SMITH & ALLEN CONSULTING

The AI-First Business Playbook

Become an AI-First Business, Department by Department

Join the AI Powered Business Revolution

Your People + AI = An Unfair Advantage

Every Era Has One Big Shift. This Is the Biggest.

Great Plains on DOS. Dynamics GP on Windows. Business Central in the cloud. For more than 35 years, our leaders have guided businesses through every major shift in business software. AI is bigger than all of them. It doesn't just change the software you use. It changes how every person in your company works. The businesses that act now will set the pace in their industries for the next decade.

What changes for your business

- **AI Does the Boring Stuff.** Data entry, reconciliations, first drafts, and repetitive reports get handled by AI, so your people focus on judgment, relationships, and growth.
- **Multiply Productivity.** Our goal is simple and measurable: the same work, at the same or better quality, in half the time or less.
- **Skills That Last.** Your staff learns to work with AI every day, building skills that compound as AI keeps improving.
- **More Self-Service.** Employees get answers from AI assistants trained on your policies, processes, and data instead of waiting in line for help.
- **Lower Cost for Support and Customization.** AI dramatically speeds up support, requirements analysis, and custom development, so improvements that used to be too expensive become affordable.
- **More Enjoyable Work.** When the tedious parts of the job disappear, people do more of what they're good at. That's better for morale and retention.

How AI-Ready Are You? Self-Scorecard

Give yourself 1 point for each “Yes.”

1. Leadership has said AI is a priority for this year.
2. We have a written AI use and data security policy.
3. Our staff has access to business-grade AI tools.
4. At least some staff use AI in their daily work.
5. We know which recurring processes take the most hours each month.
6. Our ERP and financial data is clean and well organized.
7. We have someone responsible for leading AI adoption.
8. We've measured time savings from at least one AI use.
9. Employees can get answers to common questions without waiting on a person.
10. We have a training plan to keep AI skills current.

Your score

> **0–3: Getting Started.** Big opportunity ahead. Start with a policy, tools, and training.

> **4–7: Building Momentum.** Pick a department pilot and measure it.

> **8–10: Ready to Scale.** Expand to more teams and consider the $100,000 AI Challenge.

AI Use Cases by Department

Let AI Do the Boring Stuff. Let Your People Do the Great Stuff.

Accounting

BEFORE Days of month-end prep, manual reconciliations, and invoice coding.

WITH AI AI prepares reconciliations, codes invoices for review, and drafts variance explanations, so close gets faster.

Finance

BEFORE Late nights assembling board and lender packages.

WITH AI AI drafts the package, the commentary, and the forecast narrative in minutes, and your team reviews and refines.

Administration & HR

BEFORE The same policy questions, onboarding packets, and meeting notes, over and over.

WITH AI A policy Q&A assistant, auto-built onboarding packets, and meeting notes with action items, done.

AI Use Cases by Department (continued)

Marketing

BEFORE Content, SEO, and campaigns that never get the time they deserve.

WITH AI Research, first drafts, SEO improvements, and campaign variations produced in a fraction of the time.

Sales

BEFORE Proposals and RFP responses written from scratch.

WITH AI AI assembles tailored proposals and RFP answers from your best past work.

ERP & IT Support

BEFORE Slow, costly requirements gathering, specs, custom reports, and help-desk tickets.

WITH AI Claude Code turns requirements into specs and working code quickly, writes report queries, and helps triage support requests.

Your 90-Day Roadmap

DAYS 1–30

Assess & Prepare

Name an AI lead, adopt an AI use policy, roll out business-grade tools, and list your most time-consuming recurring processes.

DAYS 31–60

Train & Pilot

Train a pilot team, redesign one or two processes with AI, and track hours before and after.

DAYS 61–90

Measure & Expand

Review results, share wins, build prompt libraries and templates, and choose the next departments.

Do It Yourself, or Bring In a Guide?

Some businesses have the skills and the available people to lead an AI transformation themselves. If that's you, start with this playbook. Others benefit from an outside, unbiased leader: someone who sets honest baselines, keeps momentum when everyone is busy, and isn't caught up in internal priorities. That's where we come in.

Do it yourself if…

- You have staff with time to lead it
- You have AI experience in-house
- You can measure results objectively

Bring in SACI if…

- Your best people are already at capacity
- You want results on a deadline
- You want an unbiased outside view and proven methods

Why SACI

This website was built with Claude Code. The same AI-assisted approach we use on our own business is the one we bring to yours.

35+	150+	500+
YEARS OF EXPERIENCE	CLIENTS	PROJECTS

"Our month-end Board Package took forever, and we were always in the office making last-minute changes the night before the board meeting. SACI helped us cut a week off our month-end close and completely automated the Board Package, all the way to creating the PDF."

Matt, CFO, Healthcare

How we do it

1. Assess
We learn how your teams work today and find the processes where AI pays off fastest.

2. Train
Role-based workshops and one-on-one coaching, so the skills stay when we leave.

3. Build
AI assistants, prompt libraries, templates, automations, and custom tools built with Claude and Claude Code.

4. Support
Ongoing AI-powered support and optimization, so your gains keep growing.

Ways to Start

Free AI Discovery Call

One hour. We'll talk through your goals and show you where AI can help first.

AI Readiness Assessment

A written assessment of your people, processes, and data, with a prioritized action plan.

Team AI Training

Hands-on, role-based workshops that get your staff productive with Claude right away.

Department Pilot

Pick one department and one process. We redesign it with AI and measure the results.

The $100,000 AI Challenge

Double the productivity of three key people with AI, or pay only $25,000.

Ongoing AI-Powered Support

Continuous support and optimization as AI keeps improving.

Book a Free AI Discovery Call

www.saci.com/schedule-meeting

Or learn about the $100,000 AI Challenge: www.saci.com/ai-challenge