



# **Beyond the AI Hype**

## **Real Workflows, Real Revenue, Real Results**

Create an amazing and up-to-date presentation on AI that makes me look super smart and knowledgeable.



Sorry, if you want to be an expert on this, you should probably create the presentation yourself.





- **About Level**

Co-founded in 2010 with the goal of being one of the **top performance marketing agencies** in the US for companies with complex sales & marketing environments.

One of the first agencies in the US to offer **end-to-end multi-platform BI reporting** to all of our clients.

Now 200+ people in across 37 states working with **100+ upper-mid market to enterprise clients**.

- **About Me**

Started coding when I was eight. Went to university for **Math & Computer Science** and was coding AI algorithms in 2003.

Early technology adopter - ask me about my **Google Glass** and Apple Vision Pro.

**Lazy** (this is my super power).

# Today's Agenda

- 1 Hype & History
- 2 Real Use Case & Examples
- 3 Tools & Next Steps
- 4 Q/A & Discussion

***Disclaimer: This presentation will expire in 30 days.***



HAPPY



# Hype Cycle for Artificial Intelligence, 2023



[gartner.com](https://www.gartner.com)

Source: Gartner  
© 2023 Gartner, Inc. All rights reserved. Confidential. Do Not Distribute.

**Gartner**

We Are at  
the Peak  
"Even Your  
Grandma is  
Talking  
About It" for  
Generative AI  
Expectations

**LEVEL**

HOW DID YOU GET  
BUDGET APPROVAL  
FOR ALL THIS?

I JUST  
TOLD THEM  
THE NAME  
OF THE  
PROJECT.

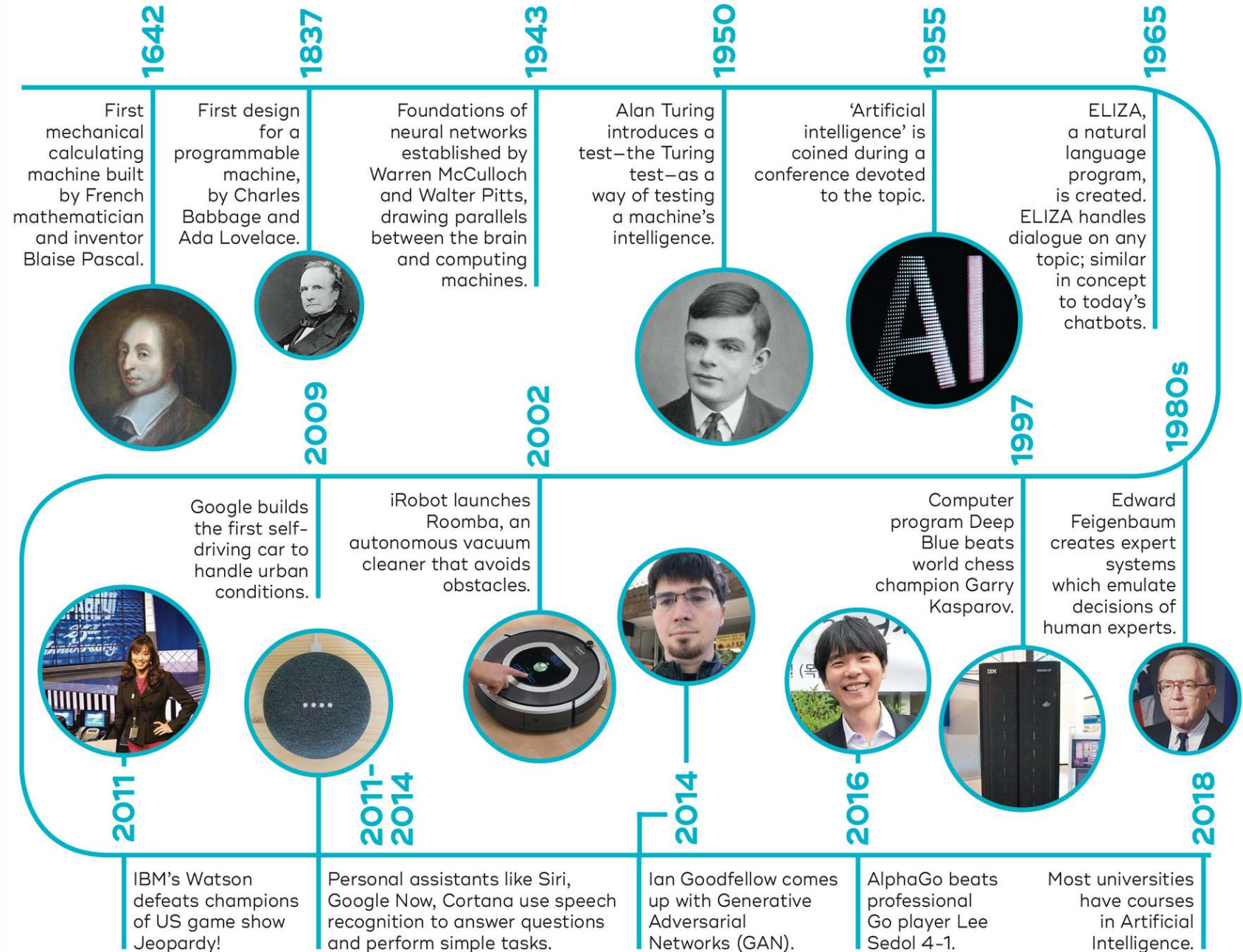
AI

TOM  
FISH  
BURNE



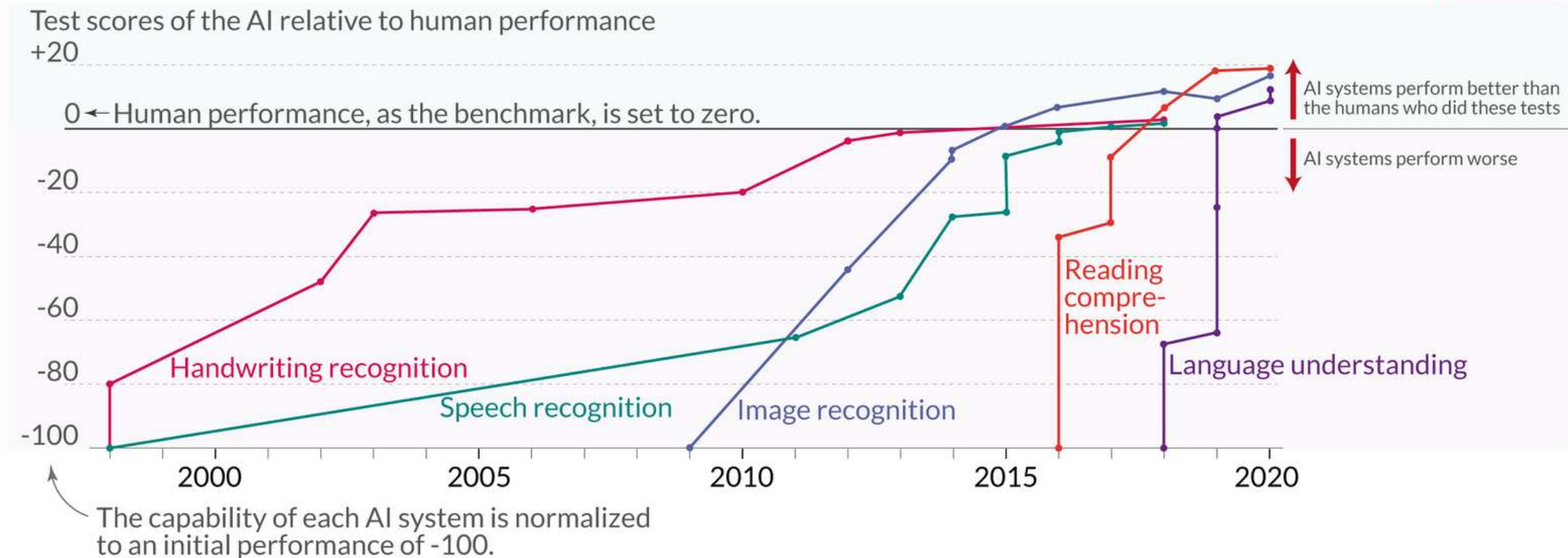
# A Brief History

LEVEL





# Language and image recognition capabilities of AI systems have improved rapidly



Data source: Kiela et al. (2021) – Dynabench: Rethinking Benchmarking in NLP  
OurWorldinData.org – Research and data to make progress against the world's largest problems.

Licensed under CC-BY by the author Max Roser

## Midjourney Version Comparison



Feb 2022 (V1) to Dec 2023 (V6)

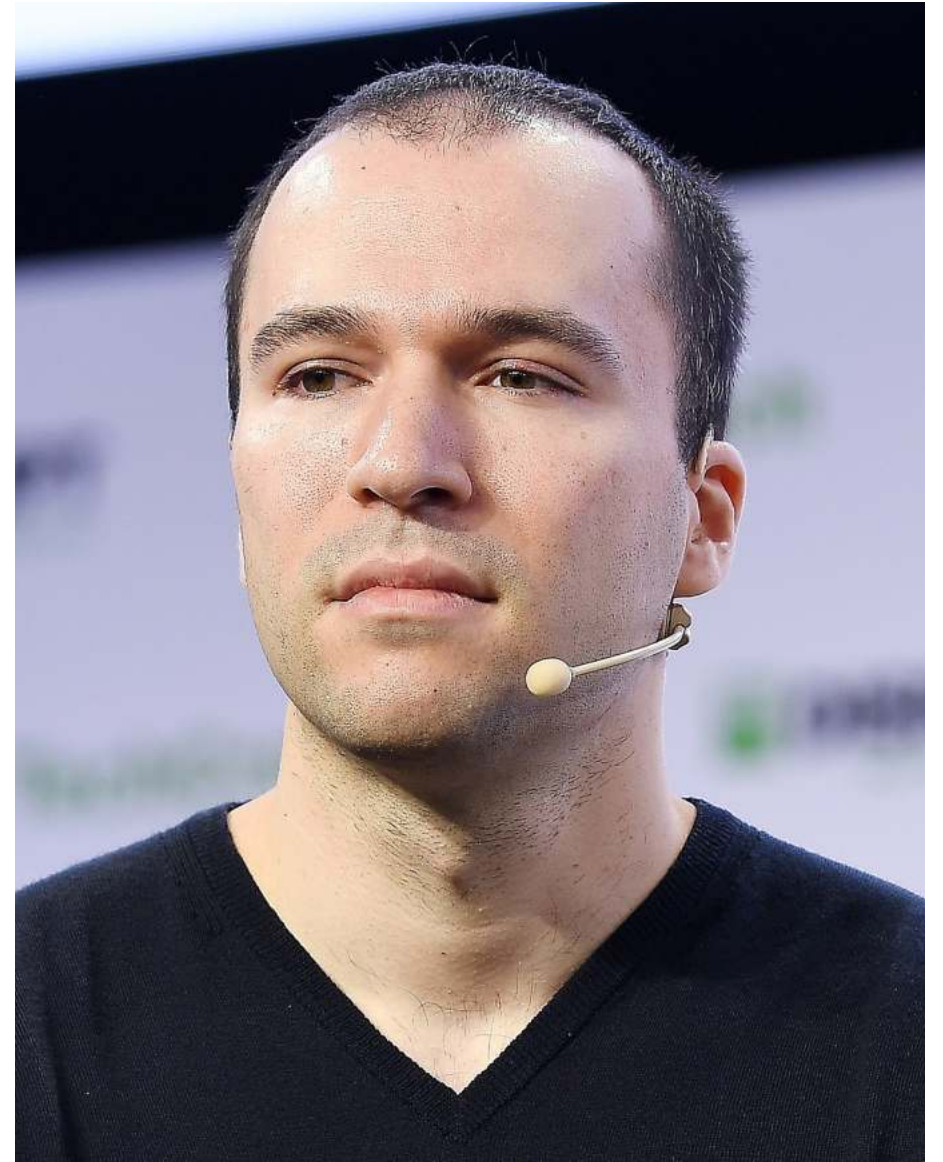
SOURCE: @MINCHOI

**LEVEL**

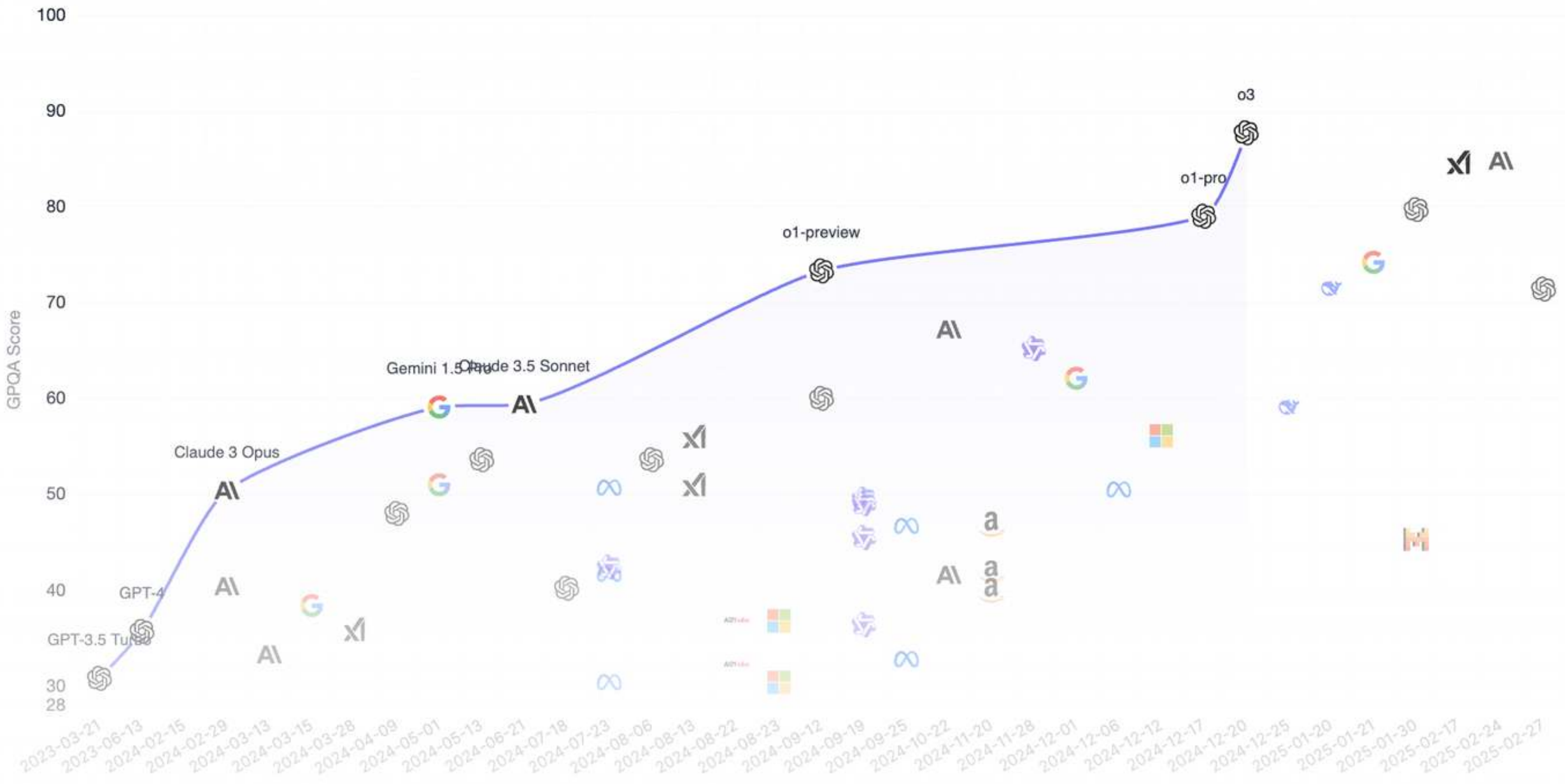
©2025 Proprietary and Confidential. Do Not Distribute.













**“Most amazing fact about AI is that even though it’s starting to feel impressive, a year from now we’ll look back fondly on the AI that exists today as quaint & antiquated.,,”**

Greg Brokman, President & Co-Founder







Organization ↕	Model ↕	Context ⓘ ↕	GPQA ⓘ ↕	Multimodal ↕
	o3	128,000	87.7%	×
AI	Claude 3.7 Sonnet	200,000	84.8%	✓
	Grok-3	128,000	84.6%	✓
	Grok-3 Mini	128,000	84.6%	✓
	o3-mini	200,000	79.7%	×
	o1-pro	128,000	79.0%	✓
	o1	200,000	78.0%	×
	Gemini 2.0 Flash Thinking	1,000,000	74.2%	✓
	o1-preview	128,000	73.3%	×
	DeepSeek-R1	131,072	71.5%	×
	GPT-4.5	128,000	71.4%	✓
AI	Claude 3.5 Sonnet	200,000	67.2%	✓
	QwQ-32B-Preview	32,768	65.2%	×
	Gemini 2.0 Flash	1,048,576	62.1%	

**Gemini 2.5 Pro** is Google’s latest AI model, optimized for complex reasoning, advanced problem-solving, and coding tasks.

It currently leads industry benchmarks in mathematics, science, and agentic coding capabilities, **outperforming competitors** like OpenAI’s GPT-4.5 and Claude 3.7.

This model is specifically built to integrate **deeper context and multimodal inputs** (text, audio, video, images), enabling more intelligent and context-aware AI applications.

Benchmark		Gemini 2.5 Pro Experimental (03-25)	OpenAI o3-mini High	OpenAI GPT-4.5	Claude 3.7 Sonnet 64k Extended Thinking	Grok 3 Beta Extended Thinking	DeepSeek R1
Reasoning & knowledge Humanity’s Last Exam (no tools)		18.8%	14.0%*	6.4%	8.9%	—	8.6%*
Science GPQA diamond	single attempt (pass@1)	84.0%	79.7%	71.4%	78.2%	80.2%	71.5%
	multiple attempts	—	—	—	84.8%	84.6%	—
Mathematics AIME 2025	single attempt (pass@1)	86.7%	86.5%	—	49.5%	77.3%	70.0%
	multiple attempts	—	—	—	—	93.3%	—
Mathematics AIME 2024	single attempt (pass@1)	92.0%	87.3%	36.7%	61.3%	83.9%	79.8%
	multiple attempts	—	—	—	80.0%	93.3%	—
Code generation LiveCodeBench v5	single attempt (pass@1)	70.4%	74.1%	—	—	70.6%	64.3%
	multiple attempts	—	—	—	—	79.4%	—
Code editing Aider Polyglot		74.0% / 68.6% whole / diff	60.4% diff	44.9% diff	64.9% diff	—	56.9% diff
Agentic coding SWE-bench verified		63.8%	49.3%	38.0%	70.3%	—	49.2%
Factuality SimpleQA		52.9%	13.8%	62.5%	—	43.6%	30.1%
Visual reasoning MMMU	single attempt (pass@1)	81.7%	no MM support	74.4%	75.0%	76.0%	no MM support
	multiple attempts	—	no MM support	—	—	78.0%	no MM support
Image understanding Vibe-Eval (Reka)		69.4%	no MM support	—	—	—	no MM support
Long context MRCR	128k	91.5%	36.3%	48.8%	—	—	—
	1M	83.1%	—	—	—	—	—
Multilingual performance Global MMLU (Lite)		89.8%	—	—	—	—	—



# ChatGPT - Which Models to Use

As of 25 April 2025



## ChatGPT Models

## My Use

GPT-4o

Great for most tasks

### Quick questions

Good for small quick tasks, e.g.: sense check, translate

GPT-4.5

RESEARCH PREVIEW

Good for writing and exploring ideas

### Writing & Deep Chat

Best writer. 'Understands' most deeply. Good for deeper chats

o3

Uses advanced reasoning

### Problem Solver

Most universal at using tools, solving problems in many ways, but slow

Daily Driver

o4-mini

Fastest at advanced reasoning

### Processor

Best at mechanical tasks, e.g. churning through data quickly

o4-mini-high

Great at coding and visual reasoning

### Code & Hard Tasks

Similar to o3, better at mechanical tasks, less general understanding

2nd Daily Driver

# OpenAI Imagines Our AI Future

## Stages of Artificial Intelligence

---

Level 1	Chatbots, AI with conversational language
Level 2	Reasoners, human-level problem solving
Level 3	Agents, systems that can take actions
Level 4	Innovators, AI that can aid in invention
Level 5	Organizations, AI that can do the work of an organization

 *We Are  
Here*

Source: Bloomberg reporting

**Bloomberg**

**The technology will never  
be worse than it is today.**



**What is your  
~~AI~~ strategy?**

HAVE YOU FIGURED  
OUT HOW AI WILL  
IMPACT OUR  
BUSINESS?

WORKING  
ON IT.



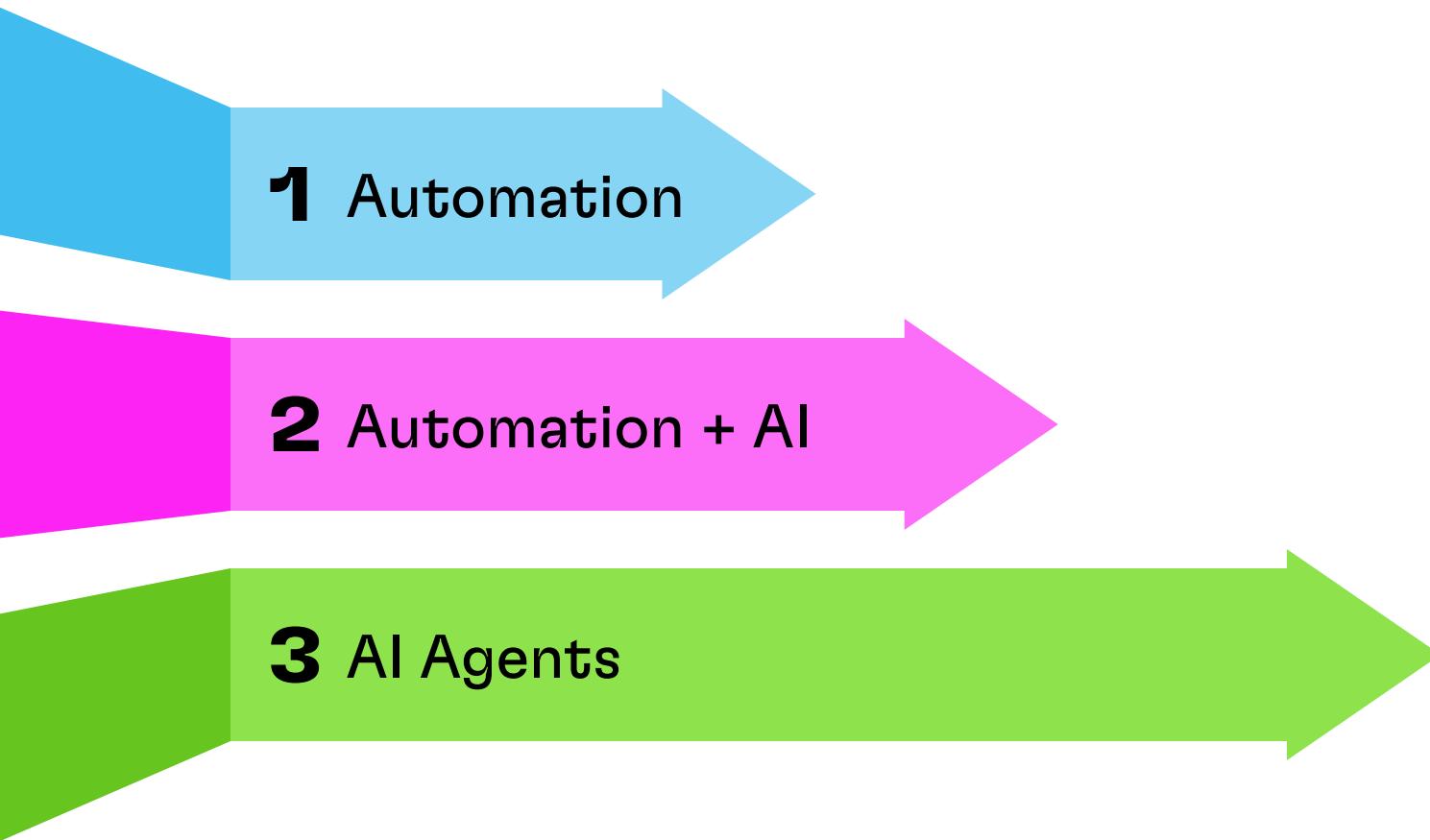
How will AI impact  
our business?



There are many ways  
that AI can impact ■

TOM  
FISH  
BURNE

# Understanding Types of Workflows



Basic automation handles fixed, rule-based tasks with no flexibility. AI automation adds smart decision-making to streamline workflows, while AI agents autonomously learn, adapt, and tackle complex challenges.

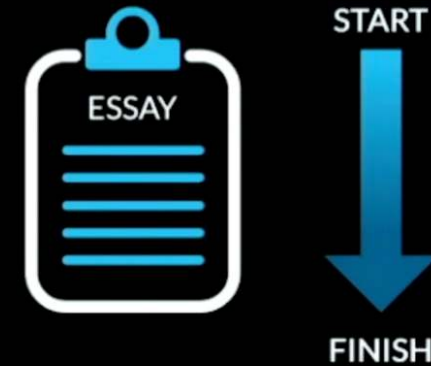
**LEVEL**



# AGENTIC AI

## NON-AGENTIC WORKFLOW (ZERO-SHOT)

Please type out an essay on topic X from start to finish in one go, without using backspace.



## AGENTIC WORKFLOW

Write an essay outline on topic X

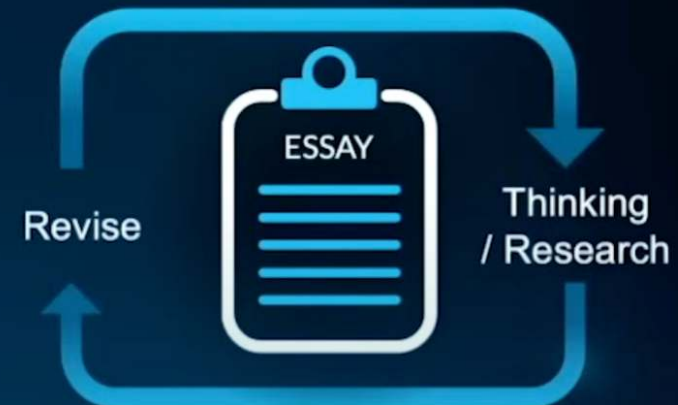
Do you need any web research?

Write a first draft.

Consider what parts need revision or more research.

Revise your draft.

...



# Agentic AI is already here with OpenAI's and Google's Deep Research

Message ChatGPT



Attach



Search



Deep research



## Deep Research

by [Tyler Cowen](#) February 4, 2025 at 2:58 pm in Education, Science, Web/Tech

I have had it write a number of ten-page papers for me, each of them outstanding. I think of the quality as comparable to having a good PhD-level research assistant, and sending that person away with a task for a week or two, or maybe more.

Except Deep Research does the work in five or six minutes. And it does not seem to make errors, due to the quality of the embedded o3 model.

It seems it can cover just about any topic?

I asked for a ten-page paper explaining Ricardo's theory of rent, and how it fits into his broader theory of distribution. It is a little long, but that was my fault, here is [the result](#). I compared it to a number of other sources on line, and thought it was better, and so I am using it for my history of economic thought class.

I do not currently see signs of originality, but the level of accuracy and clarity is stunning, and it can write and analyze at any level you request. The work also shows the model can engage in a kind of long-term planning, and that will generalize to some very different contexts and problems as well — that is some of the biggest news associated with this release.

Sometimes the model stops in the middle of its calculations and you need to kick it in the shins a bit to get it going again, but I assume that problem will be cleared up soon enough.

If you [pay for o1 pro](#), you get I think 100 queries per month with Deep Research.

Solve for the equilibrium, people, solve for the equilibrium.

## What can I help with?

Message ChatGPT

Attach

Search

Deep research

Get detailed insights on any topic



Create image

Analyze data

Code

Surprise me

Get advice

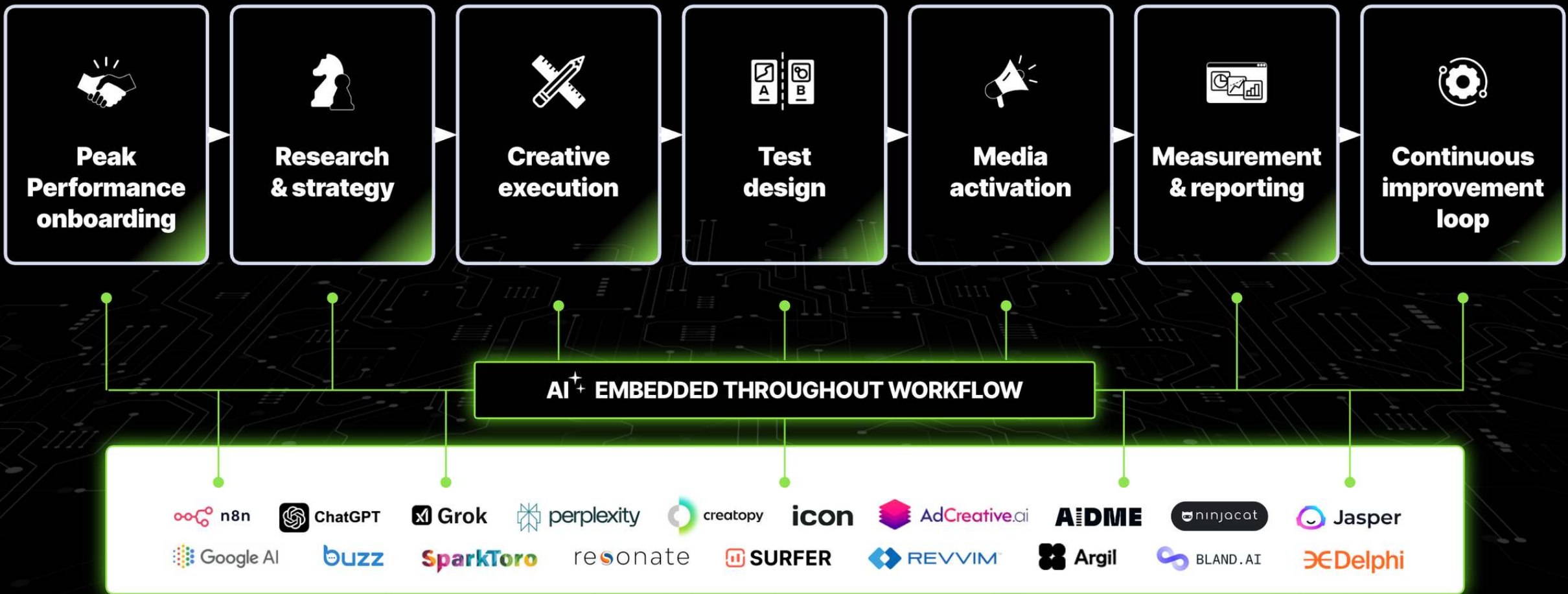
More

# Use Cases & Guides

[The Reason You Came Here]



# Extended, optimized, and constantly evolving



# Generative AI-supported workflows



## Peak Performance onboarding

- Client team submits context-rich intake form
- LVL AI Automate triggers task creation
- Slack posts to notify #ops channels
- Client dossier / client knowledge navigator GPT initialized



## Research & strategy

- APIs (Resonate, SparkToro, BuzzAI) pull target data
- GPT Assistant generates insights & concepts
- LVL AI Automate stores and summarizes insights
- Strategist assigned and creates data-supported briefing docs



## Creative execution

- Anyword and AdCreative.ai score and optimize assets
- AI-assisted versioning in platform
- LVL AI Automate stores versions for final review
- Creative Lead reviews w/ Compliance Bot and approves



# Generative AI Beginner Use Cases

### Persona Twins

Build a custom GPT on your brand, data, and give it a full persona based on your marketing research. Use this to review copy, creative, and strategies for faster iteration.

### Social Media First Draft

Build a custom GPT on your past posts that have done well. Give it parameters on length, tone, audience, etc. Automate turning an idea into 3 potential social posts.

### RFP Creation

Take the RFP process from weeks to hours. Give a custom GPT all past RFPs and turn your sales team into AI editors. **Hint:** have it work in sections, not develop the whole RFP.

### Personal Project Manager

Connect a LLM to your PM software via API. Send a request and have it clean it up, break down complex tasks, and even assign to other people.

### 1:1 Email Personalization

Use 1st party data (+ publically available data) to create 1:1 custom emails for every single customer in real-time.

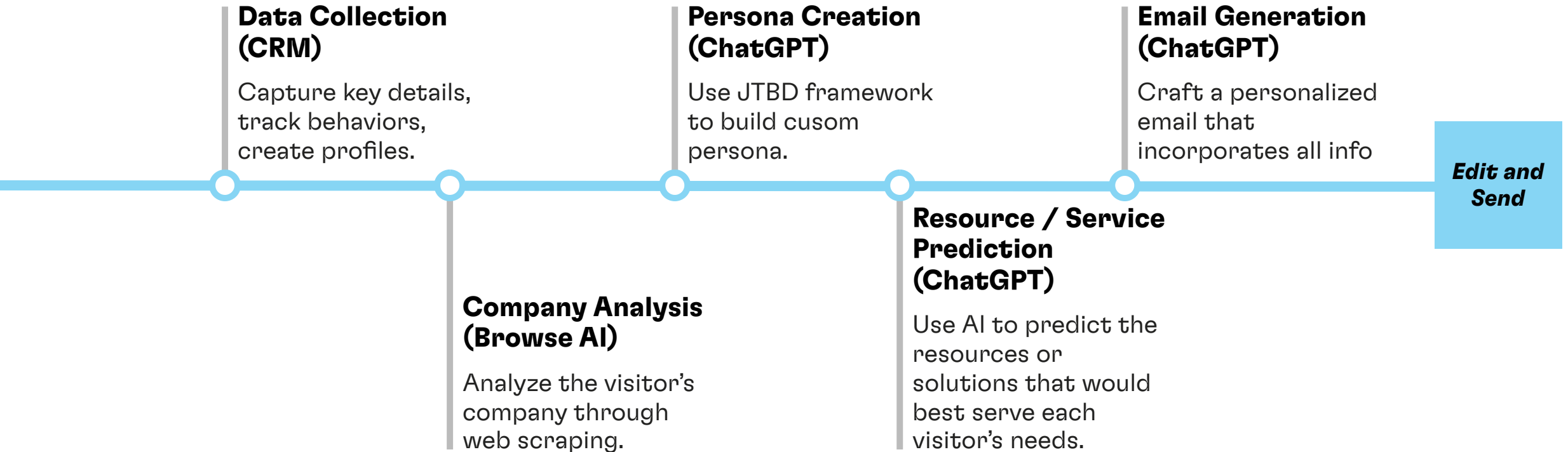
➡ **Explained on future slide**

### Bonus: Board Deck GPT

Upload all of your past board decks along with board deck best practices to custom GPT. Create board member personas.

Upload screenshots of finished slides and critique it - "Act as my chairman"

# Hyper Personalized Email Process with CRM + Browse AI + ChatGPT (Using Zapier)



**LEVEL**



# Automation: Email Notification of Properties

## Property Lead Automation Workflow

This workflow automatically searches for potential real estate leads based on configured criteria, obtains owner contact information through skip tracing, and pushes the leads to your CRM. It can be run manually or scheduled to run daily.

**Steps:** Property Search → Filter Results → Skip Trace → Format Data → Export (Excel & CRM)

### Workflow Triggers

This workflow can be triggered in two ways:

1. **Scheduled Trigger** - Runs automatically every day at the specified time
2. **Manual Trigger** - Run the workflow on-demand by clicking Execute



Daily Schedule



When clicking "Execute Workflow"

### Search Configuration

Configure your property search criteria including:

- Location (city, state, zip)
- Property type
- Value range
- Equity percentage
- Owner status
- And more

Edit the 'search\_parameters' in the Set node to customize your search criteria.



Configure Search Parameters

### Property Data Processing

1. **Search Properties API** - Connect to BatchData to search for properties
2. **Filter Property Results** - Apply additional filtering logic and calculate lead scores based on factors like:
  - Equity percentage
  - Years of ownership
  - Owner occupancy status
  - Tax delinquency
  - Recent sales activity
3. **Get Owner Contact Info** - Skip trace each property to find owner contact details
4. **Format Lead Data** - Structure the data for CRM and reporting



Search Properties API

POST: <https://api.batchdata.co...>



Filter Property Results



Get Owner Contact Info

POST: <https://api.batchdata.co...>



Format Lead Data

### Lead Output Options

1. **Create Excel Spreadsheet** - Generates an Excel file with all property leads and details
2. **Push to CRM** - Adds leads to your CRM system (HubSpot in this example, but can be changed to Salesforce, Zoho, etc.)
3. **Email Notification** - Sends a summary email with the Excel file attached
4. **Summarize Results** - Provides a summary of the execution results



Create Excel Spreadsheet

Write to File



Summarize Results



Push to CRM

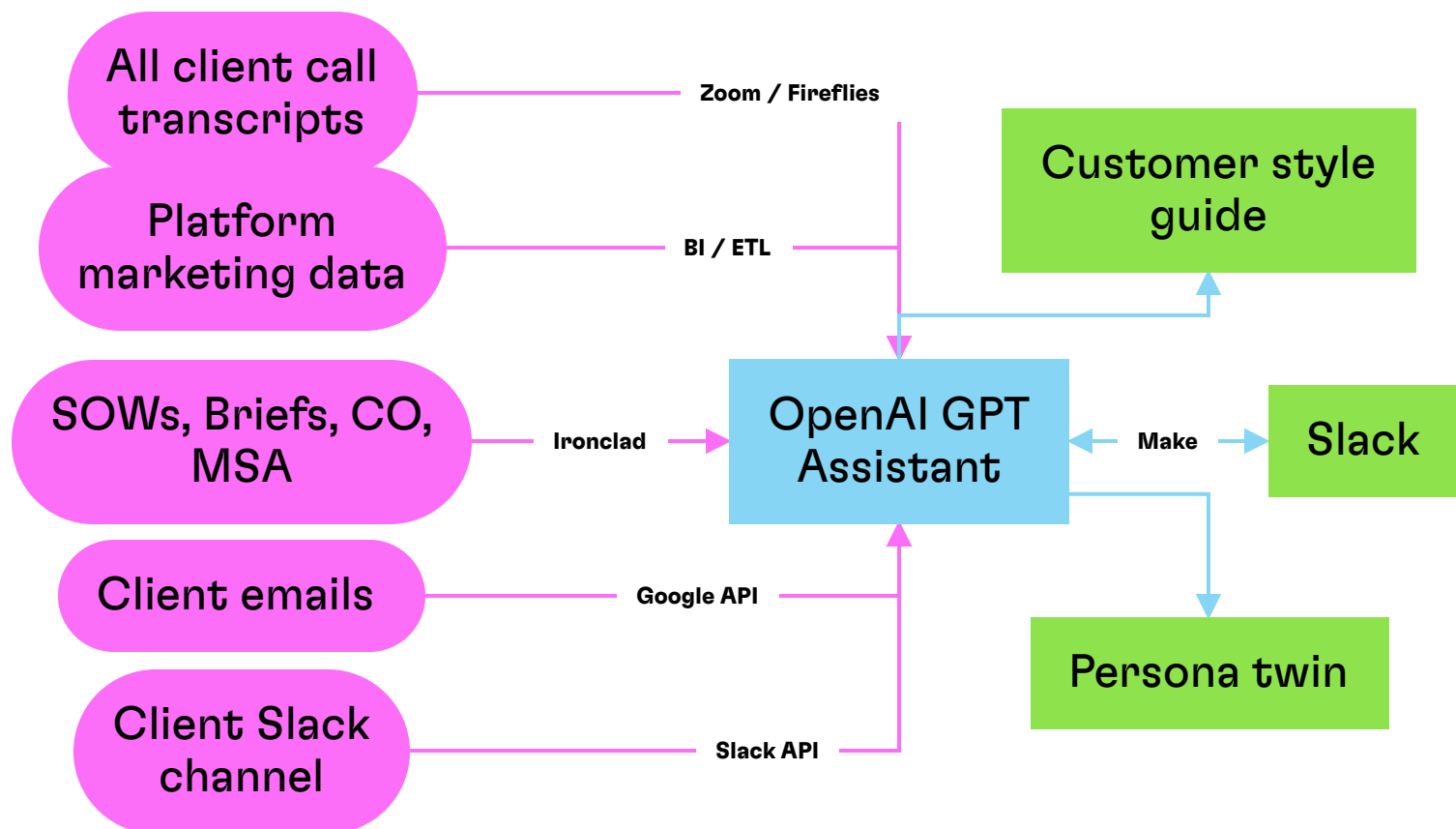
upsert: contact



Email Notification

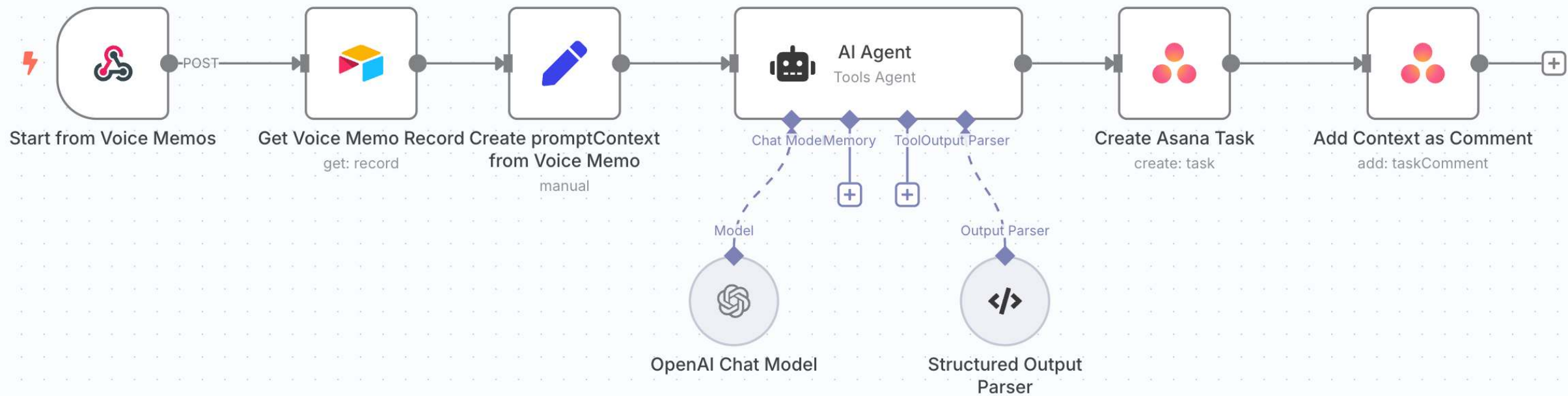
Send

# Client Knowledge Navigator



Centralize and streamline client-specific data for clients, enabling real-time interaction, enhanced onboarding, and comprehensive understanding of ongoing client details.

## Easy: Phone Voice Memo to Asana Task



# Create a Custom Email Style Guide Based on Historic Emails

## ### INSTRUCTIONS ###

I am going to build a GPT that helps me craft email responses in my style. I would like you to analyze the emails below, break it down to the DNA of the email, and then create a detailed explanation I can feed a Custom GPT that will use those as instructions on how to craft emails as me.

## ### END INSTRUCTIONS ###

## ### EXAMPLE EMAILS SENT ###

Researched for 2m 10s >

## Patrick Patterson's Email Writing Style Guidelines

Below is an analysis of Patrick Patterson's email writing style, distilled into clear guidelines. These can be used to fine-tune a custom GPT model to generate email responses in Patrick's distinctive style.

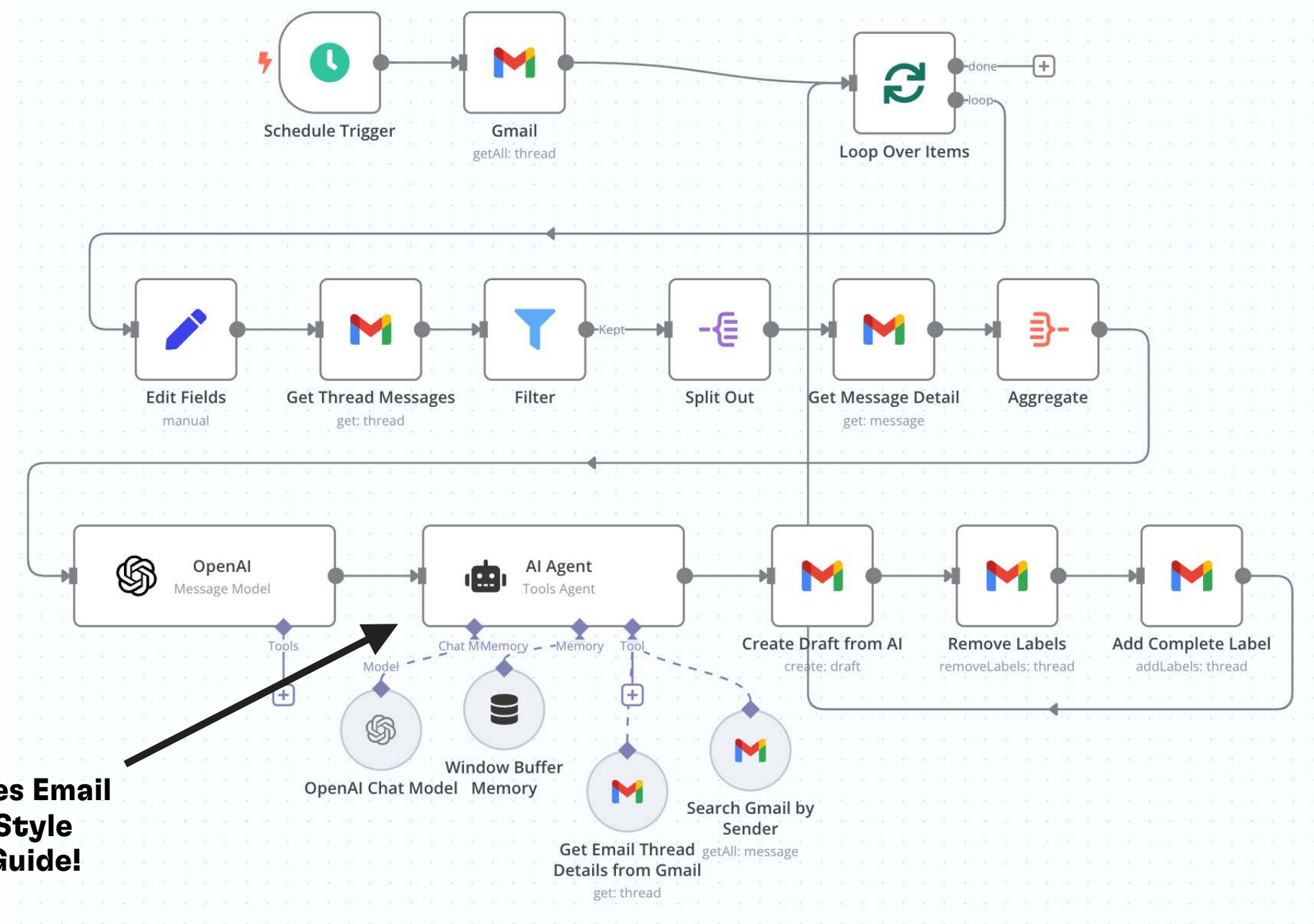
### Tone & Voice

- **Professional Yet Approachable:** Maintain a professional tone that still feels personable. Patrick's emails are respectful and business-like, but he isn't overly formal when it's not needed. For example, he might write "Hi team," instead of a very formal salutation, striking a balance between friendly and professional.
- **Direct and Pragmatic:** Be straightforward. Patrick gets to the point quickly and avoids flowery language or long-winded explanations. The tone is pragmatic – every sentence has a purpose. There is minimal small talk or filler.
- **Minimal Fluff:** Keep the language concise and **avoid unnecessary details or jargon**. Patrick communicates the necessary information clearly and leaves out extraneous commentary. The result is a tone that's efficient but not curt – it remains courteous even while being brief.

LEVEL



## Medium: Auto Email Draft Creation (AI Automation + Light AI Agent)



# **Tools & Resources**

[Bonus Because I Can't Help Myself]

# The Anatomy of an o1 Prompt

I want a list of the best medium-length hikes within two hours of San Francisco.

Each hike should provide a cool and unique adventure, and be lesser known.

For each hike, return the name of the hike as I'd find it on AllTrails, then provide the starting address of the hike, the ending address of the hike, distance, drive time, hike duration, and what makes it a cool and unique adventure.

Return the top 3.

Be careful to make sure that the name of trail is correct, that it actually exists, and that the time is correct.

--

For context: my girlfriend and i hike a ton! we've done pretty much all of the local SF hikes, whether that's presidio or golden gate park. we definitely want to get out of town -- we did mount tam pretty recently, the whole thing from the beginning of the stairs to stinson - it was really long and we are definitely in the mood for something different this weekend! ocean views would still be nice. we love delicious food. one thing i loved about the mt tam hike is that it ends with a celebration (Arriving in town to breakfast!) The old missile silos and stuff near Discovery point is cool but I've just done that hike probably 20x at this point. We won't be seeing each other for a few weeks (she has to stay in LA for work) so the uniqueness here really counts.

Goal

Return Format

Warnings

Context Dump

Structured prompts—employing techniques like zero-shot, few-shot, and chain-of-thought prompting—can still enhance AI output quality by 2–3 times.

As AI continues to evolve, the emphasis will shift towards adaptive and multimodal prompting, but the core principles of effective prompt design remain crucial

# Scan to Download my 45 Tools in 45 Minutes Presentation

(Updated 2024)



**LEVEL**





# ChatGPT Team Edition

Opt your entire organization out of data sharing and control data privacy.

## Members

Team · 25 members

All members

Pending invites

Name	Email	Role
Lucy Chivera (You)	lucy@acme.com	Owner ▾
Bella Quan	bella@acme.com	Admin
Andrew Haas	andrew@acme.com	Member
Georgia Rempe	georgia@acme.com	Member
Alex Close	alex@acme.com	Member

## New at Acme

Recently created GPTs in your workspace



### Jira Assistant

Creates tickets for bugs and product requests in Jira.



### Document Search and Summaries

Finds documents in Google Drive and summarizes key points.



### Earnings Call Analyzer

Dissects earnings calls for account and competitive research.

# Creating Custom GPTs

A screenshot of the 'New GPT' editor interface. At the top, there's a back arrow, a 'New GPT' title with a 'Draft' status, and two tabs: 'Create' and 'Configure'. Below the tabs is a large circular button with a plus sign. The form has several sections: 'Name' with a text input field containing 'Name your GPT'; 'Description' with a text input field containing 'Add a short description about what this GPT does'; 'Instructions' with a larger text area containing 'What does this GPT do? How does it behave? What should it avoid doing?'; 'Conversation starters' with a text input field and a close button; and 'Knowledge' with a note about file uploads and an 'Upload files' button.

<https://chatgpt.com/gpts/editor>

- 1 Head to <https://chatgpt.com/gpts/editor> (or select your name and then “My GPTs”)
- 2 Select “Create a GPT”
- 3 In the Create tab, you can message the GPT Builder to help you build a new GPT. You can say something like, "Make a creative who helps generate visuals for new products" or "Make a software engineer who helps format my code."
- 4 To name and set the description of your GPT, head to the Configure tab. Here, you will also be able to select the actions you would like your GPT to take, like browsing the web or creating images.
- 5 When you're ready to publish your GPT, select “Publish” and share it with other people if you'd like.

Creating a GPT is only available to paid users and is currently powered by GPT-4o.



You Tube





# No Code / Low Code Tools to Connect Everything Together



**Zapier**

Automation hub (Simple)



**Airtable**

No-code database environment with automation options



**Axiom.ai**

No-code browser automation



**n8n.io**

Automation hub (On Prem + Cloud)



**JotForm**

No-code form creation, basic



**Browse.ai**

No-code browser automation



**Make**

Automation hub



**Typeform**

No-code AI powered form creation with marketing friendly integrations



**Microsoft Power Automate**

Automation hub (Intermediate), requires Office 365

**“There will be three types of businesses in every industry: AI Native, AI Emergent, and Obsolete.”**



**Paul Roetzer**  
Founder of the Marketing AI Institute

# Becoming an AI Emergent Company



**"The best time to start implementing this is yesterday, the second best time is today."**

# Checklist for Generative AI

Empower your leadership with our tailored Generative AI Checklist, your roadmap to AI-driven success. Unleash the potential of AI in your organization, cultivate a future-ready team, and establish robust policies.



SCAN ME

## Potential (AI Strategy & Impact)

Assess AI Readiness & Maturity

Align with Business Goals

Focus on High-Impact Use Cases

Leverage Existing Solutions

Assess Competitive Landscape

## People (Workforce & Leadership)

Ensure Executive Sponsorship

Start Workforce Upskilling

Create Culture of Innovation

Execute Transparent Change Management

Focus on Employee Engagement

## Policy (Governance & Ethics)

Establish Ethical AI Guidelines and Practices

Publish AI Usage Guidelines

Implement Governance & Oversight

Teach Responsible AI Practices

Setup Iterative Policy Updates

LEVEL

**Imagine starting a  
business today  
leveraging the AI  
tools that exist. How  
would it be different?**



# Voices in AI to Follow Today



**Ethan Mollick**

Professor @Wharton studying AI,  
innovation & startups.  
Democratizing education using  
tech.

@emollick

<https://www.oneusefulthing.org/>



**Andrew Ng**

Co-Founder of Coursera; Stanford  
CS adjunct faculty. Former head of  
Baidu AI Group/Google Brain.

@AndrewYNg

<https://www.andrewng.org/>

- **The Artificial Intelligence Show**

Paul Roetzer & Mike Kaput

- **Marketing Against the Grain**

Kipp Bodnar (HubSpot's CMO)  
and Kieran Flanagan (Zapier's  
CMO)

# Great Examples of AI Agents

Agent.ai is a project by Dharmesh Shah, co-founder and CTO of HubSpot, designed as a professional network for AI agents.

<https://agent.ai/>

**LEVEL**





# Feel Free to Reach Out



+1-412-956-0423



ppatterson@level.agency



<https://www.linkedin.com/in/pattersonwork/>



@PatOnTheLevel