

Proof Digital 

AI-Ready Masterclass: *How to Future-Proof Your Business in 60 Minutes*

April 15, 2026



What You'll Walk Away With

Clarity

- What AI is good for
- Where it creates risk
- What it should not own

Priorities

- Which workflows to start with
- How to spot high-impact opportunities
- What good first pilots look like

Guardrails

- What your team can do
- What your team should never input
- How to build a practical policy

Action

- A 30/60/90-day plan
- How to measure ROI
- Questions to ask before buying tools

This is not a tool demo. It is a business-readiness session for leaders who need useful next steps.

What You'll Walk Away With

Today's roadmap

- 1 The AI moment** Why this matters now for growing companies
- 2 Find the work** Where AI can actually help
- 3 Fix the inputs** Data, systems, and process readiness
- 4 Prepare your team** Roles, training, and adoption
- 5 Pilot with discipline** Guardrails, measurement, and implementation
- 6 Act in 90 days** A practical next-step plan



Why This Matters Now

The AI Moment for Businesses

58%

SMBs using generative AI

U.S. Chamber, Aug. 18, 2025

78%

Organizations reporting AI use in 2024

Stanford HAI, 2025

53% / 80%

Leaders need more productivity; workers lack time and energy

Microsoft, Apr. 23, 2025

What is changing

- Adoption is moving mainstream.
- Capacity pressure is rising.
- The winners will redesign work, not just buy tools.

What this means for SMB leaders

- Pick one workflow.
- Assign one owner.
- Measure one business outcome.

That is how you move from interest to value.

Sources: U.S. Chamber of Commerce, Aug. 18, 2025; Stanford HAI AI Index 2025; Microsoft Work Trend Index, Apr. 23, 2025.

Real SMB Signals, Not Hype

24%

NFIB small employers currently using AI

NFIB, Jun. 25, 2025

63%

Say AI will affect their industry within five years

NFIB, Jun. 25, 2025

77%

QuickBooks SMB respondents using AI regularly

QuickBooks, Feb. 10, 2026

Most common NFIB use cases

29% Communications

27% Marketing and advertising

14% Business analysis / predictive analytics

9% Customer service

What QuickBooks users say changes first

45% Use AI for marketing tasks

78% Say AI boosts productivity

27% Say AI has shortened the workday

47% Of non-users are considering adoption

Different samples, same direction: SMB adoption is spreading fast, and early wins cluster around content, communication, reporting, and support.

Usage Is Common; Scaled Value Is Still Rare

Operating model comparison

	Experimentation	Strategy
Starting point	A tool someone likes	A workflow that needs to improve
Operating model	Loose experimentation	Owner, metric, review rule
Success measure	It 'feels' useful	Time, speed, quality, throughput
Risk handling	Figure it out later	Guardrails before broader scale

The shift is from unmanaged usage to governed workflow improvement.

What the 2025 data says

88%

Regular AI use in at least one business function

~1/3

Organizations that have begun scaling AI

23%

Organizations scaling agentic AI somewhere

McKinsey: the top performers redesign workflows, track KPIs, and define where human validation belongs.

The AI-Ready Framework



1

Identify high-impact opportunities

Repetitive work • Clear bottlenecks • Measurable business value

2

Organize data and systems

System of record • Clean enough inputs • Defined ownership

3

Prepare your team

Leader priorities • Manager review • Team adoption

4

Build an AI policy

Approved tools • Sensitive-data rules • Human review requirements

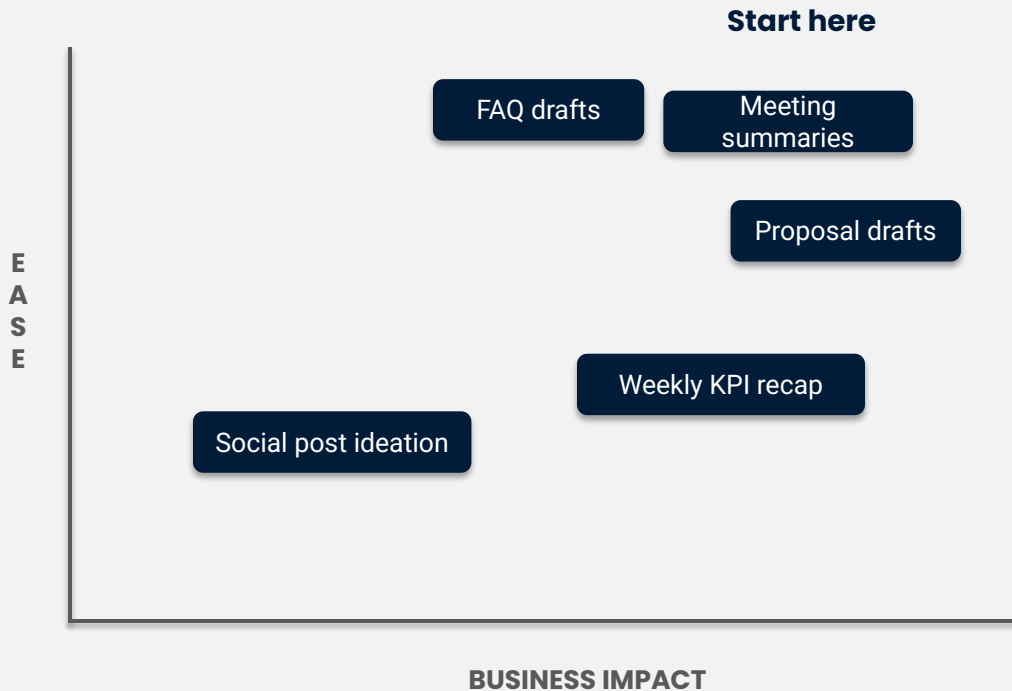
5

Run measured pilots

One or two pilots • Baseline + target metric • Scale what works

Step 1: Identify High-Impact Opportunities

Opportunity matrix



Strong first use cases are high-impact, relatively easy to implement, and easy for a human to review.

Score each workflow on five tests

Frequency Does it happen every day or week?

Impact Does it affect revenue, service, speed, or quality?

Human review Can a human catch mistakes quickly?

Data access Do you have what the workflow needs?

Sensitivity Is the content safe enough for an early pilot?

A simple screening question

“Which three repeated weekly tasks steal time without requiring senior judgment?”

What High-Value Use Cases Look Like

Marketing

Workflow: Turn one webinar transcript into a landing page, three LinkedIn posts, and two nurture emails.

Business win: Shorter content cycle time and more consistent output.

Sales

Workflow: Turn discovery notes into a CRM update, next-step email, and proposal outline.

Business win: Faster follow-up and cleaner pipeline data.

Operations

Workflow: Turn weekly team updates into a status recap, blocker list, and owner action items.

Business win: Fewer internal meetings and clearer accountability.

Service / Admin

Workflow: Turn FAQ and internal documentation into draft responses and escalation tags.

Business win: Faster response time and more consistent service.

Good First Pilots and Practical Examples

Best first pilots

Meeting summaries

Proposal first drafts

Weekly KPI recap

Save for later

Autonomous customer communication

Legal or pricing decisions

Company-wide rollout before policy

Sensitive data in unmanaged tools

Pilot examples

Meeting summary assistant

Ops lead

Measure recap time and follow-through.

Proposal first-draft assistant

Sales lead

Measure follow-up speed and turnaround.

Marketing KPI recap

Marketing lead

Measure reporting time and insight quality.

NFIB found that 98% of current AI users saw no change in employee count. Early pilots are about capacity, not replacement.

Step 2: Organize Your Data and Systems

The workflow is only as good as the system behind it

Inputs

CRM

Marketing tools

Finance / ERP

Docs / SOPs

Shared sheets

AI-ready
workflow

Outputs

Draft output

Human review

Next system / team

Data-readiness checklist

- Know the system of record.
- Standardize key fields and naming.
- Check that the data is current enough.
- Define who owns the workflow.

Why this breaks so often

- Incomplete CRM fields
- Manual reporting every week
- Important SOPs living in people's heads
- Disconnected tools with no clean handoff

QuickBooks reports 36% of SMBs struggle with weak integration between tools. AI does not repair a disconnected operating system.

Step 3: Prepare Your Team

1

Leaders

Set priorities, choose metrics, and fund the right pilot.

2

Managers

Redesign workflows, review outputs, and coach adoption.

3

Teams

Draft with AI, verify facts, and escalate exceptions.

Why enablement stalls

26.9%

Lack accessible AI education

25.8%

Lack trusted AI resources

41%

Solo entrepreneurs cite lack of time

ICIC takeaway: comfort grows faster when training is hands-on and role-specific, not generic.

Source: ICIC, AI in Business, Feb. 2025.

Step 4: Build an AI Policy

Green

- Public information
- Brainstorming
- Internal first drafts
- Meeting summaries

Yellow

- Customer data
- Contracts
- Financial analysis
- Customer-facing drafts

Red

- Credentials
- Highly sensitive data
- Confidential client IP
- Final outputs with no review

Never put this into public AI tools

- Passwords or credentials
- Unapproved customer lists
- Confidential client materials
- Regulated or sensitive personal data

Minimum policy in 30 days

- Approved tools only
- Human review before anything external
- One owner per workflow
- Short training for everyone using AI

NIST frames AI risk management as a trust-building discipline. McKinsey says 51% of AI-using organizations have already seen a negative consequence.

Step 5: Run Measured Pilots

Pilot scorecard

Use case	What workflow are we improving first?
Owner	Who owns rollout and output quality?
Baseline	What happens today, and how long does it take?
Metric	What number should move if the pilot works?
Review rule	Who checks outputs before they move forward?
Decision date	When do we scale, redesign, or stop?

Recommended starting workflows

Workflow	Recommended format	Owner	Primary KPI
Meeting summaries	AI assistant + recap	Ops	Recap time reduced
Proposal first drafts	Drafting assistant	Sales	Follow-up speed
Automated reporting	KPI recap automation	Marketing / Ops	Prep hours reduced
Knowledge assistant	Internal search + FAQ	Service / Admin	Response speed

Start small. Measure what changed. Scale only what earns trust and shows value.

AI Apps, Automation, and Agents

Three layers of capability

Apps

A person uses a tool directly

Best when you need research, drafting, or summarization.

Automation

A workflow triggers repeatable tasks

Best when the inputs are structured and the steps are predictable.

Agents

A system handles multi-step work inside guardrails

Best when the workflow is stable, governed, and clearly owned.

Examples worth building toward

Knowledge assistant

Search SOPs, policies, and previous answers in one place.

Lead-research flow

Research a prospect, suggest angles, and prep the rep.

Reporting monitor

Watch KPIs and draft an insight recap when something changes.

Onboarding helper

Guide new hires through process, documentation, and next steps.

McKinsey says 23% are scaling agentic AI somewhere, but no function is above 10%. For most SMBs, apps then automation is still the right sequence.

The AI-Ready Action Plan



1

First 30 Days

Choose the right work before buying more tools.

Audit workflows • Shortlist 3 use cases • Choose owners • Set basic policy

2

Days 31–60

Run small pilots with a baseline and review loop.

Launch 1–2 pilots • Train users • Track baseline • Review output quality

3

Days 61–90

Scale what works and stop what does not.

Scale winners • Document new process • Fix weak inputs • Stop low-value efforts

By day 90: basic AI policy, 1–2 measured pilots, clearer workflow ownership, and a scale/stop decision.

Operational Habits That Create Measurable Value

Habits that create lift

- Solve workflow problems, not novelty problems.
- Assign one owner and one KPI.
- Redesign work before asking AI to scale it.
- Define where human validation belongs.
- Stop pilots that do not earn trust or value.

Failure modes to watch for

- 1 Buying a tool before naming the workflow problem
- 2 Letting data quality stay messy because the pilot feels small
- 3 Training users without training managers on review and coaching
- 4 Skipping review rules for customer-facing or high-stakes outputs
- 5 Running pilots with no baseline, no target, and no decision date

McKinsey's pattern is straightforward: the organizations seeing more value treat AI like an operating change, not a one-off tool purchase.

Five Leadership Questions to Take Back

- 1 What exact workflow should get better first?
- 2 What metric should move if this works?
- 3 What data or system does the workflow depend on?
- 4 Where is human review non-negotiable?
- 5 Who owns rollout after the pilot starts?

If your team cannot answer these clearly, do not buy another AI tool yet.

Measured AI Value Is Already Showing Up

**Most businesses are still early enough to move deliberately.
They are no longer early enough to keep waiting.**

71%

AI users in marketing and sales reporting revenue gains

Stanford HAI, 2025

49%

AI users in service operations reporting cost savings

Stanford HAI, 2025

78%

QuickBooks AI users saying productivity improved

QuickBooks, Feb. 10, 2026

The takeaway is simple: disciplined action is already translating into revenue lift, cost savings, and productivity gains.

AI Has Left the Chat Window

It now clicks through websites, reasons in the physical world, and shows up as moving robots.

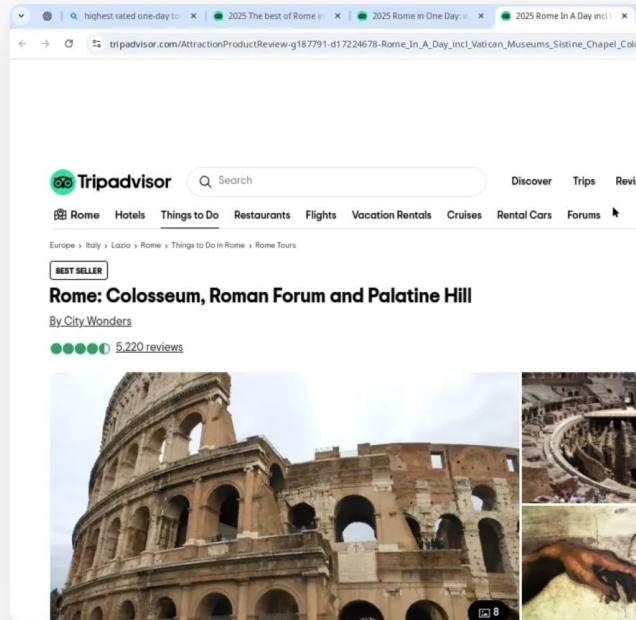
OpenAI

Find and book me the highest rated one-day tour of Rome on Tripadvisor.

I'll search for the highest-rated tour of historic Rome on TripAdvisor. Once I find a suitable option, I'll provide you with the details. Let's begin.

Worked for 2 minutes ^

- Navigating to TripAdvisor website
- Selecting "Things to Do" category
- Searching for historic Rome tours
- Closing pop-up, continuing tour search
- Searching for Historic Rome tours
- Exploring all historic Rome tour options
- Closing Colosseum tab, resuming tour search
- Closing tour pop-up, tab afterward
- Exploring options for top-rated tours
- Sorting results by tour ratings
- Exploring filters for top-rated tours
- Scrolling for sorting options, finding tours



AI that uses a computer for you

It doesn't just answer — it clicks, types, scrolls, and gets work done.

Google DeepMind



AI robots that think before acting

Google's robots can see, plan, use tools, and turn instructions into movement.

Disney



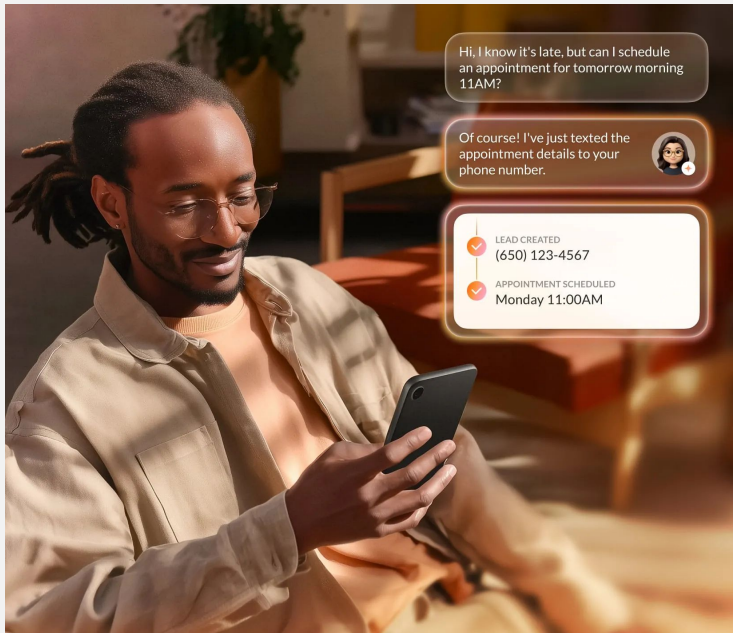
Free-roaming droids with personality

Disney is building robots that feel less like machines and more like characters.

This Same Tech Is Already Hitting Main Street

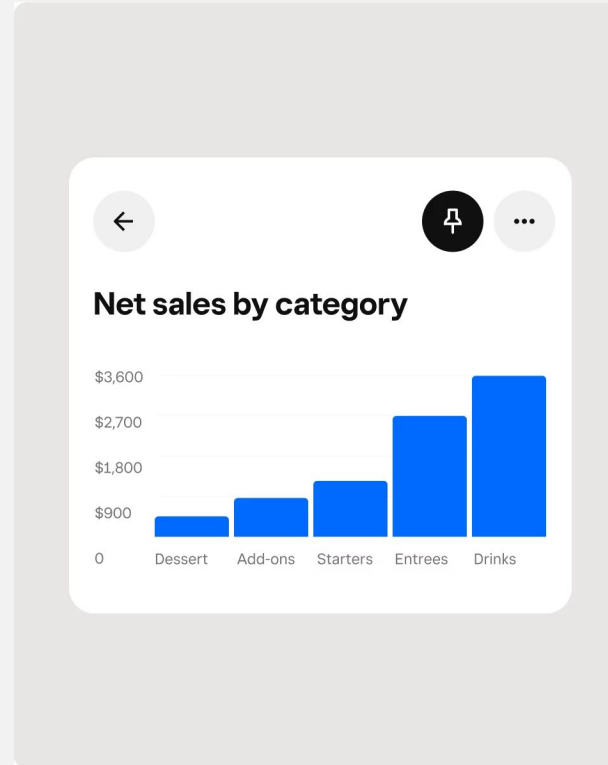
For businesses, the wow is not humanoids — it's front desks, customer conversations, and live business decisions.

RingCentral AI Receptionist



An AI front desk that answers every call, books appointments, and captures leads 24/7.

Square Square AI

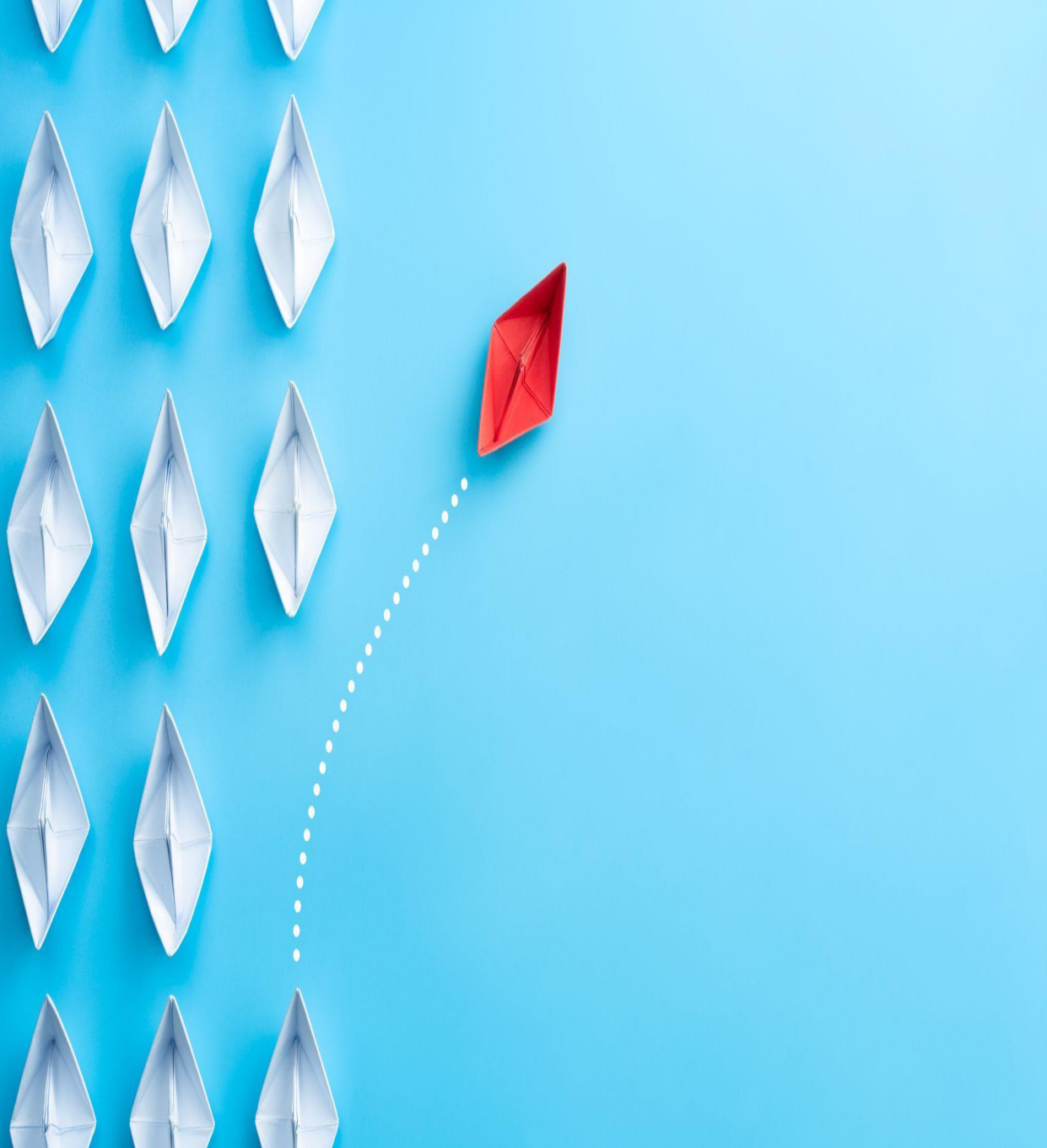


A local business can now ask its POS questions like a smart analyst.

HubSpot Breeze Customer Agent



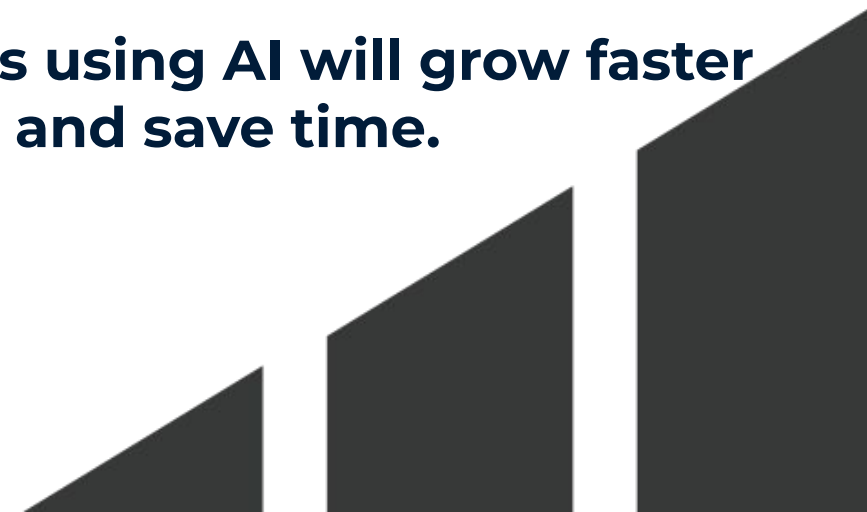
AI agents are already handling a huge share of customer conversations.



Not Everyone will keep up!

It's the AI-powered businesses that move to automate faster that are the ones who will disrupt your markets. They are the ones to watch out for.

Businesses using AI will grow faster and save time.



Thank You!



Let's Connect!
Grab Some Resources Here.

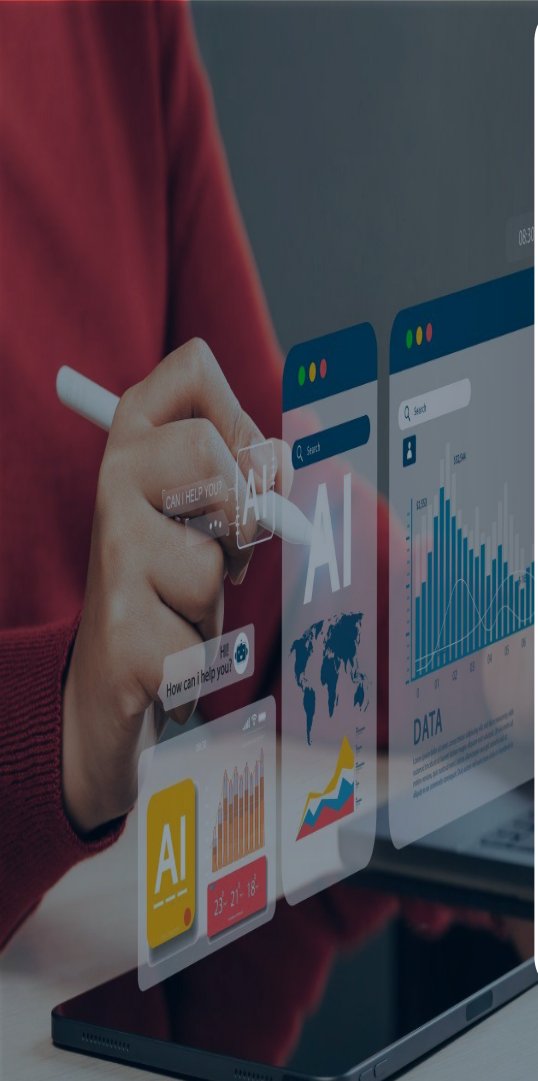


Appendix

AI Tool Visual References

The following slides showcase different AI tool interfaces we have developed

How Proof Digital Helps You Operationalize AI



1

Assess the workflow

Audit bottlenecks, shortlist use cases, and rank them by business value.

2

Fix the inputs

Clarify system of record, data handoffs, and ownership.

3

Set guardrails

Define approved tools, review rules, and lightweight policy.

4

Launch measured pilots

Stand up one or two pilots with a KPI and scale-or-stop date.

What clients leave with

- Prioritized use-case shortlist
- Pilot scorecards and success metrics
- Practical guardrails and review rules
- A 90-day roadmap tied to the business

AI Tools

Name	Main Use	Best For	Free / Paid
1. ChatGPT	Chat, content creation, coding, everything	Everyday tasks of all kinds	Free + Paid plans
2. Gemini	Search, images, multimodal tasks	Google users and research. Visual interpretation.	Mostly Free
3. Claude	Long-form text, coding, analysis	Deep thinking & professional writing	Free + Paid
4. Copilot	Microsoft Office integration	Office work & coding	Paid (with Microsoft 365)
5. Grok	Real-time information, humor, search	Q&A and creative thinking	Free + Paid
6. Perplexity	Search + answers + sources	Research & fact-checking	Free + Paid
7. DeepSeek	Coding, math, technical tasks	Developers & students	Mostly Free
8. Jasper AI	Marketing content, blogs, ad copy	Content creators & marketers	Free Trial + Paid
9. Synthesia	AI avatar-based video creation	Video content & presentations	Free Trial + Paid
10. Midjourney	High-quality image generation	Artists, designers & creators	Paid (via Discord)

Automated Reporting

AI Research Buddy

Proof Digital



YOUR RESEARCH BUDDY

Let's prepare a competitive analysis, Stacie

Choose a research type to generate structured competitive and market insights.

- 📍 Geographical Competitor Analysis >
- 🌐 Online Competitor Analysis >
- 📊 Market Research Insights >

📍
2

Location Details

Tell us where your business is located

State * 📍

Indiana

Service area / city (optional) 📍

e.g., Indianapolis

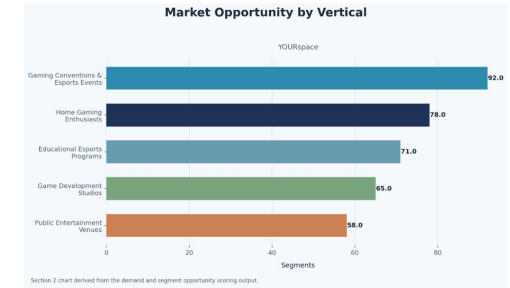
Continue

Section 3: Market Demand and Segment Opportunity

Top opportunity vertical

Gaming Conventions & Esports Events

Gaming conventions and esports events represent the highest-opportunity vertical due to rising demand for professional-grade gaming environments, moderate competition, and high buyer maturity. Event organizers face acute pain points around noise management, space optimization, and creating premium experiences that justify ticket prices and sponsorship investments. The modular, portable nature of YOURspace pods directly addresses event logistics challenges while enabling rapid deployment at scale.



Section 2 chart derived from the demand and segment opportunity scoring output.

How to win this market

Overall difficulty

Moderate. YOURspace has strong product-market fit and USA manufacturing advantage but faces conversion readiness gaps and limited proof density. Primary challenge is translating 53% visibility into qualified leads through better trust signals and clearer ROI messaging.

Quick wins

Deploy convention case studies with quantified outcomes like setup time, attendee satisfaction, and sponsor ROI. Create location-specific landing pages for basement, bedroom, and garage installations to capture 75% of missed geo-modified traffic. Add comparison content addressing gaming pods versus DIY soundproofing and gaming chairs.

Best angle

Own the portable, event-ready positioning that competitors like Framery and Kabin cannot match. Emphasize USA manufacturing, rapid deployment logistics, and modular scalability for convention organizers. Use convention proof points to build residential credibility through aspirational marketing showing professional-grade equipment accessible for home use.

Recent investments




Organization	Amount	Year	Description	Verified
Gaming convention industry overall	Market growing at 9.2% CAGR	2024-2030	Global gaming events and esports tournaments market expansion driven by increasing prize pools, sponsorship investments, and venue infrastructure development	Yes

Automated Reporting

YOUR RESEARCH BUDDY

Let's prepare a competitive analysis, Stacie

Choose a research type to generate structured competitive and market insights.

-  Geographical Competitor Analysis >
-  Online Competitor Analysis >
-  Market Research Insights >

2

Core Information

Tell us about the product and target market

Product / Service Name * ⓘ
e.g., AI Research Assistant, Cloud CRM Platform

Client Website * ⓘ
https://example.com

Launch Stage * ⓘ Market Focus (optional) ⓘ
Select stage... v e.g., SMB SaaS, Enterpris

Launch stage is required.

Seed Keywords (optional) ⓘ
e.g., CRM software, sales automation, pipeline managemen

Business Verticals (optional) ⓘ Target Geographies (optional) ⓘ
e.g., Healthcare, FinTech e.g., United States, Europ

Continue

Automated Reporting

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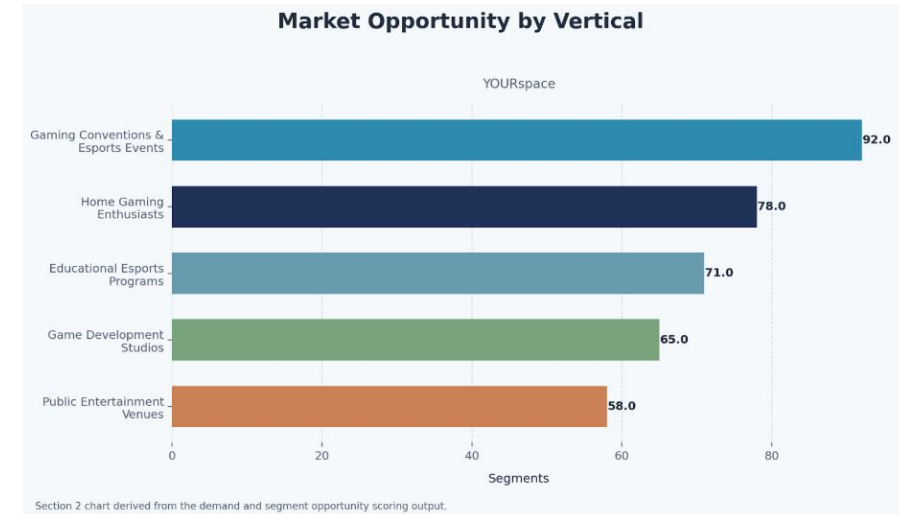
GPT-Ge

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Market opportunity by vertical

Meeting Summary

BEFORE vs **AFTER**

BEFORE:

- Manually opening Fathom and copying transcript links.
- Copy-pasting transcripts into docs or email.
- Writing MoM and formatting by hand.
- Manually creating action item lists and sending emails.
- Creating ClickUp tasks one by one and assigning owners.
- Time required: 1–2 hours per meeting.

AFTER:

- One webhook trigger from Fathom link.
- Clean transcript fetched and merged automatically.
- Single, unified MoM generated by AI.
- Action items extracted as structured JSON.
- Tasks created in ClickUp with correct folder and assignee.
- Time required: 3–5 minutes once triggered.

Hello Team,

You have been assigned one or more action items that align with current priorities. Please review the list below and update progress as work moves forward.

Action Required: Review each item, confirm ownership, and update status or notes as work is completed.

ACTION ITEMS

Current Tasks

- TASK**
Coordinate training plan and onboarding steps for Madeline
Timeline: TBD
Owner: Kelly Porter / Sydney Bilger
- TASK**
Connect to finalize Madeline onboarding process and task assignments
Timeline: This Week
Owner: Kelly Porter / Victoria Dominesey
- TASK**
Update VAI presentation deck with corrected pricing (\$10.99/\$9.99) and share with team
Timeline: This Week
Owner: Jane Madden
- TASK**
Draft and send VAI nurture email sequence for review and campaign update
Timeline: Next Week
Owner: Meghan Lund
- TASK**
Prepare and send End Tomorrow ABM campaign preliminary plan
Timeline: Next Week
Owner: Kelsey Batten / Nick Hupp
- TASK**
Schedule and conduct sync meeting to discuss ABM progress and brainstorm
Timeline: Before Next Strategy Call
Owner: Stacie Porter Bilger / Nick Hupp
- TASK**
Review ACS MailChimp campaign data and share actionable insights
Timeline: TBD
Owner: Kelsey Batten / Sydney Bilger
- TASK**
Confirm with VAI if additional campaigns run targeting engaged subscribers
Timeline: This Week
Owner: Kelsey Batten / Meghan Lund

Quick Tip: Keep all follow-ups, deadlines, and notes in one place so the team can collaborate without losing context.

PROOF DIGITAL
Performance marketing agency • Indianapolis
317-537-0488 • info@proofdigital.com

Sales Proposals

Generate Marketing Proposal ✕

Transform your business with our digital marketing solutions. Upload your consultation transcript or call recording link.

Website URL *

* Provide one of the following:

Paste Your Consultation Transcript

OR

Fathom Recording URL

Average Project Value (Optional)

Desired Leads Per Month (Optional)

Current Monthly Revenue (Optional)

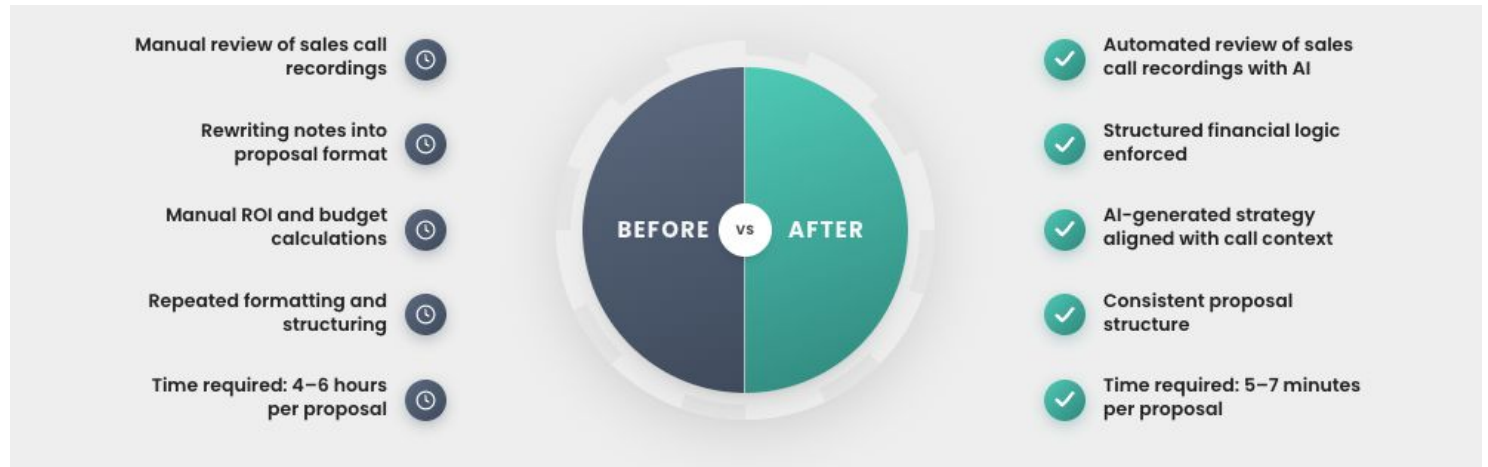
Monthly Marketing Budget (Optional)

One-Time Setup Budget Available? *

One-Time Budget Amount *

[Back](#)

[Generate My Proposal](#)



Section 1

Executive Overview

Orleans Co. Tree Service has built a strong reputation as a full-service tree care provider since 1991, but their marketing hasn't kept pace with their business evolution. They've shifted focus from commoditized tree removal toward higher-margin, recurring plant health care services—a consultative business model that generates long-term customer relationships. Current paid advertising has attracted volume-based removal leads at high cost; their previous agency (KeyWeb) delivered maintenance-level service without strategic collaboration. This proposal positions Orleans Co. as Richmond's expert tree health authority, capturing premium clients through a phased, two-pillar approach: Phase 1 establishes lead generation (PPC + SEO) focused on qualified outcomes and brand foundation; Phase 2 amplifies authority through brand awareness campaigns that accelerate the customer consideration cycle. The strategy accounts for evolving buyer behavior—research via ChatGPT followed by Google validation—and builds presence across the entire customer journey to dominate the premium tree care market.

Section 2

Business Overview

- **Client:** Orleans Co. Tree Service
- **Website:** <https://orleanscotreeservice.com/>
- **Location:** Richmond, VA (Petersburg base; serving greater Richmond area)
- **Industry:** Tree Service (Residential & Commercial) - Plant Health Care, Tree Removal, Pruning, Cabling, Emergency Services
- **Primary Goal:** Lead Generation - Shift from volume-based removal leads to high-value, recurring plant health care clients
- **Current Revenue:** Not provided

Target Audience & Geography

Primary Service Area

- Richmond, VA (city and inner suburbs)
- Surrounding Richmond metro area (Henrico, Chesterfield, Hanover counties)

Secondary Service Area

- Greater Richmond region (Goochland, Louisa, Orange counties) - for large commercial/contract work

Extended Service Area

- Virginia Beach area - noted as competitive but minimal overlap with Spark Solutions' existing client

Customer Profile

- Homeowners aged 35-65 with established property value and investment mentality (focus on plant health, aesthetics, long-term care)
- Higher-income households (\$100K+ household income) who value expert consultation and ongoing relationships over lowest-cost removal
- Property managers and commercial property owners seeking reliable, professional tree care partnerships
- Educated buyers who research before calling (ChatGPT researchers, Google searchers); seek authority and trust signals
- Buyers with recurring tree care needs: pruning, treatment, preventive maintenance, not just emergency removals
- Homeowners and businesses with landscape investment in premium neighborhoods and high-value properties

Central Dashboard

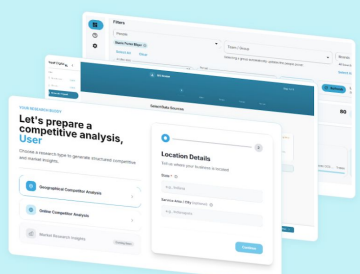
AI Hub Proof Digital MB

CENTRALIZED DASHBOARD

YOUR AI TOOLS, ONE CENTRAL HUB.

Access AI Research Buddy, SEO Master Audit, and Monday Time Tracking all in one place. Built for the Proof Digital team.

[Get Started](#) [Learn More](#)



Let's prepare a competitive analysis, User

Choose a research topic to generate structured competitive intelligence insights.

Location Details
Enter your business location

Address: [input]
City: [input]
State: [input]
Zip: [input]

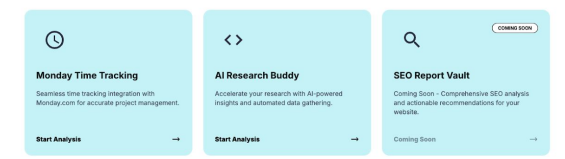
Competitive Analysis

Enter Competitor Analysis [input]
Select Research Strategy [input]

THE AI TOOLKIT

One Hub.

Access our full suite of custom AI solutions designed for the Proof Digital team.




Monday Time Tracking
Seamless time tracking integration with Monday.com for accurate project management.
[Start Analysis](#)

AI Research Buddy
Accelerate your research with AI-powered insights and automated data gathering.
[Start Analysis](#)

SEO Report Vault
Coming Soon - Comprehensive SEO analysis and actionable recommendations for your website.
[Coming Soon](#)

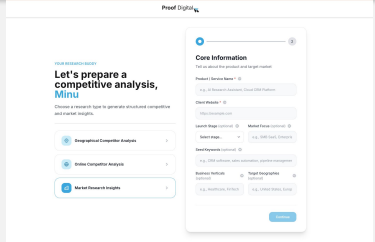
Everything you need to manage your AI tools

- Centralized access to all your AI tools in one place
- Role-based permissions for team members
- Detailed usage tracking and reporting
- Seamless integration with your existing workflow

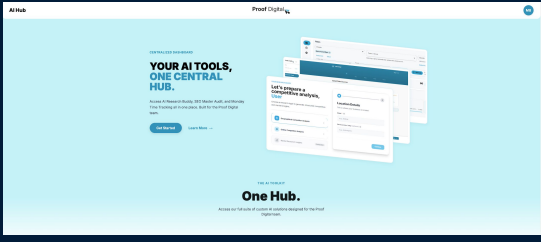


Four Tools, One Connected Platform

All tools connect through and originate from the Central Dashboard



Automated Reporting



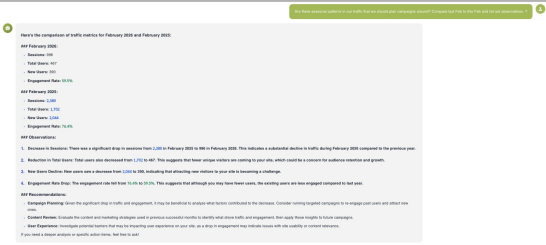
Central Dashboard



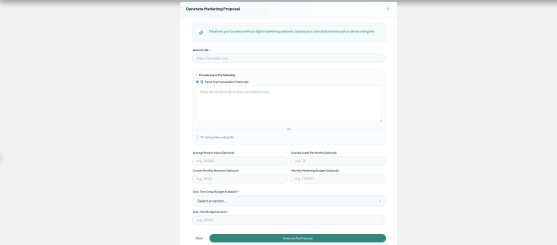
Meeting Summary

- Manually opening Fathom and copying transcript links.
- Copy-pasting transcripts into docs or email.
- Writing MoM and formatting by hand.
- Manually creating action item lists and sending emails.
- Creating ClickUp tasks one by one and assigning owners.
- Time required: 1-2 hours per meeting.

- One webhook trigger from Fathom link.
- Clean transcript fetched and merged automatically.
- Single, unified MoM generated by AI.
- Action items extracted as structured JSON.
- Tasks created in ClickUp with correct folder and assignee.
- Time required: 3-5 minutes once triggered.



Analytics Chatbot



Sales Proposal

All tools feed into and launch from the Central Dashboard – a single operational hub.