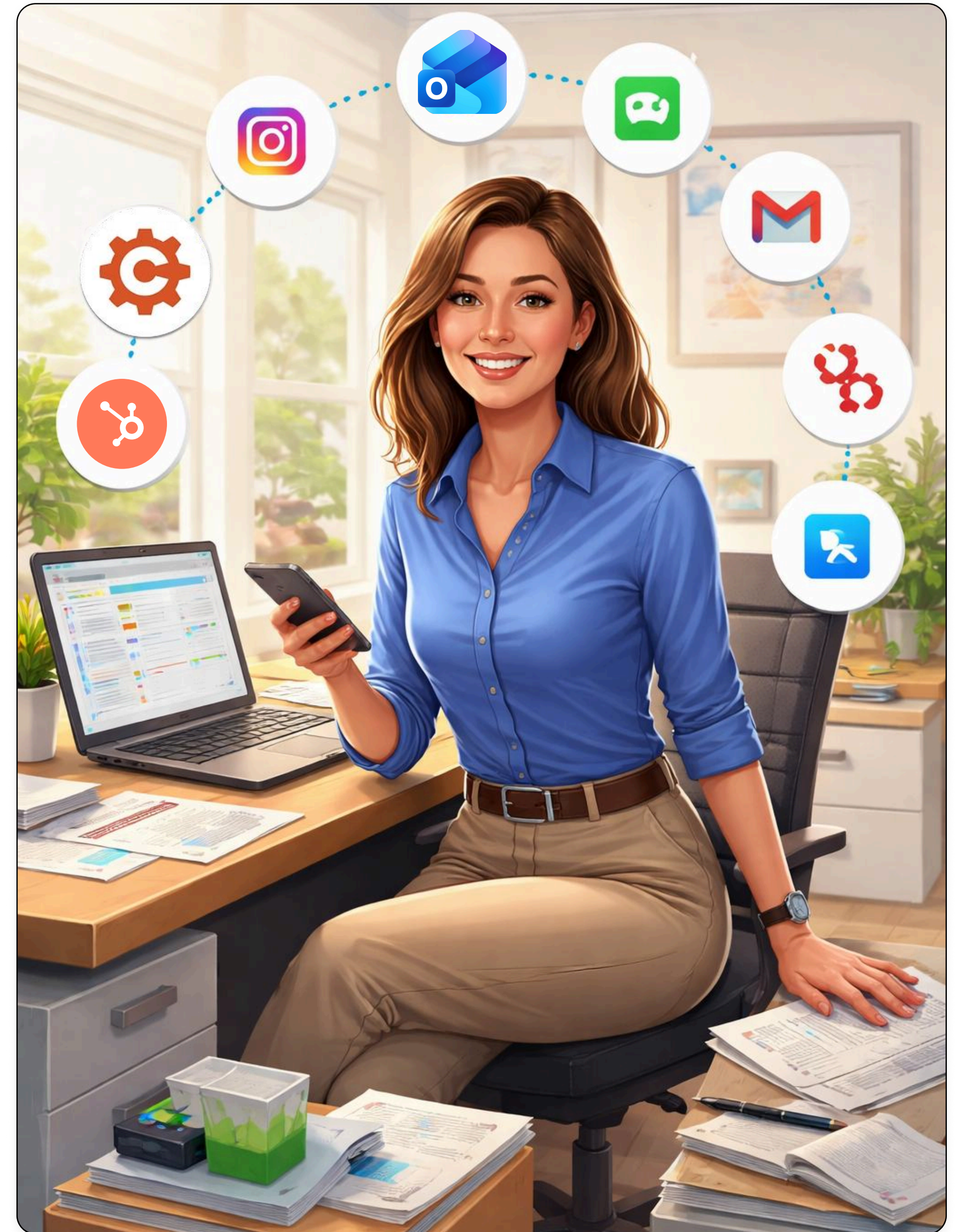


# A Day in the life of Sam

This is Sam!

Sam **runs a small business** in real estate. Every day, **leads show up from different places**: messages, emails, social, her CRM, and listing sites.

To keep up, she **jumps between tools all day**. Each app does one part well, but Sam is the one **connecting the dots**. She answers questions, logs details, and **follows up as fast as possible**.



# Sam's Morning Routine

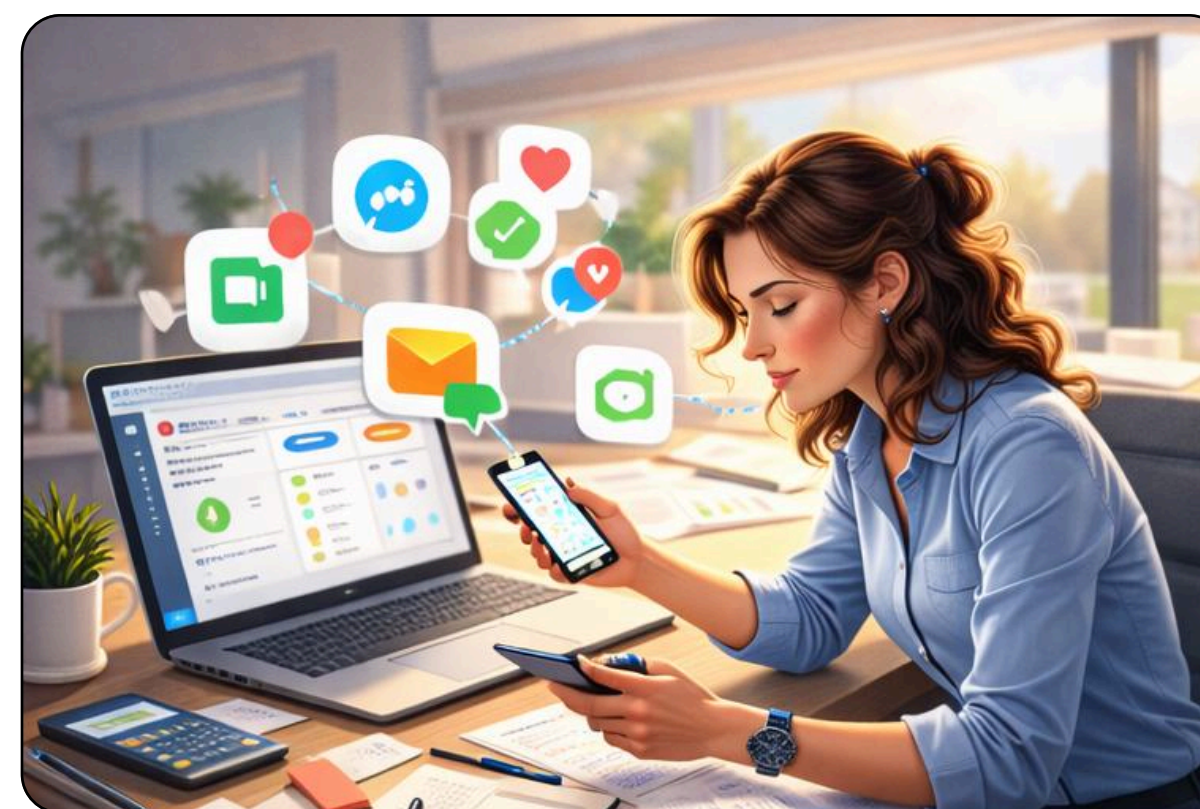


## 8–10 AM

Sam opens messages, checks form submissions, and tries to respond fast before the day gets away from her. **Leads arrived from multiple channels**, so she starts by figuring out where each lead came from and how urgent it is.

She's already making mental notes:

- Is this purchase or refinance?
- What's the timeline?
- What state is this in?



## 10 AM –12 PM

Sam **reviews each lead and manually** enters details into the CRM. She's basically running a qualification checklist in her head: **credit band, down payment range, income type, and quick risk flags**.

She's also doing mini-calculations and judgement calls:

- *DTI feels high...*
- *Timeline is tight...*
- *Self-employed less than 2 years?*



## 1–2 PM

By mid-morning, **the real drain hits**: documents. Every lead is missing something, and the details are scattered across a ton of apps. Sam **spends time** checking what came in, matching it to the right person, and **figuring out what is still missing**.

Then it is the **same cycle again and again**.

Coffee in hand, she thinks,

*"I can't hire yet. How do I scale without burning out?"*

# But the **tools** aren't the **problem...**

The **problem** is Sam's  
doing the **glue-work**  
manually.



## ● **FIRST THING**

Sam doesn't need more apps. The problem is that work gets split across tools.

## ● **SECOND THING**

Each tool does one thing well, but none of them talk to each other. Sam becomes the connector: reading, copying, organizing, and following up.

## ● **SO WHAT'S NEXT?**

Sam needs a repeatable process that connects her tools and runs the busywork in the background. That is a workflow. Next, we will break down what workflows are and why they matter.

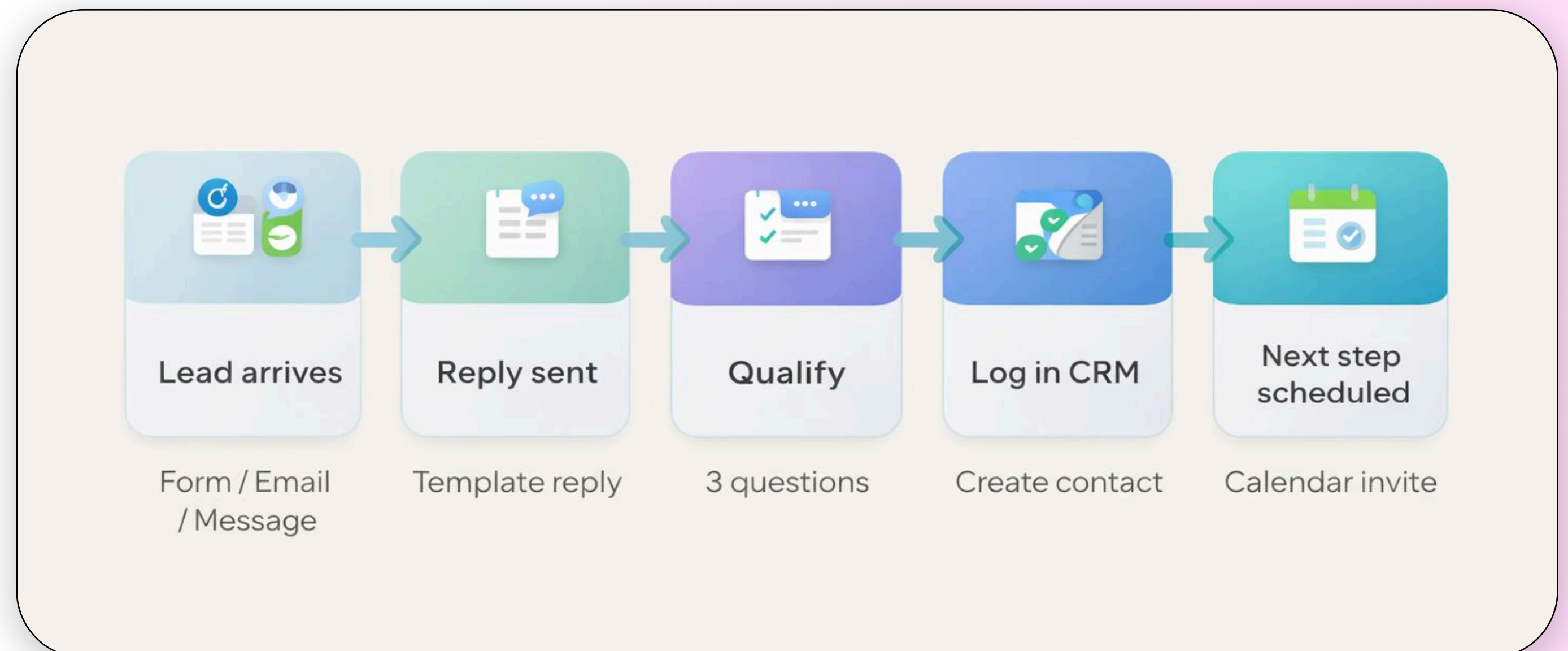
# Introduction to AI Automated Workflows

## what is a workflow?

A workflow is the repeatable path work takes from start to finish. In business, it is how an input becomes an outcome, for example a new lead becoming an appointment, or a document request becoming a complete file.

Workflows also make handoffs clear. Each step has an owner, the info needed to start, and a clear finish line before it moves forward. When a workflow is written down, you can spot the gaps where time gets wasted, like switching tools, copying data, and chasing follow-ups.

An automated workflow keeps the same steps, but it removes the busywork in between. The goal is simple: faster response, fewer mistakes, and a more consistent customer experience.



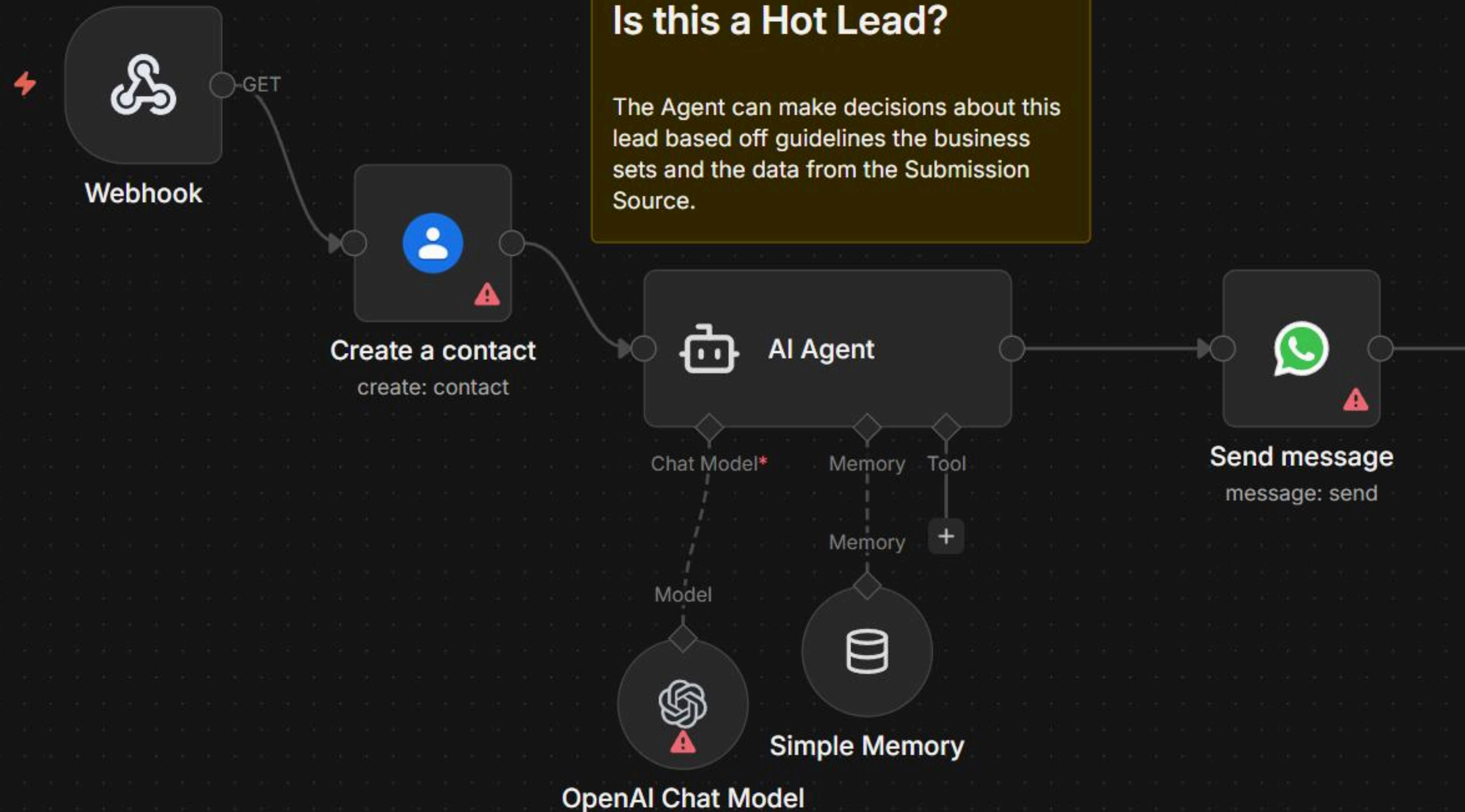
# A Deep Dive into Sam's Automated Workflow

Sam's daily steps are consolidated into one workflow. A lead comes in, a contact is created, and the details go to the AI Agent.

The agent reviews the lead using Sam's guidelines and moves it forward, or closes it out.

## Lead comes in

A form submission or email is all it takes.

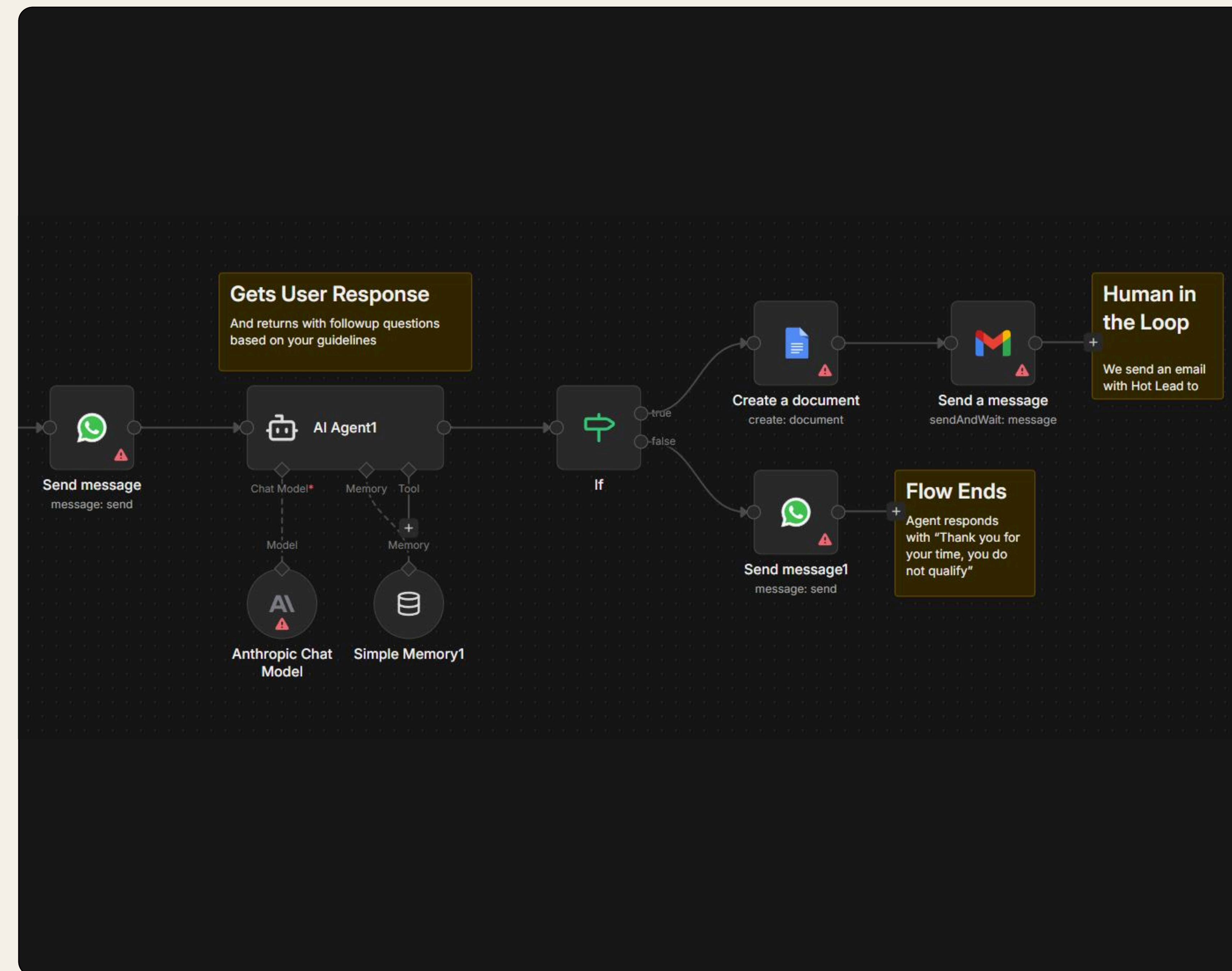


# What else can AI Agents do?

The **agent is configured** with decision logic and permissions so it **knows what it can automate** and when to hand off to a human. That **keeps you in control** while repetitive work runs automatically.

As it is used, **the agent improves** through real interactions, performance metrics, and feedback. It **becomes more accurate**, more efficient, and more aligned with **how your business operates**.

An AI agent is **tailored to your business** by connecting it to your data, tools, rules, and objectives. It functions like an **extension of your team**, not a generic solution.



# The AI Automated Workflow

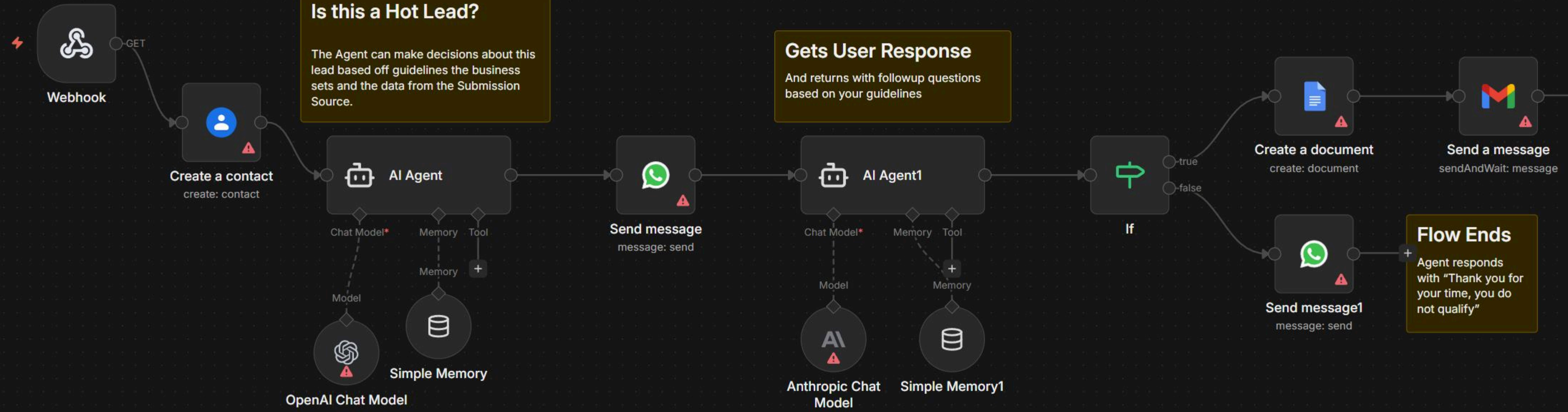
**Lead comes in**  
A form submission or email is all it takes.

**Is this a Hot Lead?**  
The Agent can make decisions about this lead based off guidelines the business sets and the data from the Submission Source.

**Gets User Response**  
And returns with followup questions based on your guidelines

**Human in the Loop**  
We send an email with Hot Lead to

**Flow Ends**  
Agent responds with "Thank you for your time, you do not qualify"



## How did this save Sam time?

With her new workflow in place,

Time **before**  
AI workflow.

# 6 Hrs

Manual Intake, data entry,  
and follow-ups for every lead



WORKFLOW  
CONNECTS APPS  
AND RUNS THE  
GLUE-WORK

Time **after**  
AI workflow.

# 20 Mins

Only review hot leads  
and exceptions

**How can this  
work for your  
business?**

**Question.**  
How can this  
apply to you?

- How many tools do you touch just to move one lead forward?
- What question do you wish you could ask your business and get an instant answer?
- What is one task you do every day that feels repetitive and unavoidable?
- Where does work get “stuck” in your business today?

# Thank you!

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