

OpenAI

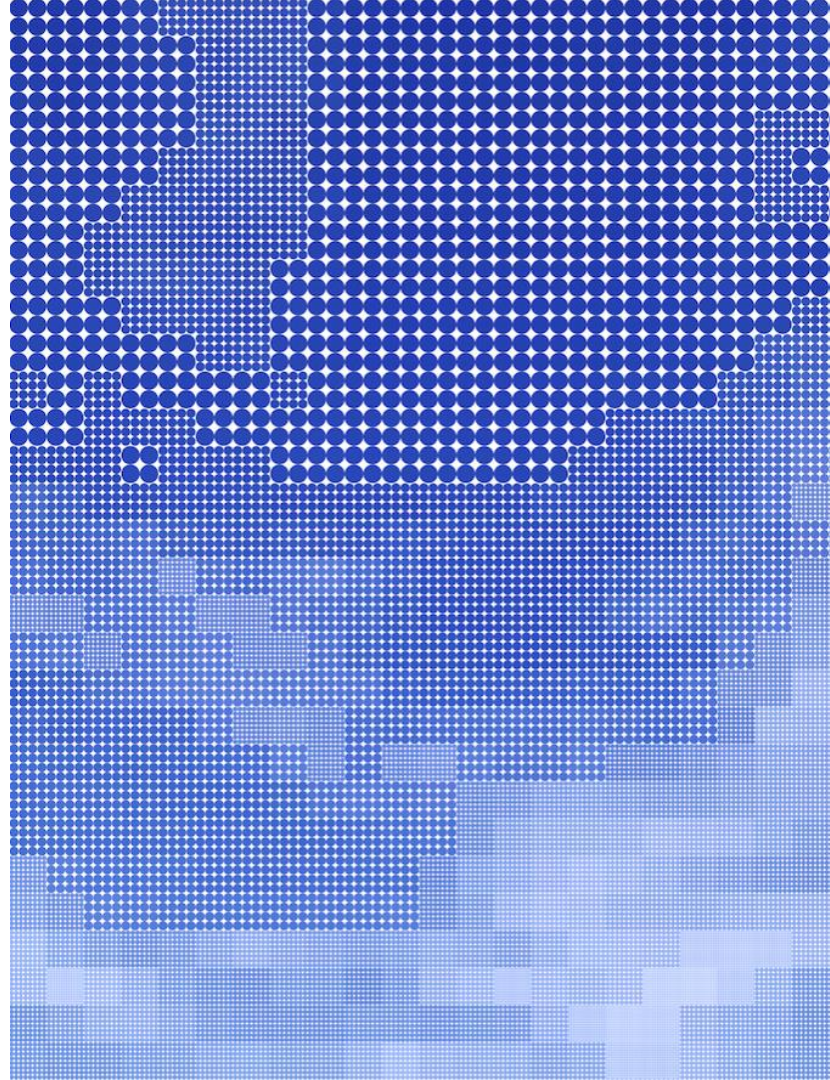
Architecting AI-native organizations

How to redesign work at scale



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Head of Solutions Engineering
Financial Services



Custom AI Systems (API)

Workforce Tools (ChatGPT)

Custom AI Systems (API)

Team-level Agents

Workforce Tools (ChatGPT)

3


Finance automates contract workflows

Reducing manual billing work and saving OpenAI \$1M+ annually


CLM (Contract Lifecycle Management) SaaS



Enterprise
contracts

 docusign

 Dropbox

 Ironclad



Extract and structure
contracts with the
OpenAI API

OpenAI



Store structured
contract data in a table

 databricks

GTM automates lead qualification and sales handoff

Driving tens of millions in annual savings and incremental revenue

Lead qualification agent



Qualifies and engages
inbound leads



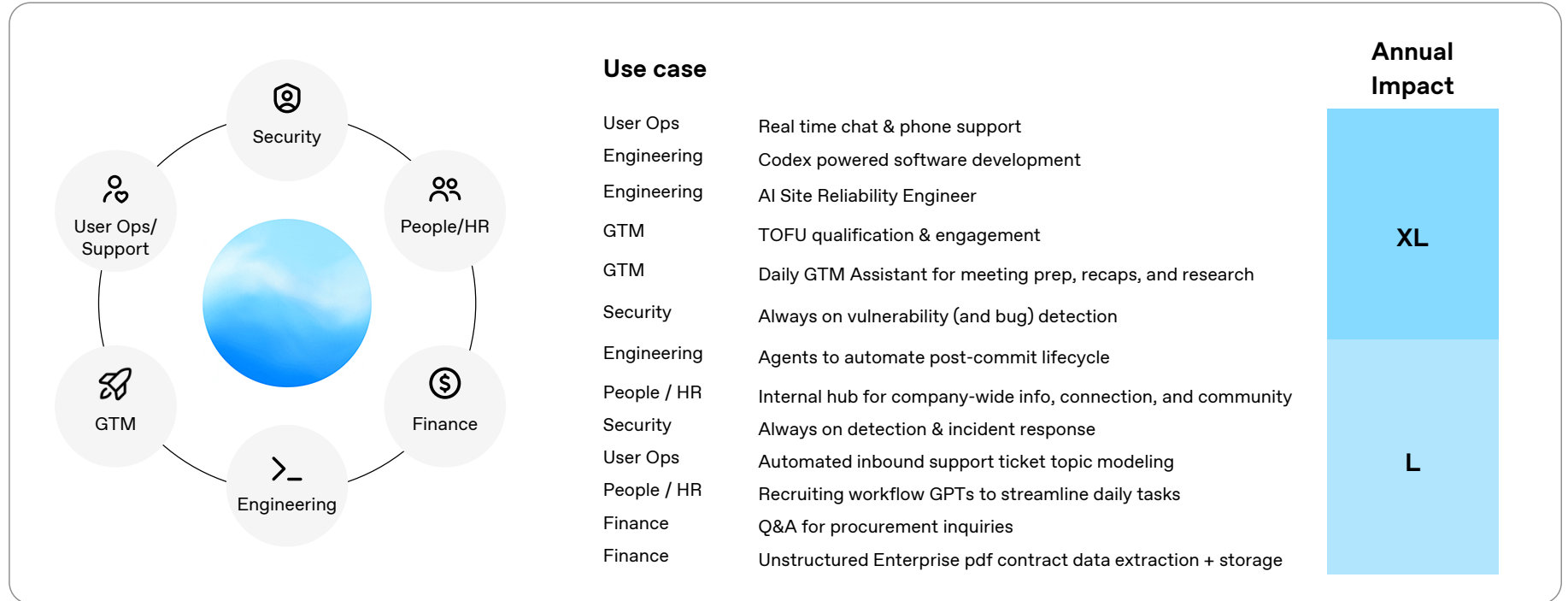
Collects purchase
details to prepare
a quote



Routes sales-ready
opportunities to reps

Functional leaders were tasked with identifying the greatest opportunities to drive cost savings and revenue impact

Estimated \$100M+ in annual cost savings + incremental revenue



01

Business leaders
should own the
outcomes

02

Embed
engineering
directly into the
business function

03

Use Ask, Assist,
and Automate to
decide where to
start and scale

Transformation works best when the business owns the outcome, and IT owns the guardrails

Central IT

Exec sponsor: CIO

- Firmwide tooling and platform
- Governance
- Central transformation initiatives

Revenue

Exec sponsor: CRO

Dedicated innovation team

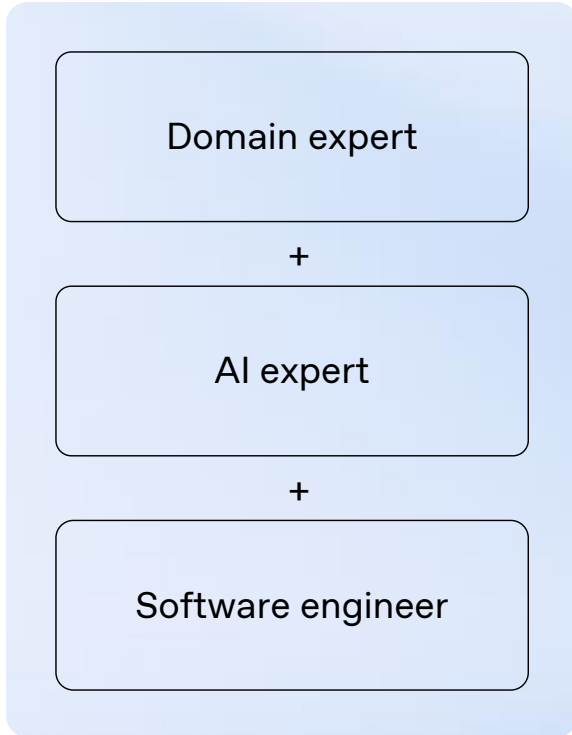
Finance

Exec sponsor: CFO

Dedicated innovation team

The new “build pod” model

Dedicated innovation team



Domain expert defines requirements, quality, and edge cases

AI expert advises on project selection, evals, and system behavior

Software engineer connects context, identity, and telemetry

The path from AI support to autonomous workflows

Capability	Description
Ask	Read across enterprise data, systems, and tools to answer questions and surface insight
Assist	Help users complete tasks, with supervised actions where needed
Automate	Execute stable workflows automatically with the right controls

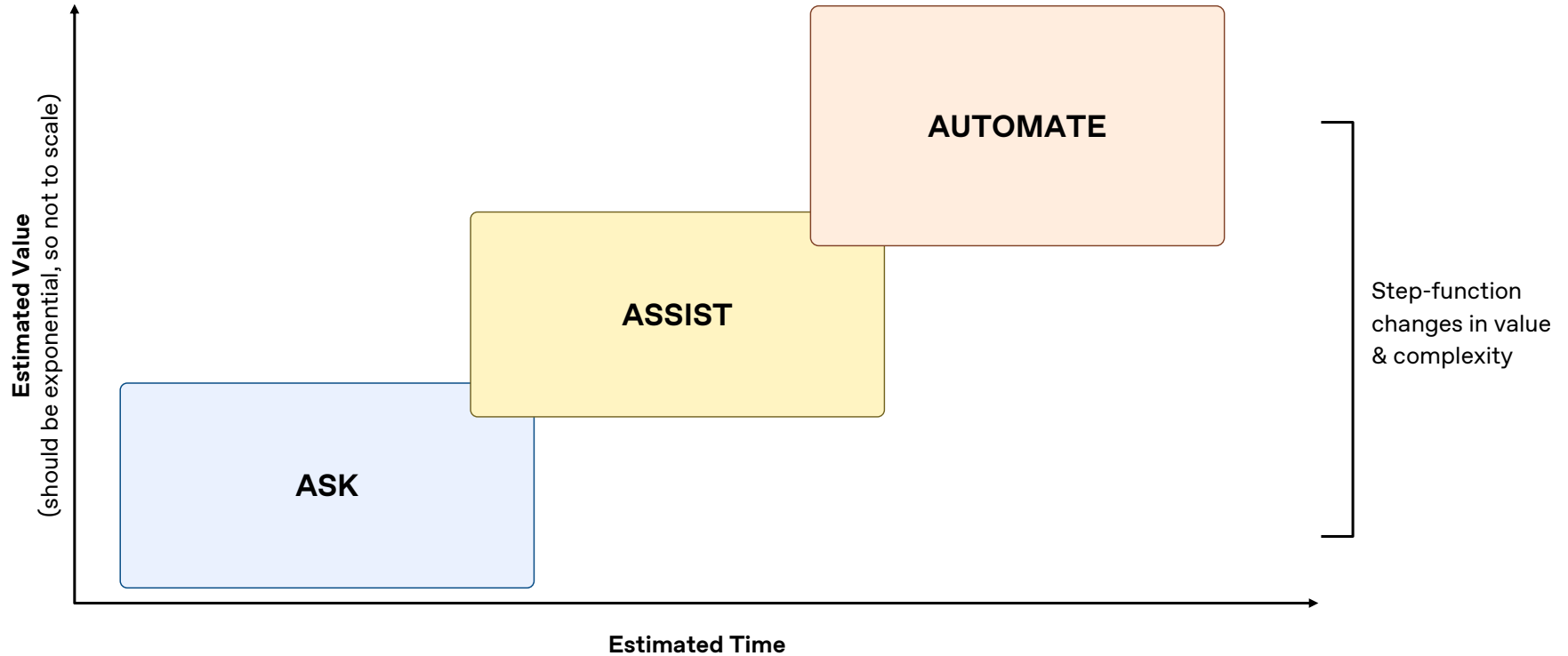


Even leading
deployments start by
building the foundation

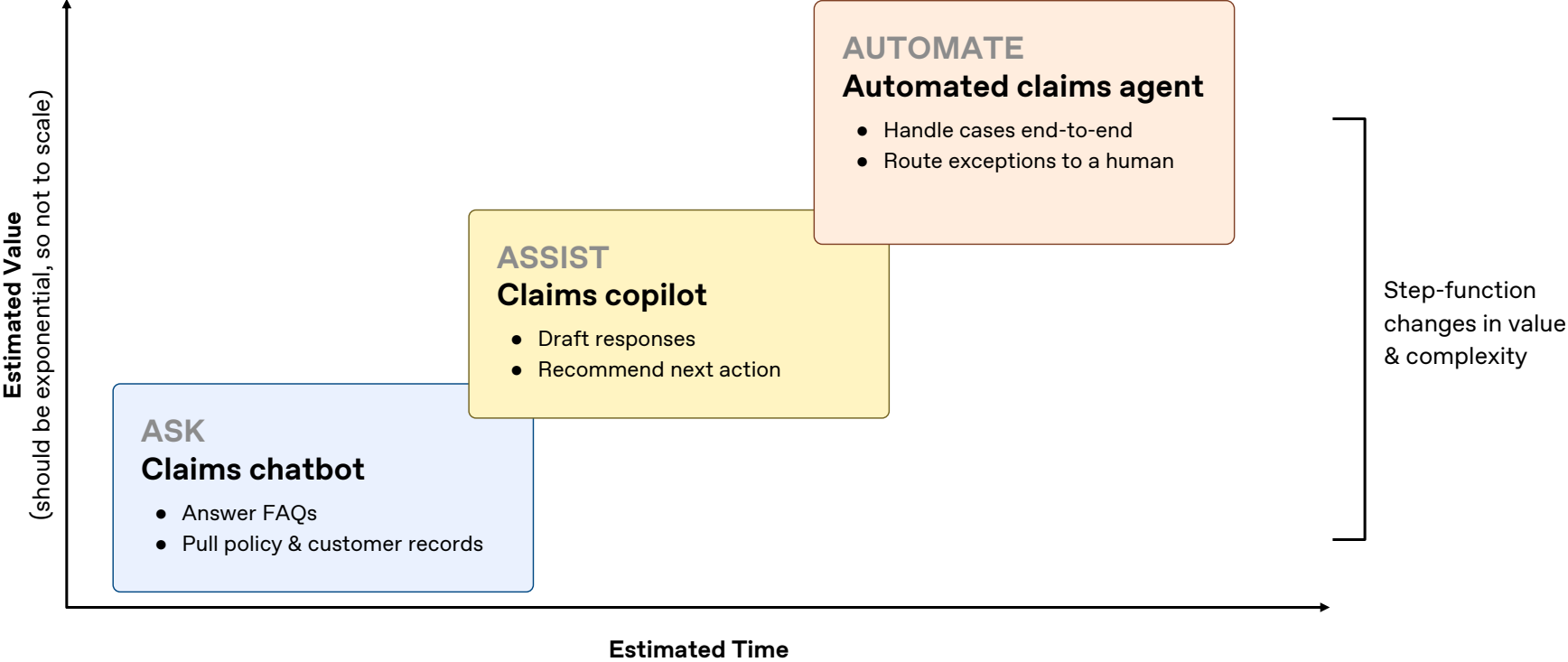


September 2024: T-Mobile CEO Mike Sievert and Sam Altman announce our partnership at T-Mobile's Capital Markets Day

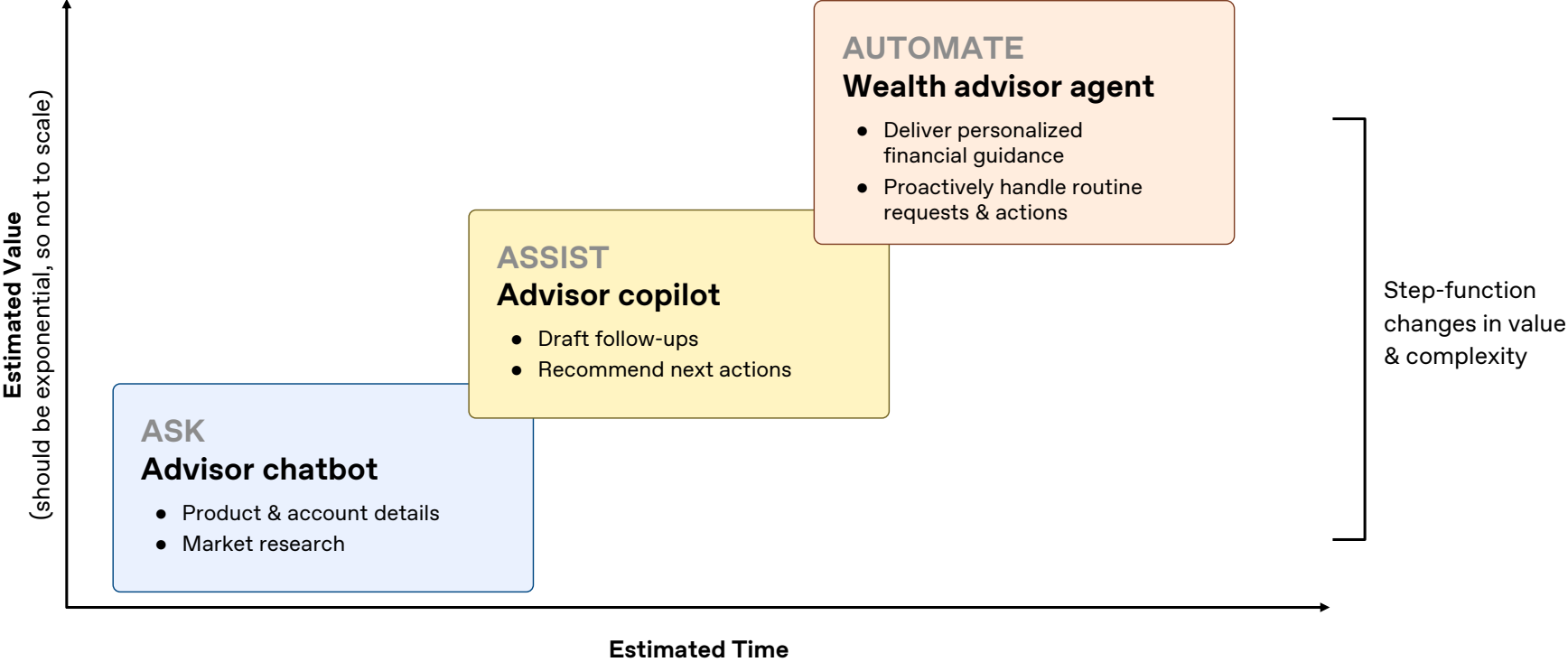
Framework to get to fully autonomous AI coworkers



Building an automated claims agent



Building a wealth management agent



BBVA and OpenAI collaborate on autonomous agents

Customer service

24/7 advisor agents

Risk

Credit risk analyst agents

AI personal assistant

All 120k employees with
ChatGPT

AI banker

Automated sales agents

Operations

Back-office automation agents

Software development

Codex agents

Agent execution

Business context

Enable domain experts as builders

Today

Team

Domain expert (DE) + AI expert + Software engineer

Technology

Bespoke API transformation project

- Custom software development
- Tools
- Data
- Evals
- Guardrails
- Tracing

Tomorrow

Team

Any individual domain expert builds AI Agents using agent builders

Technology

Agent building platform

- No-code
- Continuous evals
- Governance
- Connectors
- Skills

Measure workflows automated as the unit of value

1. Map the work and prioritize high-value workflows
1. Build with a dedicated pod and clear success criteria
1. Roll out in stages from supervised use to team-wide adoption

Example of Solutions Engineering workflow map

Stage	Workflow type	Activity Name	Detail	Time Allocation (hours)	Frequency (Per Opp)	Time per stage	Automation Status
Discovery	Discovery & Alignment	Business requirements discovery	Discovery call(s) with customer to define problem, success criteria, and scope	0.5	1	0.5	Currently Manual
		Technical requirements discovery	Discovery call(s) focused on data, systems, constraints, and architecture	0.5	1	0.5	Currently Manual
		Initial technical qualification	fit, constraints, prerequisites	0.5	1	0.5	Currently Manual
		AI maturity assessment	Run maturity rubric and produce assessment artifact, readiness, impl support reqs	0.5	1	0.5	Currently Manual
		Risk Identification & No-Go Assessment	Identify business, technical, and delivery risks; document go/no-go	0.5	1	0.5	Currently Manual
Customer Meetings (all stages)	Customer Meeting Preparation	Prep for Customer Discovery	Slides, agenda, context review	1	1	1.0	Currently Manual
		Prep for Demo or Workshop	Demo setup, slides, data, prompts	1	2	2.0	Partially Automated
		Prep for Exec / EBC	Executive-grade narrative and visuals	4	1	4.0	Currently Manual
		Prep for PoV or Hackathon	Technical and agenda prep	1	1	1.0	Currently Manual
		Internal Alignment Meetings	Sync with AD, SA, product, partner	0.5	6	3.0	Always Manual
	Live Customer Engagement	Discovery Session	Live discovery call	0.5	2	1.0	Always Manual
		Demo Session	Live demo (ChatGPT, API, Codex)	0.5	2	1.0	Always Manual
		Architecture Review Session	Walkthrough of customer current state and target state	0.5	1	0.5	Always Manual
		Roadmap presentations		1	1	1.0	Always Manual
		Executive Meeting	Exec sponsor alignment	1	2	2.0	Always Manual
		Workshop / Deep Dive	Multi-hour working session	2	1	2.0	Always Manual
		QBR / EBC	Strategic or executive business review	2	1	2.0	Always Manual
		Pre-Sales GPT Hackathon	Onsite or virtual working session before contract	2	1	2.0	Always Manual
		Pre-Sales Codex Hackathon	Same but Codex-focused	2	1	2.0	Always Manual
		Customer Recap & Notes	Summary, decisions, next steps	0.25	6	1.5	Partially Automated
Post-Meeting Follow-up	Action Item Tracking	Coordinate owners and deadlines	0.25	6	1.5	Currently Manual	
	Artifact Distribution	Send decks, demos, docs	0.25	6	1.5	Currently Manual	
	Follow-up Coordination	Scheduling and threading stakeholders	0.25	6	1.5	Currently Manual	
Evaluation	Solution & Architecture Design	Technical Architecture Diagram Creation	Create diagrams, flows, integration visuals	2	1	2.0	Currently Manual
		Business Process Design Creation	Create recommended solution architecture	2	1	2.0	Currently Manual
		Integration Design	Design how OpenAI connects to customer systems	2	1	2.0	Currently Manual
		Security Model Design	Auth, data boundaries, compliance architecture	2	1	2.0	Currently Manual
	Demo, Prototype & PoV Build	ChatGPT Demo Creation	Build customer-tailored ChatGPT demos	1	2	2.0	Partially Automated
		Demo Creation or Modification	Build or customize demo	4	1	4.0	Partially Automated
		Custom GPT Creation	Create GPTs for customer	0.5	2	1.0	Partially Automated
		Prototype Development	Small working solution	8	1	8.0	Partially Automated
		PoV Build Sprint	Time-boxed PoV work	8	1	8.0	Partially Automated
		Eval Pipeline Creation	Build evals for quality, cost, latency	8	1	8.0	Currently Manual

Job Description (2027): [insert domain expertise] AI Agent Manager

Description:

As a [domain expertise] AI Agent Manager, you will serve as the domain expert for [insert domain] & be responsible for managing a team of AI Agents. You will be responsible for understanding the data, systems, and business processes that will be executed by your team of AI Agents.

Responsibilities:

- Daily: monitor output of you AI Agent team, ...
- Monthly: measure performance against KPIs, evaluate performance versus expected business impact, ...
- Quarterly: Evaluate improvements made possible by new capabilities, identify new workflows that can be automated, ...

Win in the era of managing agents

01

Separate
governance from
transformation

02

Embed
engineering in
the business
function

03

Make domain
experts
accountable for
the end product

Here's the help I'm looking for

- ⚙️ Reinventing PDLC
- ✨ Rearchitecting teams

- Already working on this?
- Interested in experimenting with these concepts?