

Turning AI Into Operating Capability

From copilots to AI teammates



AI is everywhere. Value is not.

Adoption is rising faster than operating impact.

78%

orgs using AI

55% a year earlier

\$307B

2025 AI spend

\$632B by 2028

>80%

no EBIT lift yet

McKinsey



Three ways AI shows up

Prompted → embedded → autonomous

01

Thought accelerators

You prompt

02

Embedded AI

App-smart

03

Agentic AI

Acts across systems

Operating capability ↑





Thought accelerators

Fast. cheap. user-driven.

ChatGPT

Gemini

Claude

GOOD AT

Drafting

Review

Writing

Images

WATCHOUTS

Prompt-led

No actions

3rd-party only

Data risk



Embedded / vendor AI

Smart inside the app.

ERP

CRM

Finance

Phone

Reports

GOOD AT

App-aware

Fast lift

Vendor-backed

WATCHOUTS

Siloed data

Lock-in

Low autonomy

Generic fit





Agentic AI

The closest thing to a digital employee



Anticipates

Acts

Learns

Improves

Higher cost

Needs training

Iterative

Maintained

AI in Action

The story of two bots

Voice Bot

Secure Chat

Voice Bot

From “take a message” to front-desk automation

THE OLD WAY

Clunky

Message-only

No actions

No insight

THE NEW WAY

Knows your business

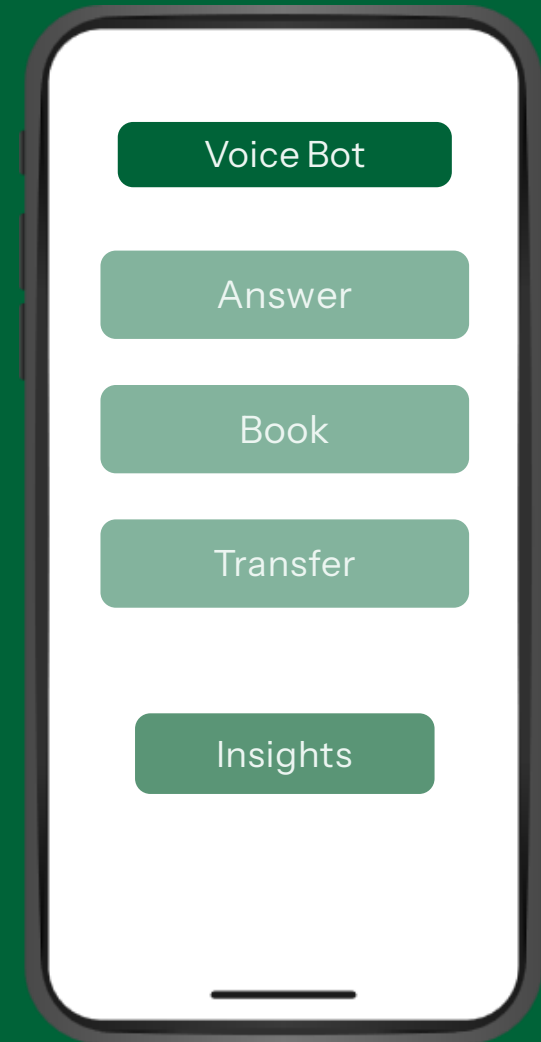
Books

Transfers

Answers

Learns

Audits



ERP

O365

Calendar

AI Voice Bot Interface – Dashboard

Voice Bot

Admin Guide

Dashboard

Call History

Unresolved Events

Caller Cache

Test Pronunciation

AI Learning

Call Metrics

3CX Status

Settings

Connection Test

Call Flow Tests

Voice Bot - Admin Dashboard

Reviews your calls and tells you what when well and what didn't

AI Insights

Dashboard

Learns how to be better from every call

418

Total Calls

0

Today

0

Tickets Created

Healthy

API Status

Recent Calls

Can tell you if a caller is upset, happy or neutral

Sentiment

Time	From	Company	Duration	Action	Ticket	Sentiment	
Apr 14 11:31 AM			33s	transferred_to_department		Neutral	Details
Apr 14 10:29 AM			41s	transferred_to_department		Neutral	Details
Apr 8 10:51 AM	Liam Holmes	MIS Solutions, Inc.	1m 49s	ticket_created	#1980726	Positive	Details
Apr 7 6:14 PM	Liam Holmes	MIS Solutions, Inc.	1m 36s	transferred_to_person	#1980554	Positive	Details
Apr 7 6:06 PM	Liam Holmes	MIS Solutions, Inc.	2m 5s	ticket_created	#1980553	Positive	Details
Apr 7 6:00 PM	Liam Holmes	MIS Solutions, Inc.	1m 59s	ticket_created	#1980552	Positive	Details
Apr 7 5:55 PM	Liam Holmes	MIS Solutions, Inc.	16s	other		Neutral	Details
Apr 7 5:45 PM	Liam Holmes	MIS Solutions, Inc.	1m 37s	ticket_created	#1980545	Neutral	Details
Apr 7 5:41 PM	Liam Holmes	MIS Solutions, Inc.	17s	ticket_created		Neutral	Details

AI Voice Bot Interface – Call Detail

Transcript ?

Full call transcript; agent said this, user said that...

Agent: Hi Lliam, this is Rosie - how can I help you today?
User: Hi, Rosie. I need to open a ticket.
Agent: I have you as Lliam Holmes at Em-eye-ess Solutions, Inc. Is that correct?
User: Yes.
Agent: What is this about - email, internet, printer, computer, software, phone system, or something else?
User: Hardware.
Agent: Is this stopping you from working completely, causing a significant disruption, or is it a minor issue?
User: Minor issue.
Agent: In one sentence, what's going wrong?
User: It appears that I have broken the flux capacitor.
Agent: Here's what I have: hardware issue - flux capacitor broken - minor priority. Should I submit this?
User: Yes.
Agent: Caller confirmed all
Agent: Your ticket has been created—ticket number 1980726. Our team will respond within 2 business days. Would you like me to check if an engineer is available to help you right now, or would you prefer to be transferred to a service coordinator?
User: Can somebody help me?
Agent: Caller would like to speak with
Agent: Chad Cartee is available to help you right now. Shall I connect you?
User: Yes, please.
Agent: One moment while I connect you to Chad Cartee.
Agent: Hi, this is the Em-eye-ess
Transfer Target: Am I asked the chefs
Agent: Solutions automated assistant. I have Lliam Holmes with Em-eye-ess Solutions, Inc. on the line regarding ticket 1980726 about a minor hardware issue specifically a broken flux capacitor. Connecting them now.

Recording ?

Copy of the call recording

▶ 0:00 / 1:49



AI Voice Bot Interface – AI Learning

AI Call Review & Learning ? ▶

327

Calls Reviewed ?

1601

Insights ?

677

Pending ?

1109

Applied ?

951

Auto-Applied ?

63

Avg Quality ?

Last run: Apr 15, 2026 3:59 AM

completed

Run Now

Review Runs ?

Insights ? 1601

Recommendations ? 677

Applied History ?

All Types



Trust but verify - Required human approval to implement changes

Type	Target	Current	Proposed	Confidence	Occurrences	Actions
prompt	transfer	Uses filler words 'Um' and 'Uh' when explaining transfer failures	Use confident, professional language like 'I'm experiencing a technical difficulty with transfers right now'	60%	1	<button>Approve</button> <button>Reject</button>
prompt	transfer	Simply states transfer didn't go through without explanation or alternatives	Provide specific error information, offer alternative contact methods (direct phone number, email), or collect caller information for callback	60%	1	<button>Approve</button> <button>Reject</button>
keyword	service tech coordinator	—	service tech coordinator	70%	1	<button>Approve</button> <button>Reject</button>
prompt	identification	Agent greets caller by name 'Wendy' without verifying identity	Ask caller to confirm their identity or company before using their name	60%	1	<button>Approve</button> <button>Reject</button>



Secure Chat

Consumer AI feel. Enterprise controls.

WITHOUT GUARDRAILS

Shadow IT

No policy

Sensitive data
risk

No audit

WITH SECURE CHAT

Encrypted

DLP + PII/PHI

Malware scan

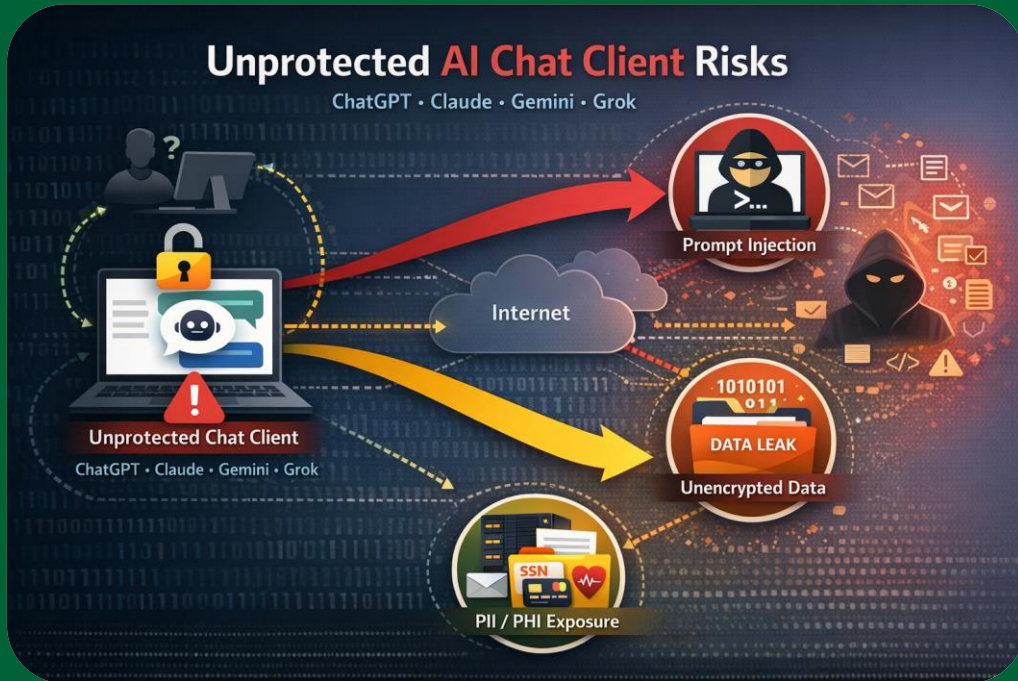
Audit trail

Knowledgebase

Entra ID



Secure Chat – The Problem



- Unencrypted text means anyone can read your chats
- Users can enter whatever they want –
 - credit cards
 - bank accounts
 - birthdays
 - social security numbers
- Malware can be embedded into skills and plugins.
- Ransomware can be embedded in file uploads
- Connecting Office 365 and back end servers can lead to “overprivileged” access.

Secure Chat – The Solution



- End to end encryption – private conversation
- PHI / PII protection
- Data Loss Protection (DLP) – files containing sensitive data can not be attached to a chat.
- Files are scanned for Ransomware and malware before being uploaded.
- Office 365 Entra ID integration
- Duo or Microsoft MFA Protection
- Users can share chats internally

MIS AI Bot Implementations

Call Auditor – listens to every support phone call

- Scores what went well and what could have been improved.
- Looks for systemic process failures – when an engineer constantly forgets to do something
- Provides user-level and company-level customer service mentoring

Ticket Eliminator – deletes false or garbage tickets (spam) from our ticketing system

Microsoft Teams “Mr. Wizard”

- Allows engineers to ask for help troubleshooting an issue.
- Ensures that next steps are clearly identified in each ticket
- Notifies the Service Coordinator if a ticket is taking longer than expected to resolve.

Customer AI Bot Implementations

- Sales Commission Reconciliation Bot
- Project Management Bot
- Email Bot for SAAS company
- Website Chat Bot

Turning AI into operating capability

Start with guardrails. Scale with iteration.



The goal is not
more prompts. It is
more capability.

Final Thought about Operating Capability



Companies that are not increasing their operating capabilities will soon be left behind – and they won't be able to catch up.