



Audience Q&A

① The Slido app must be installed on every computer you're presenting from

— For: BAC Community Bank

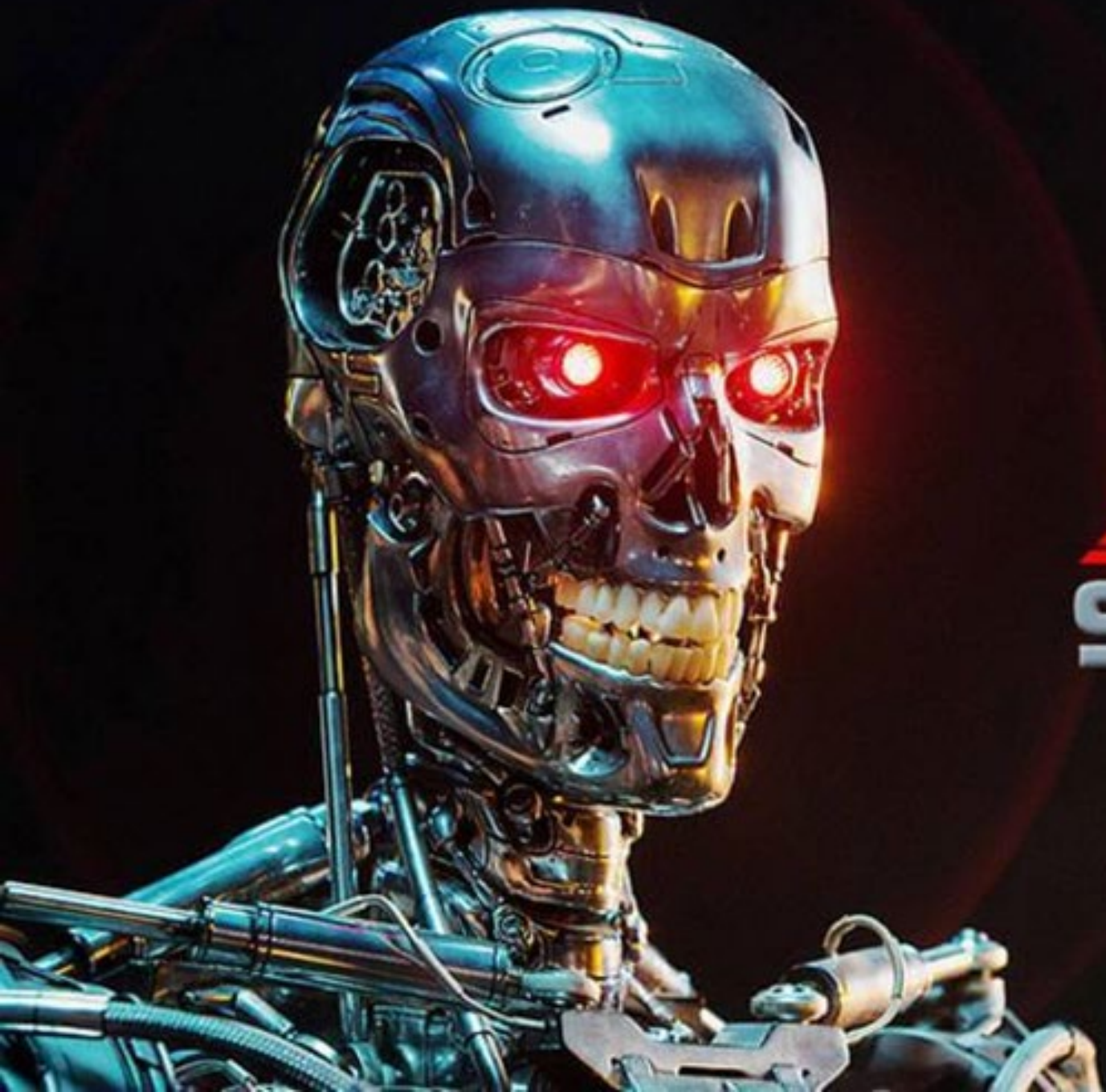
Demystifying AI for Business Leaders

Risk, Reality, and Opportunity





What is AI?



The Smart Intern



HARVARD
UNIVERSITY

University of Pennsylvania
Wharton

AI

Risks

Understanding the challenges ahead

Risks



What percentage of your workers do you think are using unapproved AI tools?

59%






What percentage of your workers do you think are entering sensitive data into those AI tools?

75%



A person wearing a dark hoodie is centered in the frame against a black background. The person's face is partially visible, looking directly at the camera. The text 'SHADOW AI' is overlaid in a white, outlined, sans-serif font across the lower half of the image.

SHADOW AI

AI & Data Regulations You Should Know

Industry-Specific Frameworks

HIPAA · GLBA/SEC · FERPA · PCI DSS — common AI threads

- **Vendor contracts:** BAAs/DPAs before regulated data hits AI
- **Human oversight:** AI assists, licensed pros decide
- **Audit trails:** log AI inputs, outputs, and overrides
- **Disclosure:** tell customers when AI is in the loop

CCPA / CPRA

Triggers at \$26.6M rev or 100K+ CA consumers

- Privacy risk assessments required for AI/ADMT processing (Jan 2026)
- Consumer opt-out rights for automated decision-making (ADMT, Jan 2027)
- ADMT outputs and inferences treated as personal information under CCPA

FEHA AI Rules

CA employers w/ 5+ employees · Eff. Oct 2025

- AI hiring/promotion tools must not discriminate on protected characteristics
- Employer is liable for vendor/third-party AI bias (agent liability)
- Anti-bias audits strongly incentivized; 4-yr retention of ADS records

Pending HR AI Bills to Watch

2026 session — labor-backed, momentum building

- **SB 947** – No Robo Bosses: human review for discipline/firing
- **AB 1898** – 90-day notice + signed acknowledgment for AI tools
- **SB 951** – Cal-WARN notice for AI-driven layoffs
- **AB 1018** – Bias audits & impact assessments for ADS

Risks and Fines for Breaches

Regulatory Fines

Per-violation exposure adds up fast

- **CCPA/CPRA:** up to **\$7,988** per violation
- **HIPAA:** up to **\$73,011** per violation;
- **GLBA (financial):** up to **\$100K/violation** + \$10K personal liability + 5 yr prison
- **PCI DSS:** up to **\$100K/month** escalating, plus loss of card processing
- **FEHA + ADS rules:** CRD anti-discrimination penalties + plaintiff fees

IP & Confidential Data Leakage

Once it's in a vendor's model, it's gone

- **Trade-secret loss:** pasting code, contracts, or formulas into public chatbots can void confidentiality
- **Vendor data retention:** free/consumer AI tiers often train on inputs — pricing, customer lists, M&A talks bleed into the model
- **Competitive exposure:** strategy decks, deal terms, and roadmaps fed into shared models leave your control
- **No clawback:** once a prompt leaks, it cannot be deleted from a vendor's training set or third-party logs

LIVE BROADCAST

PUBLIC SERVICE ANNOUNCEMENT

11:00 PM

4

NEWS

- IT'S -
2026

DO YOU HAVE AN
AI POLICY?

YOUR EMPLOYEES ARE ALREADY USING IT



VOL



CH

AI Policy: 3 Key Elements



WHICH TOOLS

Approved AI Systems

Compliance requires signed BAA/DPA • Microsoft/Google best for data security • Business versions at minimum



WHAT DATA

Acceptable Data Use

Classify your data into sensitivity levels • Which data in which systems? • Never PHI, PII, or financials in unapproved systems



HOW APPLIED

Acceptable AI Use

Human review before client-facing output • Careful about HR use cases • Never sole basis for hiring, firing, or pricing

The Good News: Policies Can Be Enforced

Modern IT can **detect**, **restrict**, and **audit** AI use across your organization.



Identity & Access

SSO, MFA, conditional access — gate who can use which AI tools.



Endpoint Controls

Block unsanctioned AI sites and apps; allow only approved tools.



Data Loss Prevention

Detect and stop sensitive data from leaving your environment via AI.



Monitoring & Audit

Log AI activity, flag risky behavior, prove compliance to auditors.

Opportunities

Exploring the potential ahead



Two Primary Categories of Business AI



CATEGORY 01

Productivity

01

Helping people work faster and better

- **Drafting emails, memos & reports**
- **Summarizing meetings & documents**
- **Research and information synthesis**
- **Coding assistance & data analysis**
- **Brainstorming and content creation**
- **Strategic guidance**



CATEGORY 02

Automation

02

Letting AI run tasks end-to-end

- **Customer service chatbots & agents**
- **Document processing & data entry**
- **Workflow & approval routing**
- **Lead qualification and outreach**
- **Monitoring, alerting & reconciliation**

Easy Wins

WIN #1

AI-Assisted Communication

1 hr/day saved per knowledge worker

- Draft proposals, RFP responses, customer emails in minutes
- Polish meeting notes into action items and follow-ups

WIN #2

Ask Your Own Documents

Stop hunting through SharePoint and inboxes

- Drop SOPs, contracts, manuals into Copilot or NotebookLM
- Onboard new hires faster with a self-serve Q&A bot

WIN #3

Finance on Autopilot

Cut manual finance busywork and accelerate close

- Scan receipts and auto-populate expense reports
- Match invoices to POs and flag discrepancies before they reach accounting

WIN #4

Low Risk Customer-Facing

Same headcount, faster response times

- FAQ chatbot trained on your help docs and policies
- AI intake forms that summarize and triage incoming requests

AI Adoption Roadmap



WHEN TO CALL FOR HELP

Bring in an AI Partner



WHEN

Connecting your data

When native connectors aren't enough.



WHEN

Mapping your workflows

An outside lens to find the highest-leverage opportunities.



WHEN

Advanced automations

Multi-step agents and Agentic AI.



WHEN

Shaping AI strategy

Roadmap, governance, ROI, and how AI fits the business.



WHEN

Security & enforcement

Access controls, data handling, and policy compliance.



WHEN

Handing off the process

When you'd rather have someone run it end-to-end.

AI Transformation Framework



Business Alignment

Tie AI initiatives to organizational strategy & goals

- **Identify Strategic Vision**
- **Identify OKRs**
- **Identify O&O**
- **Identify Initiatives**



Data Strategy

Build the data foundation AI needs to succeed

- **Modern Workplace**
- **Major Platforms**
- **Viability Assessment**
- **Warehouse Data**



Culture

Equip people to work alongside AI confidently

- **Leadership Onboard**
- **Create AI Committee**
- **Games & Challenges**
- **Training**



Governance

Manage risk, compliance, and responsible use

- **Identify Requirements**
- **Develop AI/Data Use Policy**
- **Review Regularly**
- **Implement IT Enforcement**



Execution

Deliver value through disciplined delivery

- **Identify Initiatives**
- **Prioritize**
- **Implement**
- **Create Accountability**

CASE STUDY 01

Automated Timesheet Review

Agentic AI applied to a real internal workflow

THE CHALLENGE

One employee spent 16 hours per week reviewing more than 1,200 weekly time entries for billable accuracy. The work was tedious, error-prone, and high-stakes — inaccurate billing risks customer relationships and leaves revenue uncaptured. Even with a dedicated reviewer, accuracy was limited by human fatigue.

THE SOLUTION

We built an internal agentic AI workflow that reads every time entry, applies our business rules, and flags only the exceptions that require human judgment. The rules are fully adjustable — when billing policies or client terms change, we update the logic and the agent follows it immediately.

THE RESULTS

16hrs -> 30 min/week

A 97% time reduction

99% accuracy

verified against manual review

~800 hrs/year

reclaimed for higher-value work



THE TAKEAWAY

"The best AI projects start with your worst job."

CASE STUDY 02

Foster Family Assessments

AI applied to a high-stakes, regulated workflow

THE CHALLENGE

A foster family agency vets prospective families under California's Resource Family Approval (RFA) process — home visits, interviews, and a psychosocial evaluation feeding dozens of state forms. The work demands licensed behavioral specialists, who are scarce: statewide vacancy rates near 16% with 3-to-6 month time-to-fill. Each assessment consumed days of specialist time.

THE SOLUTION

We built an AI workflow that captures interviews during home visits, transcribes them automatically, and uses purpose-built agents to draft the majority of state-required forms from the source material. Specialists review and finalize the output rather than starting from a blank page — retaining full clinical judgment and signature authority.

THE RESULTS

~70% reduction

in documentation time per family assessment

More families

assessed with the same scarce specialist headcount

Less paperwork

specialists redeployed to relational and clinical work



THE TAKEAWAY

"AI doesn't replace your hardest-to-hire people — it gives you more of them."

CASE STUDY 03

Pre-Construction Workflow

Agentic AI applied to commercial GC bid development

IN PROGRESS

THE CHALLENGE

A commercial GC's pre-construction team spends days to weeks on each bid — reviewing plans, performing takeoffs, soliciting subcontractor bids, and assembling proposals. Estimators are high-cost and hard to hire, so bid volume is capped by their capacity. Every bid not pursued is revenue left on the table; every bid rushed risks margin erosion.

THE SOLUTION

We are building an agentic AI workflow — trained on the GC's own cost data and templates — that ingests plan sets, generates first-pass takeoffs, drafts subcontractor RFPs, and normalizes bids for comparison. Estimators move from producing the work to reviewing it: constructability, risk, and relationships.

THE RESULTS (PROJECTED)

50–70% *projected*

reduction in takeoff and bid-prep time

2–3x more bids *projected*

pursued with the same estimating team

Better margins *projected*

via faster scope review and bid normalization



THE TAKEAWAY

"Capacity, not headcount, is the new constraint."

The Agentic Future



2023

GENERATIVE

AI creates content

Drafts text and code

Produces images

Answers questions



2024-25

ASSISTIVE

AI works alongside you

Copilots in every tool

Suggests next steps

Speeds up the work



2026 +

AUTONOMOUS

AI does the work

Runs end-to-end workflows

Decides, acts, adapts

Delivers outcomes

The future of AI in business isn't a smarter tool — it's autonomous work.



Audience Q&A

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Free AI Resources



VERVE | About Us Services Learn Careers Contact Us Call Us Anytime

Verve AI Policy Template

Your free AI Policy template is ready to download and designed to be put to work right away. It gives your team clear guidelines on how to use AI responsibly, helps protect sensitive information, and positions your organization to adapt as the technology continues to evolve.

No starting from scratch. No legal jargon to untangle. Just a practical, ready-to-use framework built for businesses like yours.

▶ Get the template

Anatomy of a Good Prompt

How to Frame your Request for the Best Results

Context: Set the Stage

Task: Ask for what you want

Output: How do you want it?

Verve AI Prompting Guide

Click the link to access the **Anatomy of a Good Prompt** guide. It's a practical, no-fluff resource you can use right away to write better prompts, get stronger outputs, and unlock more value from AI in your day-to-day work.

▶ Get the guide

ChatGPT Isn't a Toy. It's a Business Tool. Here's How to Use It.

ChatGPT Workshop Series

The four-part series takes your team from ChatGPT basics all the way to building custom AI workflows and team-ready solutions — safely, strategically, and without the guesswork. Whether you're just getting started or ready to go deeper, there's a session for where you are right now.