

SOLUTION

When to use AI Agents, DocCenter or People

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Don't Tow a Boat with a Ferrari..



Quick hello before we pick up some tools

Two audiences in this room today: the people who build the automation, and the people who answer for the results. This session is for both because the right tool decision is where those two worlds meet.

About me

Vijay Sai Thiagarajan

Senior Solutions Consultant, Appian

- Help teams design automation that actually ships
- Day job matching real business problems to the right mix of tools



Source: Ferrari

EXHIBIT A

The most advanced car ever built

The Ferrari F80, a genuine engineering masterpiece.

1,200

Horsepower

2.15s

0–60 mph

3

Electric motors



EXHIBIT A (CONTINUED)

...and it's useless at towing a boat

The most advanced machine in the world is the wrong tool the moment the job changes. Nobody blames the Ferrari. They blame whoever picked it.

AI agents are the Ferrari of 2026.

Dazzling, powerful, and the answer to a very specific set of questions. The winning question isn't "how do we use agents?" It's "what's the right tool for THIS task?"

THE TRAP

When all you have is a new hammer...

“When you have a new technology, it can be the hammer-and-nail thing, everyone wants to use this tool for everything. What we've found working with real companies is that agents aren't necessarily the best solution for everything.”

Michael Chui · McKinsey Global Institute

The shiny-tool reflex is human. The cost of indulging it is real and somebody in this room pays for it.

WHY THIS MATTERS TO YOU

Tech reaches for the shiny tool. Business pays the bill.

THE BUILDER'S TEMPTATION

- **New & exciting** — agents are the fun thing to build right now
- **Resume-driven** — everyone wants the cutting-edge project
- **Over-engineering** — a 10-step agent for a 1-rule problem

THE COST OF CHOOSING WRONG

- **Slower delivery** — complexity you maintain forever
- **Higher run-cost** — tokens, latency and fragile workflows
- **Lost trust** — when the clever solution quietly breaks

Get the tool choice right and both sides win. Get it wrong and both sides lose - just at different times.

TODAY

What you'll walk away with

01

A decision framework

A simple way to match any task to the right tool — not the newest one.

02

The Appian toolbox

Five tools, one platform, and the sweet spot for each.

03

A real story

How one team resisted the hype and won — and one that didn't.

04

Three things for Monday

Concrete moves you can make the day you get back.

THE ONE IDEA

Match the task to the tool

Every automation decision comes down to one honest question about the work in front of you:

“What does this task actually need and which tool is genuinely best at that?”

Not “what’s the most advanced option?” Not “what did we use last time?” Just: what does the job need.

High-Power Automation Toolkit

Every tool has a sweet spot. Appian has all of them under one roof.



Integrations



Rules



RPA



AI



People

THE TOOLBOX

Five tools, one platform

Every tool has a sweet spot. Appian keeps all of them under one roof.



Rules

Deterministic
& high-volume



Integrations

If there's an
API, use it



RPA

No API?
Drive the UI



AI

Read, interpret,
reason



People

Judgment &
accountability

Most real processes need several of these working together — not one hero tool.

When the path is known: Rules & Integrations



Business Rules

USE IT WHEN

The path is fully defined, high-volume, and must be 100% consistent every single time.

EXAMPLE

Pricing tiers, eligibility checks, routing logic.



API Integrations

USE IT WHEN

A system already exposes an API. First choice whenever it's available, structured and maintainable.

EXAMPLE

Look up an account, post an order, sync a record.

When it's messy: RPA & AI



RPA

USE IT WHEN

No API exists. The work lives in a legacy screen or desktop app and you must drive the UI like a person.

EXAMPLE

Mainframe data entry, screen-scraping a portal.



AI

USE IT WHEN

The task is cognitive: read, interpret, or reason over unstructured data. If a human would need to read and think.

EXAMPLE

Classify an email, extract from a contract, summarise.

THE TOOLBOX · THE TWO THAT TIE IT TOGETHER

People decide. Process orchestrates.



People

Keep humans on the work that needs judgment, handles novel exceptions, or carries accountability. The goal isn't to remove people — it's to stop wasting them on what a rule could do.



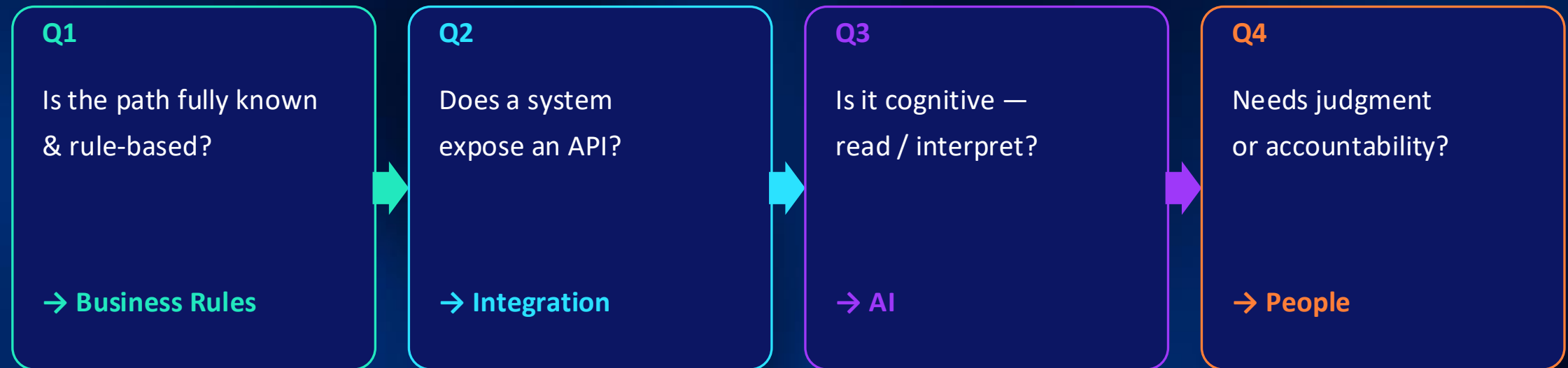
Process

No single tool is great at everything. The process model is the control plane — it sequences rules, integrations, RPA, AI and people so each does only what it's best at.

THE DECISION IN FOUR QUESTIONS

A flow you can photograph

Walk any task down these questions, in order. Stop at the first “yes”.



And if a task needs several? That's normal. Compose them in a process model — the answer is usually “and,” not “or.”

YOUR TURN — SHOW OF HANDS

Which tool would you pick?

Same task, four instincts. Be honest about your first reflex.

“We get 4,000 supplier invoices a month as PDFs. We need the totals pulled out and checked against the PO.”

Build an
AI agent

Write
rules

RPA the
portal

All of the
above

Extract with AI, validate with rules, integrate the PO lookup, escalate only the mismatches. It was “and” all along — and not one full-blown agent in sight.

A STORY FROM THE FIELD

The team that resisted the hype

An order-management team at a large manufacturer. Every order needed a contract review before it could be booked — and it was the bottleneck slowing the whole order cycle.

~30

document types

46

code variances

5 min

avg review / order

THE STORY · THE DECISION

They asked the right question

The hype answer was “build an agent to handle the whole review.” Instead they ran each part of the work through the framework:

Reading the documents	Cognitive, unstructured	AI
Checking must-have fields	Known, deterministic	Rules
Pulling order data	System with an API	Integration
The tricky exceptions	Judgment & accountability	People

One process model orchestrated all four. No single hero tool.

THE STORY · WHAT HAPPENED

The boring choice won

5→2 min

review time per order

>97%

variance-detection accuracy

+1.3pt

more variances caught earlier

The real lever wasn't speed — it was consistency.

Reviewers shifted from hunting for problems to deciding on them. Pre-analysed context meant less ambiguity, more confidence, and a process clean enough to scale. They started narrow and expanded — they didn't boil the ocean.

MEANWHILE, ON THE OTHER SIDE OF TOWN...

A Ferrari, towing a boat

A different team had the same job: “check whether an invoice total matches the PO.” They built a multi-agent system. Four agents. A reasoning loop. A vector database. Six weeks of work.

What the task actually needed:

`if (invoice_total == po_total) → pass.` One rule. One line. Runs in milliseconds, costs nothing.

WHERE EACH TOOL LIVES — TODAY

Two questions place every task

AMBIGUITY

How well-defined is the task? The fuzzier the work, the more you lean on AI — or people.

AI today

High ambiguity,
low sensitivity

People

High ambiguity,
high sensitivity

SENSITIVITY

How much does it hurt if the system gets it wrong? Higher stakes pull work back to people.

Process + Automation

Low ambiguity,
low sensitivity

Process + Automation

Low ambiguity,
high sensitivity

WHAT'S ON THE HORIZON

The boundary moves. You don't rip & replace.

As models get more reliable and guardrails improve, tasks migrate from the “people” zone into the “AI-assisted” zone. Agents become production-ready for more cases — because reliability caught up, not because they're new.



Start with what works today

Use AI for the cognitive tasks where the path is known. Like the order team did.



Let the process orchestrate

The process model is the control plane for AI skills, agents, rules, integrations and people.



Expand the boundary, don't rebuild

As capabilities mature you move the line outward. You evolve the system — you don't start over.

TAKE ACTION MONDAY MORNING

Three things to do when you get back

1

Audit one workflow

Walk a single real process through the four questions: Rules? Integration? AI? People? You'll be surprised how little needs AI.

2

Start from the human task nodes

Wherever a person does investigation or comparison today — that's your best AI candidate. Start there, start narrow.

3

Resist the urge to over-engineer

If a rule will do, use the rule. Save the Ferrari for the open road. Don't build an agent to do arithmetic.

THE ONE THING TO REMEMBER

**Don't ask what the
newest tool can do.
Ask what the job needs.**

Keep the Ferrari for the track. Bring the right tool for the boat.



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