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A KEYNOTE PRESENTATION

Uncorking AI:

A Safe & Smart Path to AI Adoption

Wines, warnings, and a practical playbook for business owners.

Work Smarter. Deliver Faster. Outperform the Competition.

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YOUR HOST

Meet Ikram Massabini.

25 years building secure technology businesses in Western New York.

Applied AI Standards Alliance

CEO
MVP Network Consulting

25 YEARS
of IT experience

EXPERT
IT security consultant

HIPAA
consultant & auditor

AI COACH
for business leaders

DEGREE
BS, Electronic Engineering

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THE QUESTION EVERY OWNER MUST ANSWER

Are you using AI intentionally?

Or is AI happening TO your business — through whatever tool your employees happen to be using on their personal accounts today?

INTENTIONAL

Approved tools. Policy. Training. Visibility. ROI tracked.

ACCIDENTAL

Shadow AI. Personal accounts. Data exposure. No insight.

MEANING

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What is AI, really?

It's actually not as "intelligent" as the marketing makes it sound.

DEFINITION

AI is the simulation of human intelligence by machines —
the ability to learn from data, reason within rules,
and improve over time through feedback.

It predicts patterns.

It doesn't "understand" — it guesses the most likely next word.

It learned from us.

Every model is trained on human text, images, and decisions.

It needs a human.

AI works best with you in the loop — reviewing, correcting, deciding.

UNDER THE HOOD

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How AI works — and why your data matters.

Models get smarter the more high-quality data they see. That includes yours.

01

Data

Engineers feed massive amounts of text, images, and code into a neural network.

02

Training

The model predicts billions of times. Every wrong guess gets corrected.

03

Fine-tuning

Human feedback shapes how the model responds: tone, safety, accuracy.

04

Use → learn

Every prompt you give a free tool can become part of the next model.

"Free" usually means your inputs are the training data. Your IP can become the next model's answer.

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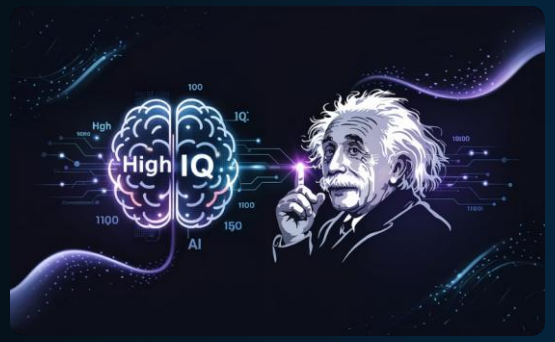
Here's the Facts...



Chat GPT 3.5 has an IQ of 155—Einstein's was 160!

What you see is only the tip of the iceberg...

GPT-4 became 10x smarter than 3.5 in months.

If this pace keeps up, AI could reach an IQ of 1600 in a few years!

WHY WE'RE HERE

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AI is already inside your business.

Whether you approved it or not.

RIGHT NOW

78%

of knowledge workers are using AI on the job.

Most of them haven't told their employer which tools.

Free tools

ChatGPT, Gemini, Claude. Personal accounts.

Browser tabs you can't see.

Real data

Customer info. Financials. Contracts. Strategy docs.

Pasted into prompts.

Zero visibility

No policy. No log. No way to know what left the building today.

THE TYPE OF AI

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AI is moving faster than any tech we've seen.

Tools. Assistants. Agents. And they're showing up at work first.

AI TOOLS	AI ASSISTANTS	AI AGENTS
Single-purpose helpers	**Embedded in your software**	**AI that takes action**
ChatGPT • Claude • Gemini	Copilot in M365 • Gemini in Workspace	Phone • Workflow • Autonomous
Generate text, images, summaries on demand.	Help you draft, analyze, and work inside the apps you already use.	Watch for triggers. Make decisions. Do the work without being asked.

Each step is more powerful — and demands more governance than the last.

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Not every job needs the most expensive AI.

Match the model to the task — like pairing wine with a meal.

FAST & CHEAP	BALANCED	MAXIMUM POWER
Haiku • GPT-4o-mini • Gemini Flash	**Sonnet • GPT-4o • Gemini Pro**	**Opus • GPT-5 • Gemini Ultra**
Best for: high-volume, low-stakes tasks. Drafting, summarizing, simple Q&A.	Best for: most business work. Analysis, writing, multi-step reasoning.	Best for: complex reasoning, sensitive analysis, hard problems worth paying for.
~$0.25 / 1M tokens	**~$3 / 1M tokens**	**~$15 / 1M tokens**

Producing a 100-word summary can range from 25 to 130 Tokens depending on the LLM selected.

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AI needs three things: data, tools, and prompts.

Better inputs in, better outputs out. Garbage in, garbage out — the rule still applies.

DATA

Your documents, files, processes, history.

- Your SOPs and policies
- Customer records and contracts
- Past quotes, emails, meeting notes
- Internal knowledge — what you've already learned

AI without your data is generic.
AI with your data is yours.

TOOLS

The applications that the AI will use to do the work

- Applications – HubSpot, outlook, word, sage, infor, epic, etc…
- Integration with the API of the tool
- Which Model to use

The applications that the agent will use

PROMPTS

How you ask determines what you get.

- A clear role for the AI
- Specific instructions
- Examples or context
- Constraints and tone

Prompting is the new business skill.
We'll teach it in 60 seconds (RISEN).

THE PAIRING

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AI is like a great wine — it needs the right pairing.

On its own, AI is a tool. Paired well, it transforms your business.

T — Tools
The right AI for the job

D — Data
Clean and accessible

P — People
Trained and empowered

P — Policy
Clear rules to follow

S — Security
Locked-down access

O — Oversight
Audit and review

Missing any one of these? You're drinking the wine straight from the bottle.

THREE FLAVORS

Three types of AI agents.

Each does more than the last — and needs tighter guardrails than the last.

01 *Find & answer*

Retrieval Agents

Pull information from your files, docs, and policies. Answer questions instantly.

Example: "What's our PTO policy for part-time staff?"

02 *Do the work*

Task-Based Agents

Triggered by an event. Perform a specific, well-defined task end-to-end.

Example: New invoice → route, follow up, close the loop.

03 *Make decisions*

Autonomous Agents

Operate without constant oversight. Perceive, plan, act, adapt.

Example: Executive dashboard assistant that monitors KPIs weekly.

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MCP servers: the universal plug for AI.

Model Context Protocol *— the standard that lets agents safely access your data and apps.*

WHAT IT IS

MCP is to AI agents what USB is to your laptop —

a standard way to plug AI into your tools without custom wiring.

An MCP server exposes one of your systems (email, CRM, files, calendar) to AI agents with explicit, auditable permissions.

It's the modern way to control what AI can see, do, and report on.

EXAMPLES OF MCP-CONNECTED SYSTEMS

Email	Read, draft, send under approval
CRM	Read leads, update notes, log calls
Files / SharePoint	Search docs, extract info
Calendar	Schedule, reschedule, summarize
Forms / Workflows	Trigger flows on events
Business apps	ERP, ticketing, HR, finance

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MY AI PREDICTION

Every business will have an AI agent — just like every business has a website.

Customer service

AI agents handling first-touch 24/7.

Sales

Agents that research prospects and draft outreach overnight.

Operations

Agents triaging tickets, routing invoices, owning onboarding.

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Good AI use cases.

Five traits that separate a quick win from an expensive mistake.

✓ **Simple**	Few steps. Clear inputs and outputs.
✓ **Repeatable**	Happens often. Same shape every time.
✓ **Low risk**	Mistakes are easy to catch and reverse.
✓ **Easy to review**	A human can verify the output in seconds.
✓ **Tied to value**	Saves real time or unlocks a real outcome.

WHAT TO AVOID — FOR NOW

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Bad AI use cases.

Five red flags. Skip these until you have governance in place.

✕	**Too much access**	AI sees data it shouldn't see.
✕	**Sensitive content**	Customer PII, HIPAA records, payment data.
✕	**No review**	Output goes straight to customers or systems.
✕	**No owner**	When AI is wrong, no one's accountable.
✕	**No policy**	Nobody knows what's allowed or expected.

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Meet your team where they are: Crawl, Walk, Run.

Don't start with autonomous agents. Start with what you can win this week.

CRAWL

Quick wins

- Use AI chat
- Summarize a contract
- Draft an email
- Find trends in data

Time to value: today

WALK

Repeatable workflows

- CRM-integrated drafts
- HR policy expert
- Templated workflows
- Certified team

Time to value: weeks

RUN

Autonomous agents

- Multi-step workflows
- Phone & email agents
- AI-first processes
- Department-level KPIs

Time to value: 1–2 quarters

THE PROBLEM

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Shadow AI is already in your company.

Free tools. Personal accounts. Your data — somewhere else.

Your employees

Pasting customer lists, contracts, and strategy docs into AI tools to get work done.

Free AI tools

Many monetize by training on inputs. "Free" means your data is the product.

Your competitor

Queries a similar prompt later — and your information can resurface in their answer.

If you don't see what AI tools your team uses, you don't know where your data lives.

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VISIBILITY = CONTROL

You can't protect what you can't see.

A REAL SMALL BUSINESS — LAST 30 DAYS

Tool	Users	Queries
ChatGPT	29	4,157
Google Gemini	3	23
Claude	2	8
DeepSeek	1	5
TOTAL	**35**	**4,193**

Source: anonymized Hatz.ai shadow-AI observation in an SMB tenant.

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Four ways unsanctioned AI hurts your business.

01

Loss of IP

Your proprietary know-how walks out the door — into someone else's model.

02

Confidential data exposed

Customer info, financials, contracts pasted into prompts you can't recall.

03

Inconsistent outputs

Different tools, different policies. No guardrails. No audit trail.

04

Data leaves with employees

Their personal AI accounts go with them — including everything they fed it.

THE DOWNSIDE OF AI

AI is here. And it's

changing everything — including the threats.

Data exposure

Sensitive content leaves your tenant when employees paste it into free tools.

Unauthorized actions

Agents with too much access can take actions you didn't approve.

AI-powered attacks

Attackers using AI to craft phishing, voice fakes, and impersonation at scale.

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Real-World AI Agent Warning: OpenClaw

AI agents are no longer just answering questions. They can connect to your tools and take action.

The risk is not the agent itself.

The risk is giving an AI agent access to:

- Email
- Calendar
- Files
- Messaging apps
- Workflows
- Business systems
- Customer or financial data

without clear controls.

AI agents need boundaries before they get access.

AI-POWERED ATTACKS

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AI scams are getting more convincing.

The phishing email you'd have spotted last year? You won't this year.

Spear phishing

Personalized to you. Mentions your kids, your boss, your last vacation.

Voice deepfakes

30 seconds of audio is enough to clone a CEO calling Finance for a wire.

Fake invoices

Vendor logo. Real wording. Wrong account number — generated in seconds.

Impersonation

AI mimics writing style, internal lingo, and meeting cadence.

Social engineering

Real-time chat with an attacker using AI to keep pace and stay believable.

Account takeover

AI cracks weak password patterns and floods MFA fatigue prompts.

30 seconds of audio or video is enough to clone a CEO's voice.

ATTACK SURFACE

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AI doesn't create most security problems. It amplifies them.

Every weakness you have today gets bigger when an agent has access to it.

Weak passwords

Faster to crack. Easier to test at scale.

Missing MFA

AI-driven MFA fatigue floods until someone clicks.

Excess permissions

Agents inherit overprivileged accounts.

No monitoring

AI can act for hours before anyone notices.

Stale offboarding

Departed staff's AI access remains active.

Unpatched systems

Attackers automate exploit discovery.

Fix the foundations first. AI sits on top of your security — not next to it.

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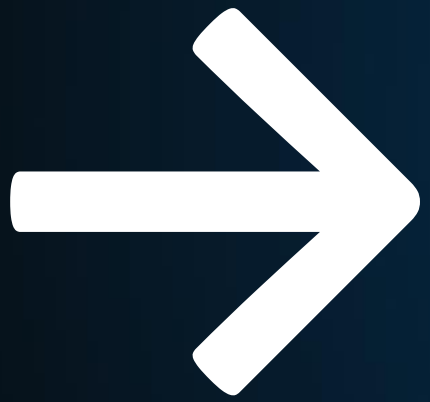

THE PATH FORWARD

So… what should Businesses actually do?

AI Is No Longer Optional for Small Business

This roadmap is how we get you there. Not with hype. Not with complexity. With a practical, step-by-step plan that fits your business, trains your team, and delivers results you can see.

Six phases. Real outcomes at every step. And a trusted partner walking with you the whole way.

Phase	Name	Timeline
01	**Discover — AI Readiness Assessment**	Weeks 1–3
02	**Build the Foundation**	Weeks 3–6
03	**Your First AI Agent (Retrieval)**	Weeks 6–12
04	**Put AI to Work — Task Automation**	Months 3–6
05	**Stay in Control — Governance**	Ongoing
06	**Your Competitive Edge**	Months 6–12+

BEFORE YOU DO ANYTHING ELSE

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Step Zero: The AI Readiness Assessment.

Before you turn on Copilot, pick a platform, or train a team — find out where you stand.

"It's easy to buy a Copilot license and chuck it there — but you don't know what data it has access to."

WE ASSESS FOUR AREAS

01

M365 Adoption

Are employees actually using what they already have?

- Active users by app
- Copilot license fit
- Feature usage patterns

02

Security

Identity, access, and threat protection posture.

- MFA & conditional access
- Entra ID configuration
- Defender + endpoint policies

03

Technical Readiness

Is the M365 tenant configured for AI?

- Licensing & SKUs
- Tenant configuration
- Network & client readiness

04

Data Governance

Where is your data, and who can see it?

- Sensitivity labels (Purview)
- Sharing & permissions
- DLP policies & retention

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WHAT YOUR TEAM GETS
✓ A clear picture of where AI can save your team hours every single week
✓ An honest assessment — no overselling, no surprises later
✓ A prioritized plan built around your business, not a generic template
✓ Executive alignment so everyone is moving in the same direction from day one

WHAT WE DO

- Sit down with you and your key people to understand how work actually flows through your business
- Audit your current tools — Microsoft 365, security setup, where your data lives
- Identify the 3–5 AI use cases that will make the biggest difference for your team right now
- Deliver an AI Readiness Scorecard: an honest picture of where you stand and what needs to happen first
- Build a prioritized action plan so we move in the right order — no wasted effort

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AI is hungry for data. Open the right door.

AI is only useful when it has data. But uncontrolled access creates the risks you're trying to avoid.

TEMPTING — AND DANGEROUS

"Just give AI everything."

Broad access. No labels. No audit. Maximum risk surface.

INTENTIONAL — AND SAFE

"AI sees what each person sees."

Scoped access. Labeled data. Logged actions. Minimum risk.

FIVE GUARDRAILS THAT MAKE DATA ACCESS SAFE

Sensitivity labels

Classify data so AI knows what it can use — and what to leave alone.

Least privilege

AI inherits the user's access. Clean up over-shared sites first.

DLP policies

Block sensitive content from leaving — or from being used in AI prompts.

Audit logs

Every prompt, every action — searchable when you need it.

Conditional access

Tie AI use to device, location, and identity posture.

GOVERNANCE

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What good AI governance looks like.

Eight pieces. If you're missing any, you're not governing — you're hoping.

1 Executive owner

Someone above the team is accountable for AI.

2 Approved tools

One short list. Everyone knows what's allowed.

3 Written policy

Plain-language AUP everyone signs.

4 Security review

Every tool vetted before it's allowed in.

5 Training

Every employee certified before access.

6 Access controls

Permissions tied to role, reviewed quarterly.

7 Monitoring

Every prompt, response, agent action logged.

8 Regular review

Quarterly audits + annual policy refresh.

THE MASTER JOURNEY — AFTER THE ASSESSMENT

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Six steps. From shadow AI to competitive edge.

Universal best practice on the outside. The MVP delivery method on the inside.

WEEKS 1 — 12 · 90-DAY QUICK START

MONTHS 3 — 12+ · SCALE & GOVERN

01	02	03	04	05	06
KNOW	**SECURE**	**TRAIN**	**AUTOMATE**	**GOVERN**	**SCALE**
Discover	Foundation	Retrieval Agent	Task Agents	Governance	Competitive Edge
Inventory current AI tools, exposed data, and permissions.	Pick approved tools. Lock down security. Deploy AUP.	Train your team on RISEN. Launch your first AI agent.	Replace repetitive work with agents triggered by events.	Monitor, audit, refine. Tighten what works.	AI is how your business runs. Compounding returns.

By Step 6: 5–10 hrs reclaimed / employee / wk • 60–80% faster client response • onboarding in half the time

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The RISEN Framework.

Five inputs that turn AI from a curiosity into a daily tool.

R

Role

Tell AI who to be.

"Act as a CFO reviewing a proposal."

I

Instructions

Say what you need done.

"Summarize the top three financial risks."

S

Steps

Show how to get there.

"First skim, then list risks, then rank."

E

End Goal

Define what success is.

"A 3-bullet summary I can paste in Slack."

N

Narrowing

Set constraints.

"Plain English. Under 100 words. No jargon."

Better prompts in. Better work out. Every employee learns this on Day 1.

Start with **existing** processes

APPLY IT TO REAL WORK

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Where does AI fit in your process?

Take any 5–8 step process. Ask: 'Can I AI that?' on each step.

EXAMPLE: A weekly LinkedIn post (8 steps, 40 minutes today)

TODAY → 40 min

Research	Compile	Edit copy	Review	Edit again	Design	Save	Post
10 min	5 min	5 min	Human	3 min	20 min	1 min	1 min

WITH AI → 5 min (-87%)

Research	Compile	Edit copy	Review	Edit again	Design	Save	Post
AI	AI	AI	Human	AI	AI image	AI	AI

5 of 8 steps offloaded to AI. ~35 min saved per post. Multiply across every process you have.

HOW WE EVALUATE EVERY AI USE CASE

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The BXT Framework.

Business + eXperience + Technology — score every AI idea against these three.

B

Business

Does this drive a real outcome?

- Quantifiable time or revenue impact
- Aligned to a clear business priority
- Owner who is accountable for results

X

eXperience

Is it usable by real humans?

- Easy to trigger and review
- Output your team trusts
- Doesn't add friction to the day

T

Technology

Will it work safely and reliably?

- Data is available and clean
- Permissions and access are appropriate
- Monitorable and reversible

Score 1–5 on each. If anything scores below 3, fix it before you build.

WHAT MICROSOFT COPILOT GIVES YOU

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Copilot, where you already work.

Embedded in Microsoft 365 — productivity gains without changing tools.

Outlook

Draft emails, summarize threads, suggest replies.

Word

Generate first drafts, rewrite tone, summarize long docs.

Excel

Analyze data without writing formulas; explain trends.

PowerPoint

Build slides from a brief; redesign existing decks.

Teams

Recap meetings, list action items, draft follow-ups.

OneDrive / SharePoint

Ask questions across your tenant; cite the source.

Copilot rides on your existing M365 security. Configured right, it's a powerful day-one win.

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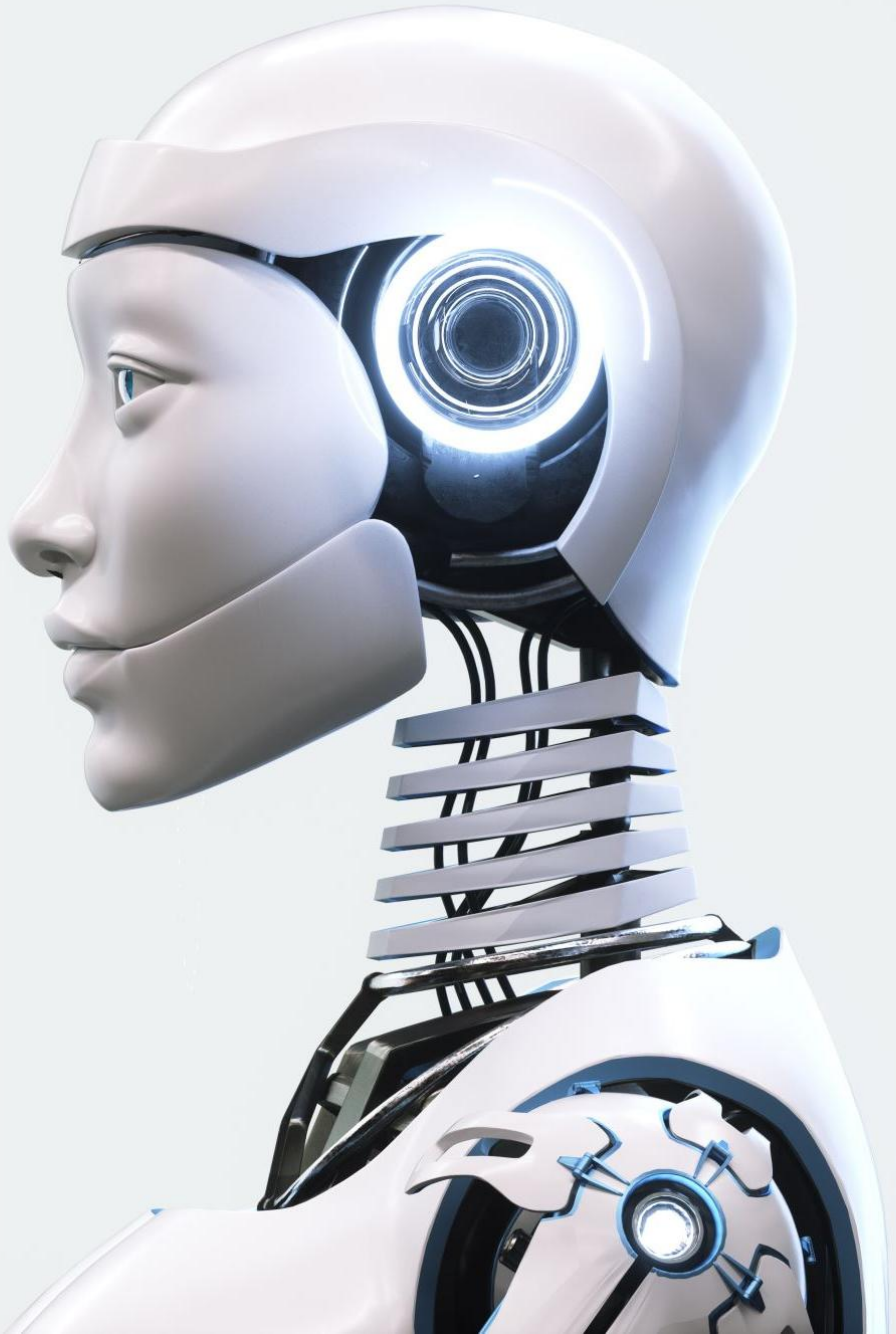
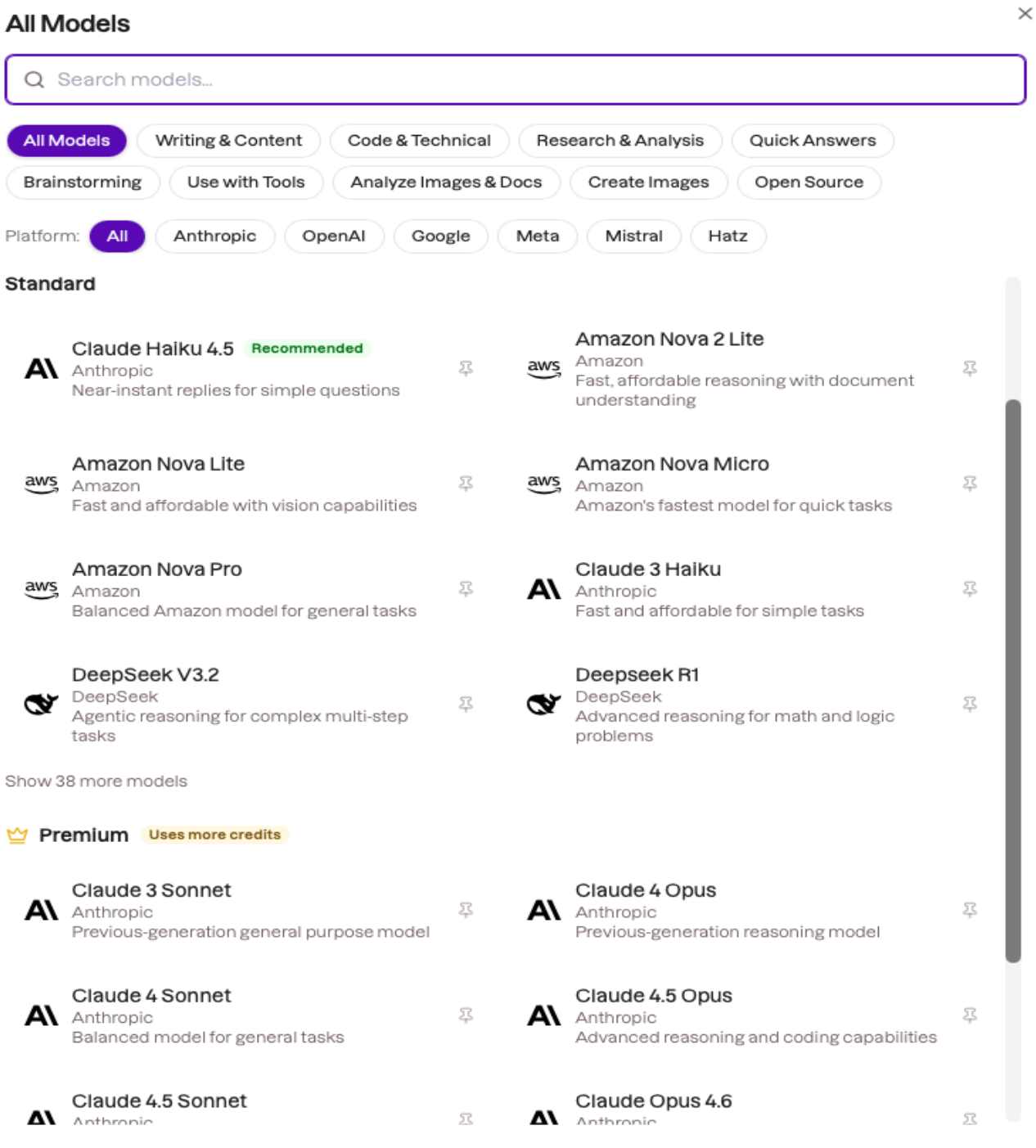
MVP introduces...

the AI Platform for ALL





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Pick from 50 LLMs – the right LLM for the job to minimize spend and get the best results

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AI FOR EVERY EMPLOYEE

Chat with AI. Manage AI. Build with AI.

Three modes. Every employee uses some mix of all three.

CHAT

Use AI

Type a question. Get an answer. Draft something. Summarize a doc.

Every employee, every day.

MANAGE

Direct AI

Configure workflows. Approve agent actions. Tune prompts. Review output.

Team leads + power users.

BUILD

Create with AI

Design new workflows. Build agents. Connect systems. No code required.

AI champions across your business.

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Let's address the elephant in the room...

"AI will replace my employees."

"This is too complex and expensive for a small business."

"We're not ready. Our data is a mess."

DON'T DO THIS

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Common AI mistakes business owners make.

Five patterns we see — every single week.

!	**Assuming no one is using AI**	*They are. 78% of knowledge workers, today.*
!	**Assuming Copilot is automatically secure**	*Default settings are not safe settings.*
!	**Skipping the policy**	*Without a policy, every employee writes their own.*
!	**Ignoring AI scams**	*The phishing email you'd have caught last year — you won't this year.*
!	**Moving too fast**	*Autonomous agents on day one create autonomous problems.*

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THE STAKES

There's too much to lose to get this wrong.

Customers

Trust is hard-won, easily lost.

Data

Your IP — out of your hands.

Reputation

One leak makes the news.

Compliance

HIPAA, PCI, state privacy laws.

Cyber insurance

No governance → no coverage.

Your business

Years of work in the balance.

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HERE'S WHAT YOU CAN DO

Phase 1 starts here.

Book your AI Readiness Assessment.

A no-charge, no-disruption review of your M365 adoption, security, technical readiness, and data governance.

WE WILL NOT

- ✕ Need administrative credentials
- ✕ Install anything on your network
- ✕ Touch your sensitive data
- ✕ Require a complicated setup
- ✕ Disrupt your business

WE WILL

- ✓ Review your current AI exposure
- ✓ Identify security gaps and risky patterns
- ✓ Prioritize your most impactful next steps
- ✓ Walk through practical AI use cases for you
- ✓ Give you a clear, written path forward

ONE LAST THOUGHT

AI is already being uncorked inside your business.

The job isn't to stop it — it's to make sure it's poured carefully.

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Designed. Built. Maintained. Secured.

Let's pour carefully.

QUESTIONS? CONTACT IKRAM.

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