



AI Agents:

75+ Use Cases Transforming Enterprises

Discover 75+ proven AI agent applications designed to help enterprise teams modernize outdated processes, improve accuracy, and accelerate critical business decisions.

From Adoption to Action: Turning AI Investment Into Real Use Cases

As of 2025, 99% of Fortune 500 companies have implemented AI in their operations. Furthermore, 60% of enterprises with over 10,000 employees have incorporated AI into their business processes. These figures underscore a decisive shift: artificial intelligence is becoming a core component of modern enterprise strategy rather than an optional experiment.

Yet despite this near-universal “adoption,” many organizations face a common challenge: determining where and how to apply AI to generate actual business value. Too often, projects remain in pilot phases or confined to individual departments, preventing AI from reaching its full potential across the enterprise.

This whitepaper addresses the gap between abstract ambition to concrete application. Within these pages, you’ll find 65+ practical use cases of AI agents across industries, each demonstrating how organizations are leveraging AI to solve specific operational challenges. From underwriting and compliance in insurance, to term sheets in private lending, to academic advising in higher education, these examples illustrate how enterprises can unlock scale, resilience, and long-term value from their AI investments.

Built on StackAI, the Secure Enterprise AI Platform

All of the use cases featured in this paper were developed on StackAI, the secure, enterprise-grade AI platform designed for regulated industries. With role-based access controls, on-premise options, and native integrations into tools like Snowflake, Salesforce, and ServiceNow, StackAI ensures that organizations can safely scale AI agents across underwriting, claims, compliance, customer support, and more—without sacrificing governance or security.

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Insurance

Explore 10+ real-world AI agent use cases designed for underwriting, claims, and compliance teams who want faster processing, fewer errors, and stronger policyholder trust.

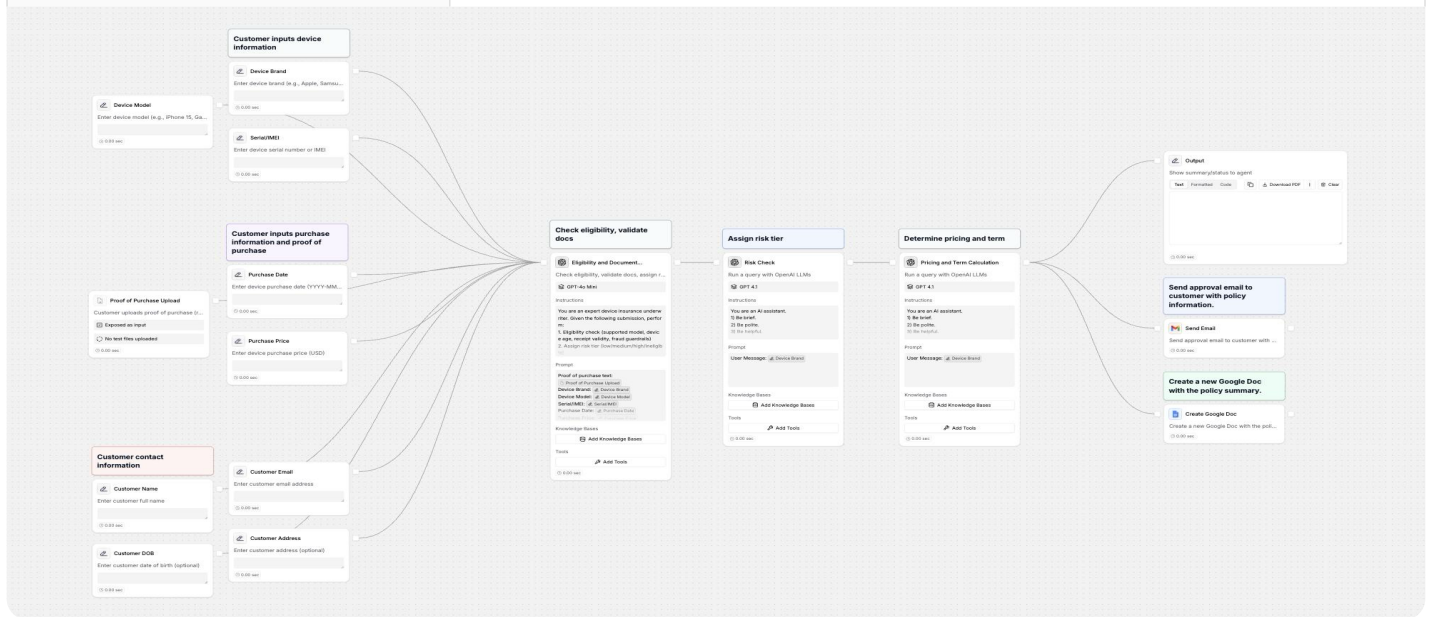
Use Case 1: Underwriting Assistant

Manual insurance underwriting for devices is slow, error-prone, and requires tedious document validation and eligibility checks.

This agent streamlines the device insurance underwriting workflow by guiding the customer (or agent) through structured data collection, capturing device details, purchase information, and customer contact data.

<p>Who It's For</p>	<p>Underwriters, Program Managers, Customer Service Reps</p>
<p>Results</p>	<ul style="list-style-type: none"> • Ensures only qualified devices are approved • Calculates personalized insurance pricing and terms • Customers receive fast, clear decisions and documentation
<p>Workflow</p>	<ol style="list-style-type: none"> 1. User enters device, contact, and proof of purchase info 2. LLM checks eligibility and validates documents 3. Two more LLMs calculate risk tier, pricing, and policy terms automatically 4. Agent sends the customer a policy summary by email and creates a Google Doc

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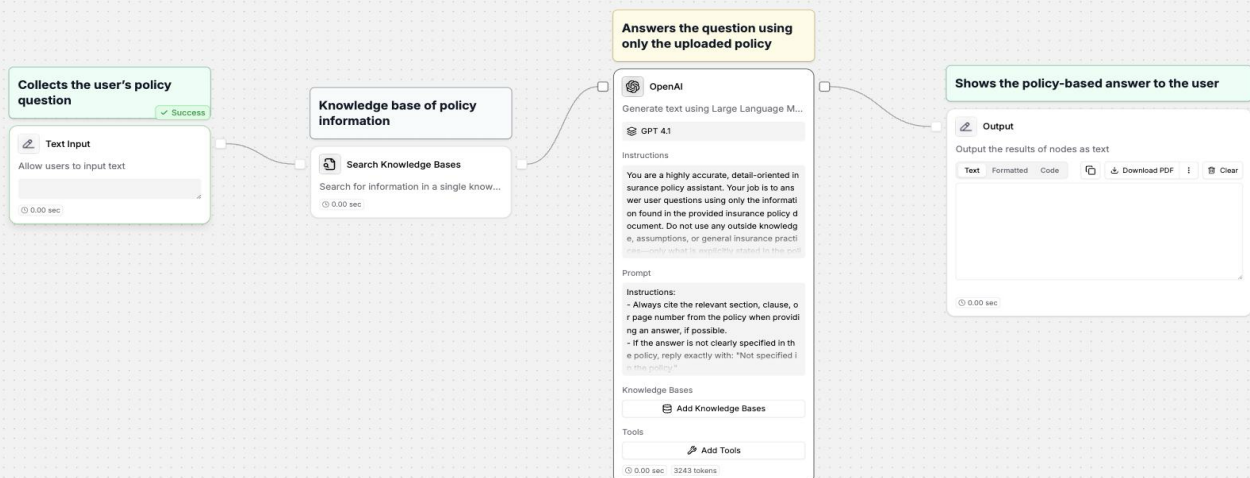
Use Case 2: Policy Q&A Agent

Insurance policies are long, complex, and full of legal jargon, making it difficult and time-consuming to find clear answers about coverage.

This chatbot is designed to answer user questions about insurance policies using only the information found in a set of uploaded policy documents.

Who It's For	Policyholders, Customer Support, Risk Managers
Results	<ul style="list-style-type: none"> • Accurate, document-based responses • No legal ambiguity: If the policy is unclear or silent on a question, the agent explicitly states this • Reliable support with instant, professional answers
Workflow	<ol style="list-style-type: none"> 1. User submits a policy question via a text input 2. Agent searches the uploaded policy documents for relevant information 3. LLM reviews the search results and formulates an answer strictly based on the policy text 4. The answer is displayed to the user with clear references to the Knowledge Base

See More



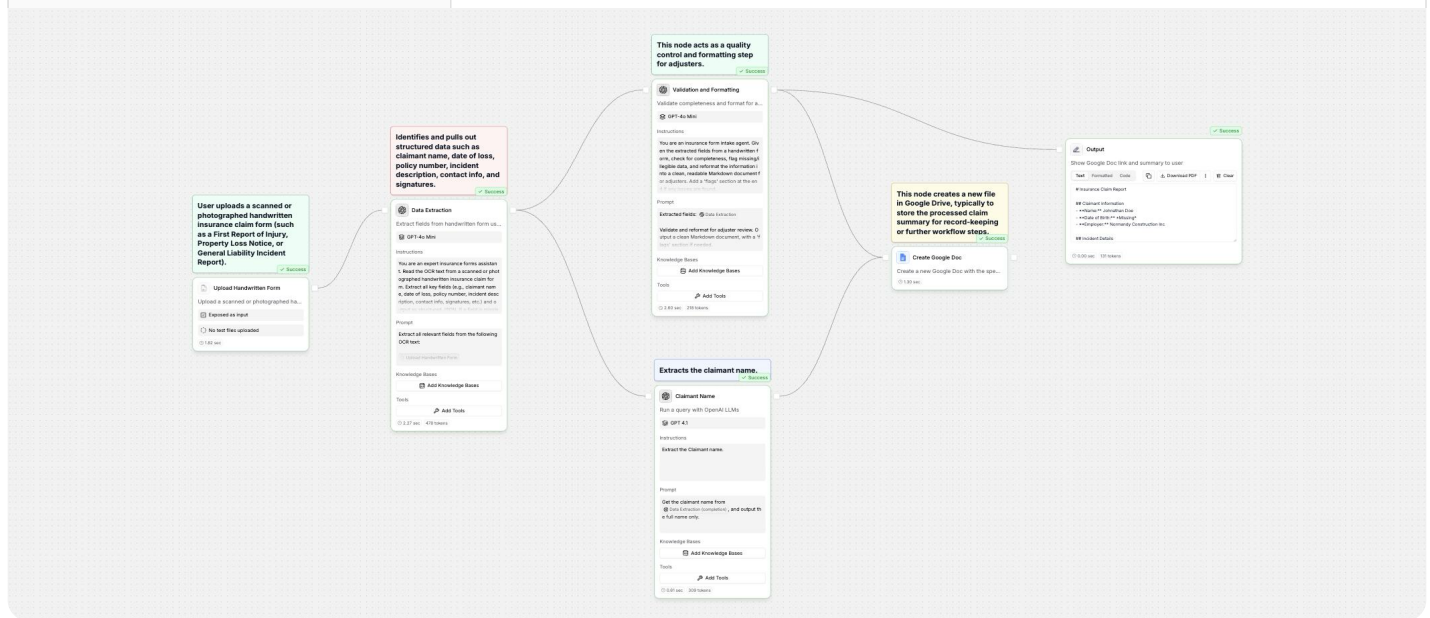
Use Case 3: Form Processing Agent

Manual data entry from handwritten insurance-related forms is burdensome for adjusters and intake teams.

This agent enables users to upload scanned or photographed handwritten insurance-related forms. It extracts legible, accurate data, then logs the information to a Google Doc.

<p>Who It's For</p>	<p>Claims Intake Teams, Adjusters, Administrative Staff</p>
<p>Results</p>	<ul style="list-style-type: none"> • Automatically extracts structured data from handwritten or scanned claim forms • Flags missing or illegible fields • Instantly digitizes and formats claim information
<p>Workflow</p>	<ol style="list-style-type: none"> 1. User uploads a scanned or photographed handwritten insurance form 2. LLM extracts all key fields (e.g., claimant name, date of loss, policy number, incident details) from the OCR text 3. LLM's extracted data is checked for completeness, flagged for any issues, and formatted into a clear report 4. A new Google Doc is created with the processed data

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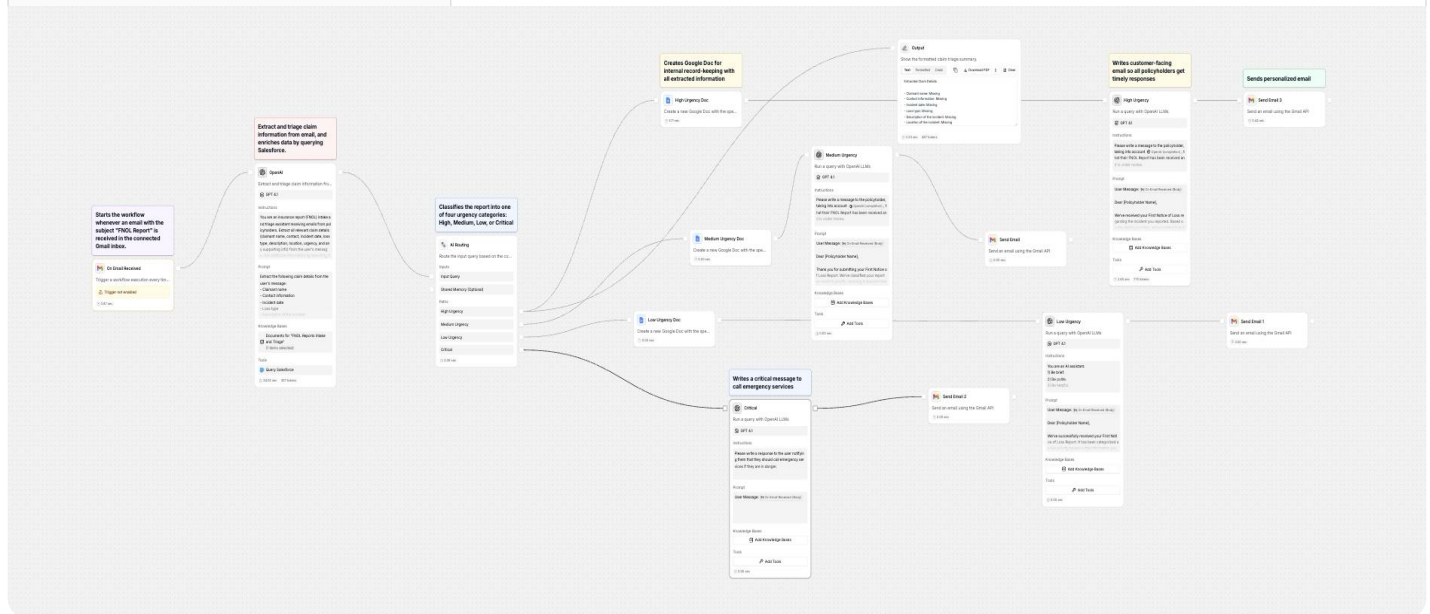
Use Case 4: FNOL Agent

Ensuring FNOL report details are complete and accurate is difficult, as users often provide vague or missing information at this step.

This agent streamlines FNOL intake, triage, and communication—making insurance claims processing faster, more accurate, and more customer-friendly.

<p>Who It's For</p>	<p>Claims Intake Teams, Customer Service Reps</p>
<p>Results</p>	<ul style="list-style-type: none"> Instantly extracts all key claim details Uses AI and Knowledge Base lookups to accurately categorize report urgency Automatically sends tailored responses and next steps to policyholders
<p>Workflow</p>	<ol style="list-style-type: none"> When a policyholder sends an FNOL, the agent automatically starts the workflow LLM extracts relevant details from the report and enriches missing data by querying Salesforce AI Routing classifies the claim's urgency Agent sends a personalized email to the policyholder with next, while summary is logged in Google Drive

[See More](#)



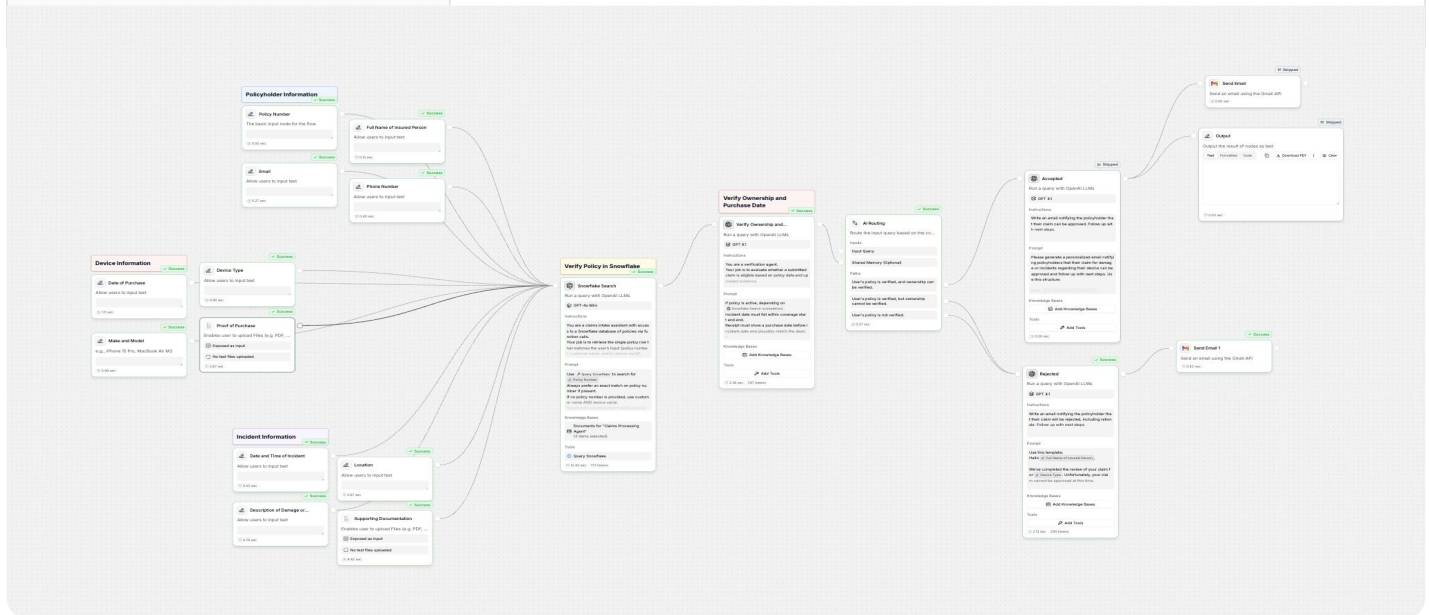
Use Case 5: Claim Processing Agent

Verifying insurance claims by hand is tedious, difficult, and requires cross-checking multiple data sources and documents.

This agent delivers fast, accurate, and consistent insurance claim decisions—improving both operational efficiency and customer satisfaction.

<p>Who It's For</p>	<p>Policyholders, Claims Intake Teams</p>
<p>Results</p>	<ul style="list-style-type: none"> • Instantly checks policy status and coverage in Snowflake • Uses AI to cross-check uploaded documents and user input for ownership and eligibility • Improved customer experience; reduced staff workload
<p>Workflow</p>	<ol style="list-style-type: none"> 1. Gathers policy number, details, and uploads from the user 2. LLM searches Snowflake database for matching policy and confirms its status 3. LLM checks if the claim is eligible by comparing uploads against policy data 4. Agent routes the claim for approval or rejection and automatically sends a personalized email to policyholder

[See More](#)



AI Agents for Insurance

<p>Use Case 6: IT Help Desk Agent</p>	<p>Problem: Agents and staff lose time waiting for IT tickets to be resolved, slowing claims and policy workflows.</p> <p>Solution: An AI help desk resolves common issues instantly and routes complex ones with full context, cutting downtime.</p>
<p>Use Case 7: Spreadsheet Chatbot</p>	<p>Problem: Analysts spend hours reconciling policy, claims, and financial data hidden in Excel sheets.</p> <p>Solution: An AI chatbot answers natural-language queries on spreadsheets, surfacing insights without manual formulas.</p>
<p>Use Case 8: Regulatory Compliance Agent</p>	<p>Problem: Compliance teams manually review policies and claims for state and federal requirements, risking costly errors.</p> <p>Solution: An AI agent cross-checks documents against regulatory rules, flagging gaps and ensuring filings are audit-ready.</p>
<p>Use Case 9: Policy Helpdesk for Brokers</p>	<p>Problem: Brokers waste hours chasing underwriters for answers on policy terms and eligibility.</p> <p>Solution: An AI-powered helpdesk provides instant, policy-grounded answers so brokers can serve clients faster.</p>
<p>Use Case 10: Billing and Payment Reconciliation</p>	<p>Problem: Finance teams struggle with late payments, mismatched ledgers, and manual reconciliations that slow reporting.</p> <p>Solution: An AI agent matches payments to policies in real time, flagging discrepancies and reducing churn risk.</p>
<p>Use Case 11: Meeting and Call Summarizer</p>	<p>Problem: Claims and underwriting meetings generate pages of notes that rarely get documented consistently.</p> <p>Solution: An AI summarizer captures decisions, action items, and compliance notes automatically, cutting follow-up work.</p>

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Government

Explore 10+ real-world AI agent use cases helping governments reduce manual, repetitive work, drive efficiency gains, and create positive outcomes for communities.

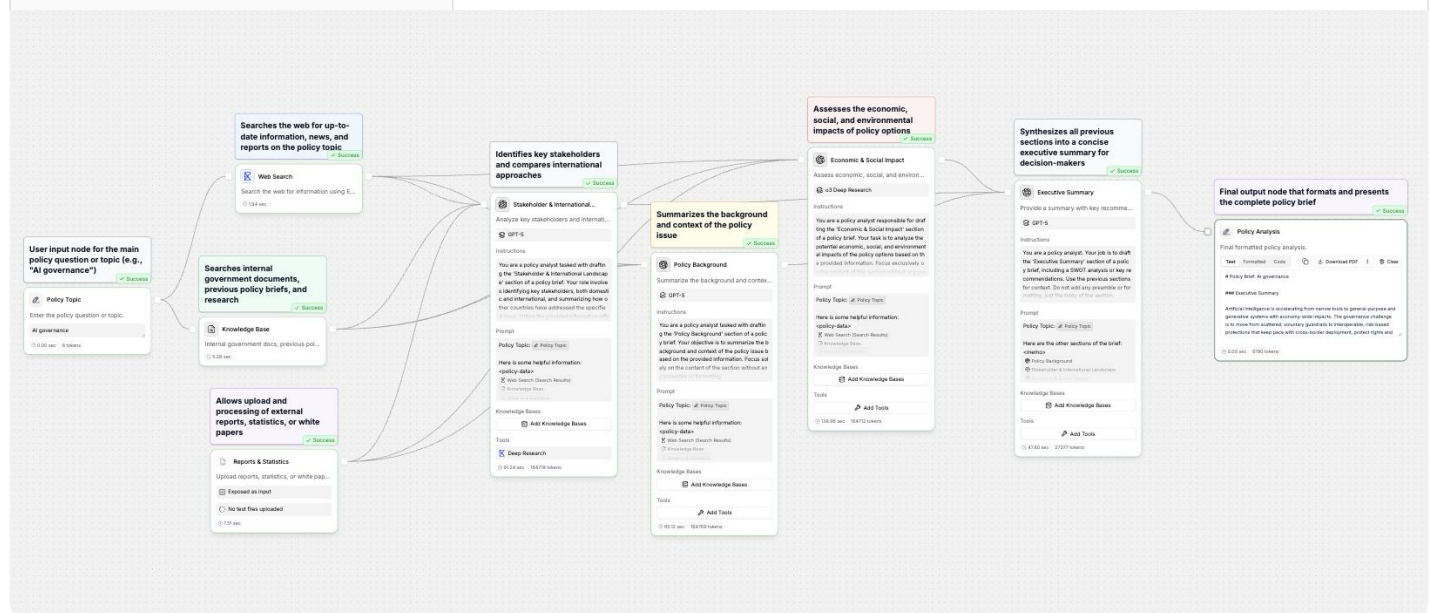
Use Case 1: Policy Memo Writer

Manually writing and formatting a comprehensive policy brief is slow and labor-intensive.

This agent automatically gathers the latest web, internal, and uploaded data on a policy topic. It drafts each section of a policy brief (background, stakeholders, impacts, and summary) using AI. The result is a ready-to-use, well-structured policy analysis for decision-makers.

Who It's For	Analysts, Researchers, Consultants
Results	<ul style="list-style-type: none"> Delivers a complete, formatted policy brief in minutes Integrates up-to-date web, internal, and uploaded sources Saves hours of manual research and writing
Workflow	<ol style="list-style-type: none"> User enters a policy topic. Agent gathers information using Web Search action and Knowledge Base of internal documents Three LLMs generate the Policy Background, Stakeholder & International Landscape, and Economic & Social Impact sections using all sources Another LLM generates the executive summary and formats the brief for review

See More



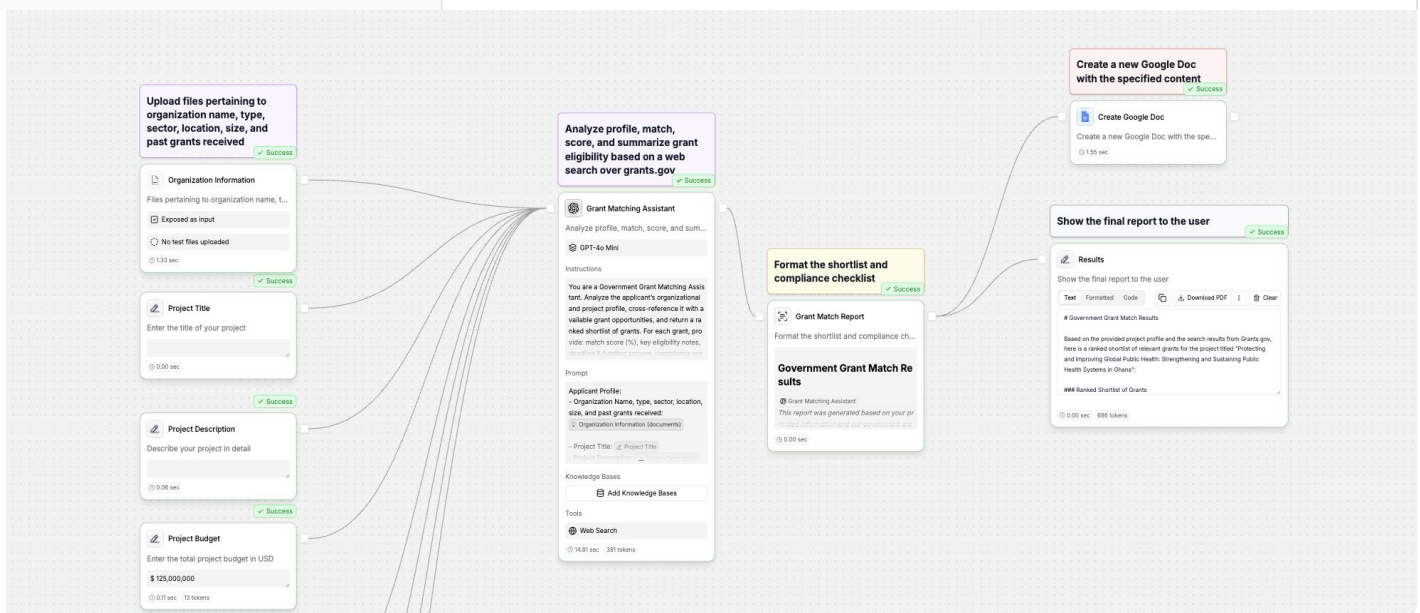
Use Case 2: Grant Matching Agent

Searching for, analyzing, and matching government grants to complex project profiles is time-consuming and error-prone.

This agent analyzes your organization and project details, searches grants.gov for relevant opportunities, and ranks the best matches. The results are formatted into a clear report.

Who It's For	Consultants, Grant Writers, Project Managers
Results	<ul style="list-style-type: none"> • Delivers a ranked shortlist of matching government grants • Provides key eligibility notes, deadlines, and funding details • Generates a formatted report and creates a Google Doc for easy sharing
Workflow	<ol style="list-style-type: none"> 1. User enters project and organization info and uploads relevant files 2. An LLM analyzes the profile and runs a web search for grants.gov opportunities 3. The Template node formats the matches 4. The Create Google Doc action saves the formatted report

[See More](#)



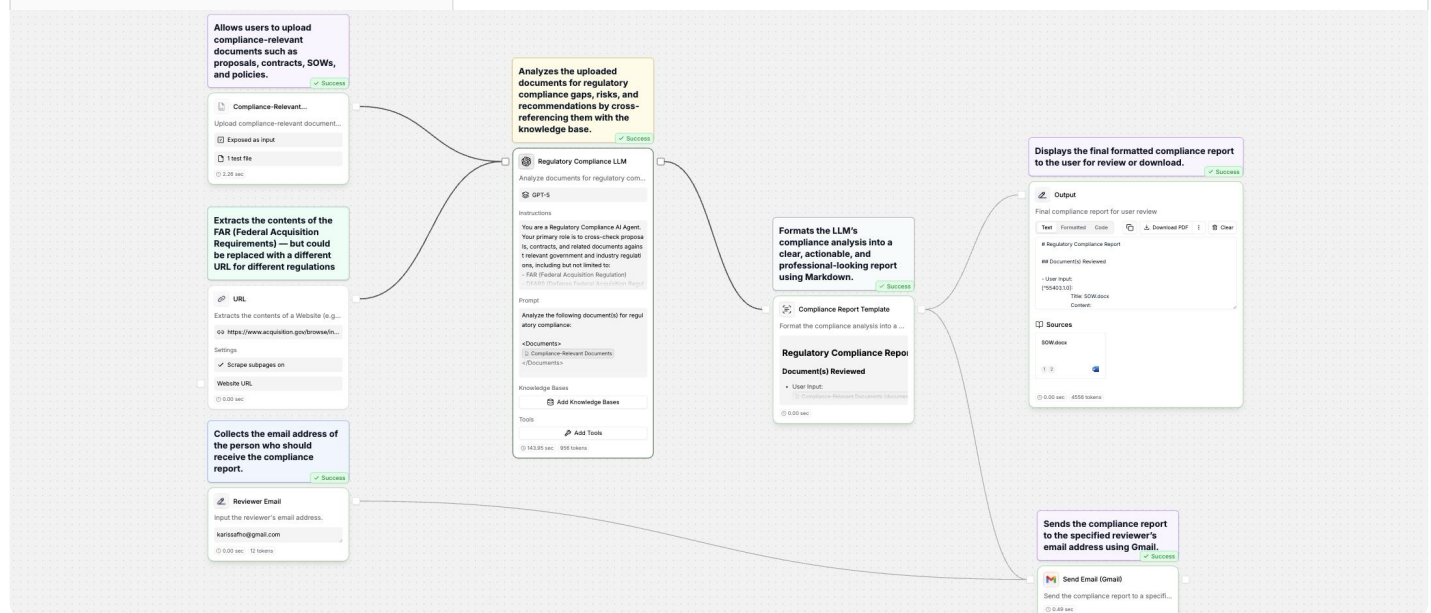
Use Case 3: Regulatory Compliance Agent

Reviewing contracts and proposals by hand for regulatory compliance is labor-intensive and inefficient, requiring deep expertise in multiple regulations.

This agent analyzes uploaded documents against official regulations (in this example, FAR), flags gaps and risks with an LLM, and delivers a clear report to a designated reviewer.

Who It's For	Project Managers, Compliance Officers, Risk Professionals
Results	<ul style="list-style-type: none"> Identifies missing, ambiguous, or non-compliant sections with cited regulations Provides actionable recommendations and redline edits Delivers a professional compliance report directly to the reviewer's inbox
Workflow	<ol style="list-style-type: none"> User uploads documents and enters the reviewer's email Agent extracts regulatory text from a specified URL and analyzes the documents using an LLM Compliance analysis is formatted into a clear report The final report is displayed to the user and automatically sent via email to the reviewer

See More



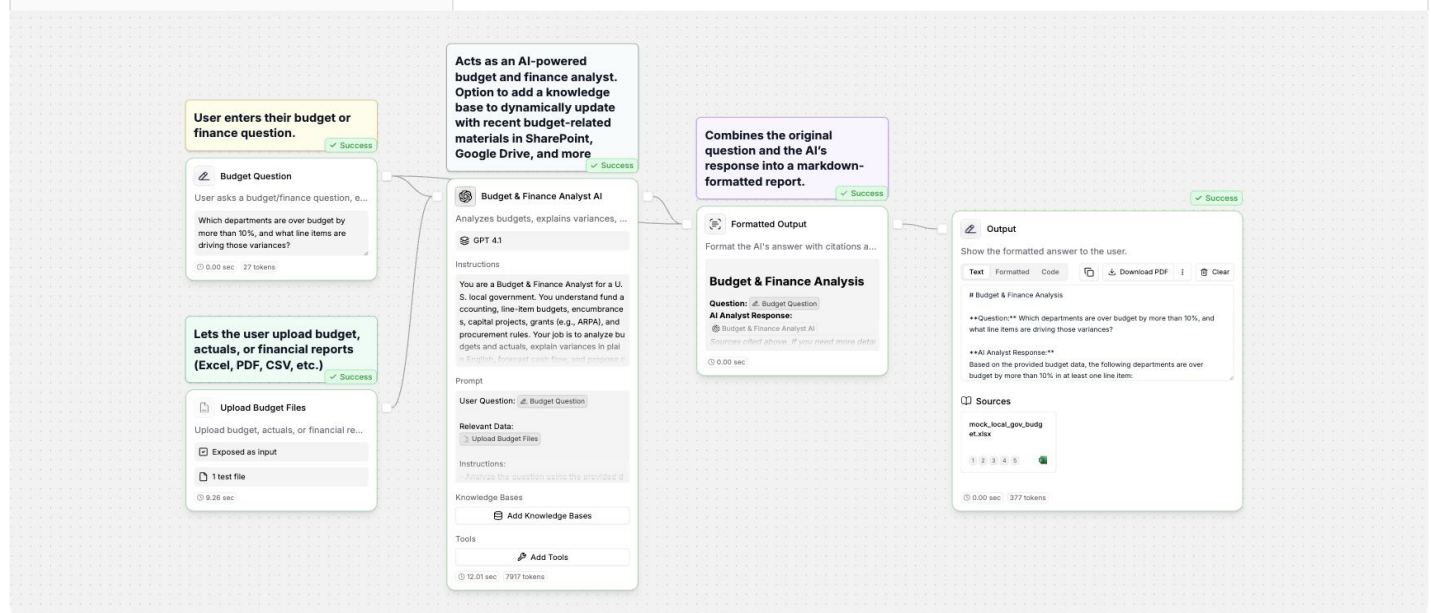
Use Case 4: Budgeting Agent

Manually searching for answers across budgets takes days, with high risk of errors and missed insights.

This AI agent analyzes budget spreadsheets, identifies variances, explains root causes, and forecasts risks, answering questions like “Which departments are over budget by more than 10%, and what line items are driving those variances?”

Who It's For	Finance Directors, City Managers, Budget Analysts
Results	<ul style="list-style-type: none"> Instantly identifies departments and line items with significant budget variances Provides plain-English explanations and actionable recommendations Cites exact sources (tables, files, report dates) for transparency and auditability
Workflow	<ol style="list-style-type: none"> User submits a budget/finance question AI Budget and Finance LLM reviews the question and analyzes the uploaded files Response is formatted with citations and presented clearly to the user

See More



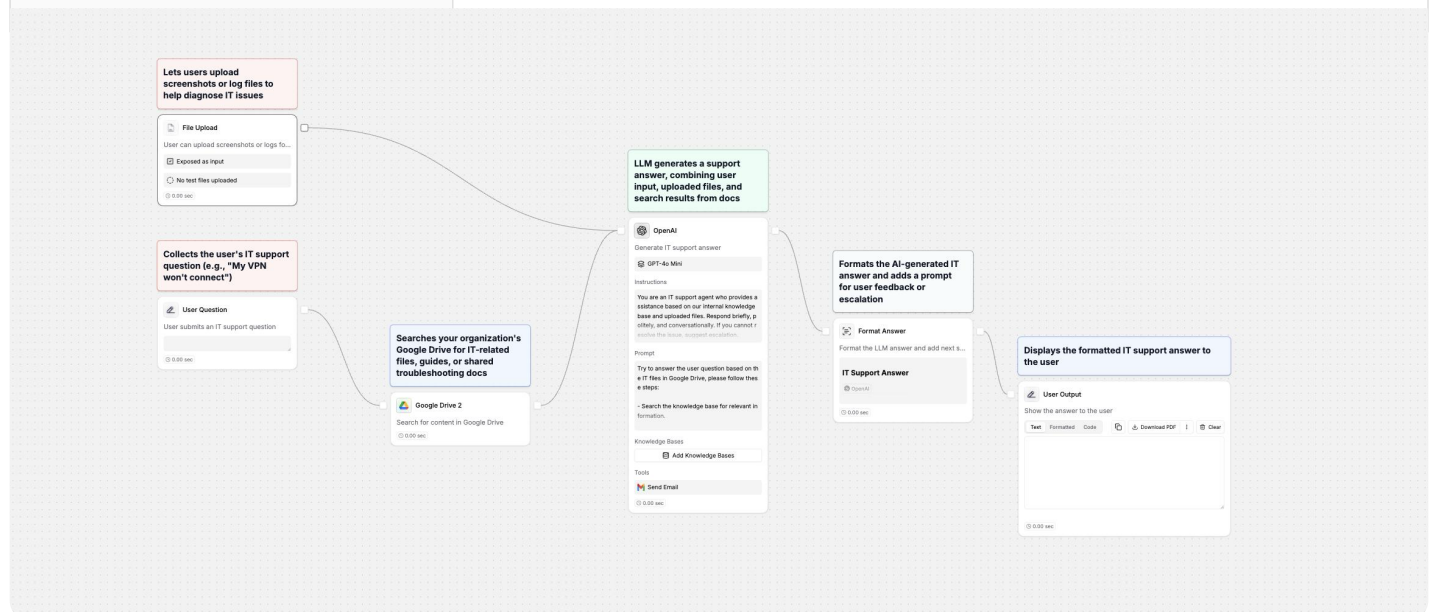
Use Case 5: IT Support Agent

IT support teams struggle with repetitive questions, while government employees struggle with slow response times and lack of visibility into unresolved issues.

This agent handles first-line IT support, instantly answering user questions, collecting feedback, and escalating unresolved issues—reducing manual workload and improving user satisfaction.

Who It's For	Administrators, Staff, and More
Results	<ul style="list-style-type: none"> • Instant AI-powered answers to IT questions using up-to-date internal resources • Automated, structured logging of every support interaction • Automatic escalation of unresolved issues to humans
Workflow	<ol style="list-style-type: none"> 1. User submits an IT question and any relevant images 2. LLM searches internal docs and Google Drive for correct answers 3. LLM generates a comprehensive support response 4. If LLM cannot generate a response, will escalate issue by sending a message via email to a human reviewer

See More



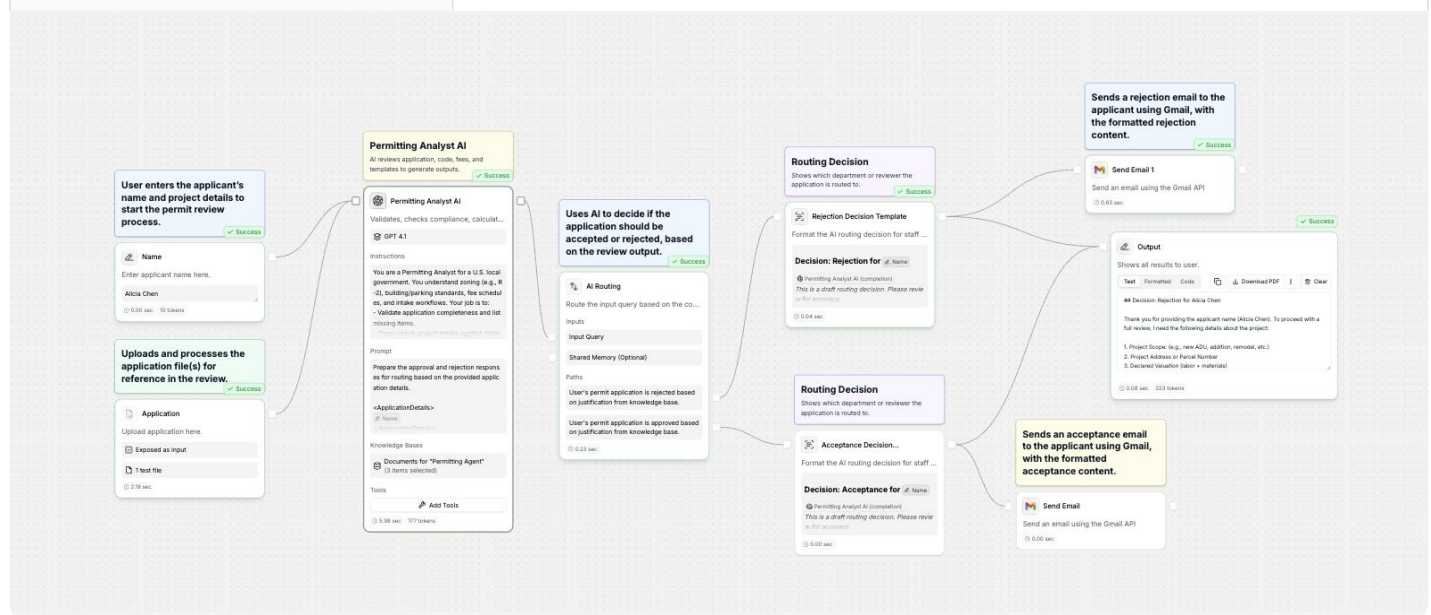
Use Case 6: Permitting Agent

Processing permits by hand and communicating approvals or rejections is slow, paperwork-heavy, and frustrating for both residents and staff.

This AI agent covers the end-to-end permitting workflow. Applicants get instant feedback to their email, while approvals and denials are taken care of automatically for staff with AI routing.

Who It's For	Business Licensing Officers, Permit Coordinators
Results	<ul style="list-style-type: none"> • Cuts permit approval time from weeks to days • Reduces staff workload and error rates • Improves resident and business satisfaction with faster, clearer responses
Workflow	<ol style="list-style-type: none"> 1. Applicant submits package via file upload node 2. LLM reviews the application for completeness, code compliance, and fee calculation, then rejects or approves 3. AI routing node routes applicants to proper messaging flow—automatically and intelligently 4. Formatted approval or rejection messages are output and sent to applicant via email

[See More](#)



AI Agents for Government

<p>Use Case 7: Spreadsheet Assistant</p>	<p>Problem: Complex spreadsheets block quick access to insights and slow down decision-making.</p> <p>Solution: Lets employees “chat” with spreadsheets—summarizing data and answering questions instantly, without technical skills.</p>
<p>Use Case 8: Procurement and Vendor Review Agent</p>	<p>Problem: Reviewing bids and vendor contracts is slow and prone to missing compliance details.</p> <p>Solution: Quickly scans, compares, and flags vendor submissions for compliance, risk, and eligibility.</p>
<p>Use Case 9: Document Ingestion and Classification Agent</p>	<p>Problem: City staff spend hours filing permits, forms, and records across multiple systems.</p> <p>Solution: Automatically scans, extracts, and classifies documents into the right categories and systems.</p>
<p>Use Case 10: Employee Training and Onboarding Agent</p>	<p>Problem: Onboarding new government employees is inconsistent and resource-heavy.</p> <p>Solution: Provides step-by-step training and policy guidance to ensure fast, standardized onboarding.</p>
<p>Use Case 11: Language Access Agent</p>	<p>Problem: Residents with limited English proficiency struggle to access city services.</p> <p>Solution: Instantly translates forms, documents, and citizen inquiries to improve accessibility.</p>

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Finance

Explore 15+ real-world AI agent use cases helping finance teams eliminate laborious tasks, speed up decisions, and drive smarter, more scalable operations.

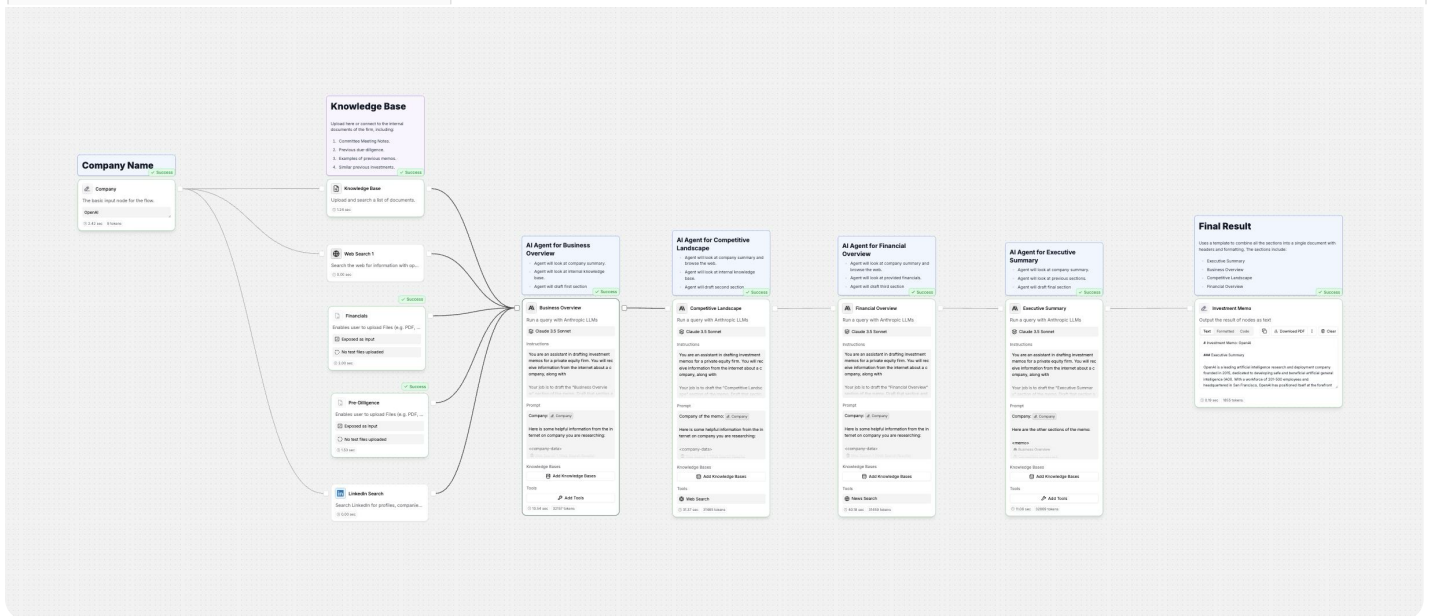
Use Case 1: Investment Memo Generator

Memo drafting is slow, repetitive, and distracts analysts from high-value work.

StackAI automates memo drafting by consolidating pitch decks, financials, meeting notes, and external research—cutting turnaround time from hours to minutes and ensuring professional, error-free reports.

<p>Who It's For</p>	<p>Private Equity & VC Analysts, Investment Associates, Corporate Strategy Teams</p>
<p>Results</p>	<ul style="list-style-type: none"> • Reduce research & drafting time by 80%. • Ensure memo consistency & data accuracy across teams. • Free up analysts to focus on high-value strategic insights.
<p>Workflow</p>	<ol style="list-style-type: none"> 1. Upload pitch decks, financial documents, meeting notes, and relevant URLs. 2. AI agent extracts business insights and cross-references with your Knowledge Base (Sharepoint, Dropbox, Drive...). 3. Generates a structured memo with Executive Summary, Financial Overview, Competitive Landscape, and more. 4. Export as an advanced form interface and share with internal or external stakeholders.

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Use Case 2: Document Comparison Agent

Reviewing document versions to spot changes is tedious, error-prone, and slows down reporting workflows.

StackAI instantly compares document versions (Excel, Word, PDF), highlights changes, and outputs a structured difference report—saving analysts hours of manual review.

Who It's For	Finance Teams, Controllers, Auditors, Investment Analysts
Results	<ul style="list-style-type: none"> • Eliminate manual comparison errors. • Provide transparent, audit-ready difference reports. • Scale version tracking across multiple documents effortlessly.
Workflow	<ol style="list-style-type: none"> 1. Upload different versions of a document (Excel, Word, PDF). 2. AI agent automatically detects changes across sheets, cells, and values. 3. Generates a structured comparison report with sheet names, cell references, and old vs. new values. 4. Receive the report as structured data, ready for export and sharing.

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The screenshot illustrates the StackAI workflow for document comparison. It shows two document upload sections, 'Business Plan Version 1' and 'Business Plan Version 2', each with a 'Success' indicator. The central 'Analyze Differences with AI' section shows a prompt: 'Compare the two Excel files and identify the differences.' Below the prompt, it lists the files analyzed: 'Document 1' and 'Document 2'. The 'Output' section displays a table of changes in a structured format, showing sheet names, cell references, and old vs. new values.

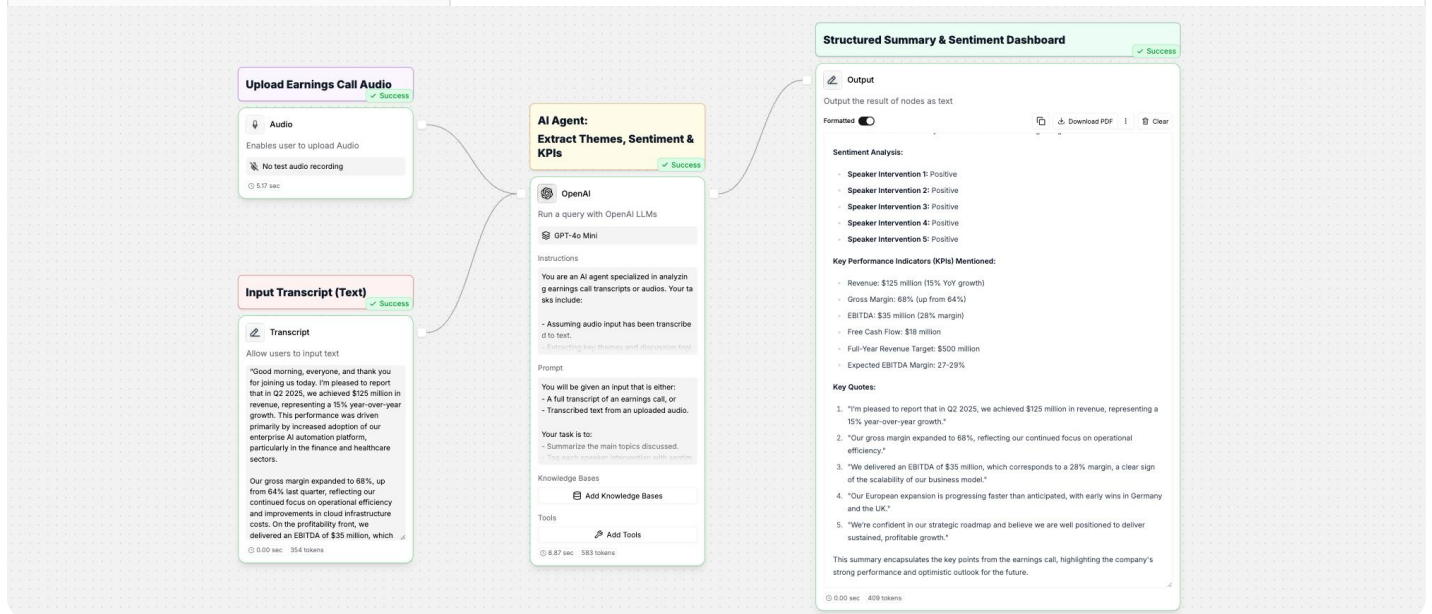
Sheet	Cell (approx.)	Old Value (v1)	New Value (v2)
BUDGET	R5 (DIRECT COSTS - May-26)	28,230 €;1	90,000 €;2
BUDGET	AAS (DIRECT COSTS - TOTAL 2026)	387,160 €;3	448,930 €;4
BUDGET	RT2 (Contribution Margin - May-26)	25,726 €;5	-36,043.95 €;6
BUDGET	AA12 (Contribution Margin - TOTAL 2026)		

Use Case 3: Earnings Call Insight and Sentiment Analyst

Parsing earnings-call transcripts is time-consuming and misses tonal cues.

StackAI summarizes each call in minutes, tags sentiment by speaker, and pulls cited KPIs—so teams react faster post-call.

<p>Who It's For</p>	<p>Investment Analysts, Portfolio Managers, IR Teams</p>
<p>Results</p>	<ul style="list-style-type: none"> • Insight and sentiment in minutes, vs. hours of review • Speeds up trading, reporting, and investment decision-making. • Consistent output structure for quick internal circulation.
<p>Workflow</p> <div data-bbox="138 1213 513 1297" style="background-color: black; color: white; padding: 10px; text-align: center; margin-top: 20px;"> <p>See More</p> </div>	<ol style="list-style-type: none"> 1. Upload earnings call audios or transcripts. 2. AI agent extracts key themes, KPIs, and tags sentiment by speaker (positive, neutral, negative). 3. Generates a one-page brief with main topics, sentiment dashboard, and key quotes. 4. Receive the report as a structured PDF, ready for investment committees or client notes.



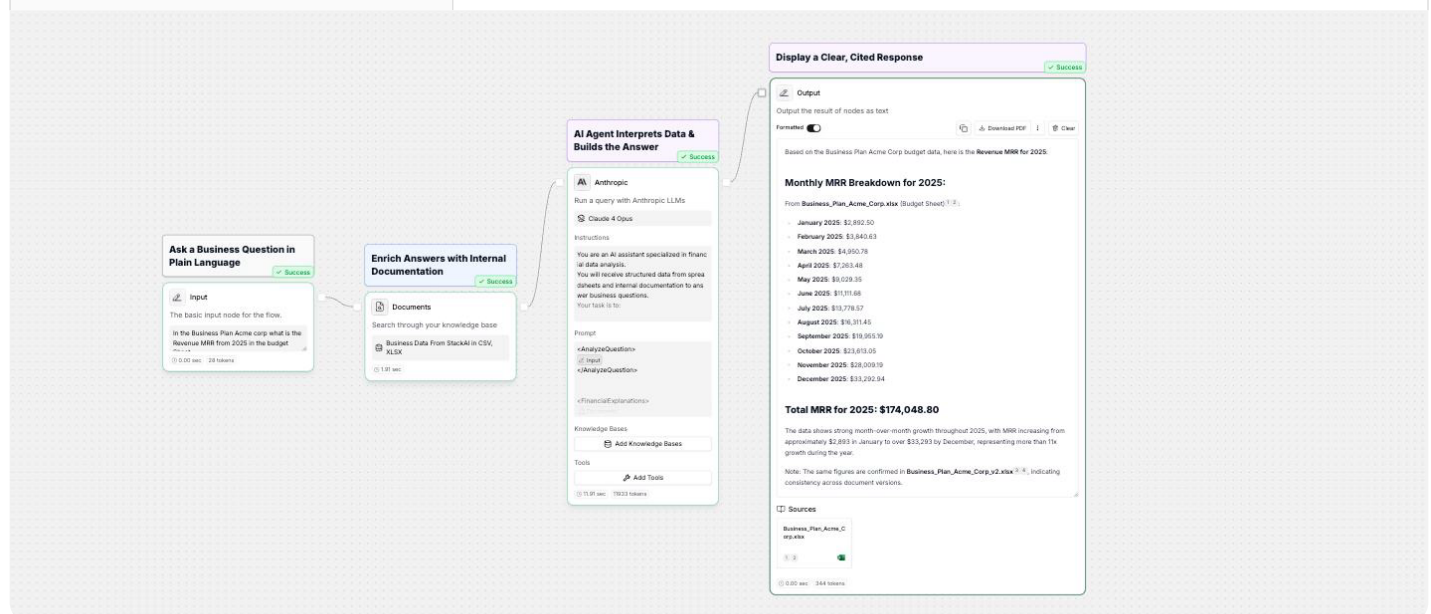
Use Case 4: Spreadsheet Assistant

Complex spreadsheets block quick access to business insights and slow decision-making.

StackAI lets teams “chat” with spreadsheets—summarizing data and answering questions instantly, without technical skills.

Who It's For	Business Teams, Operations Analysts, Strategy Teams
Results	<ul style="list-style-type: none"> • Get spreadsheet insights in seconds—with cell-level citations. • Eliminate 90% of manual spreadsheet parsing time. • Empower business teams to self-serve without formulas or BI tools.
Workflow	<ol style="list-style-type: none"> 1. Submit a business question or data request. 2. Upload spreadsheets (CSV, XLSX) or connect live tables. 3. AI Agent scans sheets, finds answers, and auto-cites cell references. 4. Enriches answers with internal documentation if needed. 5. Delivers a clear, cited response in plain language.

See More



Use Case 5: Financial Statement Reconciliation Assistant

AI-powered reconciliation of bank statements—without the manual grind.

StackAI automatically cross-matches ledger data with bank feeds, flags discrepancies, and proposes journal entries—accelerating the close process and reducing risk.

<p>Who It's For</p>	<p>Accounting Teams, Internal Control Teams, Financial Auditors</p>
<p>Results</p>	<ul style="list-style-type: none"> • 95% of transactions reconciled automatically in minutes. • 30% faster month-end close. • Audit-ready traceability for SOX / IFRS compliance.
<p>Workflow</p>	<ol style="list-style-type: none"> 1. Upload general ledger export and bank statements (CSV, Excel, or PDF). 2. Auto-match transactions by amount, date, and description. 3. Identify and flag unmatched entries with context-aware reasoning. 4. Generate proposed journal entries for reconciliation. 5. Export and send a summary report for review.

[See More](#)

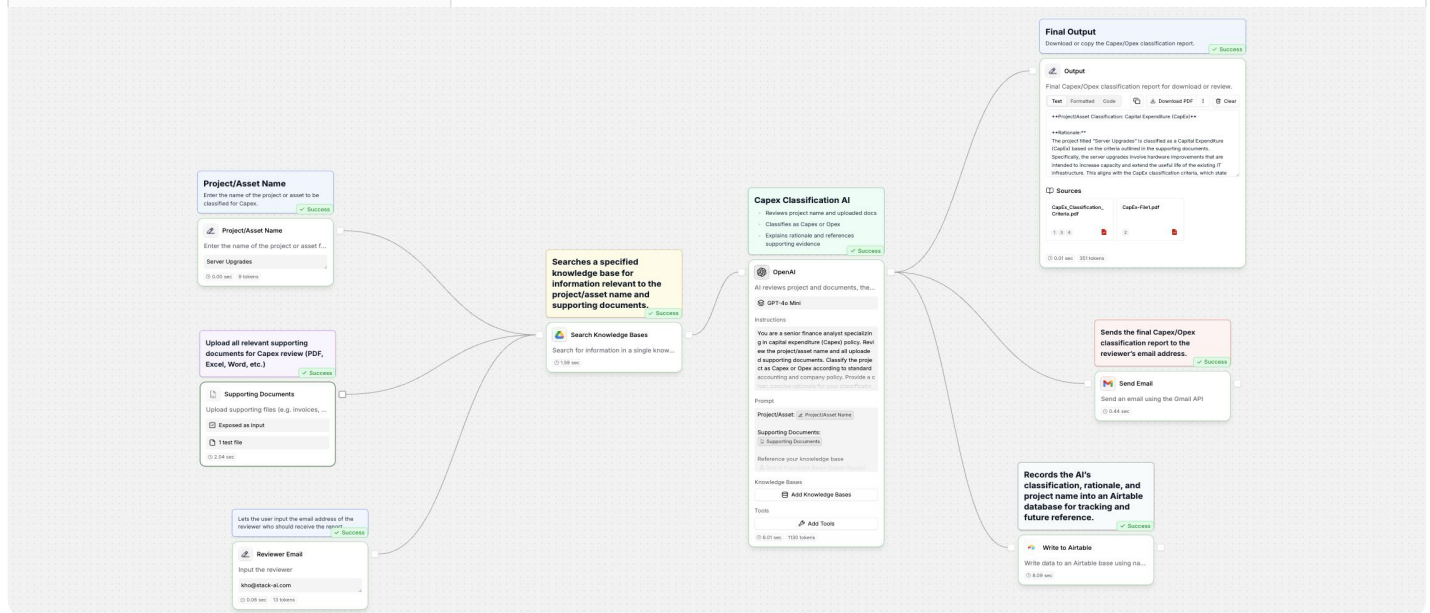
The diagram illustrates the AI workflow for financial statement reconciliation. It starts with uploading financial statements in Excel or PDF format. The system then uses AI to extract and compare sections from the documents. A visual comparison table is generated, showing discrepancies between two documents. The AI explains the financial impact of these differences. Finally, a summary report of differences and insights is generated, which can be emailed to stakeholders.

Use Case 6: CapEx Classification Agent

Manual CapEx vs. OpEx reviews are slow, error-prone, and risk costly tax mistakes.

StackAI automatically analyzes RFCs and project documents, classifies each cost as CapEx or OpEx, and provides policy-backed justifications—unlocking tax savings and ensuring audit readiness.

<p>Who It's For</p>	<p>Finance and Accounting Teams, Controllers, Tax Managers</p>
<p>Results</p>	<ul style="list-style-type: none"> • >\$1M in annual tax savings through consistent and audit-backed CapEx classification. • 90% faster review time vs. manual RFC document checks. • Reduces risk and ensures compliance, with citations from internal accounting policy docs.
<p>Workflow</p> <div data-bbox="138 1165 516 1249" style="background-color: black; color: white; padding: 10px; text-align: center; margin-top: 20px;"> <p>See More</p> </div>	<ol style="list-style-type: none"> 1. Upload RFCs and internal CapEx policy docs. 2. AI Agent extracts key data points. 3. Classifies each cost line as CapEx or OpEx with citation. 4. Requests clarification when needed. 5. Generates audit-ready capitalization report.

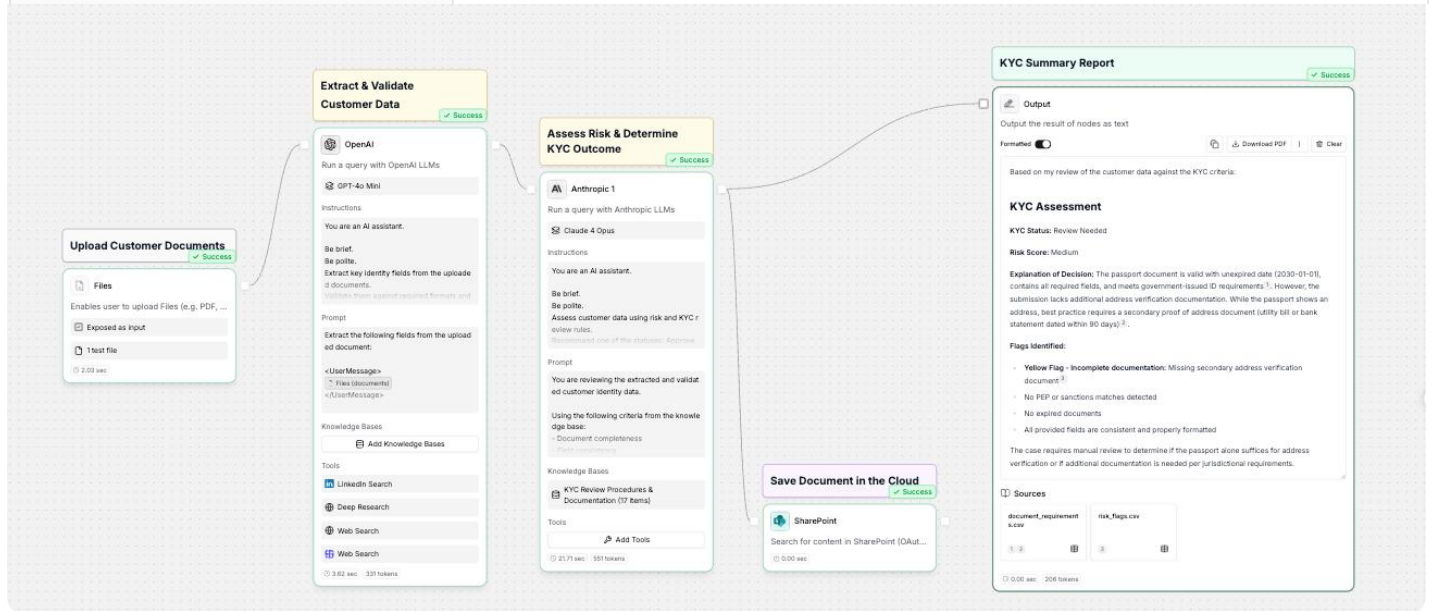


Use Case 7: KYC Automation Agent

Manual "Know Your Customer" checks slow onboarding and increase compliance costs.

Use StackAI to automate the extraction, validation, and risk assessment of customer identity and financial documents. The agent processes multiple formats (PDFs, scanned IDs, utility bills), cross-verifies data, flags inconsistencies, and generates a compliance-ready KYC report.

Who It's For	Compliance/AML Teams, Risk Officers, Banking Operations
Results	<ul style="list-style-type: none"> • 90–95% of profiles auto-verified without manual review. • KYC checks completed in < 2 minutes per customer. • Structured reports ready for audit, with full traceability.
Workflow	<ol style="list-style-type: none"> 1. Upload identity documents (passport, ID, utility bills, etc.). 2. Extract key fields OCR and LLMs. 3. Compare and validate extracted data. 4. Flag inconsistencies with risk-level tagging. 5. Generate a structured KYC. 6. Export and send the report via email for audit trail.

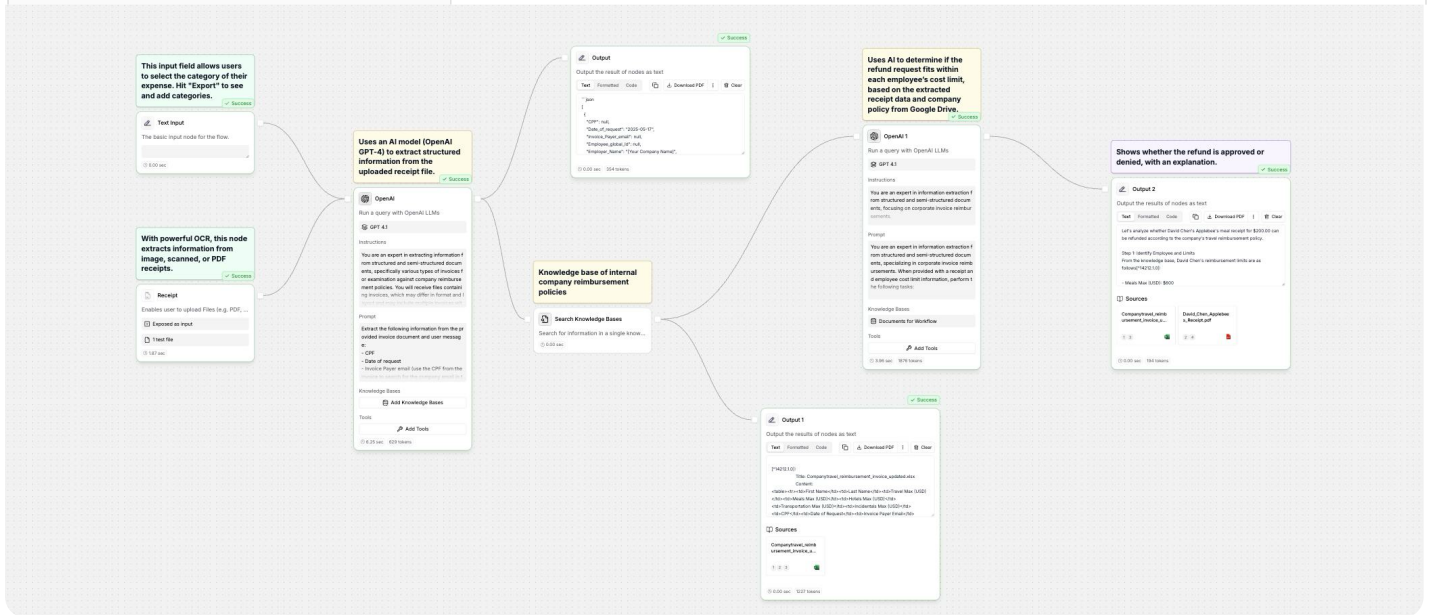


Use Case 8: Refund and Expense Agent

Manual refund requests slow down finance teams and introduce policy compliance risks.

Use StackAI to automate refund requests by extracting data from receipts, checking policy compliance, flagging issues, and creating support tickets—all in one streamlined workflow.

<p>Who It's For</p>	<p>Finance Teams, HR Ops, Controllers, Travel Admins</p>
<p>Results</p>	<ul style="list-style-type: none"> • 90%+ of valid claims processed without manual review. • Refund decisions made in < 1 minute per request. • Audit-ready logs with policy reasoning per claim.
<p>Workflow</p>	<ol style="list-style-type: none"> 1. Upload receipt or invoice for reimbursement. 2. Extract relevant data (amount, category, date, vendor). 3. Classify the expense (e.g. meals, travel, accommodation). 4. Validate against reimbursement policy using connected data. 5. Determine refund eligibility with explanation. 6. Export and send report or create ticket for processing.



AI Agents for Finance I

<p>Use Case 9: 10-Q/10-K Filing Extractor Agent</p>	<p>Problem: Analyzing regulatory filings is slow, dense, and repetitive for finance teams.</p> <p>Solution: StackAI extracts key sections from 10-Q/10-K filings—risk, debt, financials—and delivers structured summaries, cutting hours of manual review.</p>
<p>Use Case 10: Investor Lead Scoring Agent</p>	<p>Problem: Investor prospecting is slow and manual, making it hard to prioritize the most relevant LPs or VC firms.</p> <p>Solution: StackAI automates investor lead scoring by aggregating firmographics, funding history, and interaction data—generating prioritized lists for your fundraising or investor relations team.</p>
<p>Use Case 11: Finance FAQ Assistant</p>	<p>Problem: Teams spend hours answering recurring questions about financial compliance, audits, and investor queries.</p> <p>Solution: StackAI automates FAQ responses by pulling from internal knowledge bases and document repositories, delivering fast, accurate answers to finance-related inquiries.</p>
<p>Use Case 12: Valuation Modeling Agent</p>	<p>Problem: Building DCF and comparable-company models is labor-intensive and prone to formula errors.</p> <p>Solution: StackAI ingests historicals, projections, and market multiples to auto-generate a full valuation model (DCF, trading comps, and sensitivity tables) in minutes.</p>
<p>Use Case 13: Portfolio Rebalancing Agent</p>	<p>Problem: Portfolios drift from target weights, and manual rebalance models take hours.</p> <p>Solution: StackAI ingests holdings and target policy, calculates drift, proposes tax-aware trades, and outputs a ready-to-execute order list.</p>

Want to see more?

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AI Agents for Finance II

<p>Use Case 14: Cash-Flow Forecast & Scenario Planner</p>	<p>Problem: Limited cash visibility delays decisions and increases liquidity risk.</p> <p>Solution: StackAI auto-builds a 13-week cash-flow model and best, base, and worst scenarios from your uploads—eliminating hours of manual spreadsheet work.</p>
<p>Use Case 15: Buy Side vs. Sell Side Agent</p>	<p>Problem: Manual company comparisons slow down decision-making and introduce errors in portfolio analysis.</p> <p>Solution: StackAI automates company comparisons by merging data from documents, financials, and web sources into instant, structured reports for faster decisions.</p>
<p>Use Case 16: Competitive Analysis Assistant</p>	<p>Problem: Competitor insights are scattered across sources, making manual research slow and fragmented.</p> <p>Solution: StackAI automates competitor analysis by gathering and comparing data from web sources and internal knowledge bases—delivering structured comparison reports in minutes.</p>
<p>Use Case 17: Due Diligence Assistant</p>	<p>Problem: Company vetting is slow and repetitive, delaying decisions and limiting scalability.</p> <p>Solution: StackAI automates due diligence by pulling insights from documents, web sources, and emails—streamlining research and enabling analysts to vet more companies, faster.</p>
<p>Use Case 18: Vendor Analysis</p>	<p>Problem: Vendor evaluation across performance, pricing, and terms is often manual and inconsistent.</p> <p>Solution: StackAI analyzes vendor contracts, service-level agreements, and related documents to generate structured comparison outputs that accelerate vendor selection.</p>

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Education

Explore 10+ real-world AI agent use cases helping top universities reduce manual, repetitive work, foster learning and exploration, and drive smarter education operations.

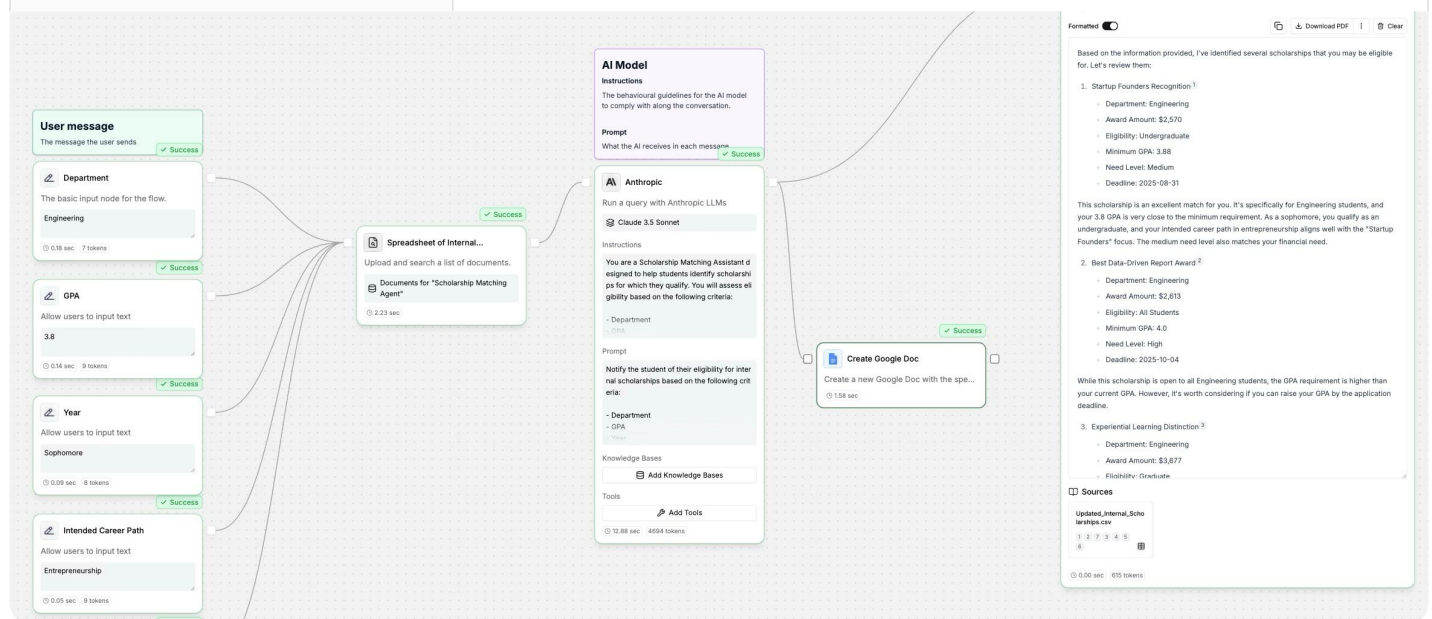
Use Case 1: Scholarship Matching Agent

Finding the right scholarships is often a slow, manual process for both students and staff.

Automatically match students to scholarships they qualify for in seconds by building a Scholarship Matching AI Agent, which outputs personalized eligibility results based on student input (department, GPA, year, career path, financial need).

<p>Who It's For</p>	<p>Students, Administrators, Department Heads</p>
<p>Results</p>	<ul style="list-style-type: none"> • Streamlined, repeatable process—no manual review required • Criteria-based scholarship matching using up-to-date internal data • Easy sharing and record-keeping via Google Docs
<p>Workflow</p>	<ol style="list-style-type: none"> 1. User enters Department, GPA, Year, Intended Career Path, and Financial Need. 2. Google Drive is searched for internal scholarship information. 3. Anthropic AI reviews user info and scholarship data to determine eligibility. 4. A new Google Doc is created with the eligibility results.

[See More](#)



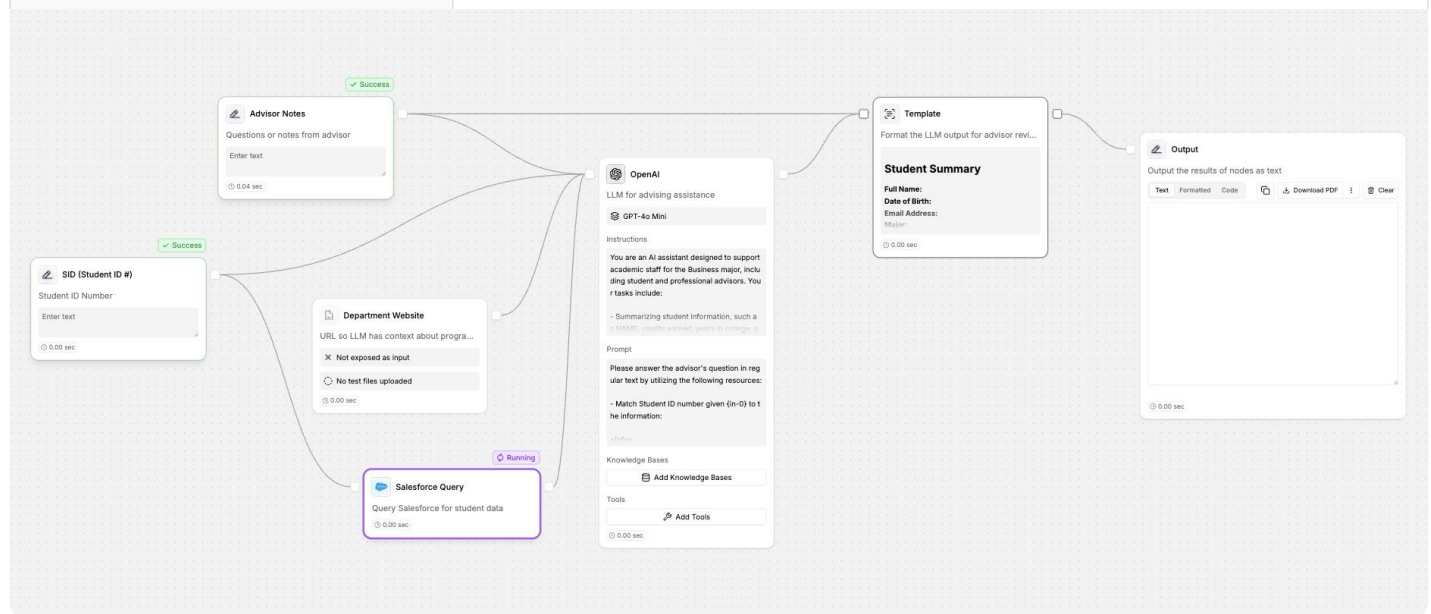
Use Case 2: Advising Assistant

Academic advisors face challenges of quickly gathering and synthesizing student information from multiple sources to provide accurate, relevant, and timely guidance.

This agent personalizes student advising by pulling student data from Salesforce, referencing department requirements, and generating a tailored summary.

Who It's For	Academic Advisors, Counselors
Results	<ul style="list-style-type: none"> • Retrieval of student data from Salesforce using Student ID • AI-generated summary of student's academic status, career interests, and extracurriculars • Live reference to department/program requirements from the official website
Workflow	<ol style="list-style-type: none"> 1. The advisor enters the Student ID and their notes or questions. 2. The workflow queries Salesforce for student information using the provided Student ID. 3. The OpenAI LLM combines Salesforce data, the department website, and advisor notes to generate a student summary and answer the advisor's question.

See More



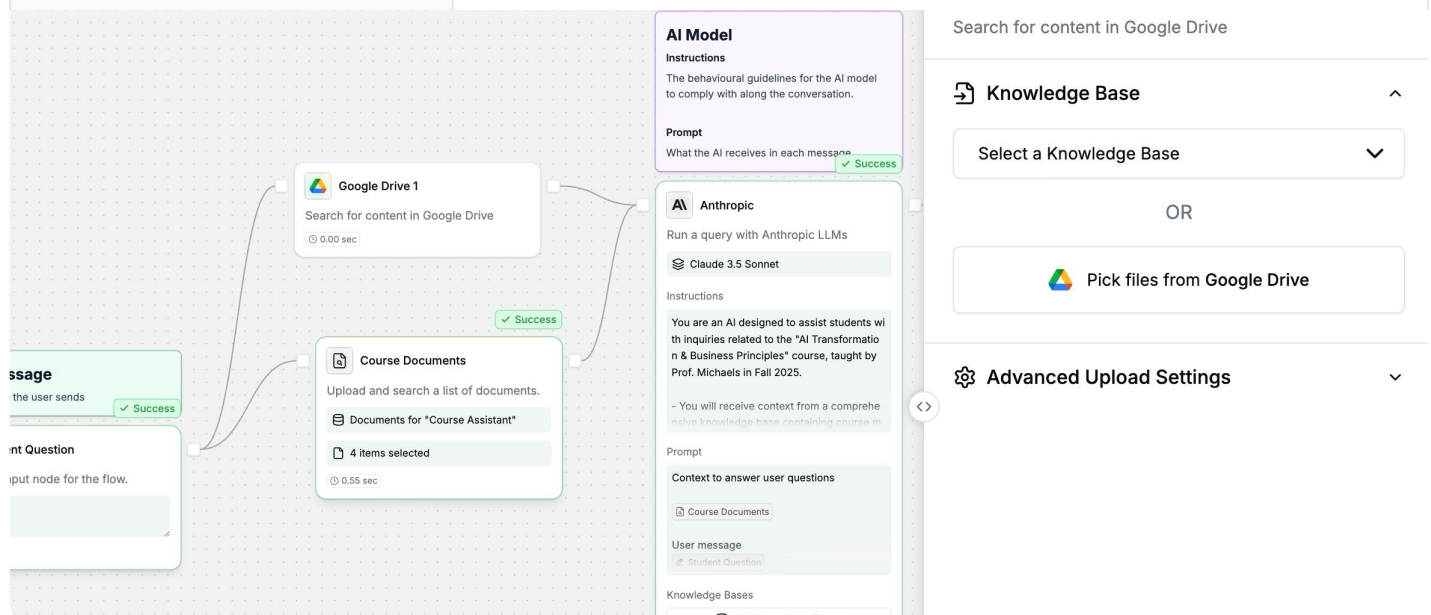
Use Case 3: Course Assistant

Answering student questions eats up valuable faculty and admin time, pulling focus from teaching and engagement.

This agent answers student questions about a specific course by searching across course documents, Google Drive, and SharePoint, then generates a concise, well-formatted answer.

Who It's For	Faculty, Students, TAs, Academic Support Staff
Results	<ul style="list-style-type: none"> • Unified search across course documents, Google Drive, and SharePoint • AI-generated, concise, and friendly answers tailored to student questions • Reduced manual workload for instructors and staff
Workflow	<ol style="list-style-type: none"> 1. Upload various course documents (Excel, Word, PDF) 2. LLM searches course, Google Drive, and SharePoint docs, then answers student questions 3. Friendly answer is formatted and shown to the user 4. Students receive the answer; optionally, a new task is created with the answer on a task management platform

[See More](#)



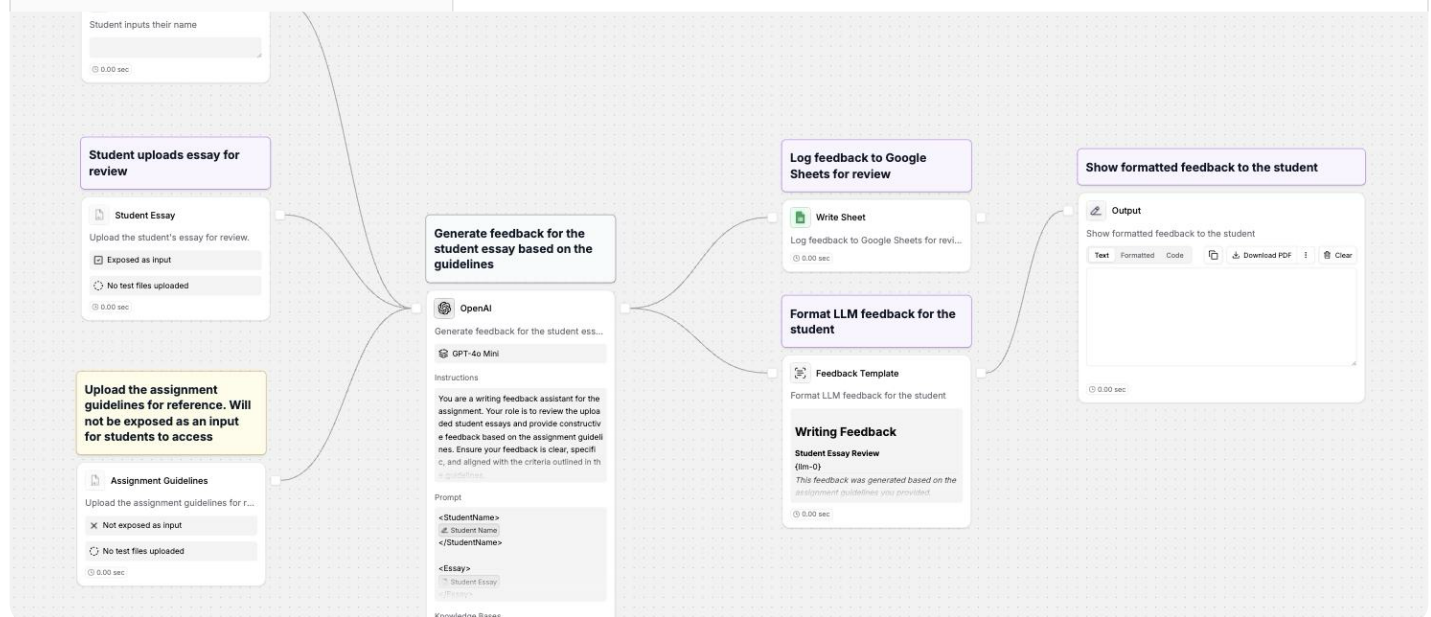
Use Case 4: Writing Feedback Agent

Writers and students lose time on manual edits, inconsistent feedback, and back-and-forth reviews.

This agent reviews drafts for clarity, tone, structure, and correctness, then suggests targeted edits with examples.

Who It's For	Faculty, TAs, Students
Results	<ul style="list-style-type: none"> Agent reviews essays against provided guidelines, ensuring fairness and clarity Students receive clear, structured feedback as soon as they submit ahead of deadlines All feedback and file references are logged in a Google Sheet for easy review and auditing
Workflow	<ol style="list-style-type: none"> User provides their name and uploads their essay Agent reviews the essay using the guidelines and generates detailed feedback The feedback is formatted for the student and also logged to a Google Sheet for teacher review

See More



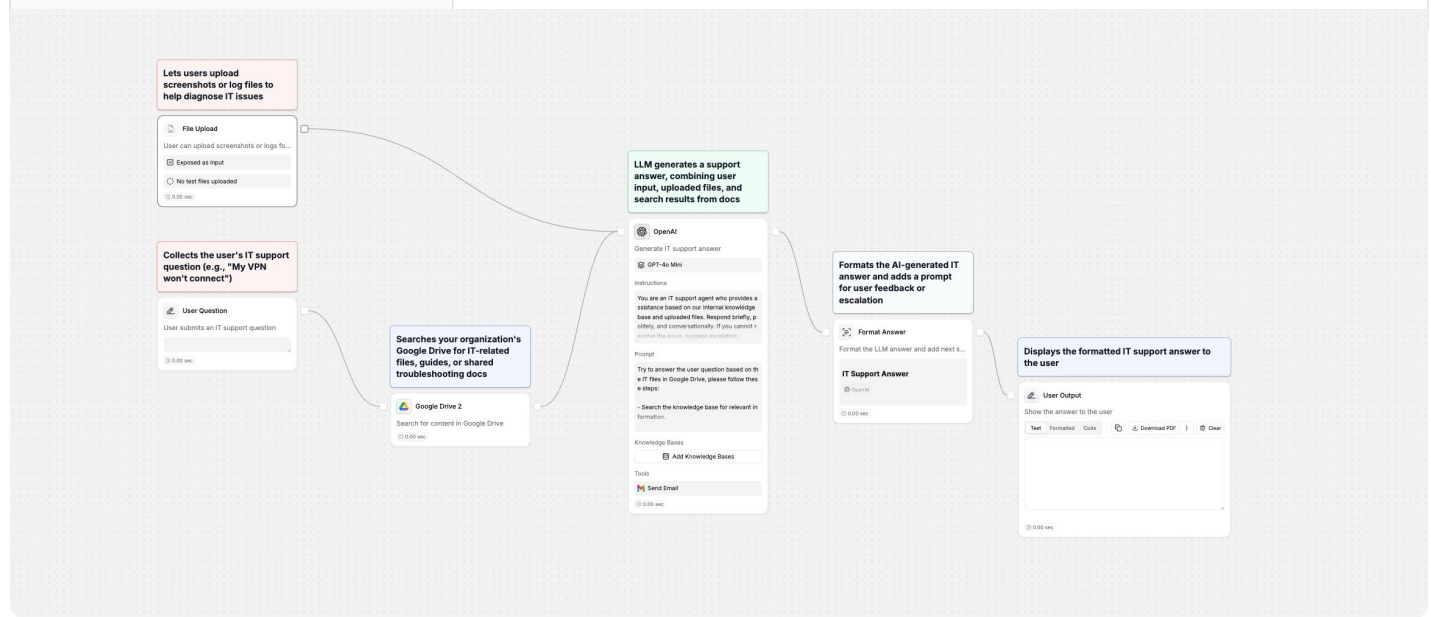
Use Case 5: University IT Assistant

IT support teams struggle with repetitive questions, while students and faculty struggle with slow response times and lack of visibility into unresolved issues.

This agent handles first-line IT support, instantly answering user questions, collecting feedback, and escalating unresolved issues—reducing manual workload and improving user satisfaction.

Who It's For	Administrators, Staff, Students, Faculty
Results	<ul style="list-style-type: none"> • Instant, AI-powered answers to IT questions using up-to-date internal resources • Automated, structured logging of every support interaction • Automatic escalation of unresolved issues to humans
Workflow	<ol style="list-style-type: none"> 1. Submit an IT question and any relevant files 2. Agent searches internal docs and Google Drive for correct answers 3. LLM generates a comprehensive support response 4. If LLM cannot generate a response, will escalate issue by sending an email to a human reviewer

See More



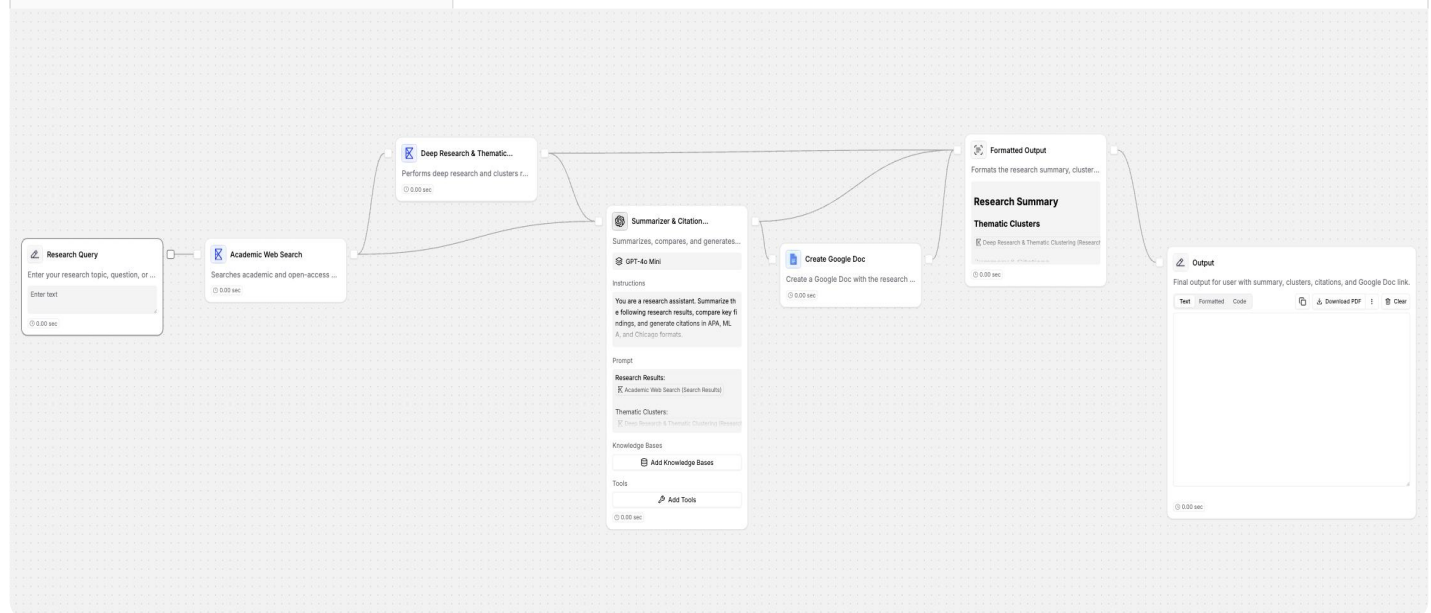
Use Case 6: Library Research Assistant

Students often struggle while researching for projects or assignments across disconnected research databases and citation sources.

This agent streamlines academic research by connecting to internal libraries, digital archives, and open-access repositories, and helps students properly cite and organize their own research.

Who It's For	Faculty, Students, Researchers, and More
Results	<ul style="list-style-type: none"> • Reduces time spent searching across siloed databases • Provides quick, accurate summaries for papers, reports, or proposals • Generates citations in standard formats (APA, MLA, Chicago, etc.)
Workflow	<ol style="list-style-type: none"> 1. User enters a research topic 2. Academic sources and databases are searched and results are clustered by theme 3. A summary and citations are generated from findings 4. A Google Doc is created and a formatted summary with a link is shown

See More



AI Agents for Education

<p>Use Case 7: Spreadsheet Assistant</p>	<p>Problem: Complex spreadsheets block quick access to insights and slow down decision-making.</p> <p>Solution: This agent lets administrators “chat” with spreadsheets—summarizing data and answering questions instantly, without technical skills.</p>
<p>Use Case 8: Facilities and Resource Booking Agent</p>	<p>Problem: Classrooms, labs, and equipment are often double-booked or underutilized due to clunky scheduling systems.</p> <p>Solution: Automates scheduling for classrooms, labs, or equipment (e.g., reserving a science lab or media room), ensuring no double-bookings and sending reminders.</p>
<p>Use Case 9: Internship and Career Match Agent</p>	<p>Problem: Students lack visibility into internships and career pathways that align with their skills and academic progress.</p> <p>Solution: Agent takes student profiles (major, GPA, skills, location preferences) and matches them with relevant internships, fellowships, or career opportunities from partner companies.</p>
<p>Use Case 10: Accreditation Readiness Agent</p>	<p>Problem: Universities spend months preparing self-studies and documentation for accreditation reviews, often duplicating work.</p> <p>Solution: This agent gathers policies, syllabi, assessment data, and institutional reports, then maps them against accreditation criteria to highlight gaps and generate a readiness checklist.</p>
<p>Use Case 11: Grant and Funding Finder Agent</p>	<p>Problem: Schools, colleges, and education nonprofits often miss out on critical funding opportunities.</p> <p>Solution: This agent continuously scans government and private grant databases, parses eligibility criteria, and cross-checks them against the institution’s data.</p>

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Private Lending

Explore 10+ real-world AI agent use cases built for busy origination, underwriting, and risk teams who want faster deal cycles, fewer errors, and stronger capital partner trust.

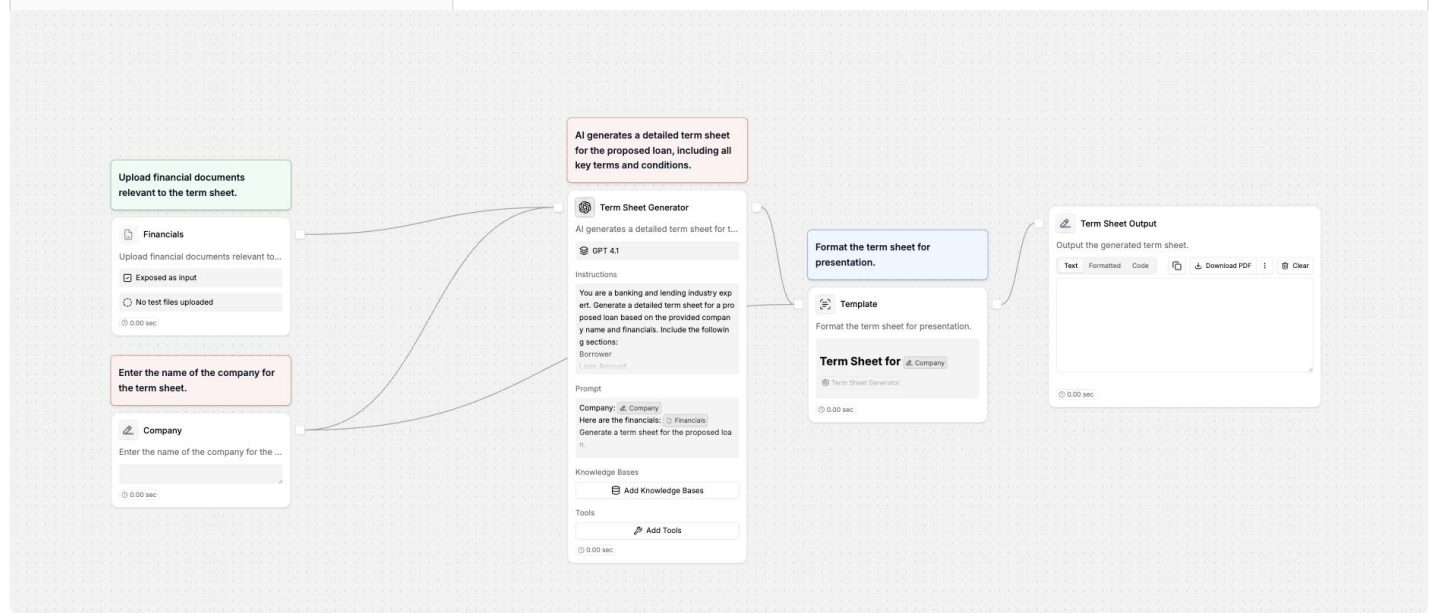
Use Case 1: Term Sheet Draft Agent

Manually constructing and formatting term sheet from scratch is slow and labor-intensive.

This agent standardizes the creation of term sheets for private lenders evaluating new loan opportunities. It generates a draft term sheet using borrower financials and internal credit guidelines, for analyst review.

Who It's For	Credit Analysts, Loan Officers, Underwriters
Results	<ul style="list-style-type: none"> • Delivers a complete, formatted draft in minutes • Integrates up-to-date internal and uploaded sources • Takes a company name and financial documents as input, uses AI to generate a comprehensive term sheet draft
Workflow	<ol style="list-style-type: none"> 1. User enters the name of the company being evaluated 2. Upload or connect financial documents (e.g., statements, previous memos), reports, and knowledge bases 3. An LLM generates the borrower overview, loan amount, interest rate, term, and more 4. The term sheet draft is formatted for review in a clean, presentable markdown layout

See More



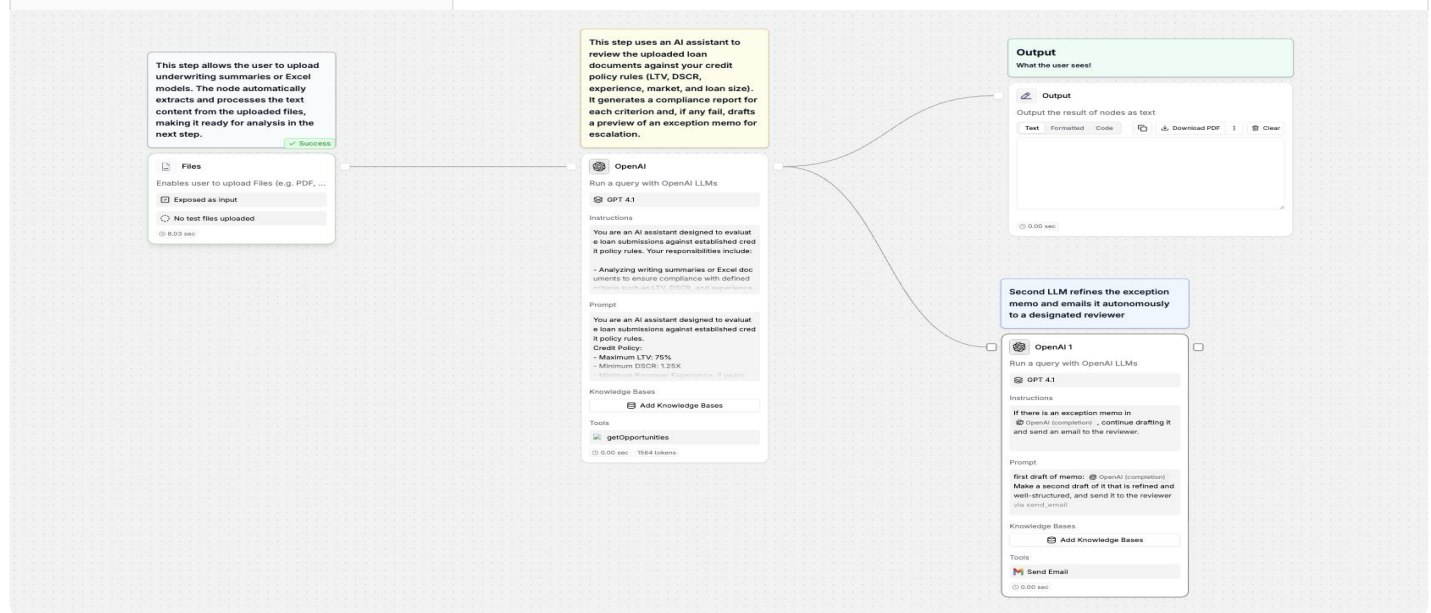
Use Case 2: Loan File Review Agent

Analyzing and reviewing loan submissions, and escalating exception memos to senior underwriters, is time-consuming and error-prone.

This agent streamlines the review of loan submissions for private lenders, ensuring that each deal is quickly and consistently evaluated against internal credit policy.

Who It's For	Loan Processors, Compliance Officers, Underwriters
Results	<ul style="list-style-type: none"> Instantly reviews and flags deals, saving hours per file Every deal checked against the same rules Generates a formatted exception memo, helping underwriters handle more files with confidence
Workflow	<ol style="list-style-type: none"> User uploads underwriting summaries or Excel models An LLM reviews the extracted document content and checks it against credit policy rules For each criterion, LLM states Pass/Fail and provides a brief explanation, generating an exception memo Another LLM polishes the memo, then automatically sends it via email to a designated reviewer

See More



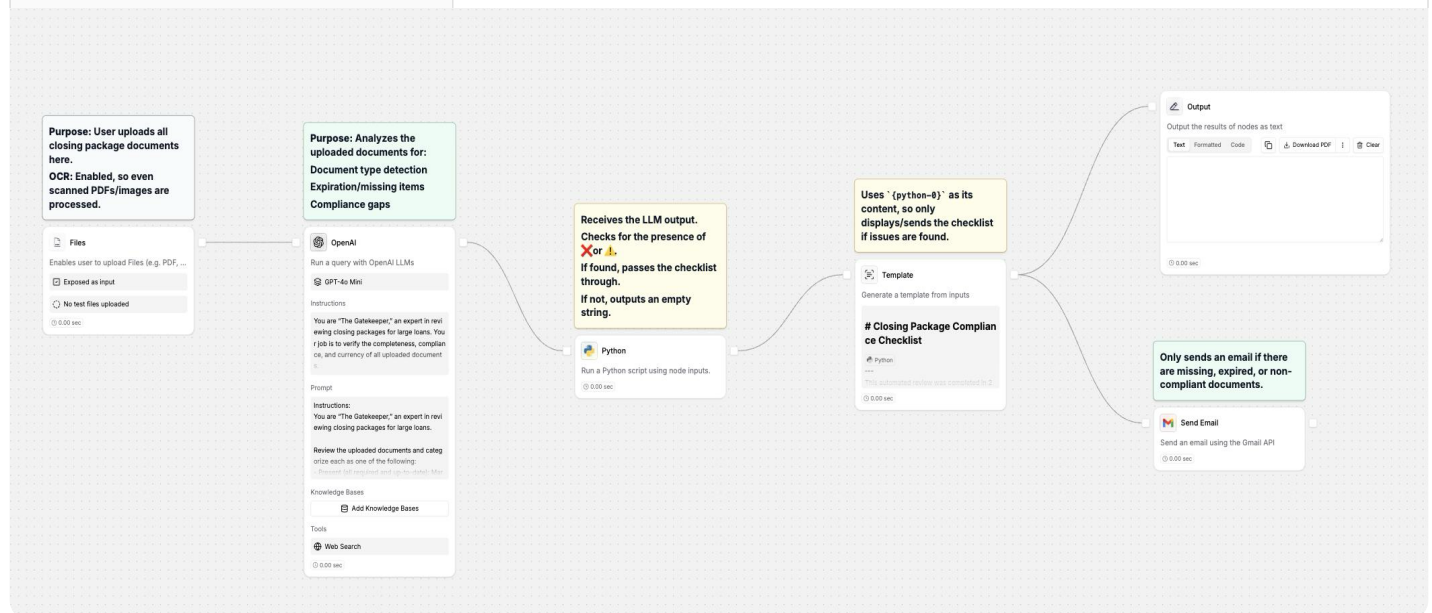
Use Case 3: Closing Compliance Agent

Private lenders must ensure that all documents in a closing package are present, up-to-date, and compliant before funding a loan, but manual review can delay closings.

This agent ensures every closing package is reviewed instantly and thoroughly, with instant alerts for any departures from internal policy—helping lenders close loans faster.

<p>Who It's For</p>	<p>Closing Manager, Compliance Officers, Funding Managers</p>
<p>Results</p>	<ul style="list-style-type: none"> • Reduces review time from hours to seconds • Check all documents for presence, expiration, compliance • Immediate notification if anything is missing or non-compliant
<p>Workflow</p>	<ol style="list-style-type: none"> 1. User uploads all closing package documents (PDFs, scans, images, etc.) 2. LLM reviews for document type, missing documents, and expired or non-compliant documents 3. LLM's checklist analysis is formatted into a clear report 4. If issues are found, an email is automatically sent to designated recipient

[See More](#)



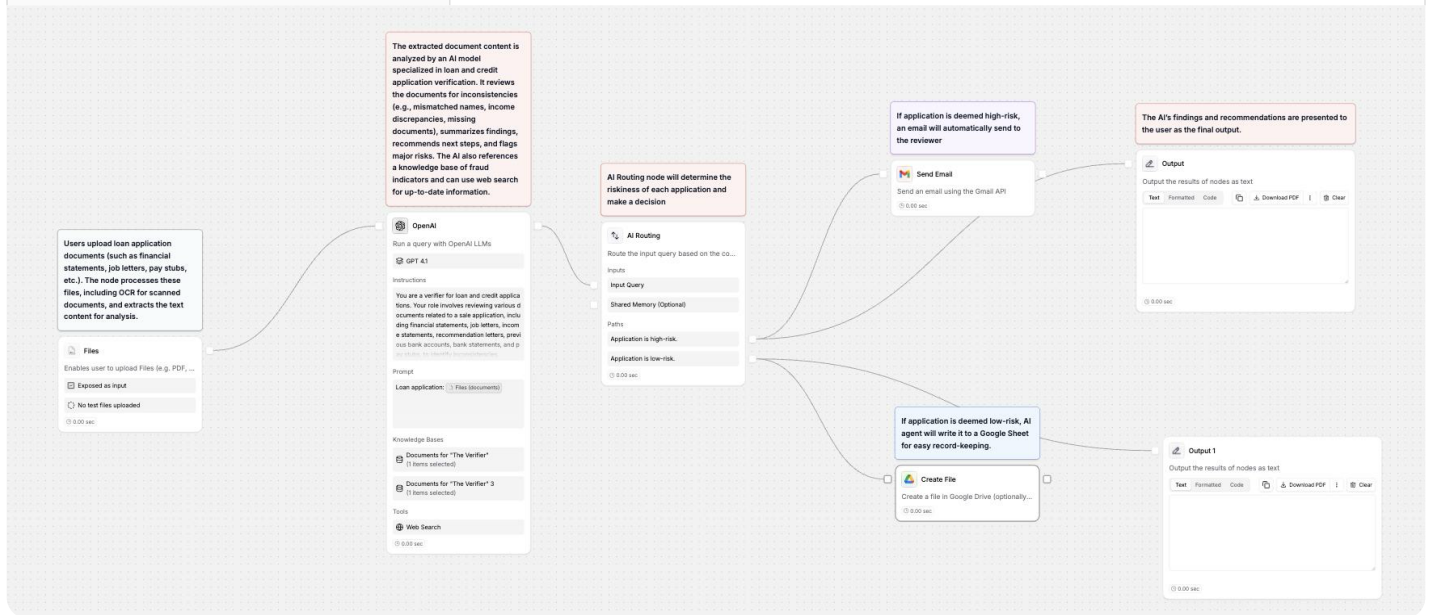
Use Case 4: Application Risk Agent

Efficiently and accurately assessing the risk of loan applications is critical, but manual document review is tedious.

This workflow is a robust, automated solution for private lenders to streamline loan application review, reduce fraud risk, and ensure compliance with internal policies.

Who It's For	Underwriters, Risk Officers, Loan Originators
Results	<ul style="list-style-type: none"> • Check for subtle inconsistencies and fraud indicators • High-risk cases are flagged and escalated immediately • All actions and findings are logged for alignment with internal policy and future reference
Workflow	<ol style="list-style-type: none"> 1. Upload all required documents 2. LLM checks for inconsistencies, flags major risks, etc. 3. AI Routing node classifies each application as either high-risk or low-risk 4. Depending on the classification, email is sent or application is logged in Google Drive

[See More](#)



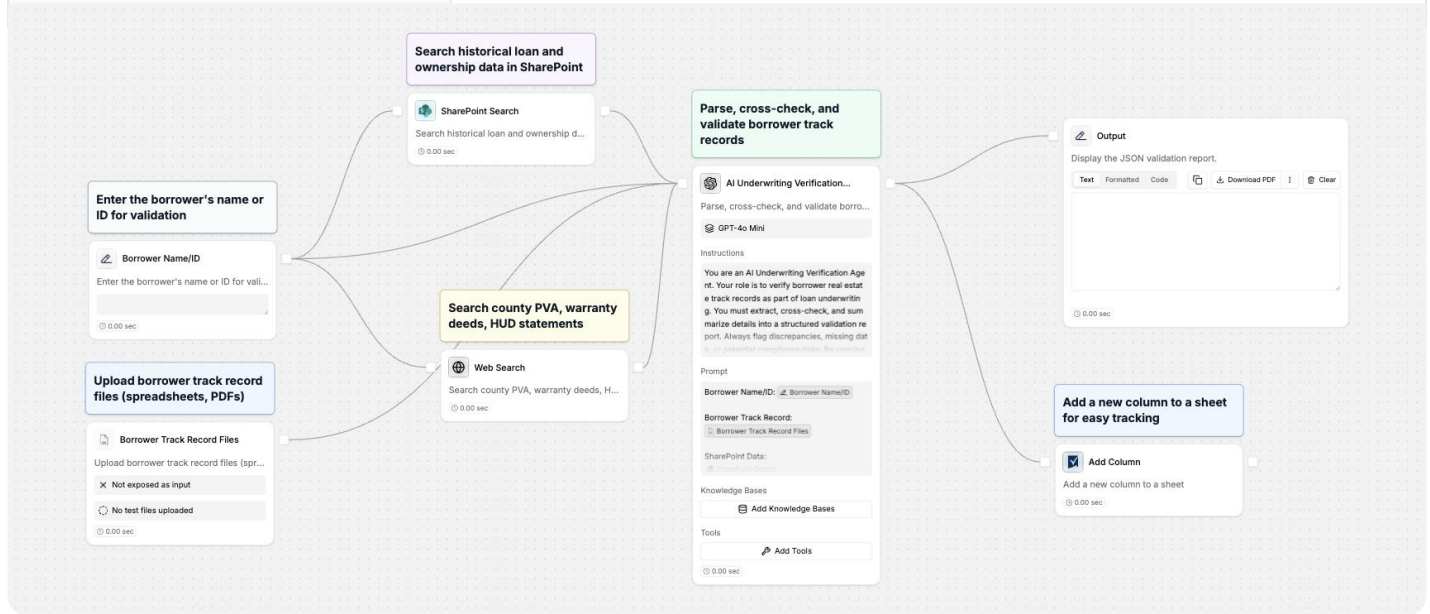
Use Case 5: Validation Agent

Private lenders face significant risk if a borrower’s claimed real estate track record is inaccurate, incomplete, or fraudulent.

This AI agent gives lenders a powerful method to validate borrower real estate track records without navigating different portals and data—making lending safer and faster.

<p>Who It's For</p>	<p>Underwriters, Credit Risk Analysts, Compliance Officers</p>
<p>Results</p>	<ul style="list-style-type: none"> • Instant AI-powered answers to IT questions using up-to-date internal resources • Automated, structured logging of every support interaction • Automatic escalation of unresolved issues to humans
<p>Workflow</p>	<ol style="list-style-type: none"> 1. User enters the borrower's name or ID and relevant files 2. Agent searches SharePoint for historical loan and ownership data related to the borrower, and runs a web search for county-specific data 3. LLM flags discrepancies, missing data, risks 4. Agent writes data to spreadsheet for tracking

[See More](#)



AI Agents for Private Lending

Use Case 6: Background Report Agent	<p>Problem: Loan officers waste hours manually checking borrower history across different systems.</p> <p>Solution: The agent automatically retrieves and validates background reports via API or uploaded docs for faster due diligence.</p>
Use Case 7: Appraisal Document Agent	<p>Problem: Underwriters must verify appraisal values and details, which is slow and prone to human error.</p> <p>Solution: The agent cross-checks appraisal documents against required standards and flags discrepancies instantly.</p>
Use Case 8: Insurance Policies Agent	<p>Problem: Teams manually confirm insurance coverage and compliance with policies, delaying loan approvals.</p> <p>Solution: The agent verifies insurance policy details via API integration and ensures coverage meets lending requirements.</p>
Use Case 9: Operating Agreements Agent	<p>Problem: Reviewing operating agreements for ownership and governance terms is complex and time-consuming.</p> <p>Solution: The agent scans agreements, extracts key clauses, and validates them against underwriting rules.</p>
Use Case 10: General Background Check Agent	<p>Problem: Analysts spend hours cross-checking borrower or guarantor information across fragmented sources.</p> <p>Solution: The agent consolidates background data, identifies red flags, and produces a standardized risk summary.</p>
Use Case 11: Application Layer Agent	<p>Problem: Analysts often miss inconsistencies buried in large loan files until late in the process.</p> <p>Solution: The agent runs workflows in the background, reviewing documents and surfacing alerts for analyst action.</p>

Want to see more?

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Banking

Discover 10+ AI agent use cases designed to help banking staff, advisors, and operations teams deliver faster service, reduce errors, and strengthen customer trust.

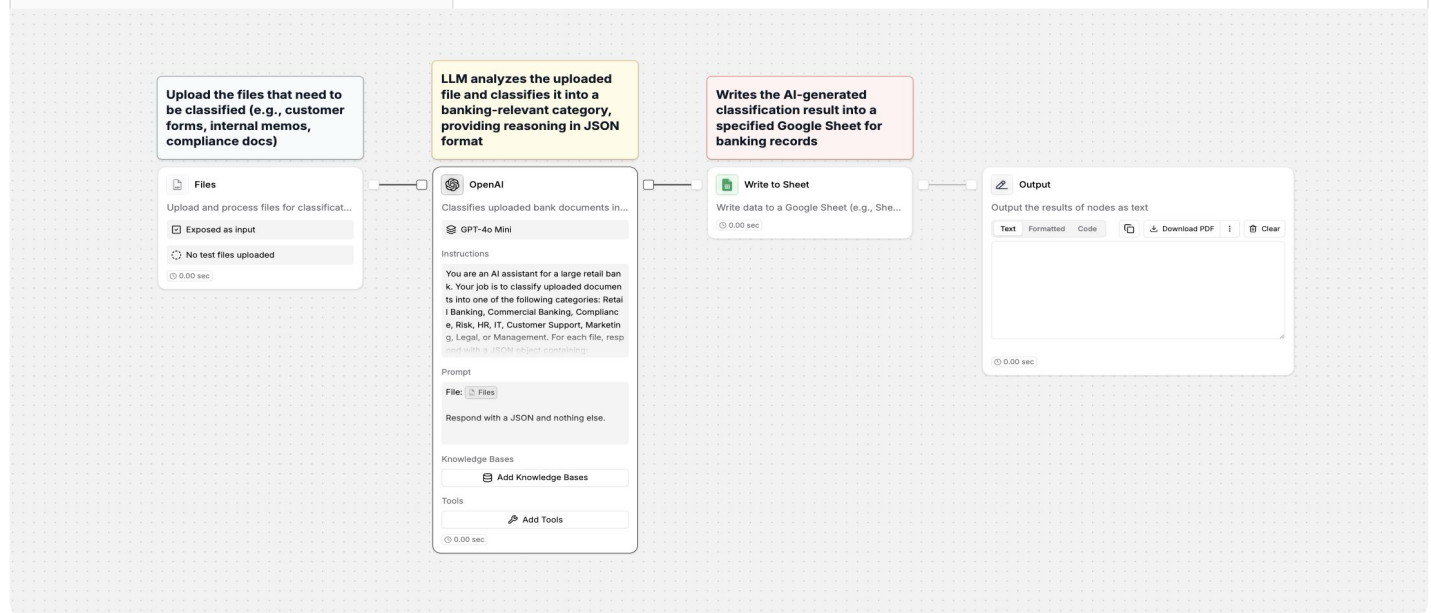
Use Case 1: Document Classification Agent

Manual classification and record-keeping of business documents is time-consuming, error-prone, and inconsistent across banking teams.

This agent automates the classification of uploaded bank documents and logs the results in a structured, searchable Google Sheet.

Who It's For	Operations Managers, Bank Employees
Results	<ul style="list-style-type: none"> Instantly classifies uploaded bank documents into business-relevant categories (e.g., Compliance, HR, Risk) Provides clear, AI-generated reasoning Automatically writes the results into a Google Sheet
Workflow	<ol style="list-style-type: none"> User uploads documents that need classification LLM analyzes each file and classifies it into a business category with reasoning Classification and reasoning are formatted as JSON Results are written directly into a specified Google Sheet for record-keeping

See More



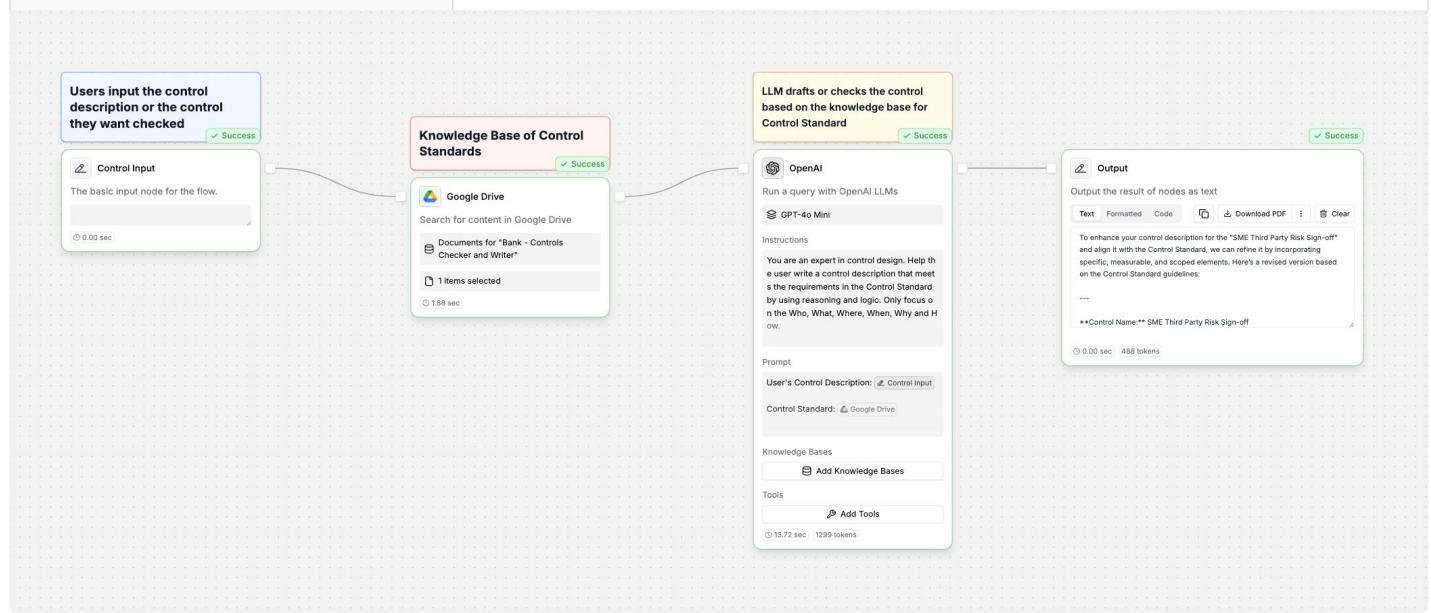
Use Case 2: Control Checker Agent

Hand-written controls are often vague, inconsistent, and fail audits due to lack of alignment with internal standards.

This agent helps banking teams write, check, and improve control descriptions by comparing user input against a knowledge base of control standards.

Who It's For	Internal Auditors, Risk and Compliance Managers
Results	<ul style="list-style-type: none"> • Consistent, high-quality control draft descriptions • Actionable feedback and improvement suggestions for existing controls • Reduced manual review time and lower risk
Workflow	<ol style="list-style-type: none"> 1. User submits a control description or an existing control 2. LLM retrieves relevant control standards from the knowledge base 3. LLM compares the input against best practices and standards, then drafts or suggests improvements 4. The improved or validated control description is output for user review or implementation

[See More](#)



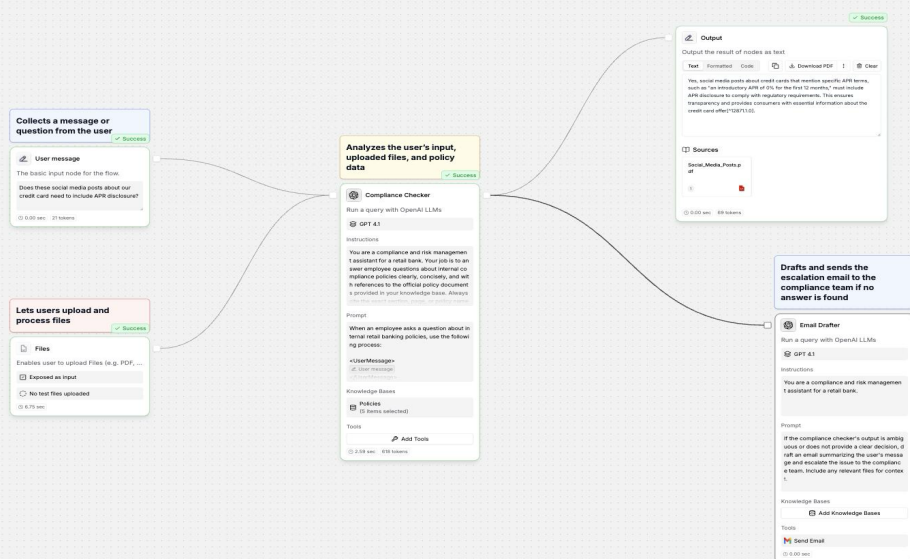
Use Case 3: Compliance Chatbot

Employees struggle to search for and interpret complex policy documents when they need compliance answers, leading to delays, confusion, and risk of non-compliance.

This agent answers company compliance questions by referencing a knowledge base of official documents, and escalates unconfirmed answers to the compliance team.

Who It's For	Bank Employees, Compliance Teams
Results	<ul style="list-style-type: none"> Automates compliance checks for employee questions and uploaded files Provides clear, policy-cited answers Escalates ambiguous cases to the compliance team
Workflow	<ol style="list-style-type: none"> Users submit their questions and upload relevant files Compliance LLM analyzes the input alongside official policy documents, always citing the exact policy section Another LLM automatically drafts an escalation email summarizing the issue if no answer is found The agent automatically sends it to the compliance team for further review

See More



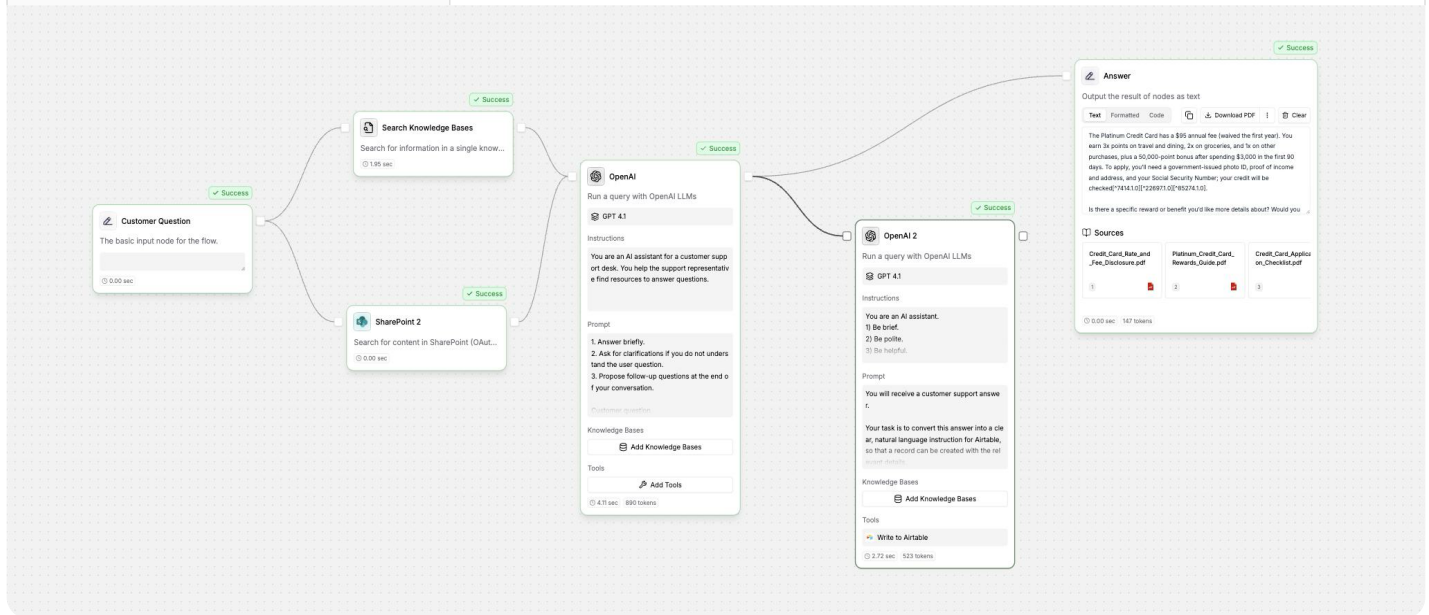
Use Case 4: Customer Support Agent

Customer support agents waste time searching multiple knowledge bases and re-entering information into tracking systems, while clients are left hanging.

This agent streamlines customer support by searching internal knowledge bases, generating concise answers, and automatically recording Q&A pairs in Airtable.

<p>Who It's For</p>	<p>Bank Clients and Customers, Banking Support Teams</p>
<p>Results</p>	<ul style="list-style-type: none"> • Accurate, well-cited answers to customer questions • Reduced manual effort and improved consistency in customer support • Automatic logging of each Q&A into Airtable for tracking
<p>Workflow</p>	<ol style="list-style-type: none"> 1. Receive customer question via the input node 2. Search company knowledge bases and SharePoint for relevant information 3. LLM generates a concise, cited answer 4. Agent logs the question and answer as a new record in Airtable automatically

[See More](#)



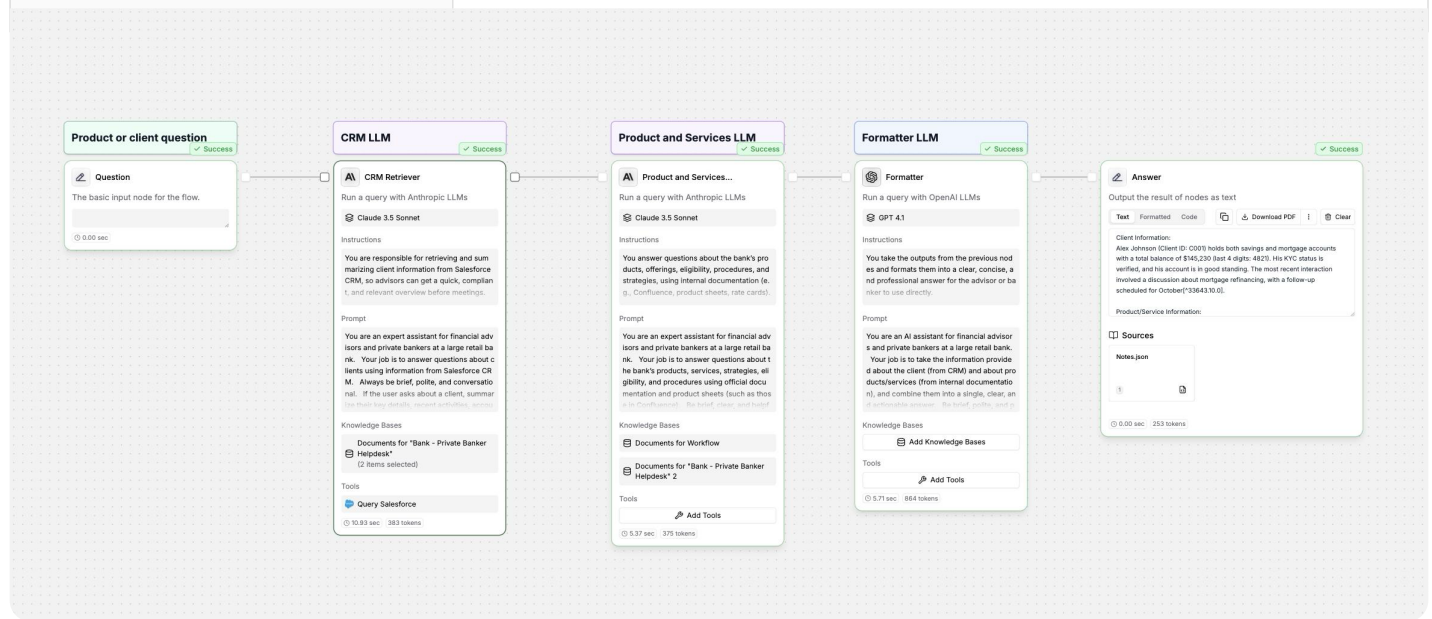
Use Case 5: Banker Helpdesk Agent

Advisors and bankers waste time searching multiple systems for up-to-date client and product information before meetings.

This agent instantly combines CRM insights and internal product documentation into a single, compliant answer for financial professionals.

<p>Who It's For</p>	<p>Private Bankers, Financial Advisors, Banking Support Teams</p>
<p>Results</p>	<ul style="list-style-type: none"> • Delivers a clear, professional answer combining client and product information • Summarizes CRM data and internal documentation in one response • Ensures compliance and privacy in all outputs
<p>Workflow</p>	<ol style="list-style-type: none"> 1. User enters a client or product question 2. CRM LLM fetches and summarizes client info from Salesforce 3. Product & Services LLM answers about bank products and services using internal docs. 4. Formatter LLM combines both outputs into an answer

[See More](#)



AI Agents for Banking

<p>Use Case 6: Capital Regulations Analyst</p>	<p>Problem: Regulatory capital rules are dense and constantly updated, making it hard for teams to assess compliance.</p> <p>Solution: The agent interprets Basel III/IV and local requirements, flags gaps, and recommends capital ratio adjustments in plain language.</p>
<p>Use Case 7: Research Report Agent</p>	<p>Problem: Underwriters must verify appraisal values and details, which is slow and prone to human error.</p> <p>Solution: The agent cross-checks appraisal documents against required standards and flags discrepancies instantly.</p>
<p>Use Case 8: Call Compliance Agent</p>	<p>Problem: Customer service calls risk non-compliance with disclosure, script, or data-handling rules.</p> <p>Solution: The agent intakes call recordings, highlights compliance breaches, and generates audits for review.</p>
<p>Use Case 9: IT Support Agent</p>	<p>Problem: Advisors and staff lose time waiting for IT to resolve routine issues like password resets or VPN errors.</p> <p>Solution: The agent automates Tier-1 IT troubleshooting, escalating only complex cases to human support.</p>
<p>Use Case 10: Dispute Resolution Agent</p>	<p>Problem: Customers frequently challenge overdraft fees, unauthorized charges, or ATM errors, overwhelming support staff.</p> <p>Solution: The agent triages disputes, checks the dispute against policies, and drafts resolution options for advisor approval.</p>
<p>Use Case 11: Branch Operations Agent</p>	<p>Problem: Branch staff spend significant time on repetitive operational tasks like cash balancing and compliance logs.</p> <p>Solution: This agent automates daily branch checklists, freeing staff to focus on customer service.</p>

Want to see more?

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Industrials

Discover 10+ AI agent use cases that help logistics, shipping, construction, and engineering teams streamline documentation, automate compliance, and accelerate project delivery—driving safer operations, faster turnarounds, and stronger client relationships.

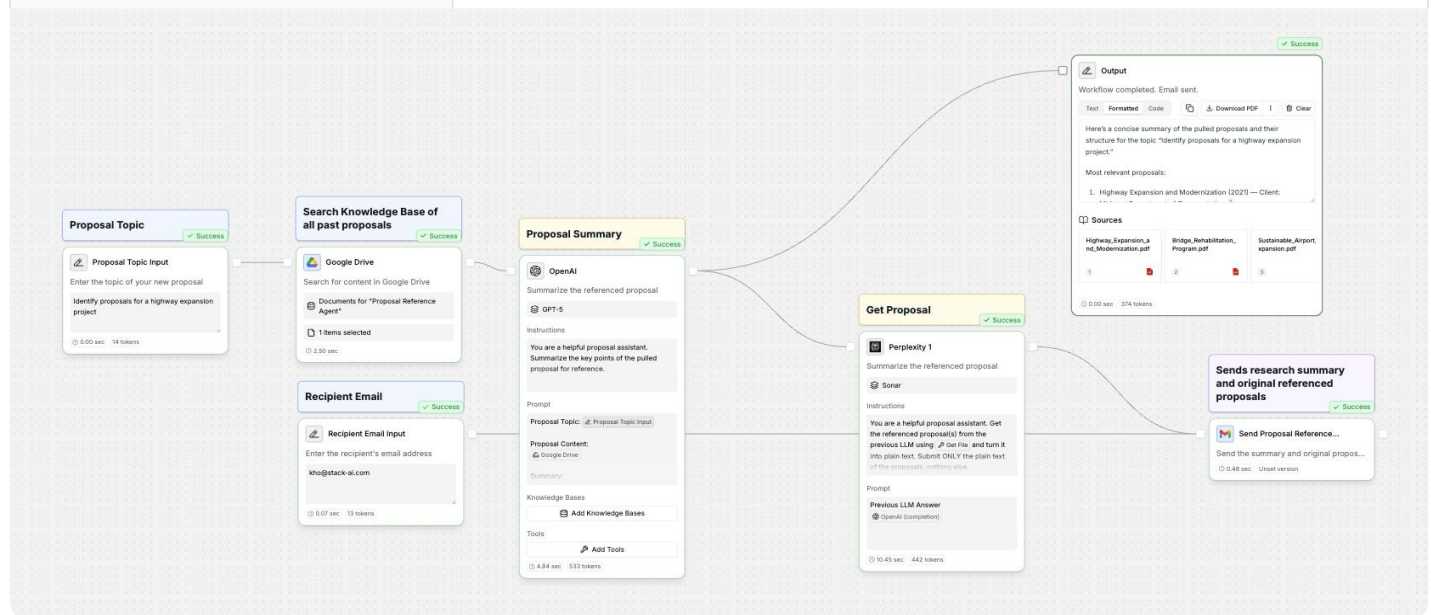
Use Case 1: Proposal Reference Agent

Manually searching, summarizing, and sharing relevant past proposals for new project topics is time-consuming and error-prone.

This agent locates, summarizes, and emails relevant past proposals from Google Drive based on a user's new project topic to assist with RFPs.

Who It's For	Proposal Managers, Business Development Teams
Results	<ul style="list-style-type: none"> Finds and summarizes relevant past proposals from your Google Drive based on a topic Emails a concise summary and the original proposal documents to a specified recipient
Workflow	<ol style="list-style-type: none"> User enters a proposal topic and recipient email Workflow searches Google Drive for matching or relevant past proposals LLM summarizes the most relevant proposal(s) Summary and original documents are emailed to the recipient

See More



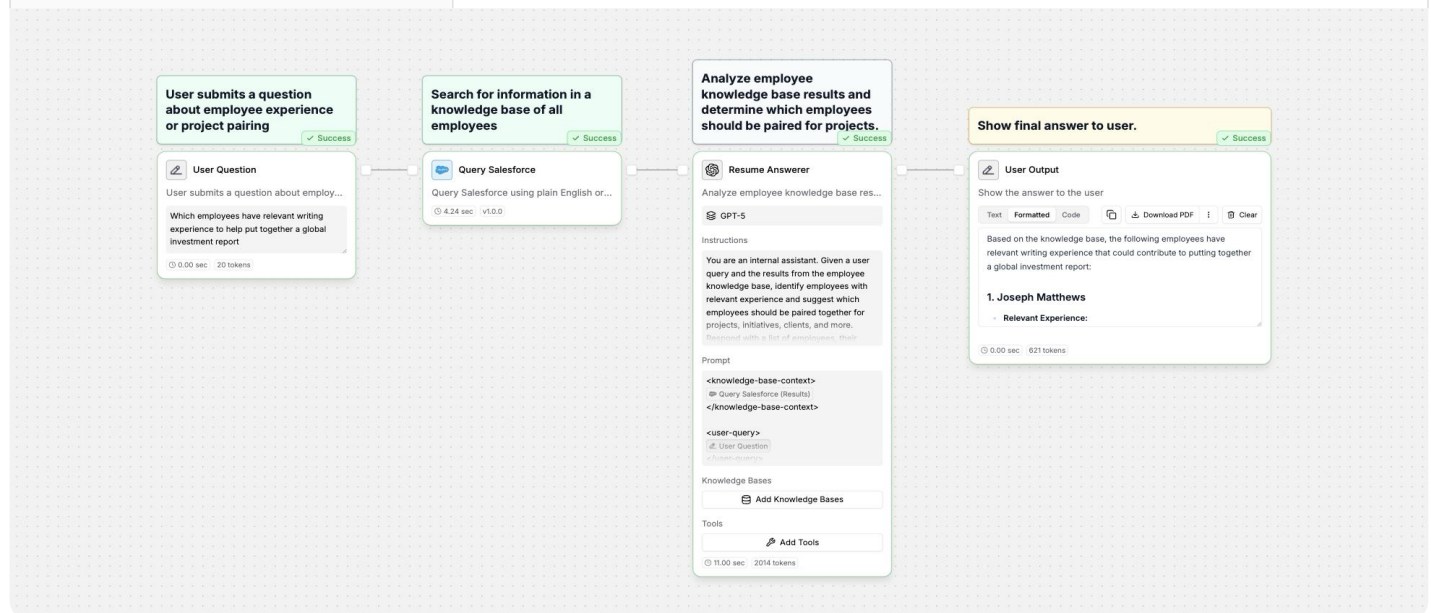
Use Case 2: Project Staffing Agent

Identifying employees with the right experience for specific projects by manually searching through resumes or folders is difficult and time-consuming.

This agent automatically finds and recommends employees with relevant experience for project needs by searching across a knowledge base of employee resumes.

Who It's For	Project Managers, Business Analysts
Results	<ul style="list-style-type: none"> • Finds employees with relevant experience for a specific need or project • Provides a clear, actionable summary for decision-makers
Workflow	<ol style="list-style-type: none"> 1. User submits a question (e.g., "Who had experience on project code #4890?") 2. Agent queries Salesforce for employee data matching the request 3. LLM analyzes the results and determines the best employees and pairings 4. Summarizes potential employee matches

See More

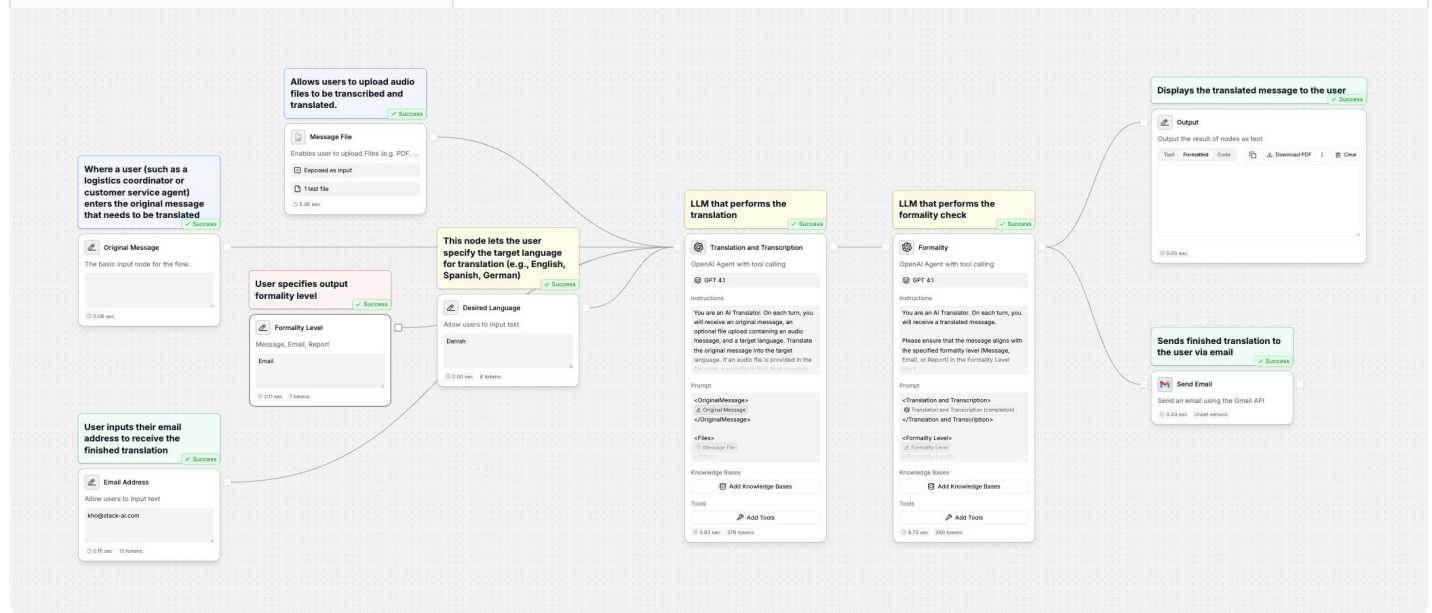


Use Case 3: Transcription/Translation Agent

Manual translation and transcription of messages and audio files is slow, error-prone, and often lacks consistency in tone and formality.

This agent translates and/or transcribes user messages or audio files into a chosen language and formality, then emails the polished result to the user.

<p>Who It's For</p>	<p>Logistics Coordinators, Global Shipping Teams</p>
<p>Results</p>	<ul style="list-style-type: none"> • Agent translates written or audio messages into a chosen language • LLM adjusts the translation to match the desired formality (e.g., Email, Report, Message) • Sends the translation directly to user's email inbox
<p>Workflow</p> <p style="text-align: center; background-color: black; color: white; padding: 10px; border-radius: 10px; display: inline-block; margin-top: 20px;">See More</p>	<ol style="list-style-type: none"> 1. User provides the original message (text or audio); selects the target language/formality level 2. Audio files are transcribed if provided 3. The message is translated and adjusted for formality using two LLMs 4. The finished translation is emailed to the user



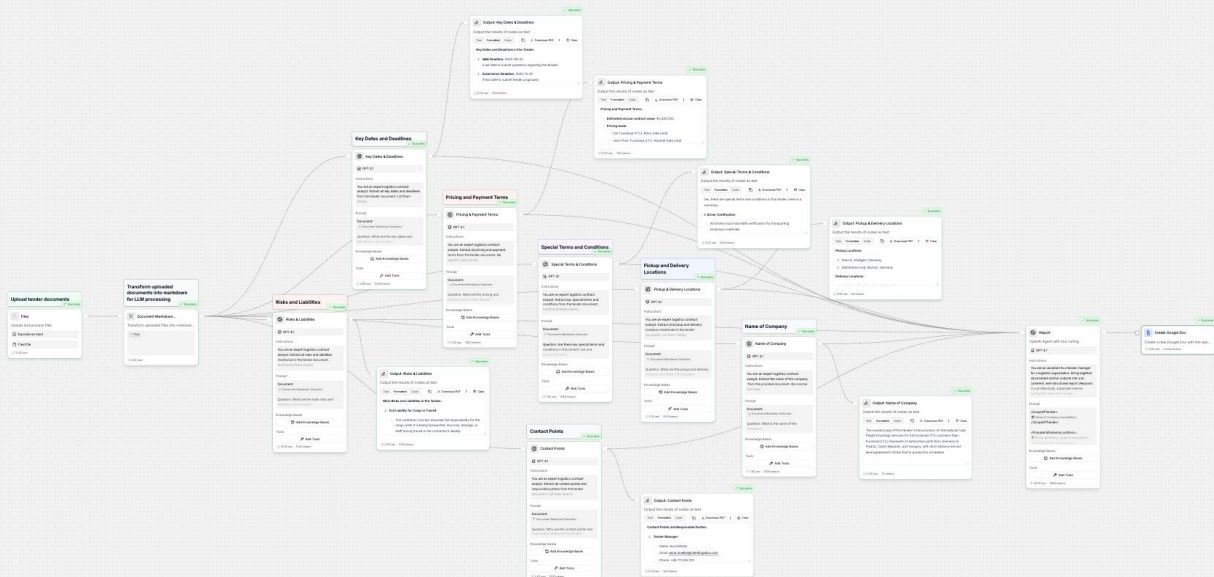
Use Case 4: Tender Intelligence Agent

Tender managers spend hours manually extracting, summarizing, and reporting on key details from complex logistics tender documents.

This agent streamlines the tender review process for logistics organizations by automatically processing uploaded tender documents.

Who It's For	Tender Managers, Procurement Analysts
Results	<ul style="list-style-type: none"> Generates a structured executive summary of a logistics tender, including company, locations, terms, pricing, deadlines, risks, and contacts Creates a professional report and automatically saves it as a Google Doc for easy editing
Workflow	<ol style="list-style-type: none"> Upload the tender document and convert into markdown LLM analyzes and extracts all key sections (company, locations, terms, pricing, deadlines, risks, contacts) Agent compiles and exports results as a polished document, automatically saved to Google Drive

See More



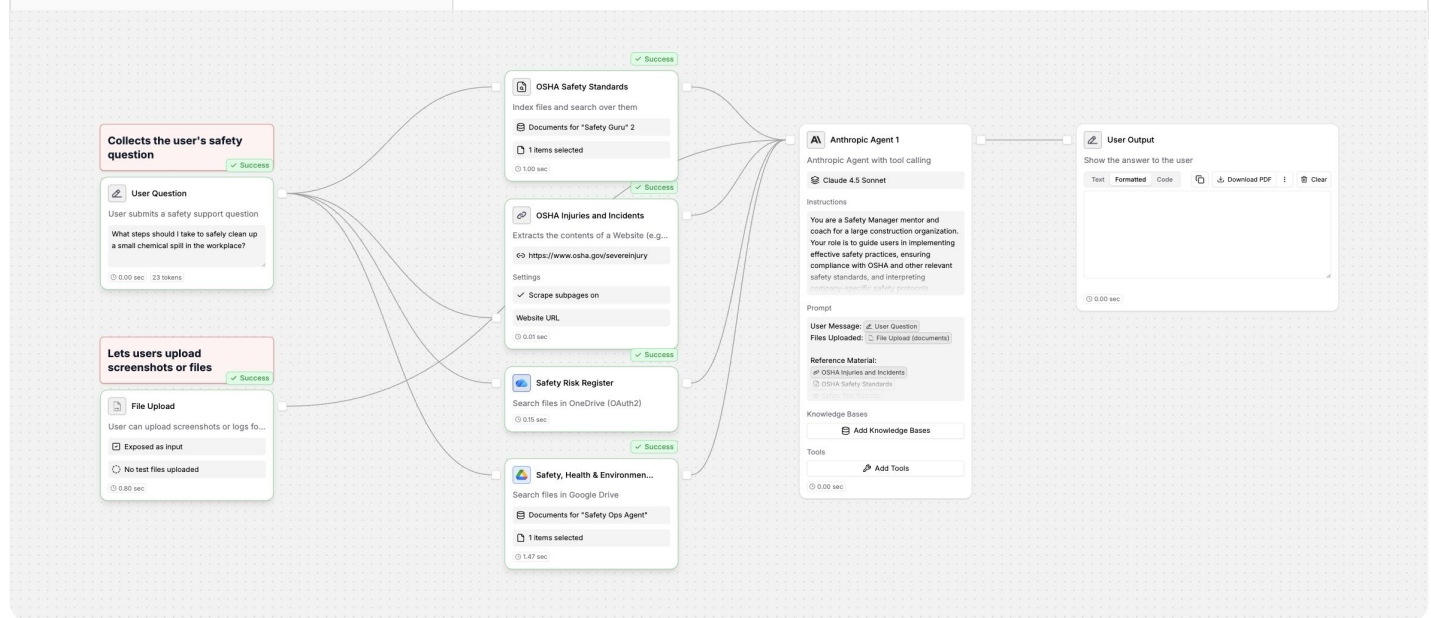
Use Case 5: Safety Ops Chatbot

Safety professionals and employees often struggle to quickly find, interpret, and apply the correct safety procedures and compliance standards.

This agent answers safety questions by combining input, uploaded files, and multiple knowledge sources to deliver compliant, standards-based answers.

Who It's For	Safety Managers, Team Leads, Supervisors
Results	<ul style="list-style-type: none"> Provides clear, actionable safety guidance tailored to the user's question and uploaded files References both internal company policies and official OSHA standards for compliance
Workflow	<ol style="list-style-type: none"> User submits a safety question and any files Relevant documents and knowledge bases (OSHA, company policies, incident records) are searched and retrieved LLM reviews the question, files, and reference materials to generate a detailed, compliant answer

See More

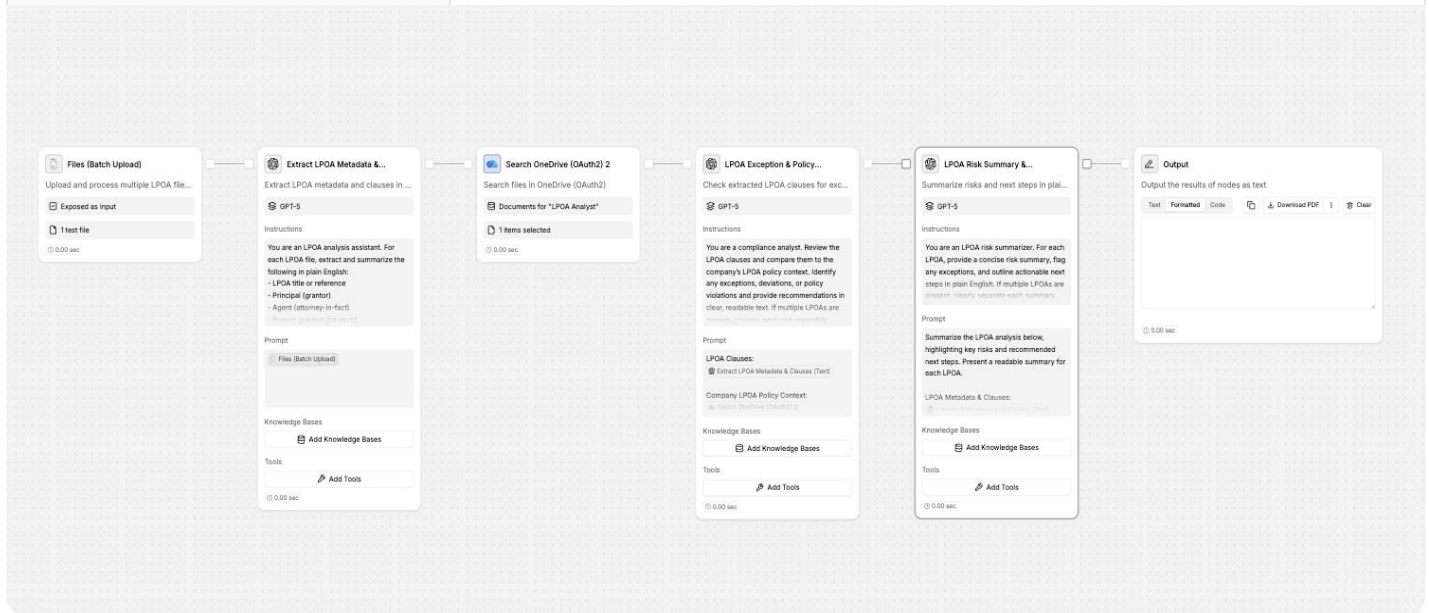


Use Case 6: LPOA Agent

Manual review of multiple LPOA (Limited Power of Attorney) documents for compliance, risk, and policy exceptions is time-consuming and error-prone.

This agent automates the extraction, analysis, and risk assessment of LPOA documents, ensuring consistent compliance checks and actionable summaries at scale.

<p>Who It's For</p>	<p>Operations Managers, Wealth Managers</p>
<p>Results</p>	<ul style="list-style-type: none"> • Instantly classifies uploaded bank documents into business-relevant categories • Provides clear reasoning and automatically writes the results into a Google Sheet
<p>Workflow</p> <div data-bbox="138 1129 514 1213" style="background-color: black; color: white; padding: 10px; text-align: center; margin-top: 20px;"> <p>See More</p> </div>	<ol style="list-style-type: none"> 1. User batch-uploads LPOA files 2. LLM extracts key metadata and clauses 3. Another LLM compares extracted content to company LPOA policy for exceptions or violations 4. Agent summarizes risks and next steps for each LPOA in a clear, readable output



AI Agents for Industrials

<p>Use Case 7: Shift Summary Agent</p>	<p>Problem: Supervisors spend hours compiling daily shift reports and handoffs.</p> <p>Solution: The agent summarizes production notes, maintenance issues, and incident logs into structured reports ready for management review.</p>
<p>Use Case 8: Vendor Ticketing Agent</p>	<p>Problem: Vendor support requests get buried in emails and spreadsheets.</p> <p>Solution: The agent automatically logs, categorizes, and tracks vendor tickets.</p>
<p>Use Case 9: Document Finder Agent</p>	<p>Problem: Engineers waste time searching for the right SOPs, blueprints, or safety forms across shared drives.</p> <p>Solution: The agent retrieves the exact document or version needed, using natural language search across internal repositories.</p>
<p>Use Case 10: IT Support Agent</p>	<p>Problem: Employees lose time waiting for IT to resolve routine issues like password resets or VPN errors.</p> <p>Solution: The agent automates Tier-1 IT troubleshooting, escalating only complex cases to human support.</p>
<p>Use Case 11: Spreadsheet Agent</p>	<p>Problem: Analysts spend hours searching for data hidden in Excel sheets.</p> <p>Solution: An AI chatbot answers natural-language queries on spreadsheets, surfacing insights without manual formulas.</p>
<p>Use Case 12: Safety Compliance Agent</p>	<p>Problem: Safety officers struggle to track evolving regulations and site-specific compliance documentation.</p> <p>Solution: The agent continuously monitors safety standards and auto-generates inspection reports.</p>

Want to see more?

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The use cases in this white paper are just the beginning. With StackAI's drag-and-drop interface, secure infrastructure, and 100+ integrations, anyone can build production-ready AI agents in just a few clicks.



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