

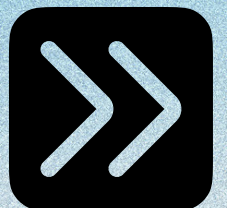
# AI *vs.* Automation

Some people use these terms interchangeably.

They should not, and the difference becomes clear when you look at real industries.

- **Manufacturing**
- **Financial Services**
- **Healthcare**
- **Insurance**
- **Legal**

*Let's break it down.*



# Quick Test

## Which one is AI?

A system that:

- Routes a claim to an adjuster
- Sends an appointment reminder
- Creates a maintenance ticket



# Answer

**None of them.**

That is **automation**.

AI does something different.



# A Simple Way to Think About It

## AI

- Understands information
- Finds patterns and insights
- Helps generate decisions or content

## Automation

- Follows rules
- Executes repeatable tasks
- Moves information between systems

Automation **does the work.**

AI **interprets the information.**

The most powerful systems combine both.



# Manufacturing

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## AI

- Predict machine failure from sensor data
- Detect product defects from image analysis
- Forecast demand to improve production planning
- Generate operational insights from factory data

## Automation

- Create purchase orders when inventory hits thresholds
- Generate maintenance tickets from machine alerts
- Route quality control reports to supervisors
- Sync production data between ERP systems

Automation runs production **workflows**.  
AI improves production **decisions**.



# Financial Services

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## AI

- Analyze financial statements during underwriting
- Detect fraud patterns in transactions
- Generate portfolio summaries for advisors
- Review communications for compliance risk

## Automation

- Route loan applications through approval steps
- Send reminders for missing documentation
- Sync CRM and financial planning tools
- Trigger compliance reviews

Automation **moves** financial data.  
AI helps **interpret** it.



# Healthcare

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## AI

- Summarize physician notes from visits
- Identify risk signals in patient data
- Assist in imaging and radiology analysis
- Generate patient-friendly visit summaries

## Automation

- Send appointment reminders
- Route patient intake forms into EMR systems
- Trigger billing workflows after visits
- Move lab results to patient records

Automation **moves** patient information.  
AI helps clinicians **understand** it.



# Insurance

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## AI

- Analyze claim descriptions and documentation
- Estimate repair costs from damage photos
- Detect fraud signals in claims
- Generate summaries for adjusters

## Automation

- Route claims through approval workflows
- Trigger policy renewal notifications
- Assign claims to adjusters automatically
- Move policy data between systems

Automation **moves** claims through the process.  
AI **evaluates** the claim itself.



# Legal Services

## AI

- Review contracts for unusual clauses
- Summarize case files and discovery documents
- Extract key terms from agreements
- Generate first drafts of legal documents

## Automation

- Route contracts for approval and signature
- Send filing deadline reminders
- Organize documents into case folders
- Sync case management and billing systems

Automation manages the **workflow**.

AI **analyzes** the documents.



# The Opportunity

Most organizations focus on either AI **or** automation.

The real value appears when they work **together**.

**AI** understands information.

**Automation** Executes the workflow.

Together they **transform** how work happens.



# Curious what this looks like inside *your* industry?

Where do you see the bigger opportunity right **now**?

- **AI**
- **Automation**
- **Both** together

Drop your **industry** in the comments.

*Let's explore!*