



BTI COMMUNICATIONS GROUP

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Less busywork. More business.

The Business Buyer's Guide to AI Adoption & Automation

Win opportunities. Protect margins. Give people more room to do the work only people can do.

A practical roadmap for growing and mature businesses: from approved employee AI to connected workflows and measurable business value.

Put AI to work.

Keep your business in control.

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50 pages | Practical tools | Reported results



PEOPLE FIRST. BUSINESS OUTCOMES NEXT.

What Could Your Best People Do With Less Busywork?

Picture a salesperson spending the morning talking with customers instead of assembling notes. A service team giving a complicated request its full attention. A manager coaching people instead of rebuilding the same report.

That is the opportunity: automate routine preparation so people can contribute more judgment, care, creativity, and commercial value. These are intended outcomes to design for, not automatic results of buying a tool.

Start with approved AI access for employees. Help them draft, research, prepare, and find answers. Then connect the useful ideas to the systems and workflows that influence revenue, spending, customer experience, and risk.

Start here	Aim for this business result
Give employees an approved AI workspace.	Better-prepared conversations and less repetitive administration.
Build a company-knowledge Expert.	Consistent answers and more attention for customers and colleagues.
Connect one valuable workflow.	More won business, lower actual costs, or better protection.

Why BTI? We combine AI consulting, development, and adoption with the IT, communications, networks, security, governance, and support the solution may depend on. Start with one need; you do not have to replace everything or your existing IT provider. ^{[19][23]}

The goal is not to make everyone busier with AI. It is to make the business more competitive and the work more valuable.

See BTI's Secure AI Workspace & Pricing

Explore the tools, included workspace support, and next steps for your team.

[Get Managed AI Pricing](#)

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READ WHAT YOU NEED. USE WHAT HELPS.

Find Your Starting Point

Use this guide as a working reference. You do not need to read every page before starting a conversation.

Find what you need	Pages
Starting points, definitions, and research	2-5
Approved employee AI, onboarding, and everyday research	6-11
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Owner or executive: start with 2, 15-16, 36-38, and 47-48.

IT or security leader: start with 6-9, 17-25, and 39-44.

Department manager: start with 10-16 and your example on 26-35.

Finance leader: start with 16, 31-32, 37, 41, and 44.

Your starting-point worksheet

First business outcome and evidence of success: _____

Accountable owner: _____

One process to investigate: _____

Most important information restriction: _____

Enable -> Teach -> Prioritize -> Connect -> Automate -> Improve.

These are stages of useful adoption, not a race toward maximum autonomy. ^[19]

CHOOSE THE RIGHT KIND OF HELP

Chat, Research, Experts, Workflows, Bots, and Agents

Chat assistance helps an employee draft, explain, summarize, or think through a task. The employee supplies context and checks the output.

Research assistance gathers and organizes information from approved sources. A useful result identifies its sources, dates, uncertainties, and missing evidence.

A company-knowledge Expert answers a defined class of questions using selected documents. In this guide, Expert is the platform term for a configured knowledge assistant, not a claim of professional credentials. ^[20]

A workflow follows a designed sequence. AI may interpret an email while ordinary software performs validation and routing.

An agent can select tools or intermediate steps within its authorized environment. An agent does not need unrestricted authority to be useful. Anthropic distinguishes predefined workflows from systems in which a model directs more of the process. ^[12]

A bot describes an interaction or automation mechanism; the label alone tells you little about its intelligence, permissions, or reliability.

Choose your starting point

Need a better draft? Start with assistance.

Need an answer from approved documents? Evaluate an Expert.

Need repeatable routing or calculations? Consider ordinary automation first.

Need interpretation across a bounded process? Evaluate an AI-assisted workflow.

Need flexible tool selection? Assess whether an agent justifies the additional complexity.

RESEARCH TO INFORM YOUR NEXT MOVE

The Opportunity Is Real. Make the Result Yours.

Published research gives businesses a reason to experiment with AI. Your business case determines whether the experiment is worth expanding.

15% more issues resolved per hour. A 2025 Quarterly Journal of Economics study followed 5,172 customer-support agents and found this average improvement with AI assistance. Results varied across workers. It studied a particular workplace, not autonomous replacement of an entire department. ^[1]

40% less task time; 18% higher evaluated quality. A 2023 Science experiment involving 453 professionals found these averages on selected writing assignments. Real-world work can require more context and fact-checking than the study tasks. ^[2]

Human judgment still matters. A study involving 758 consultants found benefits on suitable tasks but worse correctness on a task outside the tested capability range. Fluent output is not evidence that a recommendation is right. ^[3]

Use better execution to pursue better outcomes: more completed customer work, stronger proposals, lower processing expense, or a better service experience.

Turn the research into a test you can use

- ☐ Select one task that influences a business outcome.
- ☐ Record the baseline: sales, cost, quality, customer experience, or exposure.
- ☐ Test representative work, including checking and exception effort.
- ☐ Ask the people doing the work what improved and what failed.
- ☐ Decide whether the change improves the business enough to justify its cost.

Research findings, customer-reported results, and illustrative planning examples are labeled separately throughout this guide.

ENABLE EMPLOYEES

Give Your Team a Better Way to Work

Give people a useful starting point: help preparing a customer response, finding an approved answer, or turning a good idea into a first draft. Make that access company-managed, with guidance they can actually use.

BTI helps scope a managed workspace with defined access, approved capabilities, administrative visibility, and support. ^[19] Broad access means every appropriate employee can participate; it does not mean everyone can reach the same files, features, or connected systems.

Secure-workspace launch checklist

- ☐ Name the business owner and administrative owner.
- ☐ Identify approved users, authentication requirements, and offboarding steps.
- ☐ Select permitted models, tools, and features.
- ☐ Define information employees may and may not submit.
- ☐ Establish role-specific sharing and access.
- ☐ Explain activity reporting and support access to users.
- ☐ Set usage budgets, help channels, and escalation responsibilities.
- ☐ Test with approved sample tasks before wider rollout.

Start with low-risk assistance: drafting from approved material, organizing meeting notes, or converting a published procedure into a checklist. Sensitive or regulated information requires an explicitly approved design before use.

A company-managed workspace is a starting point for governance, not evidence that every employee action is compliant. The launch decision should identify the controls tested, the gaps that remain, and who owns them.

Acceptance evidence: approved user list, configuration record, initial tests, employee guidance, and a support contact.

PROTECT THE INFORMATION THAT MATTERS

Private Work Deserves Clear Boundaries

Privacy is a set of specific design decisions, not one checkbox. Review both the relevant product description and the governing data-use terms. ^{[15][16]}

Distinguish information used to answer a question from information retained in chat history, uploaded files, databases, backups, service logs, and support records. Also distinguish restrictions on model training from restrictions on storage. Microsoft's Azure documentation treats inference, stored application features, and monitoring separately. ^[6]

BTI helps you put AI to work in an approved, managed environment with defined access, data handling, reporting, and support. Privacy requirements - including restrictions on model training and retention for eligible model calls - are addressed in the selected services, configuration, and written agreements. Saved documents, conversations, audit records, and connected systems have their own retention rules.

Data-handling worksheet

For each workspace, model connection, search service, and integration, record:

- ☐ What data enters and why.
- ☐ Who processes it and in which approved location.
- ☐ Whether training or product-improvement use is allowed.
- ☐ What is retained, for how long, and by whom.
- ☐ Which permissions, approvals, and deletion processes apply.
- ☐ Which contractual terms and configuration evidence support the answer.

Where zero data retention is required, verify the specific processing route. Do not apply that label to all features merely because one model connection qualifies.

Do not submit restricted patient, banking, identity, or similar records until applicable permissions and agreements are in place. ^{[11][17]}



GOVERNANCE THAT SUPPORTS ADOPTION

Build the Confidence to Use AI

People can use AI more confidently when they understand what is allowed, where to get help, and who owns important decisions. A useful policy connects each rule to a control, an owner, and evidence.

BTI can connect AI governance to agreed IT, cybersecurity, regulatory-compliance management, GRC, and evidence responsibilities. ^{[19][23]} NIST's voluntary AI Risk Management Framework offers a foundation for organizing this work; it is not a product certification. ^[4]

Illustrative governance report - blank template, not a product screenshot

Reporting period: _____ Systems covered: _____

Accountable business owner: _____

Approved information and action limits: _____

Review area	Evidence/reference	Status	Owner/next action
Approved users and access			
Permitted data and retention			
Output quality and approvals			
Exceptions and incidents			
Changes and overdue actions			

Use **Verified**, **Gap identified**, **Not tested**, or **Not applicable with a reason**. A blank or missing record is not a passing result.

Explain what monitoring captures, who can view it, and how records are retained. Activity reporting is not automatically unrestricted access to employee conversations. In the supplied onboarding workflow, entering a user's session for support requires a separate logged grant of access. ^[20]

A dashboard helps organize evidence; it does not certify the business's compliance or replace qualified review.

A PRACTICAL START, WITH SUPPORT

BTI Handles the Setup. Your Team Brings the Business.

You should not need to become an AI administrator before seeing useful work. BTI handles the agreed configuration and implementation; your team supplies the business context, priorities, and approvals. ^{[19][20]}

Starting point	BTI's scoped work	Your contribution
Employee workspace	Configure agreed access, capabilities, guidance, and support.	Users, permitted tasks, information rules, and an owner.
Knowledge Expert	Configure approved sources, sharing, and answer tests.	Current documents, real questions, and a subject owner.
Connected workflow	Design integrations, controls, tests, and operating documentation.	Baseline, system access, business approvals, and acceptance criteria.

The starter onboarding sequence establishes the customer environment and administration, configures company context, explains user-granted support access, and creates a first document-grounded Expert. ^[20]

Useful context includes what your company does, the terms it uses, and how its communications should sound. Credentials do not belong in prompts; permissions must be enforced by the systems.

Onboarding acceptance checklist

- ☐ The correct organization and administrators are configured.
- ☐ Intended users can sign in and receive guidance.
- ☐ A supported question receives a correct, cited answer.
- ☐ Missing or restricted information is handled appropriately.
- ☐ Sharing and support access match the approved design.
- ☐ Staff know how to report a problem.

A configured workspace is not the same as organization-wide adoption or a completed integration. Deliverables, fees, training, support, and schedules are specified for the engagement. ^[19]

HUMAN ATTENTION IS THE PRIZE

A Better Workday Starts With One Useful Task

Imagine the routine preparation already done when the human conversation begins. Start with approved information, a specific task, and a person who reviews the result.

Let AI help prepare...	Give people more room to...
A follow-up draft from approved meeting notes.	Listen to the customer, refine the proposal, and win the next conversation.
A clear answer from an approved procedure.	Resolve the unusual request with patience and judgment.
A first version of a report or meeting agenda.	Coach the team, make decisions, and follow through.
A summary of permitted account information.	Ask better questions and develop the relationship.

These are illustrative starting points, not guaranteed results or included custom integrations.

Try this prompt

Help me prepare [task] for [audience] so I can focus on [human interaction or business decision]. Use only the approved material below. Preserve [facts and constraints]. Return [format]. Identify missing facts and assumptions. Do not send, publish, change a record, or make a commitment.

Before using the output

- ☐ Check names, dates, amounts, facts, and promises.
- ☐ Compare the draft with its sources; remove invented details.
- ☐ Confirm that the intended audience may receive the information.
- ☐ Apply the required approval before sharing or acting.

First-week challenge: choose one recurring task, test the assistance, and explain what you did with the attention it freed. A better customer conversation matters more than a longer prompt history.

RESEARCH WITH SOURCES AND JUDGMENT

Bring Better Research to the Human Decision

Use AI to organize a research task, not to make the evidence disappear.

A useful research brief defines the decision, questions, relevant geography, timeframe, acceptable sources, and information that must remain confidential. Research on public websites should not include private customer details merely because they make a search more specific.

Research prompt

"Investigate [question] for [business decision]. Prioritize original research and official documentation. For each material claim, identify the source, publication date, relevant evidence, and limitations. Separate verified facts, source opinions, and your inferences. Identify disagreements. Do not invent sources or fill missing evidence with plausible numbers."

Verification checklist

- ☐ Open each material citation and confirm that it supports the statement.
- ☐ Check the publication date, jurisdiction, product edition, and population.
- ☐ Verify quotations and calculations against the original material.
- ☐ Look for relevant contradictory evidence.
- ☐ Mark uncertainty and unanswered questions.
- ☐ Have the accountable person approve consequential recommendations.

Keep a short source register with the question, link, date checked, claim supported, and reviewer. A source's existence is not proof that it supports an AI-generated conclusion.

Task-dependent performance in published research reinforces the need for this review discipline. ^[3]



COMPANY KNOWLEDGE, READY TO USE

An Answer at Hand. A Person Free to Help.

Start with a limited, useful subject: current policies, approved service information, or a defined operating procedure. An Expert is a configured company-knowledge assistant, not a substitute for a qualified professional. ^[20]

Illustrative learning example - not a BTI policy, customer result, or product screenshot

Demo source: *Training Procedure D-01, step 3*: "Send purchase requests to the designated approver before ordering. The approver confirms the budget and records the decision."

Employee: What happens before I place an order?

Expert: Send the request to the designated approver. The approver confirms the budget and records the decision. Source: Training Procedure D-01, step 3.

Employee: Who may approve an exception over \$10,000?

Expert: The supplied procedure does not specify an exception authority or amount. Ask the procedure owner rather than relying on an assumed limit.

Your Expert design card

Purpose and audience: _____

Approved documents, versions, and owner: _____

Restricted topics and audiences: _____

Escalation role and review date: _____

Acceptance tests

- ☐ Supported questions return correct answers with source references.
- ☐ Missing information produces acknowledgment and escalation.
- ☐ Conflicting versions are not silently merged.
- ☐ Restricted users cannot retrieve restricted information.
- ☐ Changed or removed documents are handled correctly.

Ask the assistant to answer from approved documents, cite sources, identify uncertainty, and escalate decisions outside scope. Test that behavior rather than assuming the instruction guarantees it.

Adding documents to a knowledge assistant is not, by itself, proof that a foundation model is trained on them. Retrieval, model training, and contractual data-use rights are separate questions.

MEASURE THE CHANGE THAT MATTERS

Celebrate Better Work, Not More Prompts

Ask employees what they can now do better for customers or colleagues. Useful adoption needs practical examples, training, feedback, and a support contact - not a contest to generate the most text.

Platform reporting can show user activity, model usage, consumption, chats, and agent activity.^[18] Pair those measures with a business scorecard; software usage is not proof of profit or compliance.

Illustrative adoption and business-value report - blank template

Measure	This period	Evidence to use
Additional sales and contribution		Accepted orders; finance-approved margin
Administrative spending reduced		Overtime, outsourcing, or other actual expenditure
Materials/facilities spending reduced		Purchasing, waste, utility, or facilities records
Customer experience and company image		Complaints, service quality, authentic feedback
Security, safety, and stability		Incidents, tested controls, service interruptions
Liability and accountability		Evidence completeness; approved risk review
Human-to-human work improved		Staff examples; follow-through; quality review
Total AI cost and open issues		Billing, support effort, exception records

First-month adoption checklist

- ☐ Give each role examples and practice with approved material.
- ☐ Ask where preparation is improving real conversations.
- ☐ Sample quality, checking effort, and failed outputs.
- ☐ Review permissions, costs, issues, and training needs.
- ☐ Decide what to improve, stop, or connect next.

Report assumptions and sample limitations. Keep savings, revenue, and risk measures separate; do not turn prompt counts or unused hours into dollars.

See a Secure Employee AI Workspace. Ask to see useful employee tasks, company knowledge, reporting, and support.

DISCOVER YOUR FIRST OPPORTUNITY

Find the Friction Between Your People and Your Customers

Start with the moment that matters: a prospect waiting for a quote, a patient trying to book, a shipment exception, or a colleague asking for guidance. Then look backward at the preparation that consumes attention.

Break a job into tasks: collect, interpret, check, decide, enter, communicate, approve, and follow up. Involve the person doing the work. The aim is not simply to remove steps; it is to improve a business outcome and preserve the human contribution.

Opportunity discovery worksheet

Business outcome: revenue / cost / image / safety / stability / liability

Customer or employee moment to improve: _____

Repetitive preparation or handoff: _____

Monthly volume and current cost or lost opportunity: _____

Systems, data sources, and process owner: _____

Work that requires human judgment or personal contact: _____

What people will do differently after automation: _____

Evidence that the change improved the business: _____

Choose the right treatment

Eliminate work with no useful purpose. **Simplify** confusing steps. **Automate with rules** when the task is deterministic. **Assist with AI** when interpretation or drafting helps. **Retain human judgment** for consequential decisions and relationships.

A promising workflow creates space for a better customer outcome - not just a shorter task list.

Select one narrow process and one measurable outcome before expanding the scope.

THE BTI BUSINESS-VALUE FRAMEWORK

Six Reasons an AI Investment Can Be Worth Making

Start with a business reason, not a technology feature. Use this BTI planning framework to choose the outcome that earns the investment. ^[23]

Business reason	Define what improvement means
1. Increase sales and profit	Additional orders, renewals, or retained business in dollars; show the associated contribution or gross profit.
2. Reduce administrative cost	A quantified reduction in overtime, outsourcing, processing, or other real expenditure.
3. Reduce materials or facilities cost	Dollars removed from waste, purchasing errors, avoidable freight, utilities, or facilities spending.
4. Strengthen company image	More consistent service, fewer complaints, credible communications, and authentic customer feedback.
5. Improve security, safety, or stability	Better control performance, fewer avoidable interruptions, and tested response or recovery.
6. Reduce or limit liability	Better approvals, records, evidence, and documented risk treatment; qualified review of legal implications.

For financial outcomes, set a dollar target, period, baseline, and evidence source. For trust and risk, define observable improvement; do not invent a cash value or promise that technology eliminates liability.

Before you invest

- ☐ Name the outcome, owner, baseline, and proof required.
- ☐ Check data readiness, integration work, and ongoing cost.
- ☐ Compare AI with simpler process or software changes.
- ☐ Confirm authorized data, acceptable quality, and a human exception path.

Map a Business Outcome With BTI. Bring one opportunity and the systems it touches.



VALUE, NOT JUST VELOCITY

Does It Grow Profit or Protect the Business?

The business case is not "we saved 200 hours." It is what changes in sales, spending, customer trust, operating reliability, or exposure - after the full cost of the solution.

Illustrative first-year case - assumptions, not a BTI quote or forecast

Value driver	Explicit assumption	Annual benefit
Additional sales	2 additional orders/month at \$5,000 = \$120,000 revenue. At 40% contribution after variable fulfillment costs:	\$48,000
Lower administrative expense	\$3,000/month less verified overtime or outsourced processing.	\$36,000
Lower materials/facilities expense	\$2,000/month less waste, avoidable freight, or facilities spending.	\$24,000
Total measurable benefit	Distinct benefits; no double counting.	\$108,000
Full first-year AI cost	Illustrative total for setup, integration, tools, usage, support, training, review, and maintenance.	(\$24,000)

\$84,000

Illustrative net first-year benefit

\$108,000 benefit less \$24,000 full program cost

Planning example only. Not a customer result, quote, or performance promise.

Incremental sales contribution + verified expense reductions - full program cost.

This example assumes all benefits run for 12 months. Include ramp-up and additional operating costs in a real case. At half the modeled benefits and the same cost, the net benefit is \$30,000. This is a planning calculation, not an accounting profit forecast.

Protect what the dollars do not capture. Set separate targets for reputation, security, safety, stability, and liability management. Evidence matters; an assumed avoided incident is not booked savings.

Your decision: outcome _____ annual target \$_____ total cost \$_____ owner _____
proof/review date _____

Hours recovered are a means. More valuable work and a stronger business are the result to pursue.

HISTORICAL DATA

Put Your Business Memory to Work

Past records can support better preparation and retrieval, but age alone does not make them useful or authorized.

Potential sources include CRM accounts, proposals, purchase history, service tickets, accounting records, approved procedures, email, and permitted call or meeting records. Legacy exports may need to be matched to current account and contact identifiers before they can support a workflow.

Historical-data inventory

Source and system owner: _____

Date range and authoritative fields: _____

Permitted purpose and audience: _____

Sensitive fields and restrictions: _____

Data quality and known gaps: _____

Entity matching method: _____

Refresh, retention, and deletion requirements: _____

Preparation checks

- ☐ Separate current policy from superseded versions.
- ☐ Distinguish completed purchases from quotes and canceled transactions.
- ☐ Preserve document dates and record provenance.
- ☐ Deduplicate without deleting useful transaction history.
- ☐ Exclude information unnecessary for the purpose.
- ☐ Test record matches before using them in outreach or reporting.

Example: an old unsigned proposal may justify a salesperson's review. It does not prove that the customer still needs the product, has budget, or wants to be contacted.

REAL-TIME SIGNALS

Turn the Next Signal Into the Right Next Step

A trigger is an observable event, not a conclusion about someone's intention.

Examples include a submitted inquiry, a changed opportunity stage, a service request, a permitted call event, a purchase request, an overdue follow-up, or an approved security alert. A website visit or email click can be a research signal; it is not necessarily an identified buyer or purchase commitment.

Event-design worksheet

Event and originating system: _____
Reliable timestamp and unique identifier: _____
Identity confidence and account match: _____
Authorized data access: _____
Permitted next action: _____
Human approval or escalation: _____
Duplicate, delayed, or missing-event handling: _____
Evidence recorded: _____

Design checks

- ☐ Validate incoming events before processing.
- ☐ Deduplicate repeated notifications.
- ☐ Recheck the current record before making a change.
- ☐ Expire signals that are too old to justify action.
- ☐ Route ambiguous cases to a person.

Begin with a specific event and one bounded response. Avoid a single agent that watches every system and decides independently what the business should do.

The workflow owner should be able to explain why an action was triggered and which evidence supported it.

DATA QUALITY AND PREPARATION

Better Data. Better Decisions. Fewer Expensive Mistakes.

Data preparation includes accuracy, relevance, access, and lifecycle decisions. It is more than deleting obvious names from a spreadsheet.

Preparation checklist

- ☐ Identify duplicates, missing identifiers, invalid values, and stale records.
- ☐ Normalize company names, units, dates, statuses, and terminology.
- ☐ Select an authoritative source for conflicting fields.
- ☐ Remove unnecessary personal or confidential fields.
- ☐ Mask or tokenize information where appropriate to the task.
- ☐ Preserve source references, dates, and approved classifications.
- ☐ Inspect representative samples and document unresolved defects.
- ☐ Test how corrections and deletions reach downstream copies.

Removing a name does not, by itself, establish de-identification. For health information, HHS describes defined methods and explains how combinations of remaining information can still identify a person. Use an approved approach for the data and purpose. ^[22]

Create a quarantine path for records that fail validation. Keep the reason for exclusion so staff can correct the source instead of repeatedly cleaning the same problem.

Acceptance record

Dataset or document collection: _____

Tests performed and sample size: _____

Defects found and corrected: _____

Remaining restrictions: _____

Business/data owner approval: _____

For a first pilot, a small, well-understood collection is often a better design choice than an indiscriminate export of everything available.

ACCESS WITH INTENTION

Give People the Answers They Need - Not Every File

Design access at the application and data layers. A prompt saying "do not reveal confidential information" is not an authorization system.

The permissions design should cover the employee, the agent or service identity, the connector, the retrieved material, and the system receiving an action. Decide exactly what each identity may read and change. BTI's authority model relies on enforceable boundaries rather than model instructions alone. ^[19]

Access-control worksheet

User or role: _____
Data and fields allowed: _____
Actions allowed: _____
Service identity and credential owner: _____
Approval requirement: _____
Evidence source and review date: _____

Tests before connecting sensitive information

- ☐ A lower-privilege user cannot retrieve a restricted answer.
- ☐ Department and client boundaries remain intact after indexing.
- ☐ Generated summaries and exports follow audience restrictions.
- ☐ Secrets are not placed in prompts, documents, or ordinary logs.
- ☐ Removed access reaches derived stores and connected tools.
- ☐ A failed permission check prevents the action.

Map exceptions explicitly. An administrator's ability to configure a workspace is different from a permitted support session inside an employee account. The onboarding documentation treats those as separate mechanisms. ^[20]

CONNECTED TECHNOLOGY

Connect the Work, Not Just the Applications

A connector should have a defined purpose, owner, data scope, and failure behavior.

For documents, the system may retrieve a relevant passage. For a current balance, price, inventory quantity, or appointment slot, a controlled query to the authoritative application may be more appropriate than an old document copy. Label the information's freshness and source.

Connector register

Source and destination: _____
 Read/write permissions and identity: _____
 Authorized fields and purpose: _____
 Refresh schedule or event trigger: _____
 Limits, validation, and approval: _____
 Failure queue and reconciliation method: _____
 Retention, deletion, and export: _____
 Owner and change-review date: _____

Treat retrieved content and third-party tool results as untrusted inputs, not instructions that may expand the workflow's authority. Tool-using systems require security testing beyond an ordinary chat demonstration. ^[5]

Begin with read-only access where possible. Add write actions only after the business defines what may change, who approves it, and how failures are detected and corrected.

Illustrative connection path

01 Approved records

Historical knowledge + live events

02 Prepare and permit

Quality, access, and purpose

03 Retrieve or query

Use the authoritative source

04 Assist or automate

Interpret only within scope

05 Validate and approve

Check output and action limits

06 Act and record

Confirm completion; handle exceptions

Evidence, reporting, and exception ownership support the complete workflow.

The workflow's permissions do not expand merely because information passes through an AI model.

BTI connects the disciplines. A workflow may depend on application access, identity, network infrastructure, communications, and support. Agree who owns each connection and who helps when it fails. ^{[19][23]}

RIGHT-SIZED ARCHITECTURE

Solve the Problem. Skip Unnecessary Complexity.

The right solution may be a better form, an application rule, a reusable prompt, a knowledge Expert, or a small AI-assisted workflow. Not every opportunity needs an agent.

Anthropic's engineering guidance recommends starting with simple designs and increasing complexity when the task justifies the tradeoff. ^[12]

Decision guide

Fixed calculation or rule? Use deterministic software.

Known document questions? Evaluate a controlled retrieval assistant.

Draft requiring interpretation? Keep an employee in the review path.

Repeatable sequence across systems? Design a workflow with explicit validation.

Variable intermediate steps? Assess an agent with a limited toolset and bounded authority.

Architecture brief

Chosen approach and alternatives: _____

Where AI adds value: _____

Where ordinary code enforces rules: _____

Human decisions retained: _____

Cost and response-time constraints: _____

Testing and support owner: _____

Do not use fluent model text as the final authority for arithmetic, identity checks, permitted transaction values, or access control. Use the relevant business systems and validators.

A useful demonstration should expose the process and controls, not just show a successful answer. Ask what happens when a record is missing, a tool fails, or the proposed action is outside the allowed scope.

WORKFLOW DESIGN

Design the Handoff That Makes the Difference

Before building a bot, write the process a business owner can approve.

One-page automation brief

Outcome and accountable owner: _____

Trigger and eligible requests: _____

Historical records and current inputs: _____

Source of truth and allowed output: _____

Permitted actions and approval role: _____

Exception path and stop mechanism: _____

Success measures, baseline, and acceptance tests: _____

Illustrative workflow record - not a live system or product screenshot

Request ID: **DEMO-001**

Incoming event: an inquiry arrives through an approved channel.

Approved inputs: the inquiry, current account record, and approved service information.

Prepared output: a short brief, missing questions, and a follow-up draft.

Status: **Awaiting salesperson review. No message sent.**

Proposed next action: create an approved follow-up task.

Exception: uncertain account match goes to manual review.

The review record should identify the source information, proposed action, reviewing person, decision, and recorded outcome. Do not display a fabricated approval as proof of production performance.

Build checks

- ☐ A unique event identifier prevents duplicate work.
- ☐ Required information is validated before use.
- ☐ The responsible person can reject or amend the output.
- ☐ Failure returns work to an owned queue.
- ☐ The receiving system confirms the permitted action actually completed.

Start with a narrow process that is worth improving. This is an example to scope and validate, not an integration automatically included with employee AI access.

CONTROLLED AUTHORITY

Give AI a Job - and the Right Amount of Authority

BTI distinguishes capability from authority. An application may be able to describe an action without being authorized to execute it. The following is BTI's operating model, not an industry certification. ^[19]

- 0** **Prohibited** - the use case or action is not authorized. Excluded information and activities remain inaccessible.
- 1** **Assist** - read approved information and prepare output. A person reviews and sends it. No autonomous action.
- 2** **Recommend** - propose a specific action. An authorized person approves before execution.
- 3** **Bounded Execution** - execute approved classes of actions within enforced limits, with validation, logs, and exception handling.
- 4** **Controlled Autonomy** - execute a narrowly defined, validated, low-consequence workflow with monitoring and a stop mechanism.

Level 4 does not mean unrestricted business management. A lower level can be the appropriate permanent design. Every material workflow still needs an accountable human owner.

Authority record

Workflow/action: _____

Approved level and rationale: _____

Technical limits: _____

Approval and exception roles: _____

Stop mechanism and review date: _____

An increase in authority requires a separate decision. A successful pilot, a new model, or a vendor feature release is not permission to expand access or responsibilities automatically.

QUALITY BEFORE SCALE

Make Reliability Part of the Experience

Acceptance criteria should be written before the pilot. Use representative cases, difficult cases, and cases the workflow must refuse or escalate.

OWASP's agentic security guidance is relevant when a system can use tools and act across connected applications. ^[5] The test plan below is a proposed implementation checklist, not a certification standard.

Pilot test checklist

- ☐ Correct answers and accurate source references.
- ☐ Missing, conflicting, stale, and misleading information.
- ☐ Restricted information and cross-role access attempts.
- ☐ Malicious instructions embedded in documents, email, or tool output.
- ☐ Unauthorized actions and incorrect destination records.
- ☐ Duplicate events, timeouts, partial failures, and retries.
- ☐ Human rejection, handoff, and manual fallback.
- ☐ Usage-cost limits and runaway activity prevention.
- ☐ Regression tests after configuration or model changes.

Record test inputs, expected results, observed results, defects, remediation, and retests. Keep the evaluation data separate from the examples used to design the workflow where practical.

Go/no-go decision: state which criteria passed, which remain unresolved, who accepted residual risk, and the exact scope authorized for production.

Do not turn one impressive demonstration into evidence that the system is safe for every user, document, or transaction.

GROW REVENUE

Sales: More Conversations That Can Become Business

Illustrative workflow to scope: inquiry preparation with salesperson approval.

The human advantage - illustrative: A salesperson opens a prepared account brief instead of assembling it from scattered notes. The human work is listening, qualifying the need, and earning the next conversation.

Workflow element	Design to scope and validate
Trigger	an inquiry submitted through an approved business channel.
Historical inputs	company and contact records, approved service information, and relevant prior conversations.
Live inputs	the inquiry, current account status, and current assignment rules.
Process	match the account, identify the stated need, organize approved research, list unanswered questions, and prepare a response draft and proposed CRM entry.
Authority	begin at Level 1 or 2. The salesperson verifies the account, facts, pricing, and commitments before sending or approving a record change.
Failure path	uncertain identity, conflicting account information, sensitive attachments, or unsupported product claims go to the responsible person. A missing fact must not become an invented company detail.
Measure	Additional won revenue and contribution, conversion of qualified inquiries, completed follow-ups, and customer feedback. Response time and accepted briefs explain the outcome; they are not the financial result.
Related opportunities	meeting preparation; proposal outlines using approved content; reminders for explicitly agreed follow-ups.

Build checklist

- ☐ Define which inquiries qualify and who owns them.
- ☐ Establish reliable account matching.
- ☐ Approve research sources and service language.
- ☐ Prevent duplicate outreach and CRM entries.
- ☐ Require review of promises and commercial terms.

GROW CUSTOMER RELATIONSHIPS

Account Growth: Give Good Customers More Attention

Illustrative workflow to scope: account-review preparation, not automatic upselling.

The human advantage - illustrative: An account manager arrives ready to discuss open commitments and genuine needs. Instead of sending another generic campaign, the team can have a relevant, personal conversation.

Workflow element	Design to scope and validate
Trigger	an upcoming account review, renewal, or approved customer request.
Historical inputs	purchases, agreements, proposals, service history, and documented commitments.
Live inputs	unresolved requests, current entitlements, renewal dates, and authorized engagement signals.
Process	prepare a cited account summary, identify relevant gaps or questions, and propose a conversation agenda. Distinguish a signed agreement from an old quote and a documented need from an AI inference.
Authority	a salesperson or account owner evaluates the opportunity and decides how to approach the customer. Service issues are resolved as service issues, not automatically converted into marketing triggers.
Failure path	mismatched records, stale assumptions, sensitive information, or unresolved complaints receive human review.
Measure	Attributable expansion revenue and gross profit, retained business, completed commitments, and customer experience. Distinguish accepted opportunities from booked sales.
Related opportunities	reactivation review for inactive accounts; renewal preparation; stakeholder mapping based on verified business information.

Build checklist

- ☐ Match legacy and current account identifiers.
- ☐ Preserve dates and source evidence.
- ☐ Separate facts, signals, and proposed questions.
- ☐ Respect contact and suppression preferences.
- ☐ Assign an owner to every proposed next step.

BUILD RELEVANCE AND REPUTATION

Marketing: Less Production Churn. More Relevant Conversations.

Illustrative workflow to scope: a campaign brief assembled from approved business information.

The human advantage - illustrative: A marketer spends less effort gathering background and more effort developing an idea customers care about. Sales receives a relevant conversation starter rather than more unreviewed content.

Workflow element	Design to scope and validate
Trigger	a planned campaign or a reviewed account-interest signal.
Historical inputs	approved positioning, prior campaigns, content performance, account data, and contact permissions.
Live inputs	verified research, current offers, form activity, and reliable engagement events.
Process	identify the audience's question, assemble evidence, draft content and outreach options, and prepare a review package. Identify whether the content's purpose is search, education, sales support, email, social, or another objective.
Authority	a responsible marketer approves factual claims, audience selection, offers, and publication. Sales reviews account-specific outreach where appropriate.
Failure path	unsupported statistics, uncertain identity, suppressed contacts, or unapproved customer references are blocked or escalated.
Measure	Qualified opportunities, attributable won revenue and contribution, verified campaign costs, and brand-quality indicators. Match measurement to the content purpose; volume is not value.
Related opportunities	content refresh research; campaign reporting; preparation of personalized, human-approved outreach.

Build checklist

- ☐ Maintain source links and review dates.
- ☐ Keep suppression and preference records authoritative.
- ☐ Separate account-level signals from identified-person behavior.
- ☐ Validate claims before publication.
- ☐ Connect approved campaign activity to measured business outcomes.

LOWER COST. BETTER ACCESS.

Contact Centers: Make Routine Easy and Human Help Better

Illustrative workflow: call handling and follow-up with a reliable human handoff.

The human advantage - illustrative: Routine scheduling or information requests move through a defined workflow. When a person is needed, the employee receives context instead of asking the customer to start over.

Workflow element	Design to scope and validate
Trigger	an eligible inbound interaction or completed call.
Historical inputs	approved service guidance, routing rules, and permitted customer context.
Live inputs	current caller request, verified identity where needed, queue state, and authoritative availability.
Process	identify the requested service, summarize the interaction, prepare or perform a permitted action, and update the relevant system only within the approved design. Scheduling must use current authorized availability rather than an invented slot.
Authority	start with agent assistance. Bounded execution requires additional tests for identity, eligibility, transaction limits, and transfer failure.
Failure path	unclear requests, complaints, sensitive matters, emergencies, and unsupported actions route to the defined human channel. Do not present administrative scheduling as clinical diagnosis or medical triage.
Measure	Cost per completed request, actual administrative spending, completed bookings, attributable revenue, abandonment, repeat contact, and customer experience. A shorter call is not automatically a successful interaction.
Related opportunities	permitted call-summary drafts; routing recommendations; follow-up tasks tied to recorded commitments.

BTI connection: phones, contact centers, networks, co-managed IT, monitoring, and maintenance can be scoped together.
[23]

Build checklist

- ☐ Review applicable recording, disclosure, and consent requirements.
- ☐ Define caller verification and permitted information.
- ☐ Test transfers and unavailable staff.
- ☐ Preserve interaction context for the receiving person.
- ☐ Retain recordings and summaries only as approved.

STRENGTHEN CUSTOMER TRUST

Customer Service: Make Room for the Conversation That Matters

Illustrative workflow to scope: triage and response preparation from approved service knowledge.

The human advantage - illustrative: An employee receives the relevant history and a checked starting point. They can focus on understanding the exception, reassuring the customer, and resolving the issue.

Workflow element	Design to scope and validate
Trigger	an incoming email, form, chat, or service record.
Historical inputs	approved knowledge articles, account entitlements, and relevant ticket history.
Live inputs	current request, service status, and assignment availability.
Process	identify the issue, collect required details, retrieve relevant guidance, and prepare a response or proposed next action. A service employee checks the facts and customer commitments before release.
Authority	begin with assistance. Any later autonomous response class must have clear eligibility rules and a dependable escalation route.
Failure path	security concerns, ambiguous identity, missing entitlement, dissatisfaction, or unsupported guidance go to a person.
Measure	Verified service expense, retained customer revenue, resolution quality, repeat contacts, complaints, and authentic customer feedback. Review response speed alongside the outcome.
Related opportunities	status-update drafts; ticket summaries; knowledge-article drafts from reviewed resolutions.

Build checklist

- ☐ Use current, approved guidance.
- ☐ Keep account permissions intact.
- ☐ Define promises the assistant cannot make.
- ☐ Track corrections and recurring failure patterns.
- ☐ Review customer outcomes, not just faster replies.

REDUCE ADMINISTRATION. PROTECT CONTROL.

Accounting: Less Chasing. More Financial Control.

Illustrative workflow to scope: invoice preparation and discrepancy review.

The human advantage - illustrative: Finance reviews a queue of real discrepancies instead of re-keying every invoice. Staff can spend attention on supplier conversations, cash planning, and decisions that protect margins.

Workflow element	Design to scope and validate
Trigger	an invoice arriving through an approved intake channel.
Historical inputs	verified supplier records, chart of accounts, approved purchase orders, and policy.
Live inputs	invoice details, receipts, current approval status, and system records.
Process	extract required fields, compare source records, flag discrepancies, and propose coding or routing. Use deterministic calculations and authoritative accounting records for totals and balances.
Authority	an authorized finance employee approves postings and financial commitments according to the business's control design. Do not give a starter assistant independent authority to release payments or change bank details.
Failure path	duplicate invoices, supplier mismatch, changed payment instructions, unclear tax treatment, or unsupported documentation require review.
Measure	Verified processing expense, duplicate payments prevented and documented, avoidable fees, coding quality, and control exceptions. Faster collections improve cash timing; they are not automatically new revenue.
Related opportunities	receivables follow-up drafts; reconciliation assistance; renewal-cost review.

Build checklist

- ☐ Define permitted financial fields and storage.
- ☐ Separate preparation from payment approval.
- ☐ Verify supplier changes outside the incoming message.
- ☐ Preserve source documents and review records.
- ☐ Reconcile attempted and completed system changes.

Full banking details and other restricted information require a specifically approved processing arrangement. ^[17]

REDUCE WASTE AND SPENDING

Purchasing: Protect Margin Before the Money Leaves

Illustrative workflow to scope: purchase or expense intake with policy-based preparation.

The human advantage - illustrative: A purchasing manager sees missing information and policy exceptions early enough to discuss the right order. The aim is less waste and better decisions, not merely faster approvals.

Workflow element	Design to scope and validate
Trigger	a submitted purchase request or expense claim.
Historical inputs	approved policies, supplier records, budgets, and relevant contracts.
Live inputs	the request, receipt, current approval hierarchy, and applicable limits.
Process	check required information, identify policy provisions, flag potential duplicates or exceptions, and prepare the next approval step. Keep policy interpretations and supporting source references visible.
Authority	the authorized approver retains purchasing, reimbursement, and exception authority. An AI-generated compliance label is not permission to spend.
Failure path	unclear policy, missing receipts, supplier mismatch, unusual amounts, or a conflict of interest goes to review rather than silent rejection or approval.
Measure	Actual purchasing, freight, waste, and expense reductions against comparable volumes; policy exceptions and service impact. Separate materials/facilities savings from administrative savings.
Related opportunities	subscription inventory; contract-renewal preparation; quote-comparison summaries with an evidence trail.

Build checklist

- ☐ Use the current policy version.
- ☐ Maintain separation of requester and approver where required.
- ☐ Validate calculations outside generated narrative.
- ☐ Restrict access to expense and employee information.
- ☐ Record the final human decision and reason for exceptions.

SUPPORT PEOPLE

People and Policies: More Coaching. Less Repeating Yourself.

Illustrative workflow to scope: a policy Expert and onboarding task coordinator.

The human advantage - illustrative: A new employee gets a sourced answer to a routine question. A manager can use the next conversation to explain context, coach the person, and help them succeed.

Workflow element	Design to scope and validate
Trigger	an employee question or an approved onboarding event.
Historical inputs	current employee policies, role-specific procedures, and approved training material.
Live inputs	the relevant employment event, task status, and authorized access information.
Process	retrieve the relevant policy, provide a source-backed answer, prepare a checklist, and route exceptions to the accountable role. Draft proposed policy changes as drafts; do not silently replace the published policy.
Authority	people retain responsibility for policy approval, employment decisions, access approval, and exceptions. The starter use case is administrative assistance, not autonomous hiring, firing, compensation, or disciplinary judgment.
Failure path	confidential personnel matters, contradictory policies, or requests outside approved scope are referred to HR or the responsible specialist.
Measure	Onboarding quality, consistent policy guidance, staff experience, actual administrative expense, and evidence of review. An assistant should support people, not silently decide their employment outcomes.
Related opportunities	training-material drafts; policy comparison for review; acknowledgment and task reminders.

Build checklist

- ☐ Separate general policies from individual personnel records.
- ☐ Specify the document owner and effective date.
- ☐ Obtain approval before publishing policy drafts.
- ☐ Record training and acknowledgment evidence where required.
- ☐ Preserve a human escalation path.

TURN INFORMATION INTO ACTION

Leadership: More Decisions. Less Rebuilding the Report.

Illustrative workflow to scope: preparation of a recurring management review.

The human advantage - illustrative: A manager reviews a prepared, source-linked brief and spends the meeting discussing choices and commitments. People remain accountable for the plan and what happens next.

Workflow element	Design to scope and validate
Trigger	an approved reporting date or completed business meeting.
Historical inputs	plans, budgets, prior decisions, project records, and metric definitions.
Live inputs	current system reports, approved notes, task updates, and exceptions.
Process	assemble verified measures, identify variances, summarize decisions, and prepare proposed next actions. Distinguish actuals from forecasts and forecasts from assumptions. Keep calculations in authoritative reports or validated code rather than trusting narrative arithmetic.
Authority	the manager confirms priorities, commitments, budgets, and assignments. An automatically drafted action is not an accepted commitment until the responsible person approves it.
Failure path	missing reports, inconsistent metric definitions, conflicting dates, or unsupported explanations are flagged visibly.
Measure	Decision follow-through, attributable business outcomes, reporting accuracy, actual administrative cost, and forecast-versus-actual performance. Report preparation speed is a supporting measure.
Related opportunities	project-status drafts; scenario comparison; reminders tied to approved commitments.

Build checklist

- ☐ Define the source and owner of every key metric.
- ☐ Preserve meeting permissions and recording requirements.
- ☐ Separate facts, interpretation, and proposed action.
- ☐ Obtain approval before distributing sensitive reports.
- ☐ Track decisions and changed assumptions over time.

PROTECT PEOPLE AND OPERATIONS

Security and Stability: Keep People Focused on the Response

Illustrative workflow to scope: incident-summary and ticket preparation across approved systems.

The human advantage - illustrative: An engineer or security leader receives the relevant evidence together. They can assess the situation, communicate clearly, and coordinate a response rather than reconstructing context.

Workflow element	Design to scope and validate
Trigger	a validated alert or service event.
Historical inputs	approved asset records, incident procedures, relevant support history, and authorized system context.
Live inputs	permitted monitoring events, tickets, and current service status.
Process	correlate relevant information, assemble an evidence-linked summary, and propose an escalation or narrowly approved ticket action. Keep source timestamps and distinguish observed events from inferred explanations.
Authority	security and engineering owners approve consequential changes. Summarizing an alert is not the same as authorizing firewall changes, credential resets, door access, safety-system actions, or incident closure.
Failure path	uncertain attribution, missing information, suspected compromise, or safety implications escalate through the existing response process.
Measure	Service availability, incident impact, tested response and recovery, evidence quality, safety-control performance, and unwanted actions. Quantify risk scenarios separately from realized savings.
Related opportunities	incident timeline drafts; service-ticket preparation; evidence summaries for authorized reviewers.

BTI can scope IT, cyber and physical security, voice, paging/mass notification, GRC, and continuity around the workflow. Safety-critical actions require approved controls, not an unrestricted general-purpose agent. ^{[19][23]}

Build checklist

- ☐ Approve information sharing across domains.
- ☐ Keep monitoring and change authority separate.
- ☐ Validate downstream actions and destinations.
- ☐ Test compromised or misleading inputs.
- ☐ Maintain an effective stop and human-response path.

CUSTOMER EXPERIENCE / RSNA 2025

Radiology: Make Access Easier. Give People More Room to Care.

A radiology customer of BTI shared its operational AI adoption experience at RSNA 2025. Its presentation focused on scheduling and access - not image interpretation or diagnosis. ^[21]

The opportunity was bigger than a shorter call. Routine handling is a place to seek lower administrative cost, better access, and more staff attention for patients who need a person. The presentation's closing message emphasized care for people. ^[21]

BTI's role went beyond the AI application

Part of the environment	BTI's confirmed service scope
Communications	Phone system and contact-center technology.
AI	AI technology supporting the operational initiative.
IT	Co-managed IT services.
Infrastructure	Consulting, products, and services.
Ongoing operation	Monitoring and maintenance.

BTI supplied this service-scope description separately from the presentation. It is not a claim of exclusive development of every component. ^[23]

The adoption sequence presented

01 Mammogram + X-ray scheduling	02 Validate performance	03 Expand to ultrasound	04 Develop internal QA	05 Design CT / MRI workflows
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The next page restores the reported numbers, while keeping the customer-audit metrics separate from the presentation's broader ROI claims.

Event context: Radiological Society of North America annual meeting, McCormick Place, Chicago, November 30-December 4, 2025. These are conference dates, not an independently verified session date. Customer and technology-provider identities withheld. No RSNA endorsement is implied. ^{[14][21]}



REPORTED RESULTS / SOURCES KEPT DISTINCT

Real Numbers From the Radiology Presentation

Customer-audit figures shown on presentation slide 6 ^[21]

Cost per call

\$3.03 to
\$0.63 per call

Scheduling time

6 min to
2 min reported time

~62% of calls were for scheduling. This is not a containment rate.

The displayed unit-cost change is **\$2.40 less per call**, or approximately **79.2% lower** (calculated from \$3.03 and \$0.63). This is arithmetic on reported figures, not an independent audit. ^[21]

Separately, presentation slide 7 reports ^[21]

\$200,000

Annual savings

Explicitly labeled a multisite average.

4x ROI

Within 12 months

Presentation wording; formula and cost base not supplied.

3X more

Containment

Scheduling metric; definition and baseline not supplied.

The containment statement covers scheduling mammograms, ultrasounds, CT scans, and MRIs. The slide attributes its broader results to customer internal data validated by Advisory Board methodology. That attribution is the presentation's, not independent verification by BTI or this guide. ^[21]

A better cost structure can support margin. A different workload can create room for more personal service. Test both in your own business.

Read the figures in context. The \$200,000 is a multisite average, not this client's verified saving. Sample sizes, measurement periods, full cost base, and shared-cohort confirmation were not supplied. "4x ROI" and "3X more containment" retain the source wording; do not convert them into new percentage claims. ^[21]

Source boundary: displayed-slide figures are reproduced. Speaker notes contain different baselines and are not combined with them. Results are customer/presentation-reported, not a promise for another organization. See the source notes on page 50. ^[21]

YOUR INDUSTRY. YOUR OPPORTUNITY.

Where Could This Create an Advantage in Your Business?

The radiology presentation described a deliberate expansion path and future opportunities in referrals, follow-up, medical records, insurance, billing, and payments. Those next steps are not all completed deployments. ^[21]

Illustrative applications to assess - not additional customer success claims

Your business	Routine work to explore	Human work to protect
Manufacturing	Quote preparation, approved procedure search, maintenance requests.	Customer design discussions, quality decisions, and coaching.
Car dealerships	Inquiry follow-up, service-call summaries, appointment requests.	Buying advice, customer trust, and service recovery.
Insurance brokers	Renewal briefs, document organization, service routing.	Advice, explanations, and relationship development.
Logistics	Shipment-status help, exception summaries, delivery documents.	Customer coordination and handling unusual disruptions.
Primary/specialty healthcare	Administrative scheduling, referral preparation, staff knowledge.	Patient support, clinical judgment, and sensitive conversations.
Dental groups	Recall preparation, appointment requests, routine administration.	Personal reassurance and the care relationship.

Earn the next step

- ☐ The first workflow meets quality and business-value targets.
- ☐ People can handle exceptions and reach support.
- ☐ New data and actions have separate approval.
- ☐ The next workflow has an owner, budget, and acceptance test.

See Connected Automation With BTI. Bring the business outcome, the systems involved, and the locations affected.

PRODUCTION READINESS

Launch Something Your Team Can Rely On

A demonstration becomes an operational service only when responsibility, testing, support, and recovery are defined.

BTI describes a decision-gated implementation approach. Approval to proceed should specify what is being deployed and what is not. ^[19]

Production-readiness checklist

- ☐ Business objective, owner, and operating scope are approved.
- ☐ Data sources and permitted uses are documented.
- ☐ Access, service identities, and action limits have been tested.
- ☐ Representative and adverse-case tests meet acceptance criteria.
- ☐ Users and support personnel have been trained.
- ☐ Monitoring, budgets, and exception queues are active.
- ☐ Fallback, stopping, and recovery procedures have been exercised.
- ☐ Documentation and configuration versions are recorded.
- ☐ The business has accepted remaining risks and restrictions.
- ☐ Post-launch review is scheduled.

Deployment record

Version and systems included: _____

Approved users and authority: _____

Known limitations: _____

Launch approver and date: _____

Support owner and escalation channel: _____

A pilot result is evidence for a decision. It is not a blanket authorization to connect new applications, admit new information, or remove human approvals.

BUSINESS CONTINUITY

Protect the Business When Technology Has a Bad Day

Plan separately for an unavailable service, an unacceptable action, and a provider or staffing change.

Unavailable service: route work to a defined manual queue or existing process. Make the interruption visible and preserve enough context for staff to continue.

Unacceptable action: stop the relevant workflow, contain its permissions, preserve evidence, identify affected records, and follow the approved correction process. A stop button prevents further actions; it does not automatically reverse actions already completed.

Dependency change: maintain documentation, access ownership, export plans, and a realistic transition path. Do not assume that a custom configuration runs unchanged on another platform. ^[19]

Operational runbook

Trigger and severity: _____

Person accountable for response: _____

Stop or isolation steps: _____

Manual fallback: _____

Reconciliation and correction: _____

Communication responsibilities: _____

Recovery criteria and approver: _____

Test retries carefully. A repeated request must not create duplicate purchases, appointments, or messages. Check what actually completed before retrying a partially failed action.

Define which events generate immediate alerts and which belong in periodic review. Automation should reduce unnecessary manual monitoring, not create another dashboard that nobody has time to watch.

KEEP EARNING THE INVESTMENT

Review the Business Result - Then Decide What Comes Next

A busy AI workspace is not the same as a better business. Review the outcomes that justified the investment, the cost to achieve them, and the experience of the people using the solution.

Monthly operating and business-value review

Outcome	Result / evidence	Next action and owner
Incremental sales and contribution		
Actual administrative cost reduction		
Materials/facilities spending reduction		
Customer experience and company image		
Security, safety, and stability		
Liability controls and evidence		
Human work, quality, and exceptions		
Full AI cost and net measured benefit		

Ask your team: Which conversations are better? Which problems get more attention? Which part of the process still frustrates customers? Look for changes in completed work and real outcomes, not just activity.

At the business review, choose a decision: improve training, refine the workflow, expand it, narrow its authority, replace it, or retire it. Each new connection needs its own ownership and controls. ^[19]

Use comparable periods and volumes. Separate verified spending changes from modeled savings, pipeline from won business, and risk scenarios from realized financial benefits. Avoid double counting.

Keep the automation that earns its place. Change the automation that does not.

BUYING DECISIONS

Buy the Outcome - and Know Who Will Deliver It

An enterprise subscription may provide valuable capabilities. The buying question is also who will make those capabilities useful in your environment and maintain them. ^[19]

Compare delivery responsibility separately from software features

Work to assign	Buying a tool alone	In a BTI-scoped engagement
Select a useful starting point	Assign a business and technical owner.	Define the outcome, scope, and acceptance criteria.
Enable employees	Assign configuration, guidance, and support.	Configure and onboard within the agreed scope.
Prepare company knowledge	Assign sources, permissions, and upkeep.	Build and test the agreed knowledge application.
Connect systems	Assign integration, approvals, and failure handling.	Engineer and validate the specified workflow.
Keep it operating	Assign monitoring, changes, support, and recovery.	Document the responsibilities covered by the service.
Review business value	Establish baselines, cost, and quality measures.	Review the agreed measures and improvement decisions.

This compares responsibilities, not a claim that other vendors or implementation partners cannot provide services. Verify every proposed deliverable in the agreement.

Choose your engagement

Defined project: a particular deliverable, acceptance decision, and handoff.

Co-managed: BTI works alongside internal IT or an existing provider, with ownership assigned.

Managed service: ongoing responsibility for the agreed scope, support, and reviews. ^[19]

A workshop can help when the objective is unclear; it need not be mandatory for an already-defined need. Preserve tools that fit and fill documented gaps.

PRODUCTS, TERMS, AND RESPONSIBILITIES

Compare Privacy Without the Marketing Shortcuts

Enterprise AI products can offer meaningful privacy and administrative protections. Do not compare them with BTI by treating every alternative as an unmanaged personal account.

Published policy examples - source register dated September 30, 2026

Offering	Published training-policy distinction	Separate verification needed
ChatGPT business offerings	Business inputs and outputs are not used for model training by default. ^[7]	Enabled features, opt-ins, retention, connected applications, and plan-specific controls.
Claude commercial offerings	Commercial inputs and outputs are not used for model training by default. ^[8]	Feedback settings, agreements, features, storage, and integrations.
Microsoft Copilot for Microsoft 365	Prompts, responses, and Graph data are not used to train foundation models. ^[9]	Licensing, configuration, access, storage, search, and model routes.
Perplexity Enterprise	Enterprise data is not used for model training; provider agreements address third-party training. ^[10]	Session and file retention, sharing, connectors, and administrative configuration.
BTI-scoped managed solution	Required protections are specified for the selected services and processing routes. ^[19]	Written commitments, configuration evidence, permitted data, and included operating services.

Then compare delivery: use page 42 to assign configuration, integration, testing, training, support, change control, and value review. A software feature is not the same as operating responsibility.

No training is not no storage. Tenant isolation is not ownership of an Azure subscription. Model choice is not guaranteed portability. Compare actual scopes rather than blanket checkmarks.

SCOPE AND ACCEPTANCE

Make the Promise Clear Before You Commit

A useful proposal defines the result, boundaries, cost, and responsibilities well enough to test acceptance.

Buyer checklist

- ☐ Users, features, models, and permitted information.
- ☐ Deliverables, integrations, exclusions, and acceptance criteria.
- ☐ Identity, access, approval, logging, and incident responsibilities.
- ☐ Data-processing terms, retention, regional requirements, and applicable agreements.
- ☐ Implementation fees, licenses, usage allowances, overages, and third-party charges.
- ☐ Support hours, escalation, monitoring, maintenance, and change control.
- ☐ Ownership or license rights for custom work and dependencies.
- ☐ Documentation, exports, transition assistance, and termination terms.

Ownership should be itemized. Identify rights to source data, custom code, prompts, workflow configuration, evaluation sets, documentation, and reusable components. Third-party platforms, models, and licenses remain separate. Do not accept an assumption that "you own your data" means every part of the system is portable.

Hosting should be explicit. Identify the application tenant, hosting subscription, administrative control, model-processing route, data location, and recovery responsibility. A customer-controlled Azure architecture is a separately scoped design decision, not a default property of a managed workspace.

Financial approval: evaluate total operating cost and the business's own time, not merely a per-user price.

These are procurement questions and design requirements, not a substitute for review of the actual agreement by the appropriate advisers.

BUYER QUESTIONS

Practical Answers Before You Get Started

Do we need to replace our current AI or Microsoft tools?

Not necessarily. Start by identifying what works, what is approved, and what remains unowned or unintegrated. The right plan may use existing capabilities.

Must we replace our IT provider?

BTI's offering includes co-managed work alongside internal teams and existing providers, with responsibilities documented. ^[19]

Can every employee start at once?

Broad access can be the objective, but initial tasks, information permissions, training, and support should be ready before rollout.

Does a workspace subscription include every automation?

No such assumption should be made. Users, usage, custom development, integrations, support, and review services belong in the scope.

Can we use patient or financial information?

Only through an explicitly approved design with appropriate agreements and safeguards. Some platform terms restrict sensitive data unless written permission is obtained. ^{[11][17]}

How quickly can we start?

Timing depends on readiness and scope. A configured starter workspace is different from a deployed, tested business workflow.

How do we know it pays off?

Set a dollar target for sales contribution or real cost reduction, or a defined trust/risk outcome. Include the full program cost. Use the worked financial example on page 16.

Will management see every conversation?

Reporting, administration, and user-session support are different permissions. Define and explain the actual access design. ^[20]



MAKE THE NEXT STEP ACHIEVABLE

Build Momentum: A 30-, 60-, and 90-Day Plan

This is an illustrative planning sequence, not a guaranteed delivery schedule. Move when the evidence and decisions are ready.

Days 1-30 | Give people a useful start

Define approved uses, configure the agreed employee workspace, practice with real-but-permitted tasks, and build a small company-knowledge Expert. Ask what work employees want more time and attention for. Record a business baseline.

Days 31-60 | Build one outcome-focused pilot

Choose a financial, customer-experience, security, safety, stability, or liability-management objective. Map the process, prepare the data, assign authority, and test a narrow workflow. Document how the result will become business value.

Days 61-90 | Prove the result and plan the next step

Evaluate costs, quality, actual outcomes, and staff/customer experience. Resolve defects, approve the launch, activate support and fallback, and agree the next review. Expand only when the first workflow earns it.

Your roadmap

First business outcome and owner: _____

Financial target or observable risk/trust improvement: _____

Work people will do differently: _____

Systems, locations, and data required: _____

Pilot acceptance criteria and full cost: _____

Decision date and next approved step: _____

Employee assistance may be the right permanent starting point. Regulated, complex, or deeply integrated workflows may require more time and preparation.



LOCAL SUPPORT. CONNECTED EXPERTISE.

Why BTI? AI Expertise Connected to Your Business.

Buying an AI tool is one decision. Making it useful in your business - and supporting it as the business changes - is another.

BTI can help with both. Start with an approved employee workspace, a company-knowledge Expert, or one connected workflow. Bring in the additional expertise the result requires; you do not need to replace technology that already works. ^{[19][23]}

What BTI brings	What it means for your business
AI consulting, adoption, development, and integration	A defined use case, trained people, tested workflow, and measurable goal.
Managed/co-managed IT and network infrastructure	Support for the access, devices, applications, and connections around the AI.
VoIP and contact centers	Attention to the whole interaction, including routing, human handoff, and follow-through.
Cybersecurity, managed regulatory compliance, and GRC	Defined controls, responsibilities, evidence, and remediation.
Physical security, paging, mass notification, and continuity	Relevant facility systems, operational communications, and fallback planning.
Remote service, on-site work, monitoring, and maintenance	A support plan for the actual systems and locations involved.

These are BTI-confirmed capabilities; exact deliverables and coverage depend on the agreement. ^[23]

Local connection. Multi-state perspective. Los Angeles-area presence in Santa Fe Springs; Phoenix; and Chicago-area presence in Downers Grove. Plan remote and on-site coverage for your footprint rather than assuming identical response everywhere. ^{[13][23]}

The radiology engagement illustrates this breadth: phones, contact center, AI, co-managed IT, infrastructure, monitoring, and maintenance in one customer relationship. ^[23]

One useful starting point. Relevant expertise. Clear responsibility.



LET'S BUILD YOUR NEXT ADVANTAGE

What Would a More Competitive Business Look Like?

Bring BTI one process that could help you win business, reduce cost, improve service, or better protect your people and operation.

See a Secure Employee AI Workspace

See how staff can prepare, research, and find approved answers - then focus on the customer or colleague who needs them.

Build an AI Business Case

Map a sales, administrative-cost, materials/facilities, reputation, security, safety, stability, or liability-management opportunity. Start with the outcome, not a model choice.

See Connected Automation

Explore how a workflow works across the relevant systems, with a human handoff, support, and reporting.

Bring these five things

Business outcome and target: _____

Current process and approximate volume: _____

Systems and locations affected: _____

Where personal attention makes the difference: _____

Decision owner and desired timing: _____

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Get Managed AI Pricing btigroup.com/ai-services-solutions/
800-435-7284 | info@btigroup.com

Los Angeles | Phoenix | Chicago | Multi-state operations

Use a general description. Do not send passwords, patient information, banking details, or confidential records through a public form or introductory email. Sensitive examples require an approved secure exchange. Scope, pricing, coverage, and scheduling are agreed with BTI.

RESEARCH AND DOCUMENTATION

Research and Risk-Management References

Source register: September 30, 2026. Research describes the original populations and tasks. Product documentation can change; confirm applicable terms and configuration. Planning examples and BTI-provided accounts are identified separately.

- [1] Brynjolfsson, E., Li, D., and Raymond, L. "Generative AI at Work." *The Quarterly Journal of Economics*, 140(2), 2025, pp. 889-942.
- [2] Noy, S., and Zhang, W. "Experimental evidence on the productivity effects of generative artificial intelligence." *Science*, 2023. DOI: 10.1126/science.adh2586.
- [3] Dell'Acqua, F., et al. "Navigating the Jagged Technological Frontier." Harvard Business School Working Paper 24-013, September 2023. This guide cites the experiment described in that working paper.
- [4] NIST. AI Risk Management Framework. Voluntary risk-management resources, including the generative AI profile.
- [5] OWASP Gen AI Security Project. Top 10 for Agentic Applications for 2026.
- [6] Microsoft. Data, privacy, and security for Foundry Models sold by Azure.
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- [10] Perplexity. Data retention and privacy for Enterprise organizations.
- [11] U.S. Department of Health and Human Services. Guidance on HIPAA and Cloud Computing.
- [12] Anthropic. Building Effective Agents.
- [13] BTI Communications Group. Office Locations.

EVIDENCE, PROVENANCE, AND VERSION

Documentation, Evidence Notes, and Version Information

[14] RSNA. RSNA 2025 Highlights Science, Technologies that Advance Patient Care. December 23, 2025. Supports the conference dates and venue, not customer outcomes.

[15] Synthreo. Security. Published product description; not proof of individual customer settings.

[16] Synthreo. Privacy Policy, especially Section 4.

[17] Synthreo. Terms of Service, especially Sections 9.4, 9.5, and 9.7.

[18] Synthreo. Canopy administrative platform description.

[19] BTI. AI Solutions for Business and supplied AI services webpage draft. Company-provided offering descriptions, not independent audits. Individual services are subject to the agreed engagement scope.

[20] Platform customer-onboarding run sheet supplied to BTI. Administrative sequence, document Expert setup, and support-access procedures. Not a guarantee of total organizational implementation time.

[21] Client-supplied radiology presentation at RSNA 2025; private source. Slides 3-4: adoption and future opportunities. Slide 6: displayed customer-audit figures (\$3.03 to \$0.63 per call; 6 to 2 minutes; approximately 62% of calls for scheduling). Slide 7: separately stated \$200,000 annual multisite-average savings, "4x ROI" in 12 months, and "3X more containment." The slide attributes its data to Advisory Board methodology; no independent audit, underlying dataset, ROI formula, or shared-cohort confirmation was provided. Notes contain different baselines and are not combined with the displayed figures. Customer and technology-provider identities withheld.

[22] HHS. Guidance Regarding Methods for De-identification of Protected Health Information.

[23] BTI leadership, information supplied for this guide: six business-value drivers, service capabilities, geographic/multi-state delivery context, and the radiology engagement scope. Company-provided account, not an independent customer endorsement.

Evidence labels: Research = published study. Customer-reported = supplied account, not independently audited. Illustrative = a proposed design, template, or hypothetical calculation. Product documentation = published capability or policy, subject to actual configuration and agreement.

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