

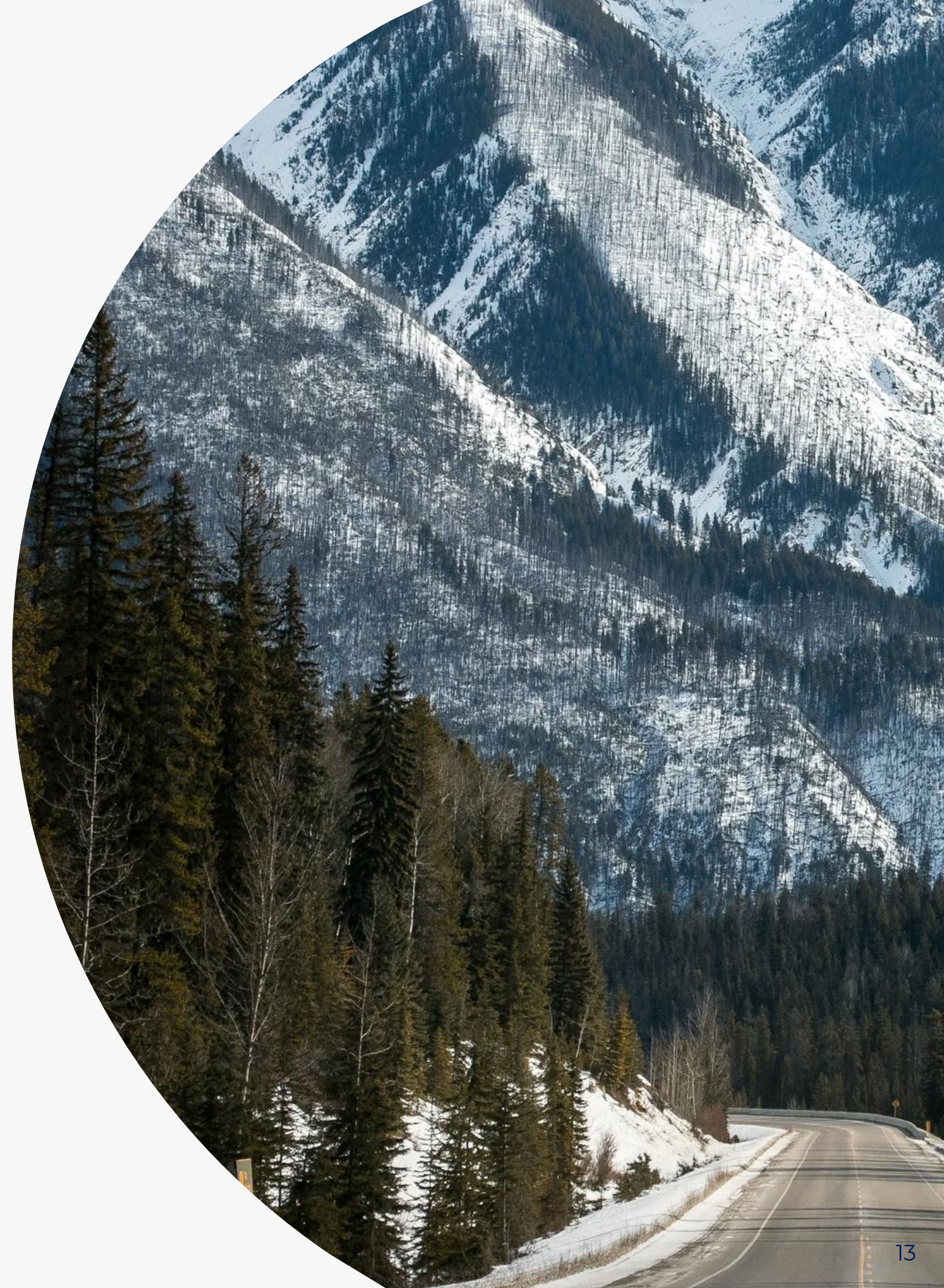
Woz Digital



**The Truth about AI:
When it helps (and When it doesn't)**

Agenda

- Introduction
- What is AI (and why are we talking about it)?
- When AI Helps
- When it Doesn't
- Application Framework

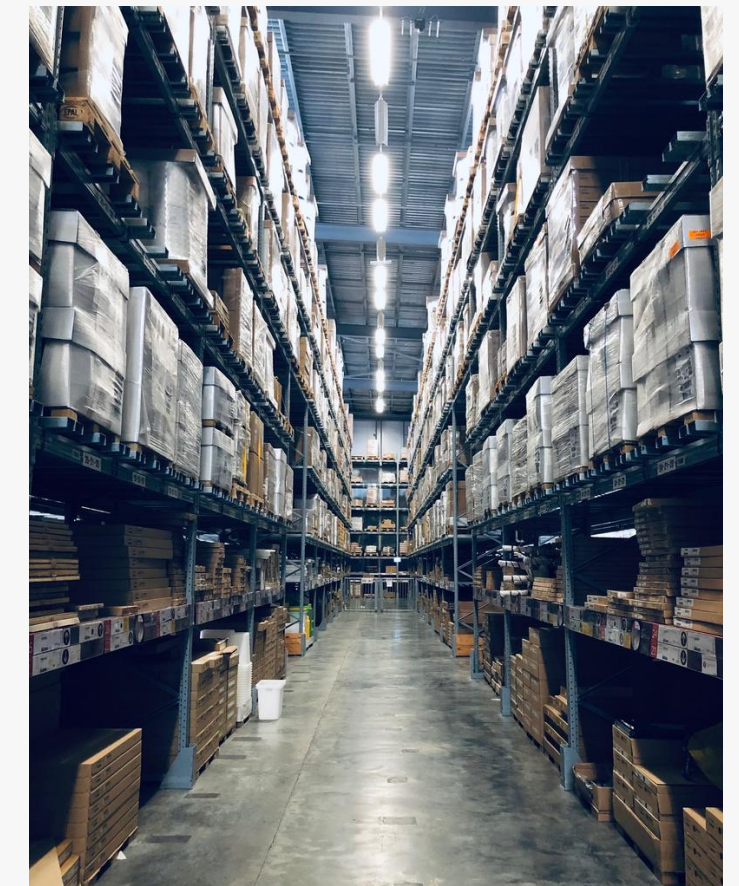
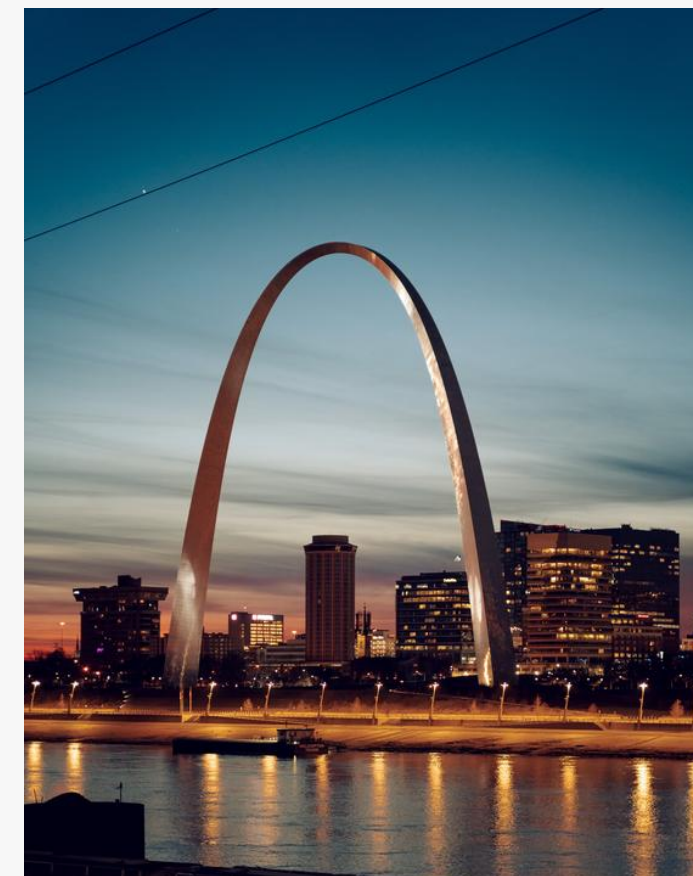


Who am I?

Experience that Bridges Business & Technology

My Background

- 5+ Years as Executive at Digital Transformation Technology Company
- Led successful multi-million dollar, cross-departmental digital transformation initiatives at multi-billion-dollar companies
- 5+ Years delivering strategic technology solutions at a \$1B+ Digital Consulting Firm
- Started career in Sales in B2B Distribution, then transitioned to technology with a focus on eCommerce
- Specialized in aligning business objectives with technological implementation
- Built expertise across the entire B2B customer journey - from acquisition to success



My AI Expertise & Certifications



- *Perplexity AI Business Fellow, Perplexity*
- *AI Applications for Growth, Kellogg School of Management, Northwestern University*
- *AI Build Lab: The Launch Studio For Real AI Projects*
- *How To Scale A Business With AI & Agentic Workflows - Foundations*

What is AI?

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AI = Artificial Intelligence

What is AI?

Wrong Question

AI = Artificial Intelligence

What is AI?

Why should you care about AI?

A tool (e.g., email, the internet) that you can leverage to improve your customer experience and do more with less in your organization

Let's walkthrough a hypothetical scenario

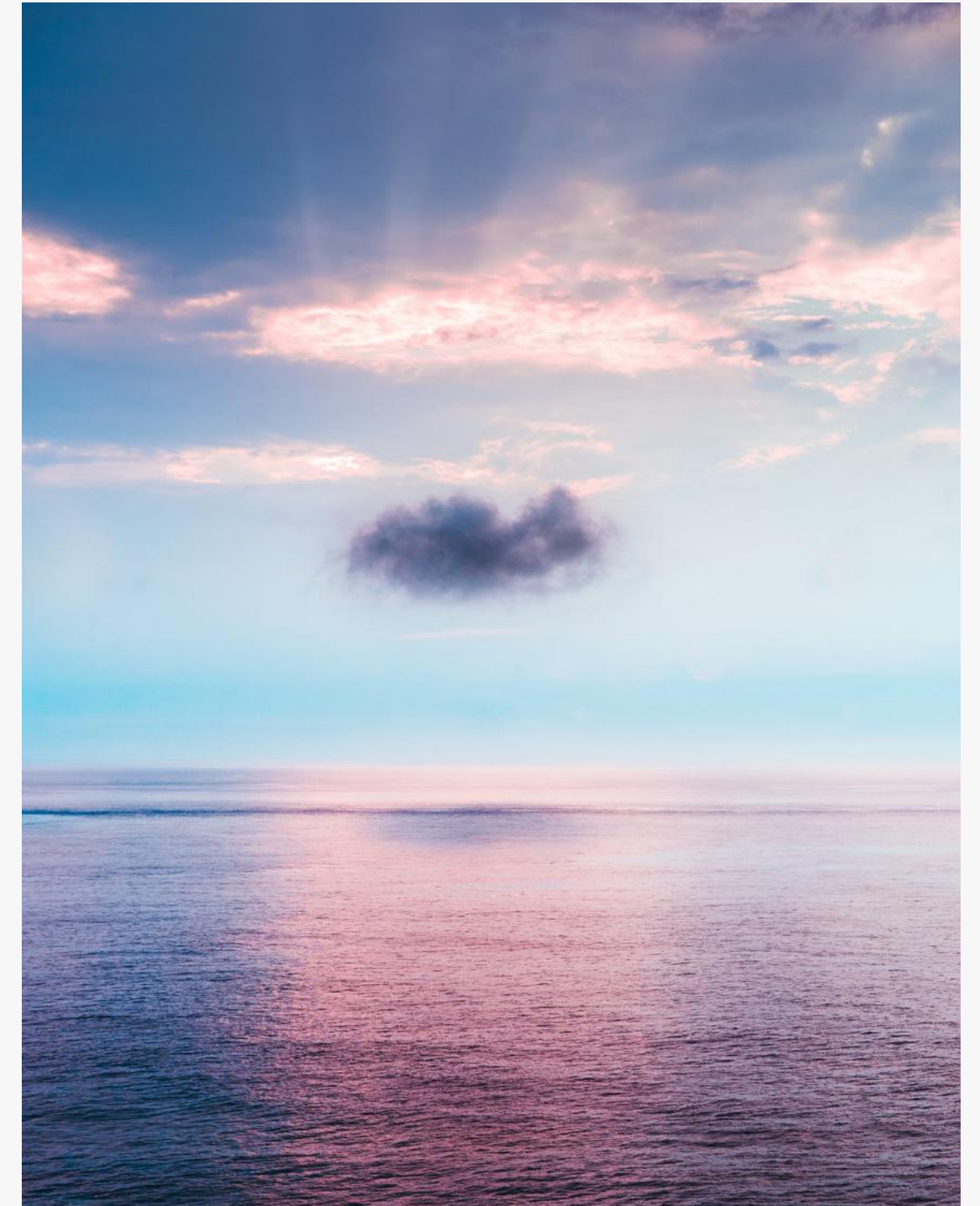
Life Today:



- Limited AI or basic Generative AI tools in use
- Strongest, most senior team members are wearing multiple hats and sifting through endless responsibilities
- Attending endless meetings or always busy with full calendars often for status updates or repetitive discussions
- Struggling to find the right information quickly or needing to train/educate team members on policy and procedures
- Significant time spent on manual data entry, report generation, and admin tasks
- Knowledge and expertise are trapped in people's heads and silos
- Limited time for deep work, creativity, and strategic thinking to move the needle and better serve customers
- Reacting to fires and putting out the largest fire, instead of solving problems and finding opportunities

Life embedding AI:

- AI handles routine tasks/inquiries freeing up more senior team member time
- Fewer, more strategic meetings—AI summarizes discussions, captures key takeaways, and drives next steps
- A continuously, automatically updated AI-powered knowledge hub that team members can use for instant answers
- More Automated workflows and streamlined processes, reducing manual effort and increasing efficiency allowing people to focus on people
- AI helps to detect trends and risks early, allowing for more proactive decision-making
- Cross-functional knowledge is more accessible, leading to better collaboration and alignment
- More time for innovation, creativity, and growth, rather than just keeping up



So let's go back: what is AI?

What is AI?

AI is pattern recognition at scale. It's smart autocomplete on steroids.

When should I use AI? When does it actually help?

When AI Helps...

AI should automate the stuff that doesn't make you money or build relationships.

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AI should automate the stuff that doesn't make you money or build relationships.

Marketing



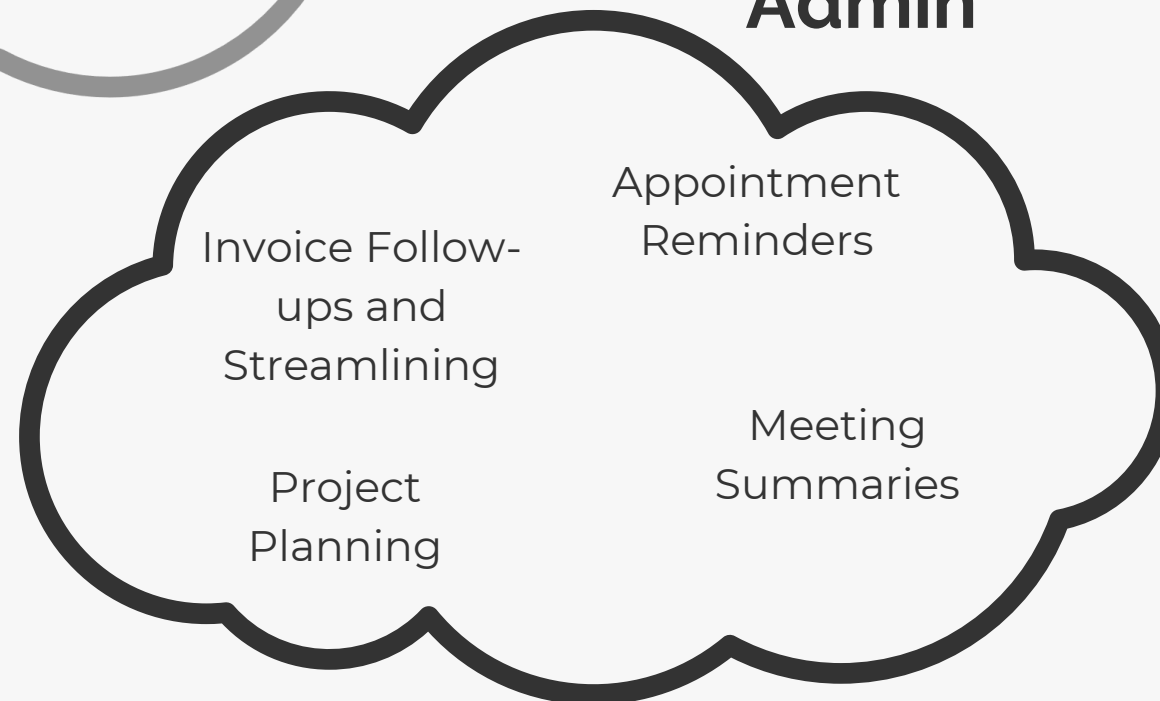
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Admin



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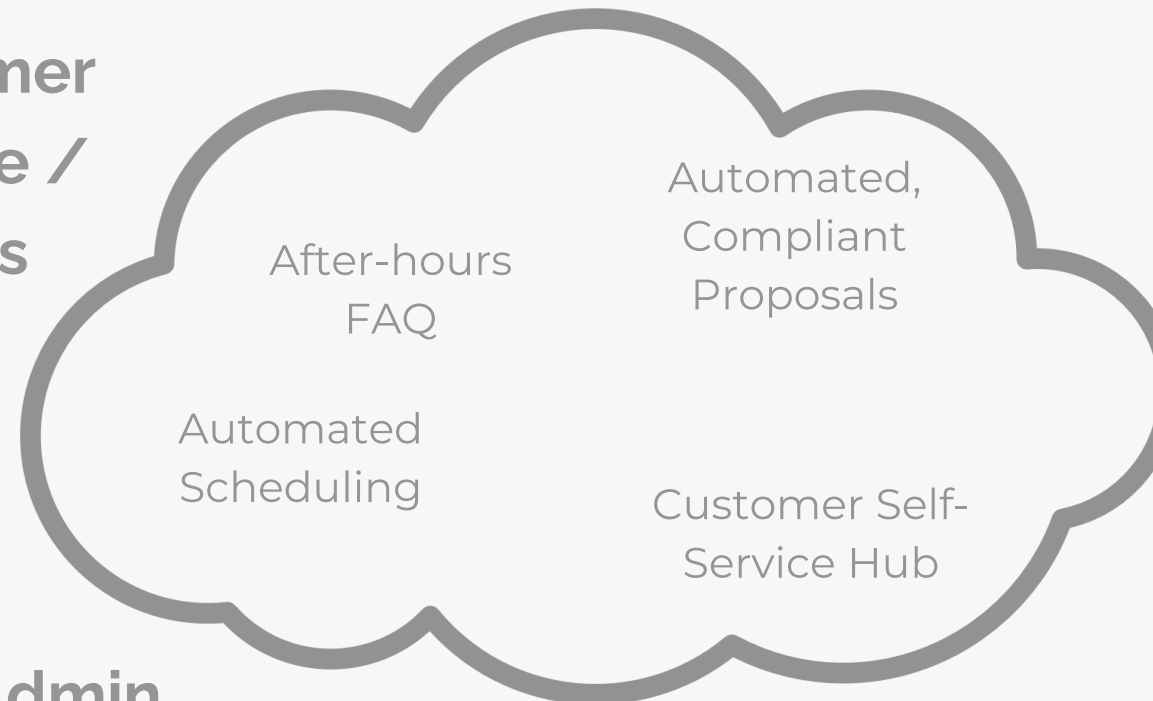
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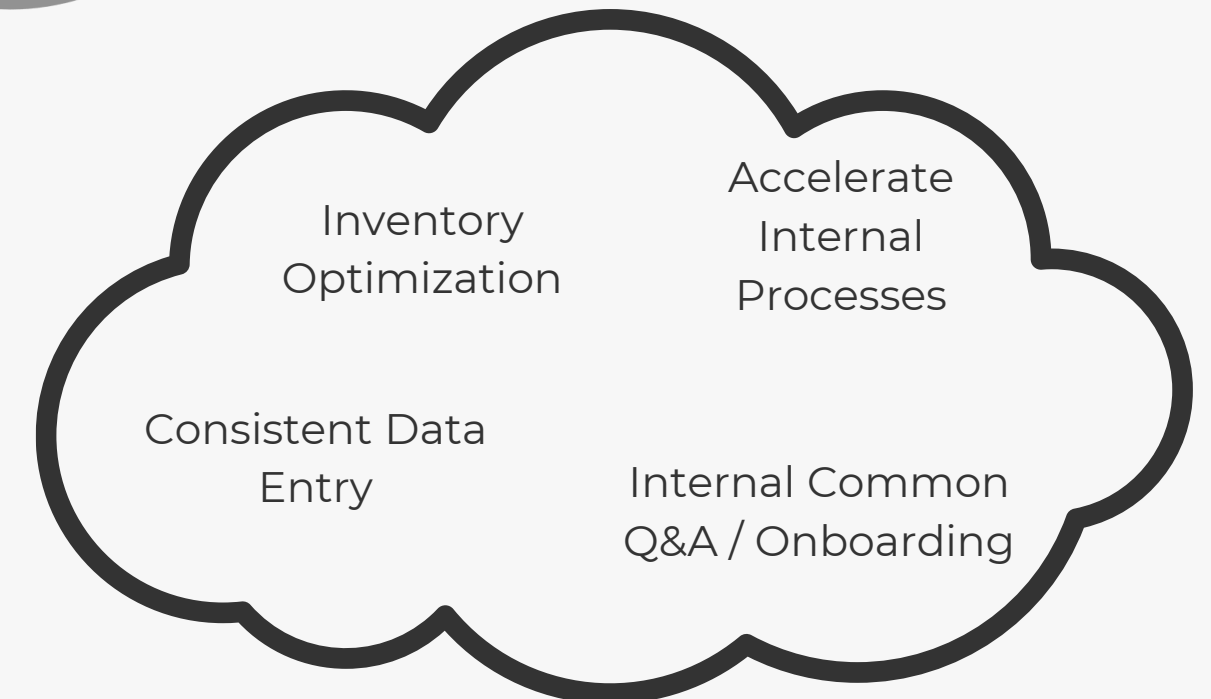
Customer Service / Sales



Admin



Operations



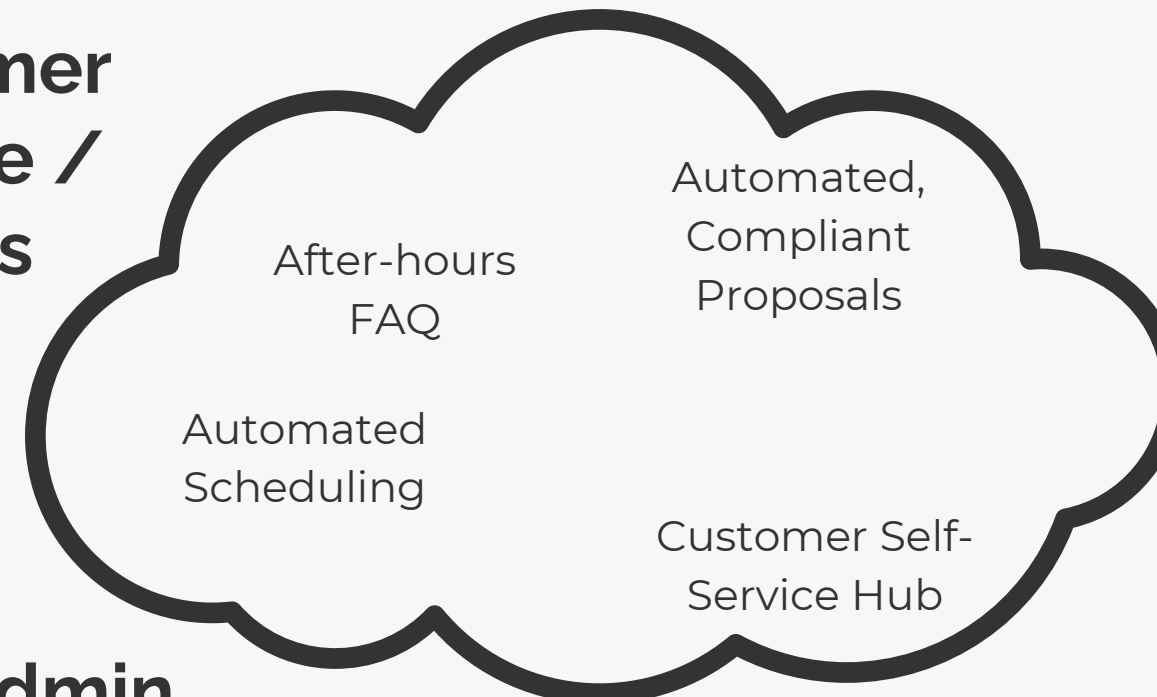
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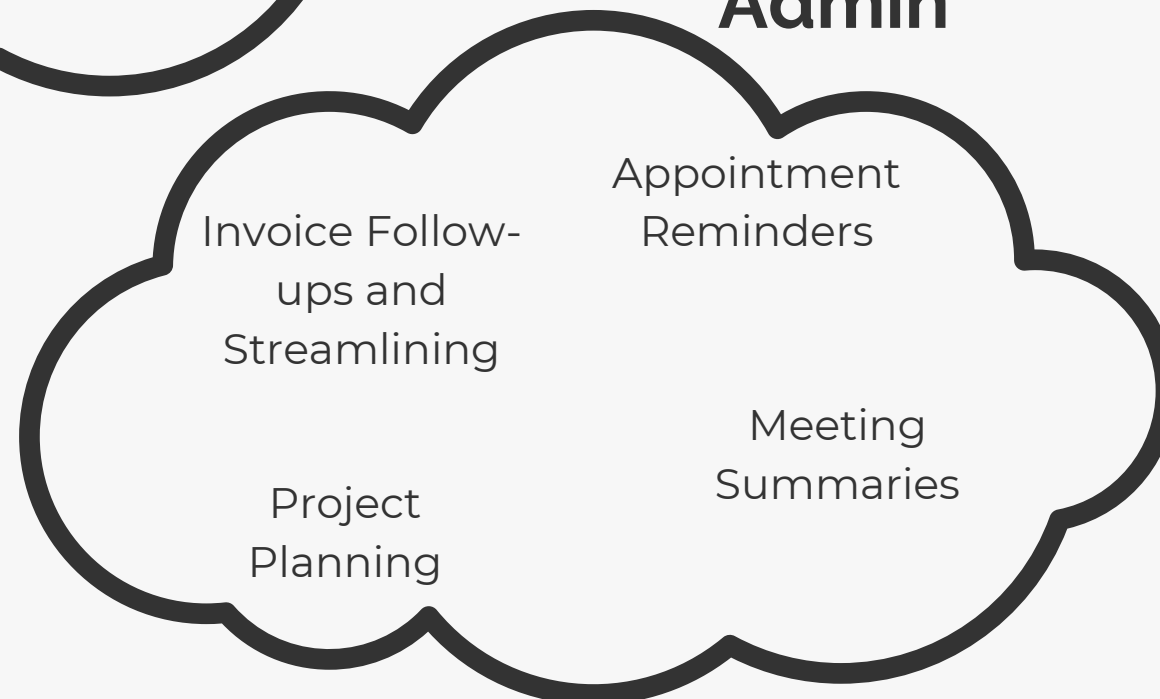
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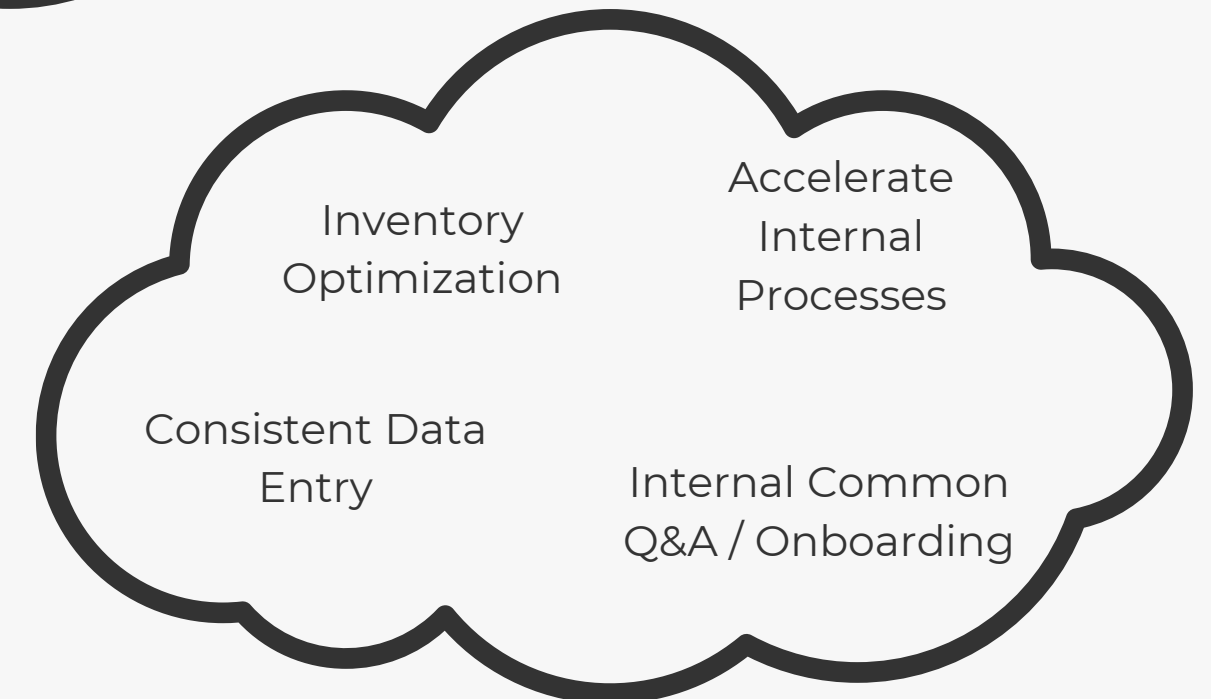
Customer Service / Sales



Admin



Operations



What do these have in common...

AI should automate the stuff that doesn't make you money or build relationships.

None of these are why your customers choose you, but they free you up to do more of why they do.

Marketing

Customer Service / Sales

Automated, Compliant

Operations

Invoice Follow-ups and Streamlining

Meeting Summaries

Project Planning

Inventory Optimization

Accelerate Internal Processes

Consistent Data Entry

Internal Common Q&A

So – when should I **not** use AI?

**AI is a terrible substitute for the things that
make you irreplaceable.**

When AI Hurts: some examples

- 1. Robocalls / Spam emails:** Everyone hates them. Automation without humanity erodes trust.
- 2. Over-automating customer relationships:** Eliminating customer service team members because AI answers all of the questions without needing a person.
- 3. Blindly using AI:** Throwing data and strategy into free versions of AI without considering implications.
- 4. Chasing tools without strategy:** Spending time on AI because it's trendy, not because it solves a real problem.

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If AI is touching the part of your business that makes you different, proceed with extreme caution.

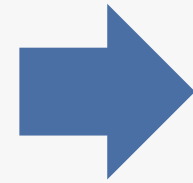
A Practical Framework to get started...

WOZ Approach: Experience-Driven AI Implementation

A proven path to move from curiosity → confidence → competitive advantage with AI

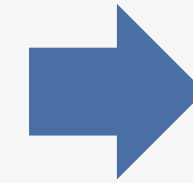
Warm-Up

Explore possibilities. Build confidence. Start smart.



Operate

Apply AI to real work. Solve real problems.



Zoom

Scale what works. Create your competitive edge.



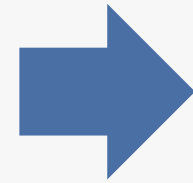
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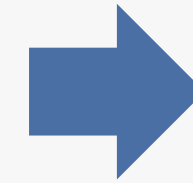
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- Find a power user in your org and learn from them
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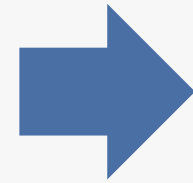
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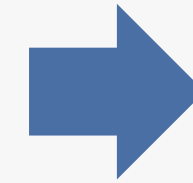
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Apply AI to real work. Solve real problems.

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- Identify one repeatable task in your business that's low-stakes and high-friction and attempt to automate



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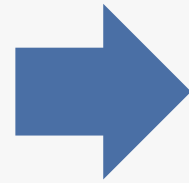
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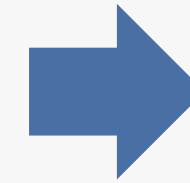
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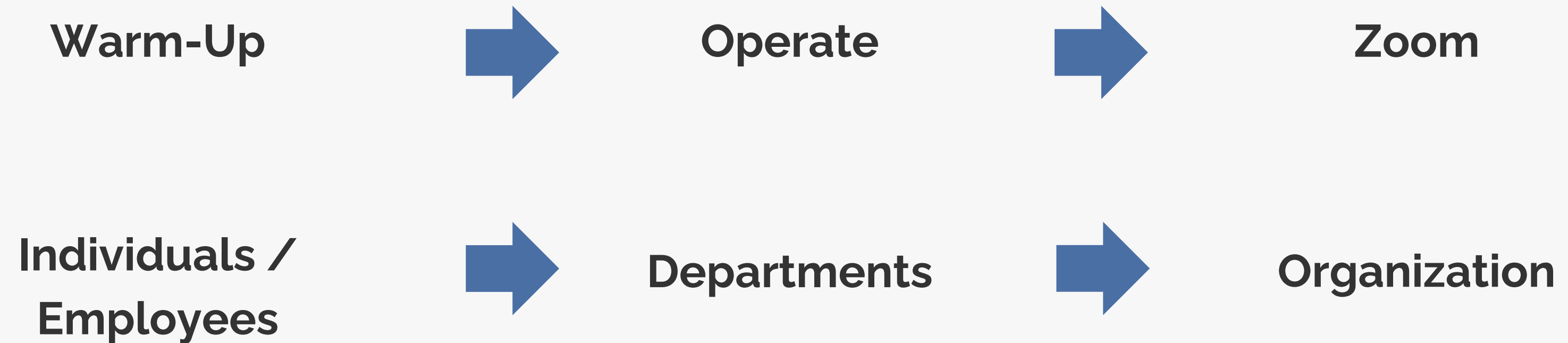
Scale what works. Create your competitive edge.

- Once you're comfortable, scale it. Embed AI into workflows that improve operations and customer experience.
- Find the next use case and do it again.



WOZ Approach: Experience-Driven AI Implementation

A proven path to move from curiosity → confidence → competitive advantage with AI



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Scale what works. Create your competitive edge.

You don't have to become an AI expert. You just need to start small and stay intentional.



The businesses that win with AI aren't the ones who automate everything.

They're the ones who automate the right things—and double down on being human where it counts.

Woz
Digital

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Thank You for Coming!



Chamber of Commerce