Unit 1 - Types of automation

Unit 1
AI, AI agents and automation

1.1 Unit Introduction

Welcome to the first unit of the course AI, AI agents and automation.

So far, you've gathered a lot of information about what AI agents are and how they work. Now, the time has come to start exploring AI agents in Make and how you can use them in automation.

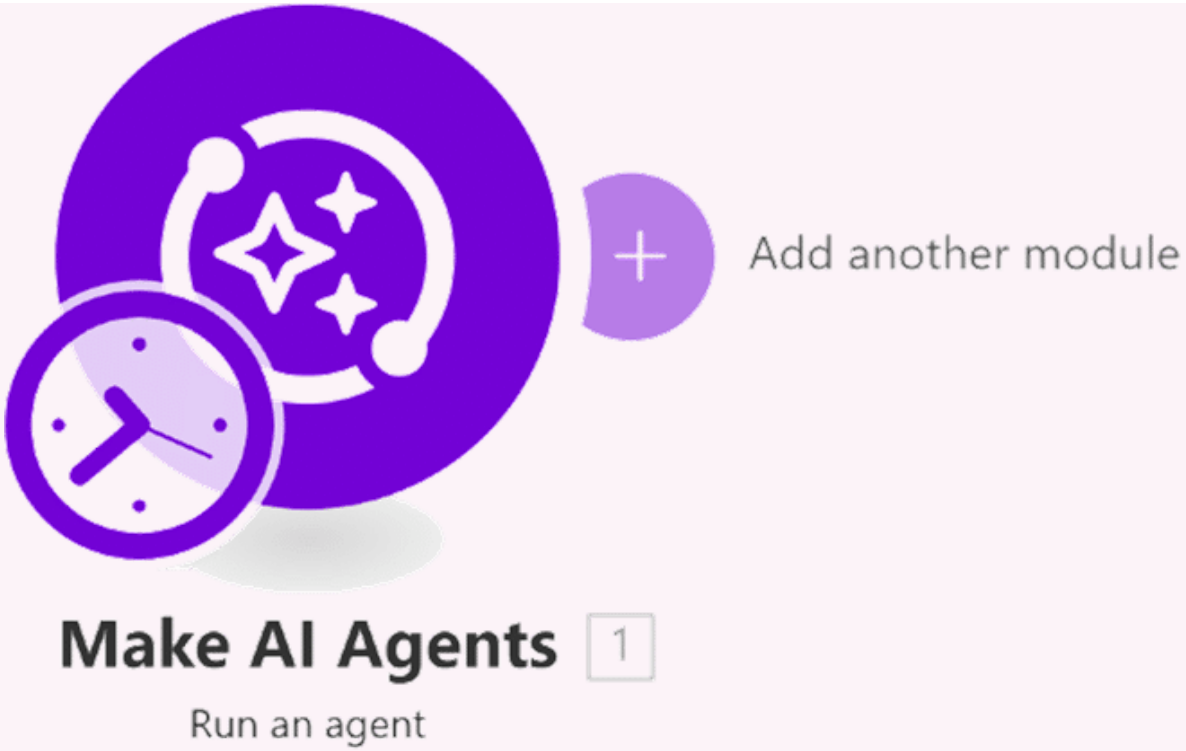
You will learn:

- the differences between traditional automation, AI automation, and agentic automation
- how they make decisions
- the strengths of each automation type

No time to lose!

Continue to 1.2: Types of automation

In Make, you can use AI agents to run your scenarios.



When talking about AI agents in Make, you will hear the term **agentic automation**. It can sound very fancy, but it simply means **using AI agents in your scenarios** to complete tasks on their own, without needing you to guide every step.

> **Need a quick recap on AI, generative AI, and LLMs?**
>
> Check out AI Fundamentals and Mastering LLMs.

This introduces a new kind of automation alongside **traditional automation** and **AI automation**. What are their characteristics?

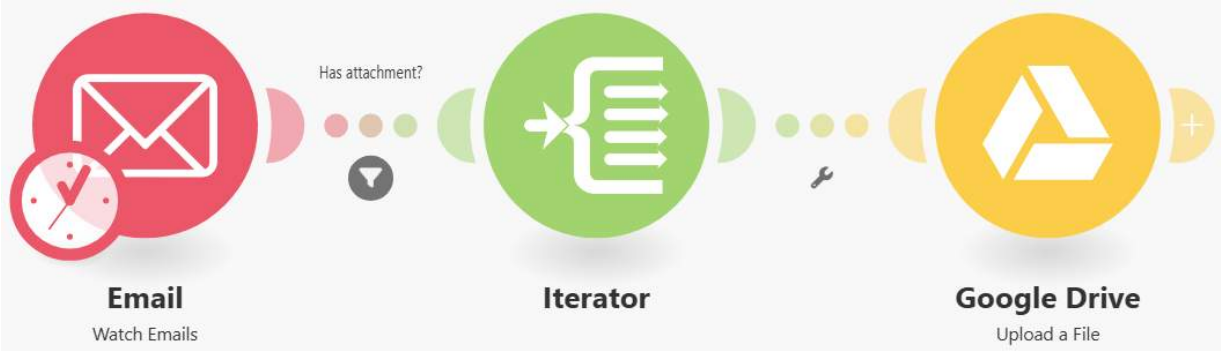
Click each tab to learn more.

TRADITIONAL AUTOMATION | AI AUTOMATION | AGENTIC AUTOMATION

Traditional automation is what Make is known and famous for. It's a workflow that **follows fixed rules to do simple, repeated tasks automatically**.

For example, it can send a message every time someone signs up on a website, or save all the email attachments to **Google Drive**.

It's like Eddie the Evidence Logger, who, whenever new evidence is discovered, enters it into the system using a fixed template. Always the same steps, no exceptions.



TRADITIONAL AUTOMATION | AI AUTOMATION | AGENTIC AUTOMATION

AI automation is like an improved version of regular automation. It **incorporates generative AI in one or more steps**, using LLMs to carry out specific tasks.

For example, AI can review messages sent through your website and determine who should handle them. The scenario then sends each message to the right person or team so users get help quickly.

It's like Ingrid the Interview Assistant, that helps Derek the Detective. She provides Derek with basic interview questions, but also suggests tailored questions based on suspects' profiles and past interviews.

TRADITIONAL AUTOMATION | AI AUTOMATION | AGENTIC AUTOMATION

Agentic automation **uses AI agents that make their own decisions and adapt to changing situations**. Instead of being told each step, they figure out the best way to reach a goal using the information they receive.

For example, a marketing AI agent could track social media mentions, analyze sentiment, and update the marketing team with insights. It adjusts its actions as trends shift, all without needing step-by-step instructions. Or, think of a recruiting AI agent. It can automate tasks like sourcing candidates, screening resumes, engaging with applicants, and handling messages, making the hiring process faster and easier.

It's your friend Derek the Detective. He doesn't just ask fixed questions, he investigates every clue in different ways: as new evidence shows up, he

changes his approach. He is also able to figure out the best actions on the fly. This is what makes him so good at solving cases!

To better understand the difference between traditional automation, AI automation, and agentic automation, let's have a look at the **kind of logic they use**.

Logic, in this case, is how a scenario makes decisions: whether it's following strict rules or making flexible judgments based on the situation.

Make scenarios can use two types of logic. ***Click each one to learn more.***

Boolean logic

Boolean logic works with **true or false values**, following clear, predefined rules. Every action depends on checking conditions that have a yes/no answer, there's no room for interpretation.

For example: *If stock is below 10, reorder trench coats*. This means that if a specific condition is true (i.e. *stock below 10*), perform a specific action (*reorder trench coats*).

This logic is **deterministic**: given the same input, the scenario always behaves the same way.

When Eddie finds a new piece of evidence, he asks: "Is this evidence a fingerprint?"

- ***If yes, he fills out the fingerprint section of the template.***
- ***If no, he skips that section and moves to the next.***

Some might say that Eddie's job is not that interesting, but it's all elementary my friend.

Fuzzy logic

Fuzzy logic works differently. Instead of strict yes/no answers, it allows for degrees of possibility. It handles uncertainty, ambiguity, and nuance, things that are hard to express with true/false rules. It asks questions like: *How likely is this email spam? Or, Does this message sound angry?*

This makes fuzzy logic **non-deterministic**: the same input might lead to different outcomes depending on the context or new data. The scenario can adjust its actions based on new facts, improving its decisions over time.

Ingrid the Interview Assistant sits across from Tyler the Thief, carefully watching his reactions. When Tyler's tone shifts, sounding nervous, Ingrid notices and adjusts her questions to be gentler, encouraging him to open up. She's the good cop in this case. Do not trust Ingrid, Tyler!

Which kind of logic do the three types of automation use? ***Click each card to find out!***

Traditional automation

Boolean logic

AI automation

Boolean logic and fuzzy logic

Agentic automation

Fuzzy logic

- **Traditional automation** uses **Boolean logic** because it follows fixed, clear rules that produce predictable

outcomes. This works well for simple, repetitive tasks where everything can be defined as yes or no.

- **AI automation** uses **Boolean logic** to handle clear, straightforward decisions with yes/no answers. At the same time it uses **fuzzy logic** to manage uncertainty and nuance, such as interpreting emotions or probabilities. In this case, AI enhances specific tasks within a predefined workflow by processing data, interpreting unstructured inputs like text or images, and helping make decisions such as classifying information or extracting key details.

- **Agentic automation** relies mostly on **fuzzy logic** because it needs flexibility to adapt, learn from new information, and make decisions in unpredictable or changing environments where strict rules don't apply.

The three kinds of automation have different strengths:

- **traditional automation** is fast and reliable for simple tasks;
- **AI automation** combines clear rules with some flexibility to handle more complex situations;

- **agentic automation** offers broad autonomy to handle changing situations.

Here's a recap of the three types of automation, with indications of when to use each. You'll explore them in more detail later.

Traditional automation

- **When:** Use when your tasks follow clear, simple rules and don't change often.
- **Why:** It's fast, reliable, and easy to set up, but can't handle surprises or new situations.

AI automation

- **When:** Use this for mostly rule-based tasks that need some smart decision making or pattern recognition.
- **Why:** It improves basic automation by learning and adapting to some

Agentic automation

- **When:** Use when tasks are complex, unpredictable, and need human-like reasoning or full independence.
- **Why:** They adapt to new information and situations on their own.

- **Examples:** Best for repetitive tasks like sending emails after sign-ups or updating records with fixed steps.

complexity while still following rules.

- **Examples:** Useful for handling customer messages, sorting requests by importance, or recommending products based on behavior.

- **Examples:** Perfect for researching sales leads by evaluating multiple sources and prioritizing contacts based on relevance, or for monitoring social media trends to identify emerging topics and deciding how to respond in real time.

Let's have a look at what you can do with agentic automation in more detail.

Continue to the wrap up for this unit

1.3 Wrap up

1

In Make, you can use three types of automation, each for a different purpose. **Traditional automation** handles simple, rule-based tasks that repeat the same way every time. **AI automation** takes this further by adding intelligence, using AI to analyze data, make decisions, or generate content. **Agentic automation** goes one step beyond, allowing AI agents to act independently, adapt to changing situations, and choose the best actions to achieve a goal.

2

Traditional automation depends on Boolean logic to follow fixed rules and get consistent results. **AI automation combines Boolean and fuzzy**

logic, using both clear conditions and adaptable reasoning to handle complex or uncertain data. **Agentic automation relies mainly on fuzzy logic**, allowing it to adjust, learn, and make independent decisions in dynamic situations.

3

Each type of automation has its own strengths: traditional automation is **fast and reliable for simple tasks**, AI automation **blends clear rules with flexibility to manage more complex situations**, and agentic automation provides **full autonomy to adapt to changing conditions**.

Unit complete!

Well done!

You have completed the first unit!

In the next unit, you'll learn when it's best to use agentic automation.

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Mark this task complete to continue to the next unit.