

LIVE TALK · 90–120 MIN

AI in Action

Practical AI for real businesses: what to build,
what to buy, what to avoid, and where to start.

Robbie Lewis

Chief Technology Officer, Digital Planning



Digital engineering for ambitious organisations

I'm Robbie Lewis, CTO at Digital Planning.

We're a Loughborough-based digital engineering studio. We design, build and run web, app and automation products - and increasingly, bespoke AI solutions tailored to a specific business problem.

We build AI solutions, then stay accountable for running and improving them.



Est. 2021

Loughborough University Innovation Centre



Award-winning

AI News Editor platform, built with agency 1284



End-to-end

Design · build · automate · secure · run



PhD-backed

Loughborough DInC innovation programme

Most businesses are asking the wrong question



The shopping-trip question

“What AI tool should we buy?”

Leads to shelfware, overlapping subscriptions, and features nobody uses.



The design question

“What job do we actually need done?”

Leads to solutions designed around a real, painful workflow that pay for themselves.

Today's promise: You'll leave able to spot where AI genuinely earns its place in your business and where it doesn't.

The format for today

1-2



Live demos

Designing an AI workflow from scratch, utilising existing AI tools

3-4



Group discussion & task

Getting to know each other and sharing experiences

5



What to avoid

The red flags that signal AI snake-oil

6



When not to use AI

The jobs where AI is the wrong answer

7



Your next steps

A simple framework to start tomorrow

01



A live demo

Let's design an AI solution together: an agent that drafts replies to inbound support tickets and emails.

Start with the pain, not the technology

Every business with an inbox has the same bottleneck



Slow first response

Tickets and emails pile up; customers wait hours for a reply that's often routine.



Repetitive answers

Staff retype the same 20 answers all day - a copy-paste tax on skilled people.

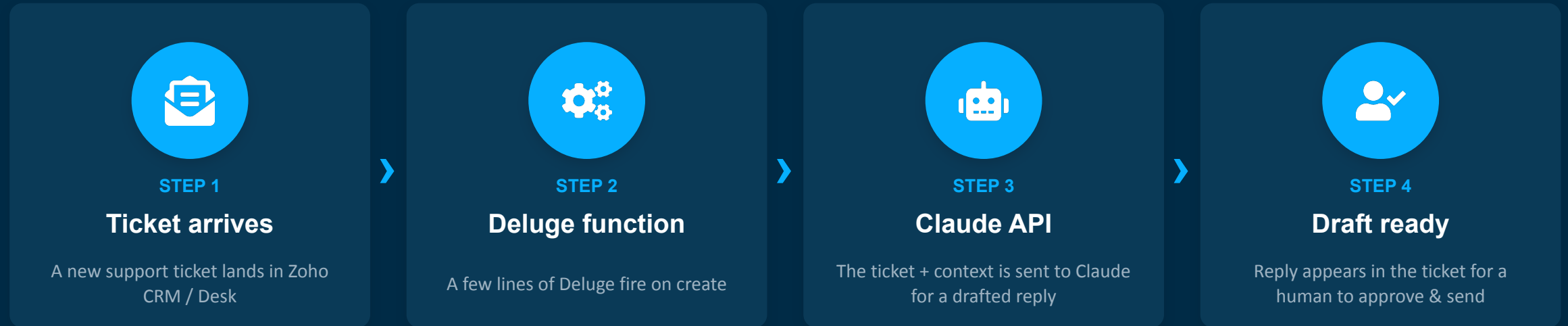


Inconsistent quality

Tone, accuracy and completeness vary by who happens to pick up the ticket.

The AI question here isn't "which tool?", it's **"can we draft a good reply automatically, and keep a human in control?"**

Version 1: Building an AI Support Agent in a few minutes



You can do this today: This took a few minutes and very little code. Anyone who responds to emails could benefit from this.

Version 2: What “production-ready” actually means

The 10-minute version

Great for a demo. Not ready for customers.

- ✗ Single prompt, no memory of past tickets
- ✗ No brand voice or tone control
- ✗ Can confidently state wrong things
- ✗ No approval step or audit trail
- ✗ Nothing to measure or improve



DP Support Agent

The same idea, engineered to be safe & reliable.

- ✓ Grounded in your knowledge base & past tickets
- ✓ Locked to your brand voice and policies
- ✓ Human-in-the-loop approval before anything sends
- ✓ Full audit trail + analytics on every draft
- ✓ Improves as it learns from your edits

The demo took 10 minutes. Making it reliable, safe and on-brand is the actual work and that's what we do.

02



AI software to use

Recommendations organised by the job you need done, not by brand.
Honest picks, including tools we don't sell.

WHAT TO USE

Pick the tool by the job, not the hype



General assistants

Everyday thinking, writing & analysis

Claude, ChatGPT, Gemini Start here. Huge productivity win for drafting, summarising and research.



Meeting capture

Notes, actions & searchable transcripts

Fireflies, Otter, Fathom Turns every call into a record you can search and action later.



Automation & glue

Connecting your apps without code

n8n, Zapier, Make Where most real ROI lives: wiring AI into workflows you already run.

Live Demo 2

*Fireflies transcript to project proposal using
Claude desktop & MCP*

WHAT TO USE

A 5-point test for any AI workflow



Real job

Does it solve a specific, named workflow you can point to today?



Data safety

Clear on where your data goes, retention, and training use?



Human control

Can a person review and override before anything consequential happens?



Fits your stack

Does it connect to the systems you already use?



Measurable

Can you actually see whether it's saving time or money?

Two or more fails? Walk away and talk to someone who'll build it correctly.

03



Speed Dating

Let's get to know each other a little better.

Introduce yourself to 3 people in the room that you don't know.

04



Group Task

Working in small groups, let's share our thoughts and experiences of using AI in our workplaces.

Share your AI experiences



AI Software Recommendations

“AI” that’s just a markup on a model you could call directly for a fraction of the price.



AI Applications to avoid

A tired legacy product with an AI checkbox added for the brochure, no real capability.



What shouldn’t be used for?

Wants all your data with vague retention terms, or trains its models on your content.



Next steps for your business

Automates high-stakes output with no review step. Fine for drafts, dangerous for decisions.

05



AI software to avoid

You don't need to know every product - just the red flags.
Here's how to spot AI that'll waste your money.

Six red flags of AI snake-oil



Thin API wrapper

“AI” that’s just a markup on a model you could call directly for a fraction of the price.



Bolted-on “AI”

A tired legacy product with an AI checkbox added for the brochure, no real capability.



Data grab

Wants all your data with vague retention terms, or trains its models on your content.



No human in the loop

Automates high-stakes output with no review step. Fine for drafts, dangerous for decisions.



Black-box lock-in

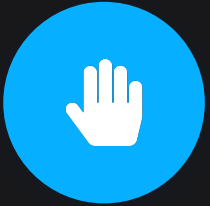
No export, no transparency, and a painful exit. Your data becomes their hostage.



Magic everything

Claims to do everything for everyone. Real tools are honest about their limits.

06



When not to use AI

The most useful thing an AI company can tell you: where AI doesn't belong.
This builds trust and saves you money.

Five places to keep humans firmly in charge



Accountability calls

Decisions that must be legally defensible or need a name attached to them.



High cost of being wrong

Medical, legal or financial output where a confident-but-wrong answer causes real harm.



Genuine human empathy

Sensitive conversations: grievances, bad news, care where a person must be present.



No clean data

If your underlying data is messy or missing, AI amplifies the mess. Fix data first.



Low-volume, one-off tasks

If it happens rarely, automating it can cost more than just doing it by hand.

So where does AI earn its place?

AI pays off when a task is all three of these at once



High-volume

It happens a lot - so small savings per task add up fast.



Repetitive

It follows a pattern a model can learn, not pure novel judgement.



Tolerant of review

A human can sanity-check the output before it matters.

Our support-agent demo hits all three - that's exactly why it's a good fit.

07



Your next steps

A simple, low-risk way to go from “interested in AI” to a working result - starting this week.

Four steps to your first real AI win

1



Audit

List your repetitive, high-volume workflows. Where does the team lose hours to routine tasks?



2



Pick one pilot

Choose a single painful process. Narrow beats broad - one clear win builds momentum.



3



Start cheap

Prove the value with a lightweight build before committing budget. Fail fast, learn fast.



4



Build vs buy

Once it works, decide: off-the-shelf, or a bespoke solution designed around your process.

You can start step 1 tomorrow morning - no budget required.

NEXT STEPS

Where Digital Planning could help



Security & Compliance

You build a demo, we finish it off with security hardening and ensure all compliance obligations are met.



Bespoke AI builds

Custom agents and automations designed around your process, like the Support Agent.



Discovery workshop

We map your workflows and find the highest-ROI place to start - no obligation.

We are technology-agnostic. Your solution can use any stack or platform.

08



Group Discussion

What are your main takeaways from this talk?

Write them down and then let's discuss.

RECAP

Things to remember



Design, don't shop

Start from the job to be done, not a tool you saw in an ad.



Drafts are easy, reliability is the work

The 10-minute demo is real but production takes engineering.



Manage risks

Data safety, human control, real fit and measurability.



Keep humans where it counts

Accountability, empathy and high-stakes calls stay with people.



Start small this week

One high-volume, repetitive, review-friendly task. Prove it, then scale.

LET'S TALK

Want the slides + our tool checklist?

Scan the code to grab today's deck and a two-page "what to use / what to avoid" checklist - and book a free, no-obligation discovery workshop.



digitalplanning.tech



robbie@digitalplanning.tech



SCAN THIS QR CODE

Questions?

Thanks for your time - let's talk about where AI fits in your business.

Robbie Lewis

CTO, Digital Planning · digitalplanning.tech

