AI MASTERCLASS FOR BUSINESS LEADERS

From AI tools to AI employees

How AI agents can take real work off your team, and how to start.

Chitiz Agarwal
Chairman & MD, Techila Global Services

17 October 2026
Viman Nagar, Pune

QUICK SHOW OF HANDS

1

Who uses ChatGPT or a similar tool every week?

2

Who has AI doing work while you are not watching?

AI BEYOND CHATGPT

A chat is where you ask.
An agent is where you assign work.

	AI tool (chat)	AI employee (agent)
Who starts the work	You type every time	A trigger: new email, 9 am, a file
Your systems	You copy and paste	Reads email, calendar, books, CRM
Output	An answer	Finished work, ready to approve
When you are away	Nothing happens	Keeps working

WHAT AN AGENT IS MADE OF

Six parts, just like a new hire

Brain

The AI model that thinks and writes

Job description

Clear instructions: what good work looks like

Tools

Access to email, calendar, books, CRM

Knowledge

Your documents, price lists, SOPs

Trigger

When it starts: 9 am, a new email, a file

Guardrails

What it must never do without you

WHERE ARE YOU TODAY?

The AI ladder: climb one step at a time

STEP 1

Chat

You ask, it answers

STEP 2

Assistant

Knows your files and style

STEP 3

Automation

Connected to your apps

STEP 4

Agent

Does a whole job, asks you to approve

STEP 5

Team

Agents hand work to each other

YOUR DIGITAL WORKFORCE

Every department has work an agent can take

Sales

- Researches every lead before the call
- Drafts follow-ups and proposals

HR

- Screens CVs against the role
- Answers policy questions 24×7

Finance

- Chases overdue invoices politely
- Flags odd payments in statements

Operations

- Sorts the inbox, plans the day
- Writes the daily MIS summary

Which one would save **your** team the most hours?

LIVE DEMO

Meet my AI leadership team

COO

Reads my inbox and calendar, sorts what matters, drafts replies

CRO

Turns enquiries into proposals and offers meeting slots

CFO

Checks the books: who owes us, bank vs books, red flags

You

Review and approve. Nothing goes out without you

Real inbox. Real calendar. Real accounts. Built with Claude, Outlook and Zoho Books.

WHAT TO WATCH IN THE DEMO

One morning, three agents, one decision-maker

1. COO

Reads 24 hours of email. Sorts it into Urgent, This week, FYI, Ignore.

2. CRO

Picks up the new enquiry. Writes a brief, proposal outline and reply.

3. CFO

Checks Zoho Books. Who to chase first, and what looks wrong.

4. You

Approve the drafts. Nothing is sent or paid until you say so.

The number that matters: 0 emails sent without me.

THE RECIPE FOR ANY AGENT

Give it a job in five parts

Job | **Tool** | **Categories** | **Output** | **Boundary**

"**Review** my **unread Outlook email** from the last 24 hours. Sort it into **urgent, this week, FYI and ignore**. For urgent ones, **draft a reply in my voice**. **Do not send anything without my approval.**"

Prompt structure adapted from Sandeep Swadia's "4 AI Agents" framework.

BUILD YOUR FIRST AI EMPLOYEE

Five steps, no coding

1. **Pick one boring, repeated task.** Frequent, digital, low-risk.
2. **Write the job description.** A new hire should be able to follow it.
3. **Give access, read-only first.** Only what a new hire would get.
4. **Keep a human in the loop.** It drafts, you approve. Promote it slowly.
5. **Measure it.** Hours saved, faster replies, fewer misses.

CHOOSING THE FIRST JOB

Start boring. Boring pays.

Good first jobs

- Summarise every sales call
- Sort the inbox each morning
- Chase overdue invoices
- Screen CVs for one role

Not yet

- Negotiating prices with clients
- Approving payments
- Hiring or firing decisions
- Anything legal or regulatory

Test: happens every week, follows rules, lives on a screen, and a mistake is easy to catch.

WHICH TOOLS TO USE

Start at level 1. Move up when it pays.

Level	Tools	Good for
1. Assistants	ChatGPT, Claude, Gemini, Microsoft Copilot	Writing, research, analysis
2. Connect your apps	Claude connectors, Zapier, Make, n8n	Email, calendar, sheets, CRM
3. Agent builders	Copilot Studio, Agentforce (on Salesforce), Lindy	Department-wide agents
4. Custom	Claude Agent SDK, OpenAI Agents SDK, with a partner	Core processes at scale

STAY SAFE

Four risks, four simple rules

Your data

Use business plans that don’t train on your data. Respect India’s DPDP Act.

Confidently wrong

AI can sound sure and be wrong. A person checks before anything goes out.

Too much access

Give an agent only what you’d give a new hire. Read-only first.

Costs creep up

Usage is billed. Start with one job and measure the hours saved.

YOUR TURN: 2 MINUTES

Design your first AI employee

The job	What task, for which team?
How often	Daily? Weekly? How many times?
Hours per week	Time your team spends on it today
Tools it needs	Email, Excel, Tally, Zoho, CRM, WhatsApp...
If it goes wrong	What is the risk, and who checks?

QUESTIONS

The agent prepares. You decide.

Bring your questions and your business challenges.

Chitiz Agarwal
chitizagarwal.com

Free 30-minute review
of your AI employee card