

BAILEY<sup>®</sup>

AI TOOLS IN MONDAY.COM  
EAGL DELTA TRACK – NOVEMBER 2026

# OUTLINE

- I. Background + Context
- II. Current State: How We Work Today
- III. Desired State: What AI Unlocks

# CURRENT STATE

# CURRENT STATE

Marketing Requests

Sidekick

Integrate

Automate / 16

+10

Invite / 3

Main table

Timeline

Form

Dashboard

Workload

Weekly Update

New item

Search

Person

Filter

Sort

Hide

Group by

Requests

5 Items

Status

In Hands Date

Priority

Final Appr...

Assigned

15 Items

Status

In Hands Date

Priority

Final Appr...

In Progress

Item

Lead

Support

Status

In Hands Date

Priority

If in-hand...

Final Appr...

Request de

Update Color Chart

CP

Awaiting Final Revi...

Oct 20

High

Bailey Overview Video

CP

Awaiting Review

Oct 31

High

Review outline/script to

2029-2031 new plant potential introductions powerpoint

CP

Awaiting Review

Nov 6

no

I am building a Powerpo

Consumer Holiday Card + Envelope

CP

Ordered

Nov 12

Aim to sen...

Need a design for a holi

Customer Personas - Bailey channels

Working on it

Nov 14

I would like...

It's time to take the feed

> D&J Signage Trial 1

CP

Awaiting Final Revi...

Nov 14

We want t...

We need to come up wit

Office Signage Request - Receiving / Cooler Docks

CP

Awaiting Review

Nov 17

Jannette is looking for re

Linkedin Job Posting - Planning & Inventory Manager

Awaiting Final Revi...

Nov 14

Post Planning & Inventor

KLG/Owner Emergency Comms

Working on it

Nov 21

Let's work ahead on key

> CF - Best Bud Sketches 5

CP

Working on it

Nov 21

Date can b...

Concept Factory has as

Portfolio File Sharing

Working on it

Nov 21

EU Brand Standards

CP

Awaiting Review

Nov 21

We need to update thes

> Drummer's Retail Bag 4

+2

Working on it

Nov 21

customer ...

creative for one side of

Pick N Plant Tags

CP

Working on it

Nov 21

Need it do...

We are going to stick in

EOY Employee Presentation

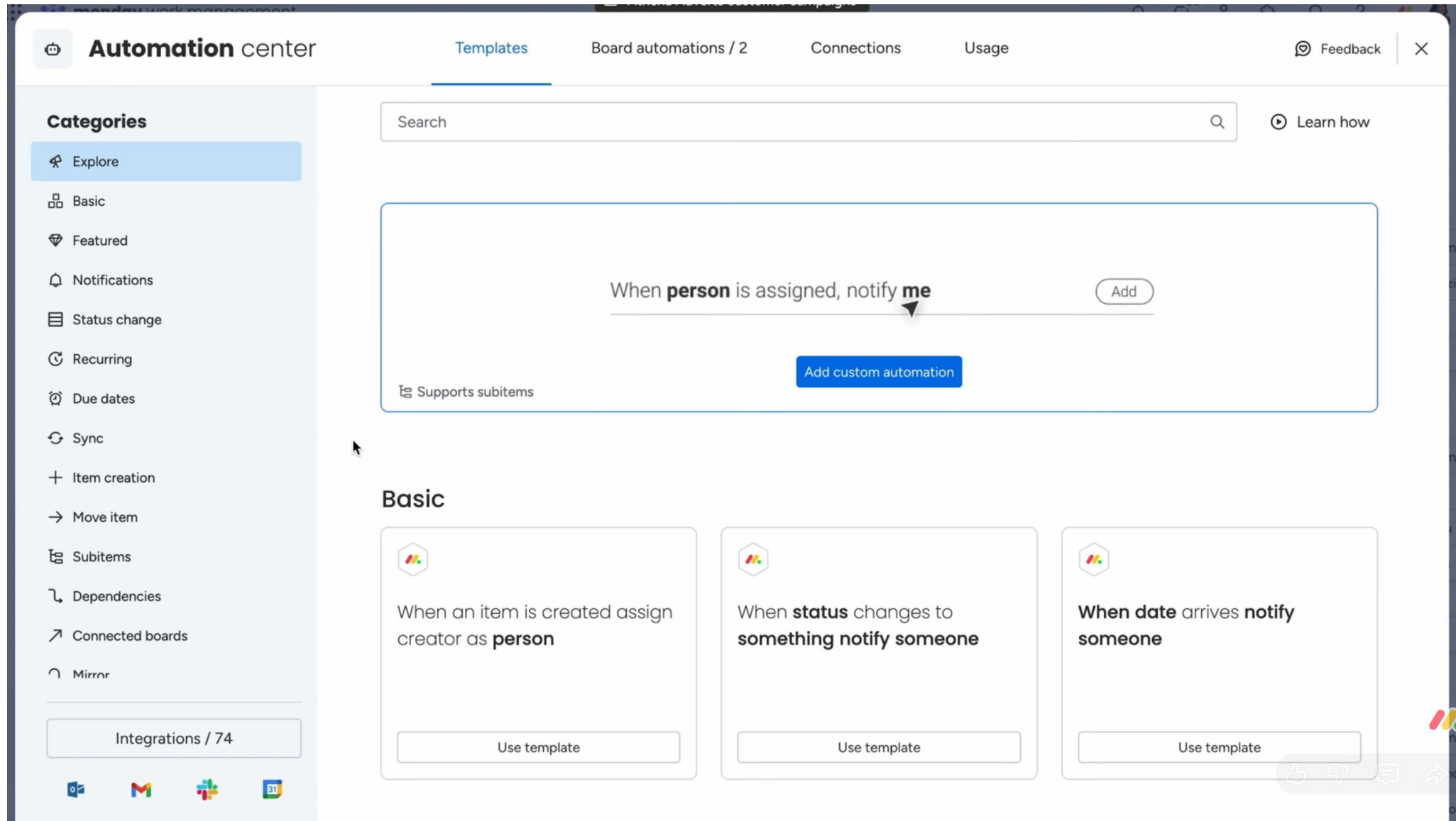
CP

Add'l Info Needed

Nov 26

Terri and Jorge to lead in

# CURRENT STATE



# CURRENT STATE

Automations

Marketing Requests

Create

Manage / 16

Manage your board automations

Create automation

Automations

Run history

My connections

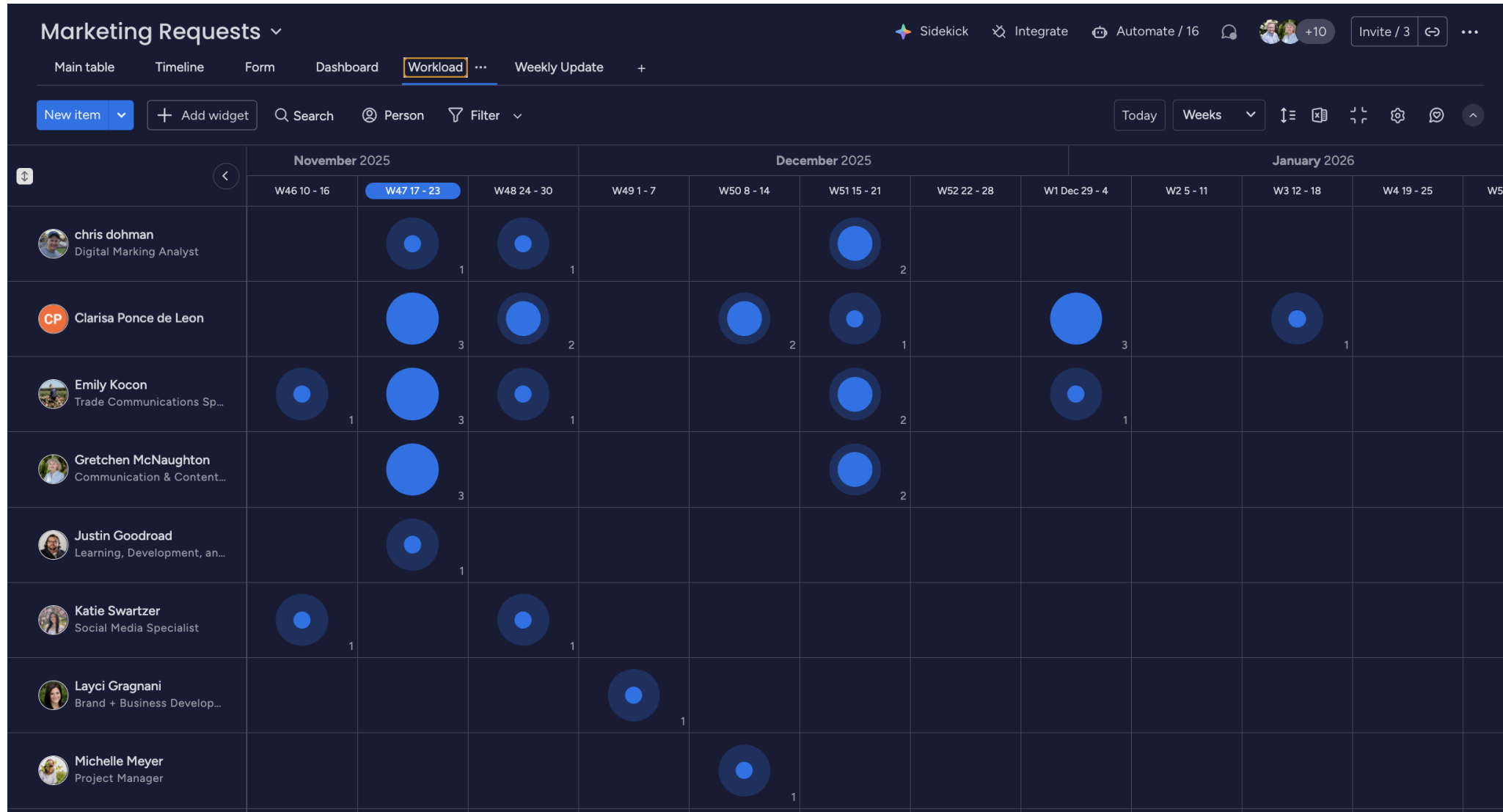
Account usage

Q Search

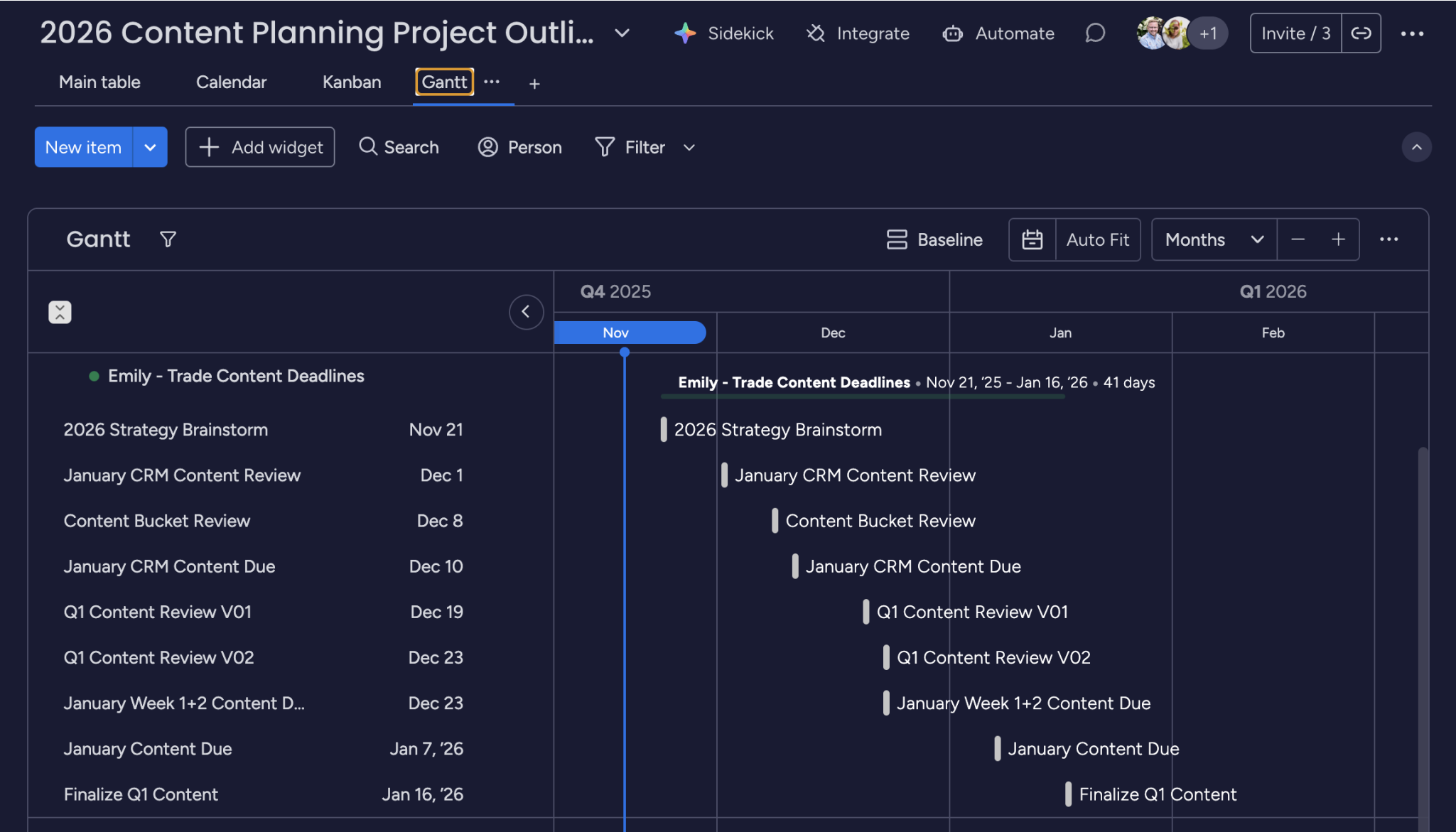
Filter

	Status	Automation	Description	Importance	Owner	App	Actions	Success	Updated
...		When Status changes to Approved notify Lead	Add description	Minor			4	<div>100%</div>	7 months a...
...		When Status changes to Done move item to 2025 Completed M...	Add description	Minor			12	<div>100%</div>	8 months a...
...		When Status changes to Rework move item to Requests and not...	Add description	Minor				<div>-</div>	8 months a...
...		When Status changes to Ready for Resources notify chris dohm...	Add description	Minor			8	<div>100%</div>	9 months a...
...		When Status changes to Awaiting Final Review notify Final Appr...	Add description	Minor			2	<div>100%</div>	9 months a...
...		3 days before In Hands Date arrives notify Final Approval	Add description	Minor			3	<div>100%</div>	a year ago
...		5 days before In Hands Date arrives notify Lead	Add description	Minor			16	<div>100%</div>	a year ago
...		When button clicked and only if Status is Approved create an ite...	Add description	Minor				<div>-</div>	a year ago
...		When an item is created set Date requested to today	Add description	Minor			16	<div>100%</div>	a year ago
...		When Status changes to Working on it move item to In Progress	Add description	Minor			7	<div>100%</div>	2 years ago
...		When Status changes to Paused move item to Paused	Add description	Minor			6	<div>100%</div>	2 years ago
...		When Status changes to Done notify Clarisa Ponce de Leon	Add description	Minor			12	<div>100%</div>	2 years ago
...		When an item is created notify Ryan McEnaney	Add description	Minor			16	<div>100%</div>	4 years ago
...		When Lead changes notify Lead	Add description	Minor			13	<div>100%</div>	4 years ago

# CURRENT STATE



# CURRENT STATE

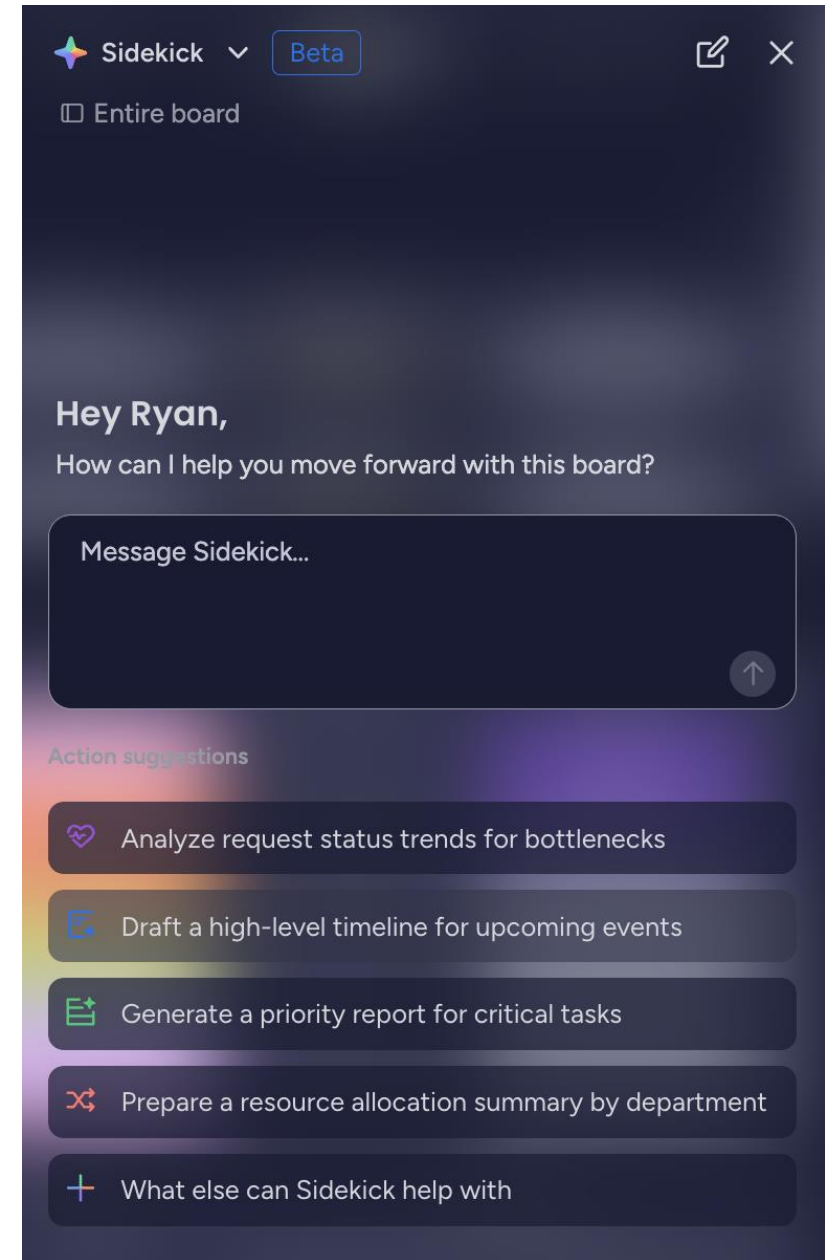




# CURRENT STATE

## Key Benefits

- Automated workflow management
  - Right person → right time
- Streamlined communications
  - Less noise
  - Clearer inter-departmental, cross-functional, and external updates
  - Standardized processes
- Predictive insights + workload intelligence
  - Early risk signals
  - Standardization of project mapping tools
- Centralized AI-supported reporting
  - One view of progress → aligned stakeholders



**DESIRED STATE**

# DESIRED STATE

Measure what matters. Tell the story. Drive behavior. Repeat.

“What gets measured gets managed.”

- Peter Drucker

“Stories are just data with a soul.”

- Brené Brown



**THANK YOU!**

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