



## Alliance Roundtable

### “How CEOs are Identifying ROI Use Cases for AI Agents”

Thursday, March 13, 2025, 2:00 pm – 4:00 pm PDT

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#### Event Overview

- **Host:** [Paul Witkay](#), [Alliance of Chief Executives](#), Founder & CEO
- **Moderator:** [Matthew Swanson](#), [Motion Enterprises](#), Managing Partner
- **Featured CEO Speaker:** [Umair Aziz](#), [Creative Chaos](#), Managing Partner

*This session was the 11th edition of a series by the **Alliance of Chief Executives** focusing on how CEOs can identify ROI-driven AI use cases, practical AI applications, automation strategies, and measuring AI's impact on business operations.*

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#### Key Discussion Points

##### 1. Understanding AI Agents & Automation

Matthew Swanson used an analogy comparing AI agents to self-driving cars:

- **Level 0-3:** Early automation like spreadsheets, rule-based systems, and predictive analytics.
- **Level 4:** AI agents that can perform tasks independently (e.g., handling emails, managing workflows).
- **Level 5 (future):** Full orchestration of AI agents across departments without human oversight.

##### 2. Framework for Identifying AI ROI Use Cases

Matthew Swanson outlined a structured approach:

- Identify revenue drivers (e.g., customer engagement, lead conversion).
- Map customer touchpoints (e.g., ad clicks, sales calls).
- Define internal tasks performed by employees (e.g., data entry, scheduling).
- Look for AI solutions that can take over repetitive tasks.

##### 3. Practical AI Applications & ROI Measurement

Umair Aziz emphasized a "**start small, scale gradually**" approach:

- **Sales & Marketing:** AI for lead qualification, prospecting, email follow-ups.
- **Customer Support:** AI-powered voice agents handling inquiries and refunds.
- **Finance & Accounting:** Automated transaction categorization and invoice processing.
- **Recruitment:** AI for resume screening and interview scheduling.

ROI should be measured not just in **cost savings** but also in **efficiency, revenue growth, and business scalability**. Umair suggested using **hourly cost savings per employee** as a simple ROI formula.

#### 4. AI Implementation Strategy

Umair Aziz stressed that **AI adoption isn't just an IT investment but a workforce transformation**. He recommended:

- **Documenting workflows** before implementing AI.
- **Identifying repetitive tasks** that employees dislike.
- **Choosing AI tools that free up employees for higher-value work.**

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#### Conclusion

The **Roundtable** provided valuable insights into how CEOs can effectively integrate AI agents into their businesses to drive **efficiency, revenue growth, and scalability**. The discussion emphasized the importance of **identifying repetitive tasks, mapping workflows, and strategically implementing AI solutions** to maximize ROI.

- Key takeaways included:
  - **AI as Workforce Transformation:** AI agents should be seen as an **enhancement to human productivity**, not just an IT expense.
  - **Strategic Implementation:** Businesses should start small by documenting workflows, selecting high impact use cases, and gradually scaling AI adoption.
  - **Measuring ROI:** Success should be evaluated not just through cost savings but also through efficiency gains, improved decision-making, and revenue impact.
  - **AI Adoption Across Functions:** From sales and marketing to customer support and finance, AI is transforming multiple business areas by automating tasks and augmenting human capabilities.

With AI's rapid advancement, business leaders must proactively experiment with and integrate these technologies to stay competitive in an increasingly AI-driven landscape.