

AI Wish Book

2025-2026



ONLINE AT CIVIC-DIALOG.COM



2026, Strategy, and Investing in People

Hello! Before you read on, please allow me some human-generated 2026 predictions.

I believe 2026 will be a decisive year for the trajectory of many companies, splitting on a single factor: Their strategic approach to artificial intelligence and automation. Most organizations will do something similar, dabbling in piloting generative AI solutions, finding small use cases, but struggling to see the transformation promised.

At the same time, there will be a flood of agencies and consultants offering to “solve” AI for you, building agents, automations, and complex systems. But beyond the high cost and ongoing maintenance, something more damaging happens: It sends the wrong signal. It tells your employees that they can’t learn this. That AI and automation are something done to them rather than with them. And it quietly triggers a fear that their days are numbered.

There is a better path.

Civic Dialog exists to help companies build AI and automation capability from the inside.

We accomplish this by developing a repeatable, durable framework for employee-driven innovation. One that equips your team to identify opportunities, use AI reflexively, build automations, deploy agents, and become your competitive advantage in 2026 and beyond.

Your leadership team may talk every year about “investing in your people” and giving them the skills to grow. These are the skills they need. This is the moment to give them the runway.

In this catalog, you’ll find visions for transformation that your team can achieve in 2026, not by investing in a new SaaS app, or outsourcing to an AI agency, but by building new instincts, skills, and processes that compound and pay dividends for you, your company, and your employees’ futures.

Thank you for reading. May the year ahead be the one where your organization doesn’t just adopt AI, it unlocks the talent that will define its future. Where it didn’t just talk about investing in its employees, it offered them the opportunity to become among the best in the world at what they do.

I would love to talk with you more about your company’s unique challenges and what opportunities might lie within.

Erik Oehler

Founder, Civic Dialog

SALES

THE AGENT-EMPOWERED SALESPERSON WORKDAY

6:45 AM – The Day Starts Itself

Your AI Sales Agent generates a morning briefing of:

- Overnight lead activity
- Accounts showing buying signals
- Priority follow-ups
- A 60-second summary of what matters most today

You start the day informed, not overwhelmed.

8:10 AM – New Lead Arrives, Work Begins Automatically

While you sip your first coffee, your agent:

- Researches the company, decision makers, CRM history
- Drafts a personalized outreach email
- Creates a one-slide intro tailored to the account

You approve the message with a review, some personal touches, and a click.

10:00 AM – First Call of the Day

Before the meeting starts, your agent has already prepared you with:

- Talking points
- Questions to ask, objections to anticipate
- Suggested next steps

During the call, it updates the CRM and drafts your follow-up automatically.

11:45 AM – Between Meetings, Opportunity Surfaces

Your agent flags:

- A warm renewal
- A quiet churn risk
- A competitor move

You receive a briefing and steps on what to do next.

1:30 PM – Proposal Time

Your agent creates:

- Pricing options
- A clean proposal
- A personalized cover note
- Internal approval tasks

What used to take an hour now takes minutes.

BUILD-IT-YOURSELF IN 1 QUARTER!



3:15 PM – Pipeline Intelligence Hour

Your agent highlights:

- Deals off track
- Accounts newly engaged
- Actions most likely to create revenue today

You move through your pipeline with clarity, not clutter.

4:30 PM – Admin Work That Never Reaches You

Behind the scenes, your agent:

- Organizes emails
- Syncs data across systems
- Prepares tomorrow's tasks

Your time stays focused on people, not process.

5:00 PM – The Workday Wraps Itself

A final notification:

"Your day is complete. Here's your plan for tomorrow."

No catch-up work.

No forgotten tasks.

No CRM guilt.

Just sales—simplified, accelerated, elevated.

HUMAN RESOURCES

RESPECT YOUR EMPLOYEE'S TIME

Monday 1:01 PM

Agents perform work in applications on your behalf!

I would like to take next Thursday off

Fewer applications to log into means fewer distractions for employees in their day. Agents can be embedded directly into Microsoft Teams, Slack, or wherever your teams collaborate!

Employee Agent Monday 1:02 PM

Ok! I'll put in the request for you. You'll have 32 hours of PTO left after this.

Thursday 7:45 AM

Who do I report a problem with the women's bathroom sink to?

Employee Agent Thursday 7:46 AM

James, our Operations Manager is the person! I'll include him here: **@James**, see Heather's note above. Would you like me to log a ticket, or check it out first?

James Thursday 7:50 AM

I'm on it! Thanks! Log a ticket and assign to me, please.

AUTO-ANSWER REPETITIVE QUESTIONS

Every company has common questions new hires ask, often to their managers, HR, or the "smartest" person in the office.

Today, this means an opportunity for automated knowledge sharing via agents. In a few months, your team can build a knowledge base that saves countless hours per year in hidden on-boarding costs.

Add to this, the ability to connect you with the right person, and you spend less time coordinating, and more time growing your business.

PUT YOUR KNOWLEDGE TO WORK FOR YOU

In Civic Dialog's **AI and Automation Cohort** programs, HR Business Partners can build the above and more:

- Translate HR policies and workflows into clear decision rules an AI agent can follow
- Build simple automations for recurring HRBP tasks (onboarding steps, reminders, communications)
- Create AI agents that answer employee/manager HR questions consistently and accurately
- Use AI to summarize ER notes, performance data, or survey results into actionable insights
- Automate pulling and organizing people data to support talent reviews and workforce planning
- Develop a reusable template/playbook for converting HR processes into automations and agents



EXECUTIVE TEAM

MAKE BETTER DECISIONS, FASTER

The speed and confidence with which your team makes decisions is an underrated factor in growth. The ingestion, classification, structuring, and analysis of data from markets, competitors, and current customers is unmanageable without investments in big data teams and IT investment...

...until now.

A Company Intelligence Application is often requested as an **AI and Automation Cohort** project, and with Civic Dialog's tailored approach, we can co-build a competitive advantage that would cost other companies **millions** to replicate.



BENEFITS

- **Centralize Intelligence:** Aggregate feedback from competitor websites and announcements, market news and opportunities, support tickets, sales emails, customer RFQs, customer meetings, and product owners.
- **Classify and Structure:** Implement a system for categorizing and structuring the feedback to make it meaningful and actionable.
- **Enable Self-Service:** Develop a user-friendly interface that allows employees across the company to easily access and generate reports from the feedback data.
- **Improve Decision-Making:** Provide departments with the insights needed to make informed, data-driven decisions.
- **Enhance Customer Satisfaction:** Use feedback to proactively address customer needs and improve products and services.
- **Increase Agility:** Increase your company's agility in responding to market changes, customer needs and competitor activities.
- **Avoid Knowledge Gaps:** Marketing, support, sales, product, operations, and executive teams can access and collaborate around the same source of truth.

**BUILT BY YOU
OWNED BY YOU**



COHORT PROGRAM

GENERATIVE AI SKILLS ARE ONLY TABLE STAKES

Generative AI has rapidly shifted from emerging capability to essential business competency. As these tools become embedded in everyday work, any competitive advantage is short-lived.

By training employees how to incorporate AI into no-code automation tools, they become business problem solving wizards. Employees who understand how to apply, refine, and govern generative AI, agents, and automations become a compounding core differentiator. Without a structured program to build, measure, and these skills, companies risk falling behind peers who are already integrating AI into frontline operations and strategic planning.

The **AI and Automation Cohort** ensures employees in **ANY ROLE** gain hands-on expertise in:

- Prompt engineering
- Workflow automation
- Testing and architecting solutions
- Process mapping and ROI measurement
- Responsible governance, change control, and project management

This creates a workforce capable of augmenting their roles with AI, improving throughput, quality, and innovation, without relying solely on external partners.

THE PROCESS

- **Workshop:** Project & Participant Identification (1 Day)
 - A one-day, leadership-aligned working session designed to identify high-value automation opportunities, nominate cohort participants, and establish the timeline for project execution.
- **Data and Governance Prep** (~2 Weeks)
 - Work with your IT teams on policy, project process, change control, governance as needed.
 - Identify data challenges, map approved enterprise tech stack
- **Cohort:** Learning (1 Week On-Site)
 - A focused, week-long immersive experience combining hours of structured classroom instruction with individualized support sessions. Participants develop the practical skills required to design, build, and govern enterprise-grade AI and automation solutions. Training includes:
- **Capstone Automation Project** (~8-12 Weeks)
 - Participants lead an end-to-end automation initiative that addresses a real business problem. Over eight weeks, they prototype, test, and validate a solution with measurable business impact.

Program structure includes:

- Weekly 1-hour check-ins for guidance and feedback
- 3-4 hours per week per employee of commitment (10% of their time)
- Access to coaching and technical support
- Assistance with data cleaning, policy, governance, and anything else needed for a successful program

Deliverable: A fully operational automation deployed in production, with documented impact (time savings, error reduction, throughput, or cost efficiency) and a process which employees can repeat without Civic Dialog's involvement



OTHER SERVICES

Lunch and Learn/Speaking Engagements: A customized overview of your company's opportunities around Generative AI and Agents, based on your inputs, industry, and tech maturity. Can be run by department or site-wide.

Reflexive AI Program: Custom programs that include training for your unique business needs, community-building, measurement, and encouragement it takes to make generative AI a first instinct, not a last resort.

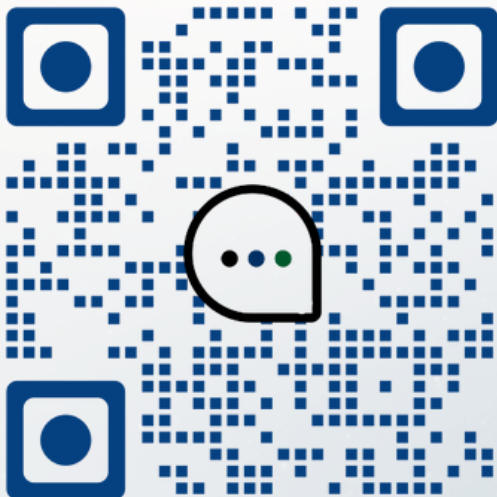
Strategic Workshops: Examples include:

- Roadmap definition: Assessing opportunities, deploying training and technologies, and measuring the impact
- Tech exploration: Explore what opportunities you may not know exist to differentiate you from your competition
- Department upskilling: Customized workshop to supercharge a department's productivity without adding headcount

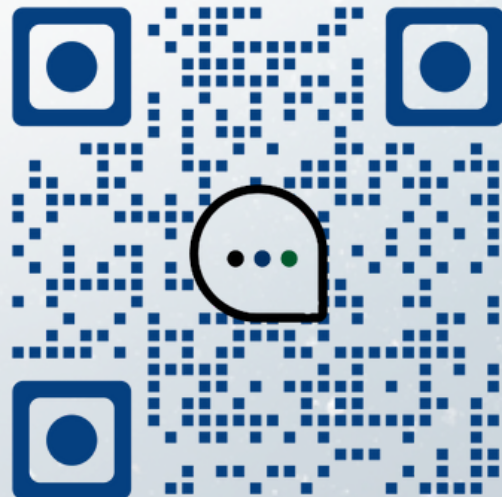
Fractional CAIO (Chief Artificial Intelligence Officer): Retainer based advisement or hands-on building of solutions as needed.

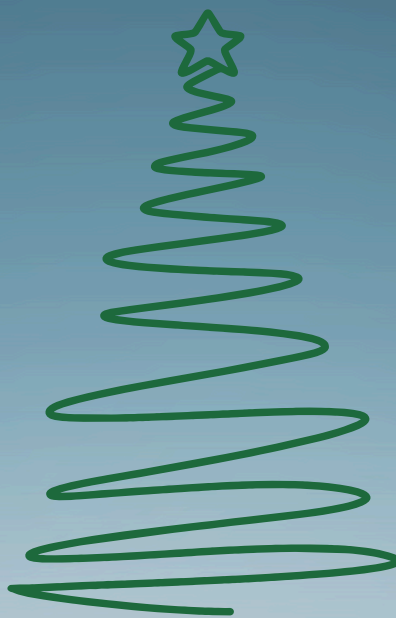
FREE RESOURCES

AI READINESS ASSESSMENT



PODCAST





Happy Holidays from

