

WRITTEN BY: **ROGER KNOCKER**

THE CAISY FRAMEWORK

AI AND AUTOMATION COACHING

Empowering Business Users to Build the Future - One Use-Case at a Time



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One CAiSY At A Time

Most Teams Are Drowning in Manual Work. AI Can Fix That - But Not How You Think.

We all know AI is coming for our jobs - or so the headlines say. But here's the truth:

Most jobs won't disappear.
They'll just evolve.
And most business users aren't ready.

Despite having powerful tools like Outlook rules, SharePoint lists, Microsoft Forms, and Excel automation right at their fingertips, many professionals still:

- Manually clean spreadsheets every week
- Don't know who updated what or when
- Struggle to track master data, tasks, or decisions
- Rely on email chains and sticky notes for coordination
- Can't find the information they need when they need it

This isn't just a training issue.
It's a business performance issue.

To make things worse, most companies already have the software needed to solve these problems - Microsoft 365, Power Platform, SharePoint, and even ChatGPT. But less than 10% of these tools' capabilities are actually used. What's left is "shelfware" - untapped potential sitting idle. Our goal is to unlock that value, with no need for additional licenses or capital expenditure.





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THE KPI APPROACH:

COACHING BUILT FOR REAL BUSINESS

Over the last decade, KPI has helped companies build future-fit teams through practical data analytics training. Now, we're extending that success into automation and AI - with the same purpose-driven approach.

Our method meets users where they are, and grows with them



→ THE JOURNEY TO

AUTOMATION MASTERY

We don't start with advanced AI - we start with what your team already has.

Our proven methodology guides users step-by-step, building confidence, competence, and momentum.

1. Start with Everyday Tools

Unlock automation hiding in plain sight. Use built-in automation features available across popular office platforms to streamline routine tasks and free up time instantly - from rules and templates to auto-reminders and dynamic formulas.

2. Structure Data Intelligently

Replace chaotic spreadsheets with shared lists, form-driven data entry, and version-controlled tracking. Monitor real-time progress with RAG indicators, dashboards, and always-fresh reports.

3. Automate Workflows Seamlessly

Use workflow automation tools embedded in your office platforms - whether Microsoft, Google, or others - to file documents, collect inputs, send alerts, and run repeatable tasks automatically, even while you're on leave.

4. Get Instant Insights

Centralise your data and utilise dashboards and smart prompts to obtain on-demand answers. Spot issues, trends, and opportunities - without waiting for someone to build a report.

5. Apply AI to Real Business Tasks

Point Generative AI at your policies, processes, and past work. Build prompt libraries, automate document search, and create custom chatbots that solve real problems using your data.

6. Advance Toward AI Agents

Train digital co-workers that don't just suggest next steps - they take them. These agents act like junior analysts or executive assistants, executing structured work with intelligence and context.



→ **REAL USE-CASES, REAL BUSINESS VALUE**

INTRODUCING CAISY

A CAiSY (Control - Automation - insight - Standardisation - You) is what we call a delivered use-case.

It's not built by IT.

It's not outsourced to a consultant.

It's built by your people, for your people.

Each CAiSY delivers value by improving how teams manage information, automate work, extract insights, and standardise processes - using tools they already have.

On average, a single CAiSY saves between R5,000 and R10,000 per year in time and efficiency gains. In fact this is not limited to the amount as one CAiSY could save millions. A team that builds 100 CAiSYs can unlock R6.5 million Net Present Value into perpetuity in productivity gains.

A few real-world CAiSYs:

- Live team status dashboards from centralised lists with alerts and requests for update as work changes
- Incident logging and follow-up workflows
- Smart filing of inbound documents into the correct folders
- AI-generated KPIs tailored to your specific business context
- Prompt libraries that troubleshoot issues and uncover root causes
- Auto-generated business cases and action plans
- AI-built user manuals for systems and processes
- FAQ bots trained on internal documentation to support daily operations

And this is just the beginning.

→ WHAT DOES

CAISY STANDS FOR

The name CAISY is a purpose-built acronym that defines each step of an effective analytical process. It ensures a disciplined journey from raw data to strategic outcomes.

C —

Control

Ensuring that users build integrity and understanding into their daily processes and data workings to create visibility and confidence for their team.

A —

Automation

Manual work removed or reduced using tools like Power Automate, SharePoint and Excel.

i —

Insight

Actionable dashboards and reporting created in data that is often invisible to your team.

S —

Standardisation

Templates, rules and repeatable systems your team can rely on.

Y —

You

Built by You, the user, not by IT or a consultant

→ WHY

KPI MANAGEMENT SOLUTIONS

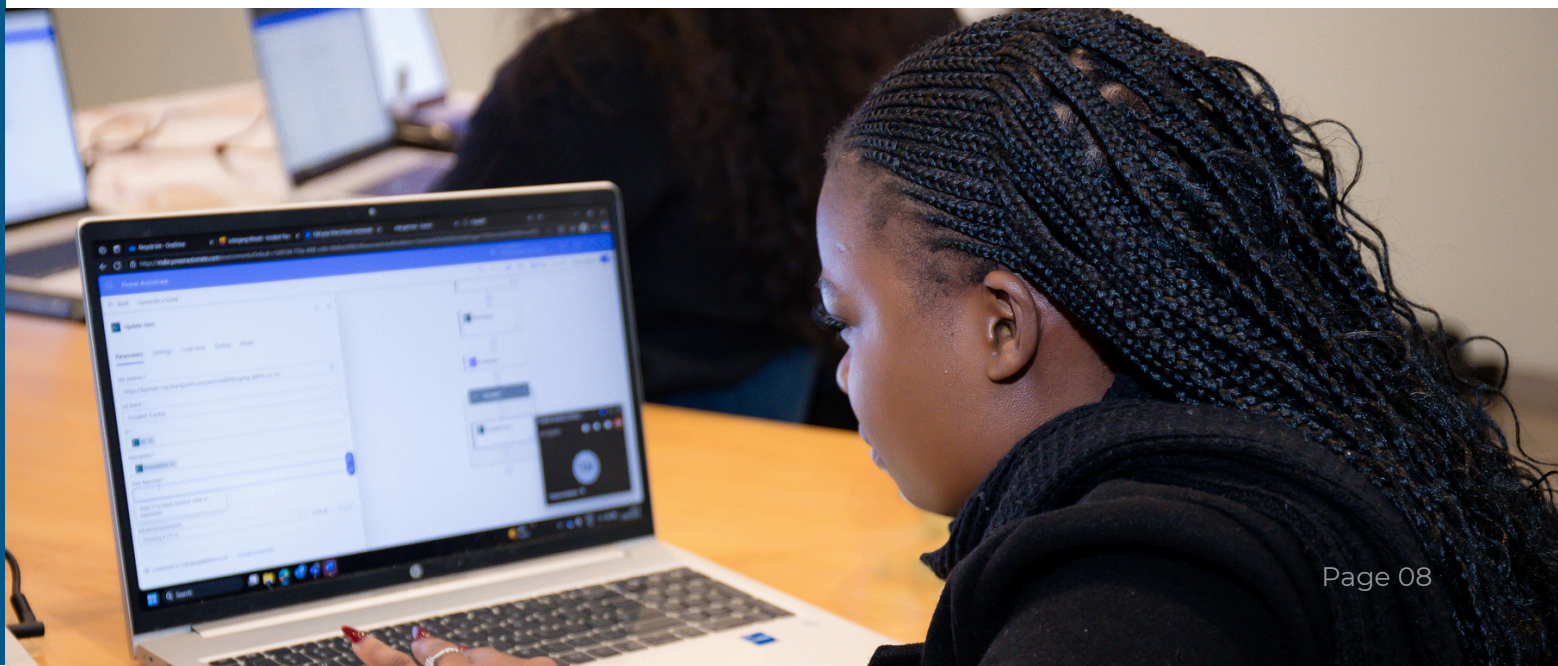
We've always focused on business performance, not just skills.

Our clients choose us because our method works.

- **Performance Focused** – We teach what matters in the job
- **Practical** – We use your company's data, not generic slides
- **Personalised** – Every learner gets 1-on-1 coaching to apply what they've learned

Our programs run bottom-up and sideways, not top-down.
That's how we get buy-in, adoption, and real change.

We gamify success. We celebrate every CAiSY.
And we equip your teams to keep building long after we're gone.



WHO SHOULD USE CAISY

This methodology is designed for professionals who are expected to analyse, interpret, and act on business data:

- Finance managers and analysts
- Business intelligence teams
- Strategic project leaders
- Executives and directors
- Operational performance managers

Whether your organisation is new to performance management or looking to refine mature processes, CAiSY provides a common language and approach.



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CONCLUSION

Insight without action delivers little value. The CAiSY methodology ensures that every phase of analysis serves a strategic purpose, culminating in decisions that are informed, intentional, and impactful.

By embedding CAiSY into your performance management approach, you move beyond passive reporting into a discipline of continuous improvement and execution excellence.

