AI that earns its place.

For small and midsize business leaders, PE-backed teams, and owners preparing for an exit.

START WITH THE WORK, NOT THE TOOL

Where do we lose margin, wait on people, repeat work, or depend on one person? Match the problem to a capability below. These categories overlap; one workflow may use several.

01 GENERATIVE AI

Create & explain

Draft proposals, board narratives, SOPs, or customer replies.

Measure: Edits needed + turnaround time.

02 KNOWLEDGE AI / RAG

Find & ground answers

Answer questions from approved policies, contracts, or operating manuals.

Measure: Answer accuracy + search time.

03 DOCUMENT AI

Read & structure

Extract invoice, order, contract, or onboarding fields for review.

Measure: Field accuracy + exception rate.

04 PREDICTIVE AI

Estimate what comes next

Flag likely churn, demand shifts, late payment, or equipment failure.

Measure: Lift over today’s method + false alarms.

05 COMPUTER VISION

Inspect images & video

Screen product defects, inventory images, or asset condition.

Measure: Missed defects + false alerts.

06 SPEECH & LANGUAGE AI

Capture & understand

Transcribe calls, classify service issues, and draft follow-ups.

Measure: Capture accuracy + action completion.

07 OPTIMIZATION

Allocate scarce resources

Improve routes, schedules, staffing, or inventory within constraints.

Measure: Service level + cost per job.

08 AGENTIC AI

Coordinate & act

Move a task across systems: gather, draft, route, and monitor.

Measure: Successful completion + interventions.

THE HUMAN CHECKPOINT

Drafts: verify facts. Knowledge: demand sources. Documents: validate key fields. Predictions: test and monitor. Vision: check misses. Speech: confirm consent. Optimization: test feasibility. Agents: set approval gates and a stop button.

Also know: robotics adds physical action and safety engineering. Rules-based automation follows fixed steps; often it is the simplest answer.

Build value. Make it provable.

An AI story is useful. Repeatable results, clear ownership, and transferable operations are stronger.

01 PICK ONE BUSINESS PROBLEM, NOT TEN PILOTS

Score each opportunity 1-5 on impact, repetition, data readiness, and ease of checking the result. Use the score to discuss priorities, not to replace judgment. No owner, no baseline, or uncontrolled risk? Fix that before a pilot.

02 FOLLOW THE VALUE

Margin: less rework, fewer credits, better pricing discipline.
Capacity: more work with the same team; name how freed hours will be used.
Cash: faster billing and collections; track separately from earnings.
Growth: measure incremental contribution, not just added revenue.

03 MAKE IT BUYER-READY

Evidence: before/after KPI, volume, period, and full cost.
Repeatability: adoption, SOP, owner, and backup.
Transferability: data rights, contracts, permissions, and handover.
Control: validation, approvals, incident log, and fallback.

HOURS SAVED ARE NOT AUTOMATICALLY EBITDA.

Separate actual expense reduction, avoided future spend, and freed capacity. Deduct software, integration, review, and support costs. Have finance validate net gains. Do not double-count benefits or assume a valuation premium.

04 A PRACTICAL 90-DAY SEED PLAN

SCAN

Days 1-15

Pick one recurring pain. Baseline the cost, volume, quality, and cycle time.

EXPLORE

Days 16-30

Prototype on approved examples. Define success, exceptions, and stop rules.

ENGINEER

Days 31-60

Connect the workflow. Add permissions, checks, logs, training, and fallback.

DELIVER

Days 61-90

Prove adoption and net value. Assign ongoing support. Scale only what works.

Illustrative cadence, not a delivery promise. An approaching sale favors narrow, demonstrable improvements over a risky last-minute transformation.

05 ASK THESE IN YOUR NEXT LEADERSHIP MEETING

What breaks if our key person leaves? Where does work wait? Which errors recur? What could a buyer reproduce without us? What evidence would make us stop or expand the pilot?

PE lens: standardize definitions and controls across portfolio companies, not every workflow. Keep company data boundaries intact. **Owner lens:** turn personal know-how into an approved, usable operating process.

Live AI tool & model guide | **Find your first opportunity with Jeff**

Sources & scope: NIST AI RMF / GenAI Profile; OECD, Generative AI and the SME Workforce (2025). Accessed Sep 26, 2026. Frameworks and examples are ZTelligence editorial guidance, not client results, investment advice, or an assurance of exit value. No private company data is used.