AI Readiness for Business: Governance, Adoption, and ROI

Artificial intelligence is no longer a future concept, it is a present-day business capability. Brian Jackson (Abacus Technologies), Taylor DeCelle (BMSS Advisors & CPAs), and Micah Murphy (BMSS Advisors & CPAs) distill the key insights of AI readiness for business to help leaders move beyond the hype and take intentional, scalable action.

AI IS A BUSINESS CAPABILITY, NOT AN IT PROJECT

One of the most important mindset shifts leaders must make is recognizing that AI belongs in the hands of your domain experts, not just your IT department. When creative, knowledgeable employees have access to AI tools, the results multiply. A company can go from 10-20 people capable of developing technology solutions to having *all* employees empowered to create technolgy-enabled outcomes.

AI GOVERNANCE FRAMEWORK

Scaling AI without structure creates significant risk. A strong AI governance framework includes four core components:

1. **Data Governance**: Know where your data comes from, confirm it is accurate and current, and understand the privacy implications before introducing it into any AI platform. Bad data still produces bad results.
2. **Model Governance**: Do not treat AI approval as a one-time event. Models can drift, be biased, and produce inconsistent results over time. Regularly test outputs using known control sets – similar to how a medical lab validates results.
3. **Risk Management**: Tier your AI use cases by risk level. Low-risk (such as summarizing a document) requires minimal oversight. High-risk tasks (such as approving financial transactions or moving money) demand robust internal controls and human review.
4. **Decision Authority**: The AI does not make the decision – you do. Human review and approval remain essential, especially for any output that touches revenue, customers, or irreversible actions. Accountability always lands on the business, not the model.

BUSINESS AI POLICY

Every organization using AI should have a documented AI policy that addresses three key areas:

- **Authorized systems** – Which AI platforms are approved for business use?
- **Assessment process** – How will new AI-integrated tools be evaluated before adoption?
- **Professional use standards** – Who is responsible for AI-generated outputs?

Complement this with an AI advisory or steering committee to share experiences, evaluate emerging tools and keep policy current as the landscape evolves.

AI DATA PRIVACY

Free or unlicensed AI platforms may use your prompts and data to train their models. Before deploying any tool organizationally, confirm you are using a properly licensed, securely configured closed system – and review the platform's data processing settings, not just the licensing agreement.

UNDERSTANDING HOW AI TOOLS WORK: TOKENS, CONTEXT, AND MODELS

Effective AI use requires basic fluency in how these tools operate. Key concepts include:

- **Tokens** are the units of text AI processes. Costs scale with usage, so proper prompting and data preparation help control spend.
- **Context windows** representing the AI's working memory is a session. Overloading a session leads to degraded output. Use separate projects for separate tasks and start fresh sessions when topics change.
- **Model selection** matters. Lighter models (such as Claude's Haiku) are faster and less expensive for routine tasks, while more capable models (such as Opus or Fable) are better suited for complex, multi-step analysis.

AI APPLICATIONS THAT DRIVE ROI

AI tools like Claude can be put to work today across finance, operations, and administration. Practical examples include:

- **Analyzing** vendor contracts to surface key dates, costs, and risks in seconds.
- **Generating** a 13-week cash flow forecast from a simple spreadsheet with a single prompt.
- **Automating** month-end close tasks by connecting AI to QuickBooks and existing Excel templates.
- **Cleaning** and consolidating messy vendor invoice files into a single, auditable register.
- **Prioritizing** email each morning based on urgency, running in the background before the workday begins.

The ROI question is not just about what AI costs – it is about what your team's time costs without it. Completing a task 50% faster consistently outweighs the token expense.

SKILLS AND CONNECTORS: THE PATH TO ENTERPRISE-SCALE AI

AI skills are reusable, plain-English instructions for completing a specific workflow consistently. Connectors allow AI to interact directly with the software your team already uses – QuickBooks, Outlook, SharePoint, Slack, and more. Together, skills and connectors allow organizations to standardize AI-driven processes, share workflows across teams, and automate routine tasks on a schedule – all while maintaining the governance controls your business requires.

BOTTOM LINE

The organizations that will thrive with AI are not those that move the fastest– they are the ones that move intentionally. Build your AI governance framework, establish clear policy, understand the tools, and put AI in the hands of the people who know your business best. The opportunity is real, and it is available now.

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