



## Accelerating Automation with Low Code and OPT-AI A Case Study

*A real-world example of how OPTiMO delivered a rapid low-code MOU tracking solution and then enhanced it with AI using our OPT-AI solutions. It demonstrates fast delivery, technical agility and seamless AI integration within a government context.*

### From Low-Code to Agentic AI: Supercharging MOU Workflows

**A proof-of-concept turned production-ready: How OPTiMO delivered a fully functional MOU tracker in days—and then made it smarter with AI**

A federal agency approached OPTiMO with a need: to quickly stand up a digital workflow to manage Memoranda of Understanding (MOUs) and Interconnection Security Agreements (ISAs). The customer provided a basic presentation outlining their goals—and within a week, we delivered a fully functional low-code application.

The initial ask was speed and compliance. Manual document handling slowed their operations, and legacy processes made it difficult to track agreement status across teams. Our solution modernized that process. And soon after, we extended its impact—adding AI capabilities to automatically extract, summarize and populate agreement data with minimal human input.

### Our Approach

We delivered a low-code solution - MOU-ISA, built on Power Platform - to digitize and streamline MOU tracking across agencies. But we didn't stop there. Using our OPT-AI Solutions, we integrated an AI document parser to automate data extraction from uploaded MOUs.

The result: A one-click experience to create a complete MOU record - populated by AI, summarized with prompts and ready to push to SharePoint or any target system.

### OPTiMO's AI-Enabled Workflow Solutions

OPTiMO's automation and integration solutions now incorporate OPT-AI, our rigorous methodology for creating or enhancing automation of workflows. OPT-AI provides specialized, adaptable AI agents that work collaboratively to automate and tailor complex processes and decision-making nodes.

With our OPT-AI solutions and custom agents, OPTiMO delivers powerful benefits:

- ✓ **Automation:** Our intelligent AI agents streamline tasks and improve efficiency.
- ✓ **Alignment:** Our experts ensure seamless integration tailored to each client's needs.
- ✓ **Resilience:** Our solutions ensure smarter, faster and more secure workflows.

Experience the future of workflow automation with OPTiMO's AI-enabled solutions. Contact us to learn more about how we can help transform your operations.



### CONTACT US TODAY

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## Beyond Low-Code. Beyond AI.

Our MOU solution is one example of how OPTiMO rapidly delivers outcomes, in this case using low-code tools and intelligent automation. But that's just one piece of what we do.

We've been delivering scalable, mission-driven digital solutions for years—combining software development, secure system integration, and human-centered design to help agencies transform the way they work.

Through our cross-functional Innovation R&D group, we continue to explore what's next—testing emerging technologies, refining AI use cases, and piloting prototypes that keep our clients ahead of the curve.

Other Examples of OPTiMO Innovation:

**Citizen Services:** Delivered a digital mail preview and real-time tracking solution supporting 72+ million users.

**Financial Management:** Designed a Business Management Portal integrating 28M+ records for real-time financial insights.

**HR Systems:** Reengineered federal hiring workflows to cut apply-to-hire timelines by up to six weeks.



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## What We Delivered

- ✓ **Low-Code Workflow with Power Platform:** Fully functional app in under one week
- ✓ **Custom AI Agent via AI Hub:** Extracts 15+ key fields from uploaded MOUs (PDFs, JPGs, PNGs)
- ✓ **Prompt-Enhanced Summarization:** Automatically generates clean summaries and metadata
- ✓ **One-Click Agreement Creation:** Instantly turns a file into a usable agreement object

## The OPT-AI Advantage

This solution was made possible through our OPT-AI Solutions, which combine:

- ✓ Pre-trained and tailored AI agents
- ✓ Integration with custom, third-party and low-code platforms (like Power Apps)
- ✓ Secure and scalable data orchestration (SharePoint, Dataverse, and beyond)

## Why It Matters

- ✓ **Faster Onboarding:** Automates manual MOU intake steps
- ✓ **Higher Accuracy:** Trained AI model tailored to government-specific data
- ✓ **Improved Compliance:** Secure handling of sensitive agreements
- ✓ **Scalable Model:** Expandable across similar document-based workflows

