

AI TRAINING HUB · WORKSHOP

No-Code Automations & AI Agents

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- 120-minute hands-on workshop

Trainer Edition · v1.0

What You'll Build Today

One lead-capture workflow. Three rounds of upgrades.

1

Basic Automation

Form → sheet → email → notify



2

AI Workflow

Summarize, score, draft reply



3

AI Agent

Research, evaluate, personalize

Goal: Leave with the same workflow in three forms — and the pattern to apply anywhere.

120-Minute Run of Show

Fast pace. Working beats perfect.

 2
hours

0 : 00 – 0 : 10	Frame, mental model & shared use case
0 : 10 – 0 : 22	 Activity — find your automation target
0 : 22 – 0 : 38	Map the lead capture workflow
0 : 38 – 0 : 43	 Demo 1 — basic automation in Relay
0 : 43 – 1 : 05	 Practice 1 — build & test your first automation
1 : 05 – 1 : 35	 Demo 2 +  Practice 2 — add one AI step
1 : 35 – 1 : 45	Agents — what they are & how they're scoped
1 : 45 – 2 : 00	 Demo 3 +  Practice 3 — scope & build the agent
At close	Humans in the loop · share-out · takeaways

The Mental Model

Three things that get casually called "AI."

Automation

Fixed steps. If A, then B.

AI Workflow

Fixed path with a smart step in the middle.

Agent

Goal-driven. Chooses its own path within boundaries.

RULE OF THUMB *Automation moves data. AI interprets it. Agents pursue goals.*

What Should You Automate?

Three signals to look for.



Repetitive

Happens at least weekly with the same shape



Low Judgment

A junior could follow written instructions



Friction

It's annoying, slow, forgotten, or wasteful

Shortcut: Score each candidate on **Frequency × Time × Annoyance**. Highest score wins.

Do Not Automate Chaos

Pick fights you can win.

Good fit

- Clear, documented steps
- Stable inputs & outputs
- Low-stakes if it misfires
- Repeats many times a week

Wait on this

- Emotionally sensitive replies
- Unclear or shifting process
- High-judgment, high-stakes
- One-off or rare work

Example: Automate the confirmation email. Don't automate the negotiation.



Activity — What Repeats in Your Week?

 5
minutes

List three repetitive tasks, then score each 1–5. Multiply to find your best automation target.

Task	Frequency How often?	Time How long?	Annoyance How much?	Score $F \times T \times A$
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____

Pick the highest score. That's your automation target for today.

Our Shared Use Case

Lead capture — every business has a version of this.

STEP 1

Form submitted

Someone reaches out

STEP 2

Store the lead

Sheet, CRM, or DB

STEP 3



Send confirmation

Sender knows they're seen

STEP 4

Notify the team

Someone follows up

Why one example? So your brain doesn't have to keep switching contexts.

SWAP THE LABEL *Lead → applicant → student → customer. Same shape.*

Every Workflow Has a Shape

Before tools, we need clarity.

TRIGGER

What starts the workflow?

INPUTS

What data comes in?

STEPS

What happens in order?

OUTPUT

What do you get at the end?

CHECK-IN *"In our lead example — what's the trigger?"*

Workflow Map: Lead Capture

In plain English first. Tools second.

TRIGGER	A new lead form submission comes in
INPUTS	
STEP 1	
STEP 2	
OUTPUT	

Workflow Map: Lead Capture

In plain English first. Tools second.

TRIGGER A new **lead form submission** comes in

INPUTS Name, email, message

STEP 1

STEP 2

OUTPUT

Workflow Map: Lead Capture

In plain English first. Tools second.

TRIGGER	A new lead form submission comes in
INPUTS	Name, email, message
STEP 1	Add a row to the sheet
STEP 2	
OUTPUT	

Workflow Map: Lead Capture

In plain English first. Tools second.

TRIGGER	A new lead form submission comes in
INPUTS	Name, email, message
STEP 1	Add a row to the sheet
STEP 2	Email a notification to my team
OUTPUT	

Workflow Map: Lead Capture

In plain English first. Tools second.

TRIGGER	A new lead form submission comes in
INPUTS	Name, email, message
STEP 1	Add a row to the sheet
STEP 2	Email a notification to my team
OUTPUT	Lead is logged, and team notified

Transition: If you can explain it in plain English, you can build it.

LIVE DEMO · 5 MINUTES

Demo 1 — The Basic

Automation

Trigger starts it. Actions do the work.

Lead Capture (automation) ☆ ▾ 📊

✎ Editor ⌚ Runs 1

Trigger

▶ Start a test run

1

Form submitted

☐ Off

2

+

Add row to

+

AI Build Academy - R...

🔗

3

✉

Send email to yourself

+

If the Demo Breaks

Backup slide — use only if needed.

 **Max 2 min troubleshoot**

1

Acknowledge briefly

"Real builds break — that's part of the work." Don't apologize at length.

2

Switch to backup

Open the pre-built workflow or screenshot. Walk through it as if you built it live.

3

Keep the pattern

Trigger → action → action. The lesson holds whether the live demo runs or not.

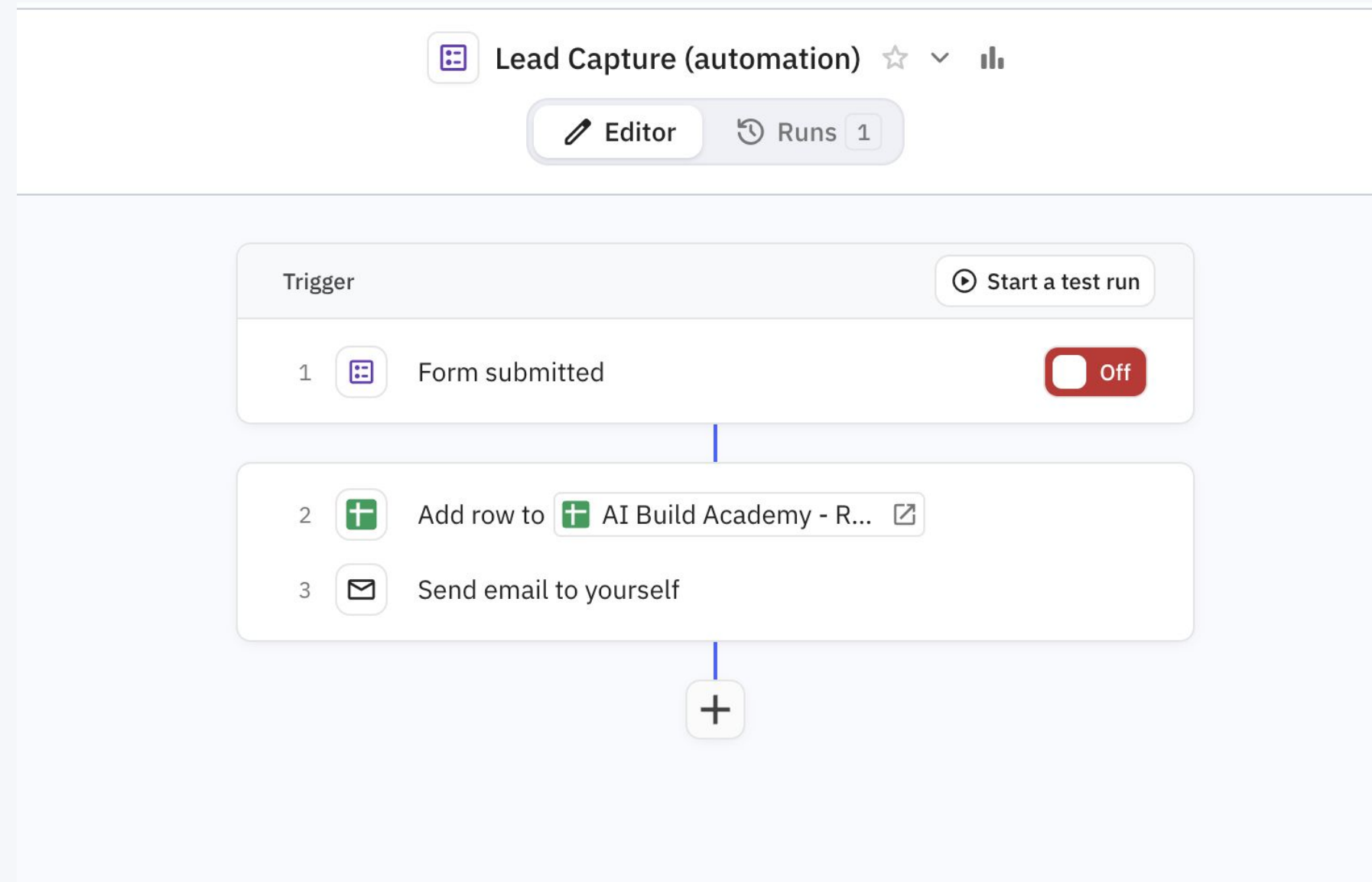
4

Move on within 2 minutes

The room loses energy fast in troubleshooting. Cut and keep going.

Practice 1 — Your First Automation

 15 minutes



Stuck? Ask yourself two questions: *What starts the workflow? What should happen next?*

Debrief: What Changed?

Name the leverage out loud.

Before

- Manual copy-paste from form to sheet
- You write each confirmation reply
- You remember to notify the team
- Leads slip through the cracks

After

- Sheet updates itself, every time
- Sender hears back sooner
- The team is always in the loop
- You get back the busywork hour

TRANSITION *Automation moves work off your plate. Now we'll move thinking off your plate too.*

Add AI to the Workflow

AI is a step, not a replacement.



Summarize

*Long input into a short, useful
output*



Classify

*Pick one label from a list you
defined*



Extract

*Pull specific fields out of messy
text*



Draft

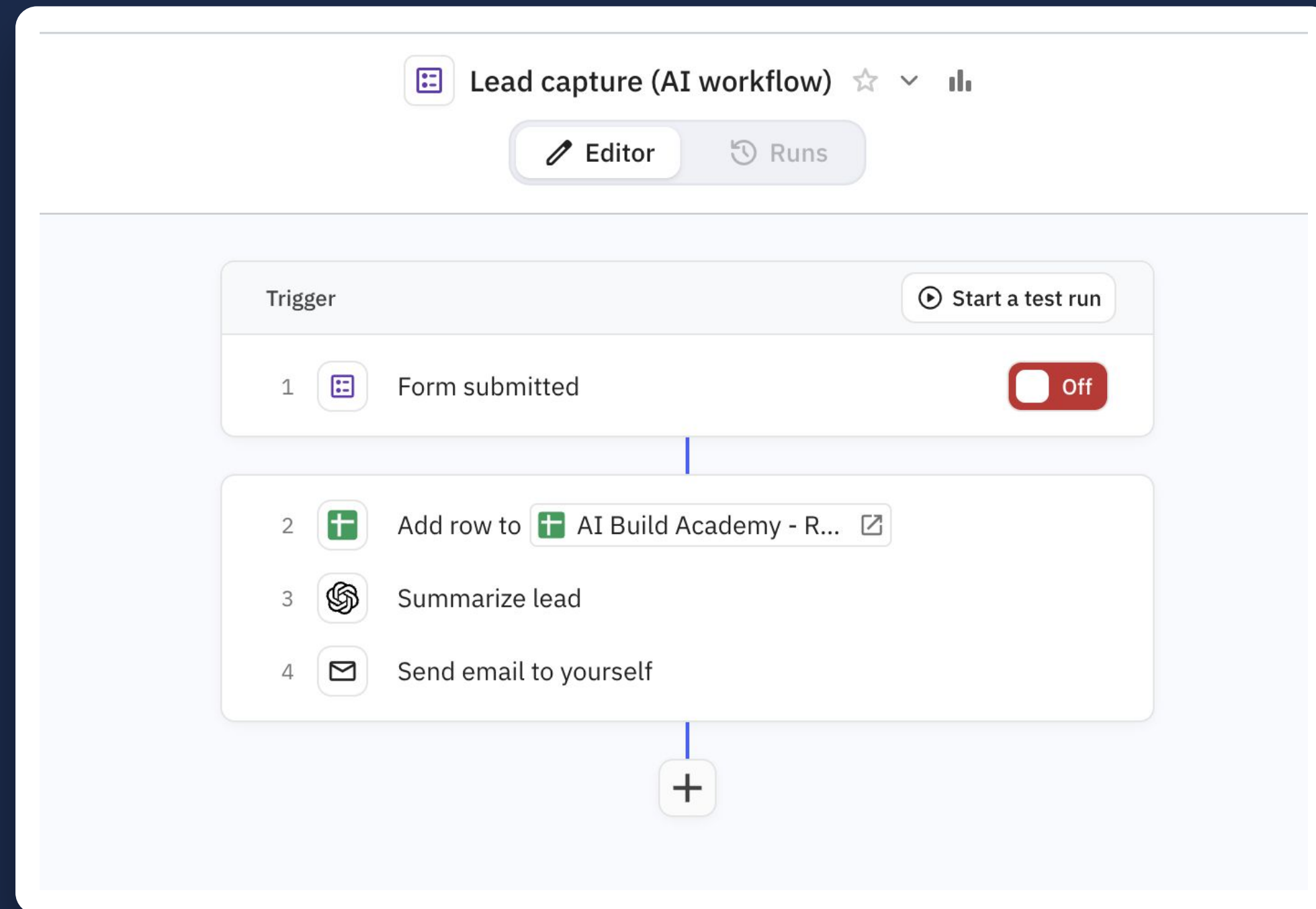
*Write new text from a template &
inputs*

MANTRA *Automation moves data. AI interprets data.*

LIVE DEMO · 5 MINUTES

Demo 2 — Add AI Summary & Classification

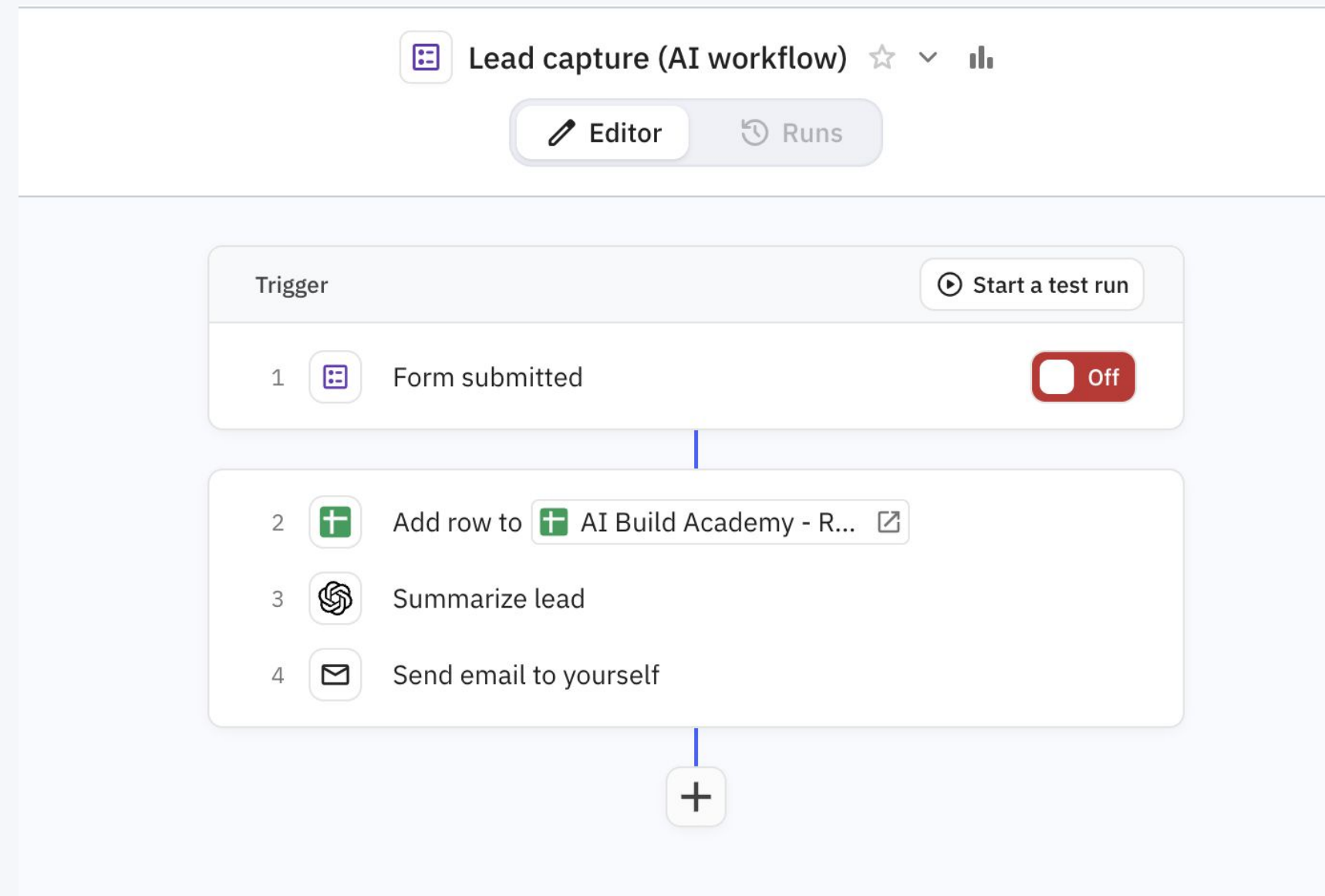
The automation handles structure. AI handles the flexible thinking inside it.





Practice 2 — Add One AI Step

10
minutes



Stuck on the prompt? See the Prompt Pack in the appendix (Slide 25).

Stretch goal: Add conditional routing — if classification is High, draft a reply; if Low, just log and stop.

From Workflow to Agent

Same use case, different shape of system.

Workflow

- You define the path
- Each step is fixed
- Predictable, repeatable
- "First A, then B, then C"

Agent

- You define the goal
- It chooses the steps
- Flexible within boundaries
- "Achieve X — here are tools"

DEMYSTIFY *An agent is not magic. It's a flexible workflow with decision-making.*

Agent Anatomy

Four parts every useful agent has.



Goal

*What success looks like —
narrow and measurable*



Tools

*What it can do — look up,
send, write, search*



Instructions

*How to behave — tone, format,
what to avoid*



Boundaries

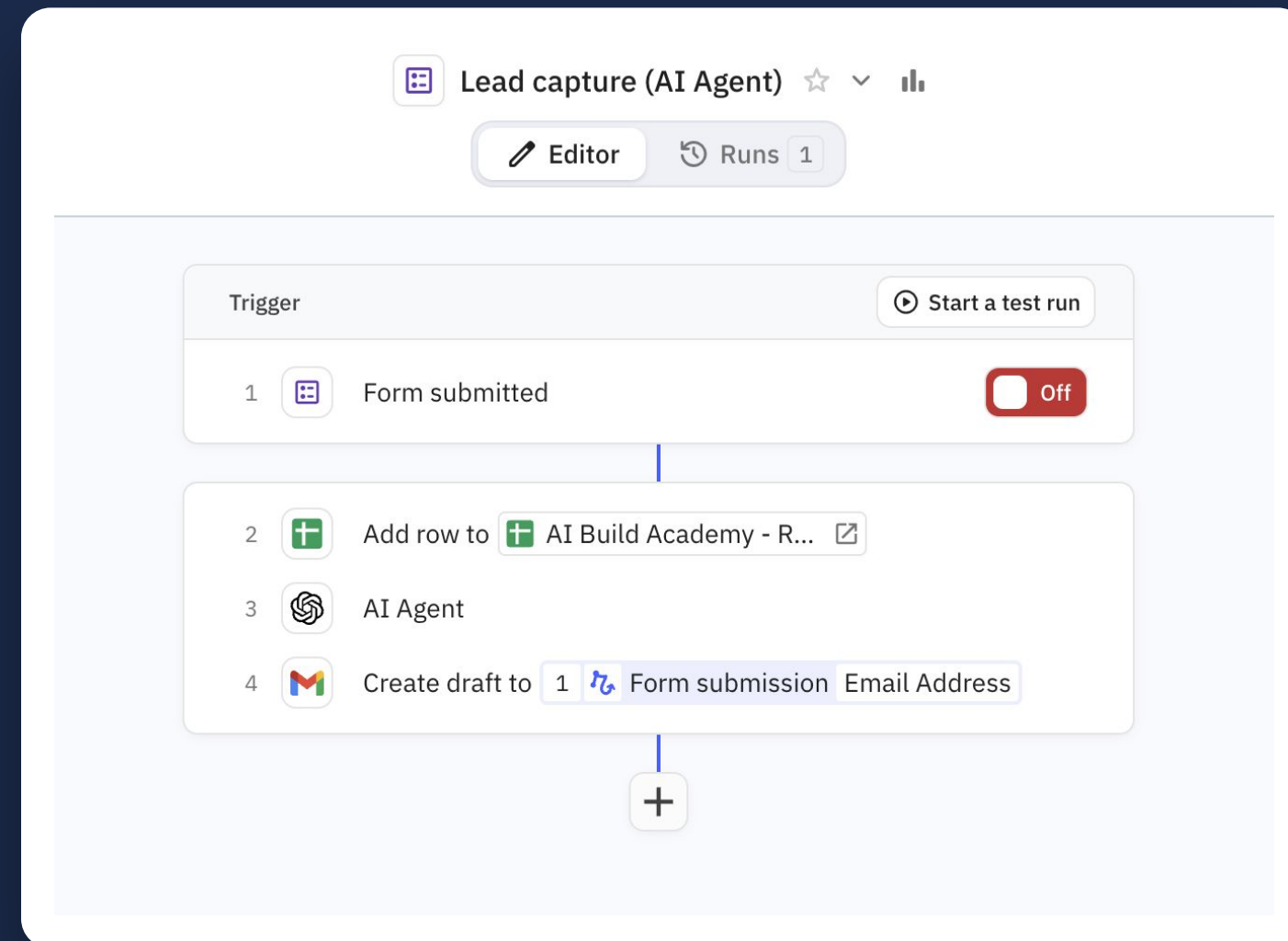
When to stop and ask a human

GOAL TEST *Bad: "Help with sales." Better: "Evaluate inbound leads and draft a personalized reply for human review."*

LIVE DEMO · 10 MINUTES

Demo 3 — Scope the First Lead Agent

Turn the workflow into a narrow agent — without making it dangerously broad.

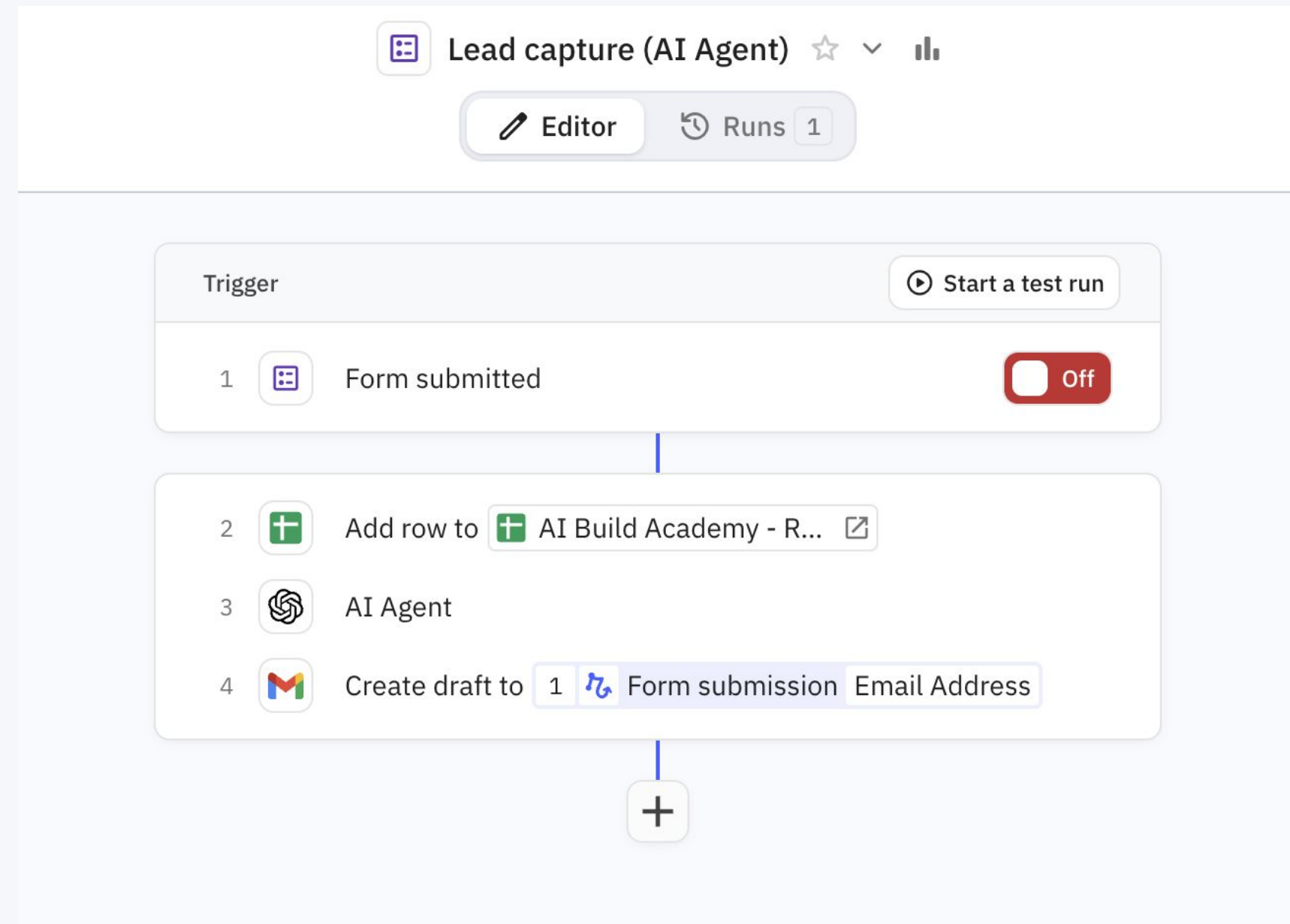


GOAL: Evaluate inbound leads and draft personalized replies. **TOOLS:** Lead form data · Google Sheets · web research · email draft. **BOUNDARIES:** Draft only — never send. Ask a follow-up if information is missing. **OUTPUT:** Fit assessment · reason · draft reply · recommended next step.



Practice 3 — Scope & Build Your First Agent

15
minutes



GOAL: What outcome do you want the agent to achieve? **TOOLS:** What can it look up, write, or send? **BOUNDARIES:** Draft only. When should it stop and ask? **OUTPUT:** What does it hand back to the human?

Keep Humans in the Loop

Trust is earned by observation, not promised by the vendor.

STAGE 1 · EARLY

Draft only

Agent proposes. Human approves every output. Always start here.

STAGE 2 · MATURING

Suggest & review

Agent acts on routine cases. Human reviews edge cases — low confidence, high stakes.

STAGE 3 · TRUSTED

Act & log

Agent runs low-risk actions automatically. Logs everything. Human reviews weekly.

BOUNDARY RULE *Always require human review for money, customers, health, legal, or reputation.*

Share-Out

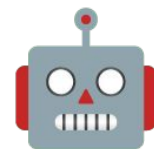
Make the learning visible.

 5–7 minutes



What did you build?

One sentence on the system you shipped today.



Where did AI help?

Name the step where AI did real interpretation.



What would you improve?

One change you'd make if you had another hour.

Trainer note: 2–3 volunteers, two minutes each. If running behind, one voice only.

What to Remember

Four ideas to take with you.



Automate repetition

Annoying small tasks first. Impressive ones later, with more confidence.



Map before tools

Plain English first, then click anything. Clarity is the cheapest debug.



Add AI narrowly

One job per step. Specific output format. Pipe results downstream.



Agentize only when flexibility matters

If a workflow can do it, don't reach for an agent. Start with draft-only.

THIS WEEK *Pick one real workflow. Build the simplest useful version.*

Appendix — AI Step Prompt Pack

Copy, narrow, and paste into your AI step.

Reference

 SUMMARIZE

Inquiry summary

Summarize this inquiry in one sentence under 20 words.

 SUMMARIZE

Meeting recap

Summarize this transcript as 3 bullets: decisions, owners, next steps.

 CLASSIFY

Lead intent score

Classify lead intent as High, Medium, or Low. Output only the label.

 CLASSIFY

Support ticket type

Pick one category: Billing, Bug, Feature, Other. Output only the label.

 GENERATE

Confirmation reply

Draft a 3-sentence reply thanking {{name}} and promising follow-up within 1 business day.

 GENERATE

Internal heads-up

Write a 1-sentence Slack message alerting the team about this new lead and why it matters.

 EXTRACT

Contact fields

Extract name, email, company, role as JSON. Use null if a field is missing.

 EXTRACT

Deal signals

List any mentions of budget, timeline, or decision-makers as bullets.

Appendix — Activity Reference

Quick reset card for the trainer.

Reference

PRACTICE 1

First automation

One trigger, two actions, one successful test run.

Stretch: Third action or personalized email.

PRACTICE 2

Add one AI step

Pick one AI job. Output must flow into a later step.

Stretch: Conditional routing by classification.

PRACTICE 3

Scope & build the agent

Goal, tools, instructions, boundaries, output — then build the narrowest version.

Submit: one test case + screenshot or link.

 **Trainer rule:** Keep the first agent narrow — draft only, never auto-send. One goal, few tools, clear output.