FRAMEWORK | IT

The Business Leader's Complete AI Playbook

Your guide to safe, governed, productive AI adoption

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CHAPTER 01

Executive Summary

AI is already here. Your employees are already using it, whether you know it or not.

According to Microsoft research, 75% of organizations have employees using AI tools without formal approval, oversight, or governance. They're pasting client data into free chatbots, running financial models through unvetted platforms, and making decisions based on outputs that nobody is reviewing. The tools are powerful. The risk is real. And the gap between "using AI" and "using AI well" is where most organizations get stuck.

This playbook exists to close that gap.

WHAT YOU'LL LEARN

- ✓ What AI is and what it can do for your business today
- ✓ How organizations in professional services verticals are using AI to reclaim hours and reduce errors
- ✓ The security and governance questions you need to answer before scaling AI
- ✓ A clear, phased roadmap for AI adoption: the Crawl-Walk-Run Framework
- ✓ How Managed Framework AI provides the platform, methodology, and partner to execute
- ✓ A 45-item governance readiness checklist to assess where you stand

Over the following chapters, you'll learn what AI actually is and what it can do for your business today, not in some theoretical future. You'll see how organizations in legal, consulting, financial services, insurance, accounting, and other professional services verticals are using AI to reclaim hours, reduce errors, and build competitive advantages that compound over time. You'll understand the security and governance questions you need to answer before scaling AI adoption, and you'll walk away with a clear, phased roadmap for getting there.

This playbook is a business leader's guide to making AI work inside your organization: safely, with structure, and with measurable results.

Framework IT has spent more than 16 years managing technology for small and midsized businesses across the United States. We've watched every major technology shift from cloud migration to cybersecurity to unified communications. AI is the next one, and it's moving faster than anything that came before it. We built Managed Framework AI because we saw our clients struggling with the same set of problems: they knew AI mattered, but they didn't know where to start, who to trust, or how to do it without creating new risks.

This playbook gives you the starting point. Managed Framework AI gives you the partner to execute it.

CHAPTER 02

About the Author

Adam Barney

President and Managing Partner, Framework IT

Adam Barney is President and Managing Partner of Framework IT, a premier managed IT and telecommunications firm based in Chicago. With more than 15 years of executive experience in managed services and telecommunications, Adam leads with a core philosophy that technology should be user-friendly and approachable, empowering businesses to thrive in their respective industries. He holds a Bachelor of Science in Finance and Business Administration from the University of Illinois Urbana-Champaign, where he graduated Summa Cum Laude.

Since assuming the presidency in April 2022, Adam has led a team of over 40 professionals spanning sales, information technology, operations, marketing, human resources, and fulfillment. Under his leadership, Framework IT remains committed to its inverted-pyramid approach, which ensures clients' needs and aspirations are always the company's top priority.

> *"People say we're a technology company. I think we're a customer service organization first and foremost that serves companies' technology needs."*

In recent years, Adam has spearheaded the adoption of artificial intelligence in Framework IT's internal operations and service delivery, positioning the company at the forefront of AI-driven IT management. He has pioneered the launch of Managed Framework AI to help clients implement AI and AI-based automation in their own businesses. Adam is also a founding member of The Forge AI Alliance of MSPs, an alliance of managed service providers working to accelerate the adoption of AI and automation. He is a frequent speaker and panelist on AI adoption at industry events, sharing practical insights on how small and midsized businesses can implement AI safely and effectively.

Under Adam's leadership, Framework IT earned a spot on the **Inc. 500 Fastest Growing Private Companies in America** twice and the **Inc. 5000** list at least 5 times. The company ranked as one of the **Best and Brightest Places to Work in Chicago** for 5 consecutive years and in the **Nation** twice. Framework IT has maintained a BBB complaint-free record since 2008. Adam's insights have appeared in the **Harvard Business Review**, the **Washington Post**, and **Fox 32 Chicago**.

CHAPTER 03

AI Is Here. The Question Is How You Use It.

Understanding the technology that's changing how businesses operate

What Is AI, Really?

Strip away the hype and AI is a category of software that can process language, recognize patterns, generate content, and make decisions based on data. The most visible form of AI today is the Large Language Model (LLM), the technology behind tools like ChatGPT, Claude, and Gemini. These models were trained on massive amounts of text and use statistical pattern recognition to predict what comes next in a sequence. In practice, that means they can understand context, follow complex instructions, and produce human-quality writing, analysis, and code.

But AI goes well beyond a chatbot. Modern AI platforms combine multiple capabilities into a single environment:

Conversational AI (Chat). Ask questions, draft documents, summarize reports, brainstorm ideas, analyze data, and get research-backed answers in seconds. This is the capability most people encounter first, and it's immediately useful.

Workflow Automation. Connect AI to your existing business systems (your CRM, email, project management tools, file storage, and more) and build automated processes that run on their own. No coding required. A visual, drag-and-drop builder lets anyone design multi-step automations.

AI Agents. Purpose-built AI assistants trained for specific tasks: writing SOPs, analyzing financial statements, coaching sales calls, generating marketing content, responding to reviews, and dozens more. Agents go beyond chat by following structured processes with built-in guardrails.

AI Phone Agents. Voice-based AI that handles inbound and outbound calls, understands natural language, routes calls intelligently, and integrates with your business systems. Available around the clock.

The Human-in-the-Loop Principle

One of the most important concepts to understand about AI is that it is a tool designed to augment human judgment, not replace it. The best results come from a model called human-in-the-loop, where AI handles the heavy lifting and a human makes the final call.

Not every AI task needs the same level of oversight. A useful framework for deciding when and how much human review to apply:

Light touch. Low-risk, repetitive tasks like summarizing meeting notes, drafting internal emails, or formatting data can often run with minimal review. Spot-check periodically, but these are good candidates for high automation.

Review before action. Tasks that involve client-facing content, financial analysis, or operational decisions should always be reviewed by a qualified person before acting on the output. AI does the first draft; a human verifies accuracy and applies judgment.

Human owns the outcome. Legal filings, compliance documentation, medical or safety-related decisions, and anything with significant financial or reputational consequences should treat AI as a research assistant only. A human owns the final product.

The organizations that get the most value from AI are the ones that build review habits into their workflows from day 1, not as an afterthought once something goes wrong.

Why This Matters Now

The window for competitive advantage is open, but it's narrowing. Organizations that build AI capability now will compound those gains over the next 2 to 3 years. Those that wait will face a steeper learning curve, higher costs, and competitors who have already baked AI into their operations.

Consider the math. If AI saves a single employee 30 minutes per day on routine tasks, that's 10 hours per month, or 120 hours per year. Multiply that across a team of 20, and you're looking at 2,400 hours recovered annually. At a blended cost of $50 per hour, that's $120,000 in productivity gains from a single use case. Now multiply that across 5 or 10 use cases. The numbers get serious fast.

The Real Risk: Unmanaged AI

The biggest threat to your organization comes from employees already using AI without your knowledge, approval, or oversight.

This is called Shadow AI, and it's happening in most organizations today. Employees are copying client lists into free chatbots. Finance teams are running projections through consumer tools with no data protection guarantees. Marketing is generating content with platforms that may train on your proprietary information.

The intentions are good. The risk is enormous.

75%	78%	$1.24M	221
using AI without org approval	have zero AI policies or controls	avg breach cost with unmanaged AI	AI queries per day avg per SMB on free tools

Managed Framework AI helps organizations move from shadow AI and uncertainty to safe, governed, productive AI adoption, replacing ungoverned, unmanaged access with a structured, partner-led program. Same productivity. Zero exposure.

CHAPTER 04

What AI Can Do for Your Business

Practical applications across every department

AI is a set of tools your teams can use today, for work they're already doing, to get better results in less time. The key is knowing where to point it.

Below is a practical look at how AI applies across core business functions, with specific examples drawn from the types of professional services organizations that benefit most: legal, consulting, financial services, insurance, accounting, architecture, and engineering firms.

Sales and Business Development

Sales teams spend a disproportionate amount of time on activities that aren't selling: researching prospects, writing follow-up emails, updating CRM records, preparing for calls, and building proposals. AI collapses the time spent on all of these.

Prospect research. AI agents can compile verified business intelligence on target companies and key contacts in minutes, including company details, leadership profiles, recent news, and relevant industry context. What used to take an hour of manual research now takes seconds.

Call preparation and coaching. Before a meeting, AI can pull together account context, attendee backgrounds, and a suggested agenda. After the call, it can analyze transcripts, score performance against proven sales methodologies, identify coaching opportunities, and generate follow-up action items.

Outreach and content. Draft personalized cold emails, LinkedIn messages, proposals, and follow-up sequences grounded in actual prospect research, not generic templates.

Pipeline management. AI can analyze your pipeline for at-risk deals, stale opportunities, and forecast accuracy issues, surfacing the problems that are easy to miss when you're inside the data every day.

Marketing

Marketing teams are content engines. AI accelerates every stage of the content lifecycle, from ideation to distribution.

Content creation. Blog posts, social media content, email newsletters, landing pages, case studies, and press releases. AI can produce 80%-complete drafts that save 2 to 3 hours per piece while maintaining your brand voice and SEO best practices.

Social media. Generate LinkedIn posts, Twitter/X content, and platform-specific copy optimized for engagement, all grounded in your actual expertise rather than generic filler.

Campaign planning. Build full campaign briefs with objectives, audience segmentation, messaging, channel strategy, content calendars, and success metrics.

Review management. Draft professional, search-optimized responses to customer reviews that protect your brand reputation and incorporate relevant keywords.

Finance and Accounting

Finance teams deal with repetitive, high-precision work. AI handles the repetitive parts so your team can focus on the high-precision judgment calls.

Financial analysis. Upload a Profit and Loss statement and get expert-level variance analysis, trend identification, anomaly detection, and scenario modeling. AI can process financial data with the rigor of a seasoned analyst.

Forecasting. Build P&L; forecasts using multiple methodologies (trend, seasonal, driver-based) with confidence scoring and automatic health checks.

Journal entries and reconciliation. Prepare entries with proper debits, credits, and supporting documentation. Reconcile accounts by comparing GL balances to subledgers, bank statements, or third-party data.

Audit preparation. Generate SOX sample selections, testing workpapers, and control assessments with defensible methodology.

Human Resources

HR teams manage high-volume, high-stakes processes where consistency and quality matter enormously. AI brings both.

Hiring. Create inclusive, effective job descriptions. Analyze candidate resumes against job requirements. Build structured interview plans with competency-based questions and scoring rubrics. Compare multiple candidates side by side.

Onboarding. Generate comprehensive onboarding checklists, first-week plans, and 30/60/90-day goal frameworks tailored to each role.

Performance management. Structure performance reviews with self-assessment templates, manager review frameworks, and calibration preparation. Build professional development plans aligned to business priorities.

Policy and compliance. Answer employee questions about company policies using a grounded, citation-backed knowledge base. Draft and refine HR policies that align with current regulations.

Operations and Project Management

Operations teams are the backbone of execution. AI helps them document, plan, and improve the processes that keep the business running.

SOP creation. Turn tribal knowledge into professional, audit-ready Standard Operating Procedures through structured interviews. What used to take days now takes hours.

Project planning. Build comprehensive project management plans with work breakdown structures, RACI charts, risk registers, and milestone timelines.

Process documentation. Create flowcharts, RACI matrices, and process maps that capture how work actually gets done, including the exceptions and edge cases that live in people's heads.

Change management. Develop change management and communication plans for strategic shifts, with risk assessment, stakeholder mapping, and implementation timelines.

Legal and Compliance

Legal work requires precision, thoroughness, and defensible methodology. AI handles the research and drafting burden so attorneys and compliance professionals can focus on judgment and strategy.

Legal research. Conduct preliminary legal research across publicly accessible sources with confidence scoring, multi-jurisdictional coverage, and structured citation verification.

Contract review. Analyze agreements against your negotiation playbook, flag deviations, generate redlines, and provide business impact analysis.

Compliance. Run compliance checks against applicable regulations, identify required approvals, and surface risk areas before they become problems.

Vendor management. Assess vendors with structured evaluation frameworks, risk-based research, and side-by-side comparison analysis.

Executive and Strategy

Leaders need synthesized information and structured thinking tools. AI provides both without the overhead of scheduling another meeting or hiring another consultant.

Scenario planning. Model high-uncertainty strategic decisions with evidence-based probability assessments, expected value analysis, and strategy portfolios.

Investor and board communications. Generate professional update memos through structured interviews, covering KPIs, metrics, and narrative context.

ROI analysis. Quantify the business case for any initiative with formal cost-benefit analysis, risk assessment, and implementation complexity scoring.

Measuring AI ROI

One of the most common questions leaders ask is "How do we know AI is actually working?" The answer is measurement, but the right metrics depend on the type of use case. Not every AI win shows up the same way.

Here are the 4 categories of AI ROI and how to measure each one:

Time savings. The most straightforward metric. Measure how long a task takes before and after AI. If a proposal that took 3 hours now takes 45 minutes, the savings are concrete and easy to calculate across your team.

Error reduction. AI can reduce errors in data entry, compliance checks, contract review, and financial analysis. Track error rates before and after, or count the number of issues caught by AI that would have been missed.

Revenue acceleration. Some AI use cases generate revenue directly: faster proposal turnaround, better lead qualification, personalized outreach at scale. These are harder to isolate but often the highest-value wins.

Cost avoidance. AI can replace expensive tools, reduce the need for outsourced services, or prevent costly mistakes. A single avoided compliance violation or data breach can justify years of AI investment.

Start simple. Pick one use case, measure the baseline, deploy AI, and measure again after 30 days. That first data point is worth more than any theoretical projection, and it gives you the evidence to expand.

CHAPTER 05

AI Agents: Your Digital Workforce

Beyond the chatbot

Most people's first experience with AI is a chatbot: you type a question, you get an answer. That's useful, but it barely scratches the surface. The real power of enterprise AI lives in agents and automated workflows.

An AI agent is a purpose-built assistant designed for a specific task or process. Unlike a general chatbot, an agent comes pre-loaded with instructions, structure, guardrails, and domain expertise. It knows what questions to ask, what format to follow, what mistakes to watch for, and when to stop and ask for human input.

Think of the difference between handing someone a blank notepad and handing them a detailed checklist with step-by-step instructions. Both can get the job done. Only one does it consistently, every time, without missing steps.

What Makes an Agent Different from a Chat?

Structure. An agent follows a defined process. A sales coaching agent, for example, doesn't just "analyze a call." It scores performance across specific categories, applies recognized sales methodologies, calculates quantitative conversation metrics, and produces a downloadable coaching report with trend tracking across multiple calls.

Guardrails. Agents include built-in quality controls. A legal research agent will flag confidence levels, cite sources, and explicitly note when it's operating outside its reliable knowledge. An HR policy agent will only answer from the connected knowledge base and will refuse to speculate.

Consistency. When 10 different people use the same agent, they get consistently structured outputs. The quality doesn't depend on who wrote the prompt or how experienced they are with AI.

Integration. Agents can connect to your business systems. They can read from your CRM, write to your project management tools, pull data from your file storage, and trigger actions in other applications, all without manual copy-and-paste.

Workflows: Agents That Run Themselves

If an agent is a skilled assistant, a workflow is a skilled assistant that works on autopilot. Workflows connect multiple steps into automated processes that run on a schedule, respond to triggers, or execute on demand.

A workflow that takes a new client onboarding form submission, creates the client record in your project management system, assigns onboarding tasks to the right team members, and sends a personalized welcome email.

A workflow that pulls weekly sales data from your CRM, generates a performance summary, and posts it to your team's Slack channel every Monday morning.

A workflow that processes incoming resumes, scores them against the job description, and surfaces the top candidates for human review.

You build workflows using a visual, drag-and-drop interface. No coding required. You describe what you want, connect the data sources, define the steps, and let it run.

The Framework IT Standard Library: 100+ Ready-to-Use Agents and Workflows

When you deploy Managed Framework AI, you don't start from scratch. Framework IT has built a library of over 100 agents and workflows, purpose-built for the types of work our clients do every day. These are tools we've designed, tested, and refined based on years of working with small and midsized businesses.

The library spans every major business function:

Sales and business development: Prospect research, call coaching and assessment, pipeline analysis, outreach drafting, sales plan architecture, funnel optimization, and ROI calculators.

Marketing: Blog writing, LinkedIn and social media content, campaign planning, SEO optimization, review response generation, webinar campaign building, and brand-compliant marketing image creation.

Finance and accounting: P&L; analysis, forecasting, journal entry preparation, variance analysis, and break-even ROI calculation.

Human resources: Job description creation, candidate evaluation, interview preparation, onboarding checklists, performance reviews, professional development plans, and performance improvement plans.

Operations: SOP writing, project planning, knowledge base architecture, change management, vendor assessment, RFP creation and evaluation, and scenario planning.

Legal and compliance: Legal research, contract review, NDA triage, compliance checks, and vendor agreement management.

Productivity and IT: Prompt coaching, SMART goal setting, brainstorming, deep research, presentation creation, Microsoft Office expertise, and AI platform help. This category also includes dedicated agents that help you build new workflows and agents without needing to become a prompt engineering expert. They guide you through the process step by step.

> ***These 100+ tools are available on day 1 of your deployment. They're in addition to the 500+ community-built apps already available on the platform. Your team can start getting value immediately while you build toward custom solutions tailored to your specific processes.***

CHAPTER 06

The Major AI Models and Providers

One platform, 67 models

One of the most common mistakes organizations make when adopting AI is locking themselves into a single provider. They sign up for ChatGPT and assume they've "covered AI." In reality, different AI models have different strengths, and the landscape changes fast.

Managed Framework AI, powered by Hatz AI, gives your organization access to 67 Large Language Models (LLMs) from the leading AI providers, all through a single secure platform. No separate subscriptions. No vendor lock-in. When a new model launches, it's added to the platform automatically.

The Major Providers

OpenAI builds the GPT family of models, including GPT-5, GPT-5.1, GPT-5.2, and GPT-5.4. These are the most widely recognized AI models and excel at general-purpose tasks including writing, analysis, coding, and creative work. GPT-5 Nano offers a cost-efficient option for high-volume, simpler tasks.

Anthropic builds the Claude family, including Claude 4.5 Sonnet, Claude 4 Opus, Claude 4.5 Opus, Claude Opus 4.6, and Claude Sonnet 4.6. Claude models are known for strong reasoning, nuanced analysis, and careful handling of complex instructions. They're particularly well-suited for long-form content, detailed research, and tasks that require following multi-step processes.

Google builds the Gemini family, including Gemini 2.5 Pro, Gemini 3 Pro, Gemini 3.1 Pro Preview, and Gemini Flash 3. Google's models bring strong multi-modal capabilities and tight integration with Google's search and data infrastructure. Gemini 3.1 Flash is an excellent cost-efficient option.

Meta builds the Llama family of open-source models, including Llama 4 Maverick and Llama 4 Scout. These models offer strong performance at lower cost.

xAI builds Grok 3 and Grok 4, high-capability models with strong reasoning and conversational abilities.

Amazon offers Nova Micro and Nova Lite, cost-efficient models well-suited for high-volume, routine tasks where speed matters more than peak capability.

Specialized models include advanced reasoning models designed for mathematical problems, coding challenges, and multi-step logical reasoning, as well as cost-optimized models ideal for high-volume tasks where speed matters more than peak capability.

How to Choose the Right Model

You don't need to become an AI model expert. The practical guidance is straightforward:

High-stakes work: Use frontier models from OpenAI, Anthropic, or Google for client deliverables, strategic analysis, and complex reasoning. They cost more per query but produce the highest quality output.

High-volume work: Use value models from Amazon, Meta, or the faster tiers from Google and OpenAI for routine drafting, simple Q&A;, and data formatting. They're significantly cheaper and fast.

Complex reasoning: Use reasoning models for tasks involving complex math, multi-step logic, or structured analysis. These models show their work and produce more reliable results on challenging problems.

Image generation: The platform includes Nano Banana (powered by Gemini) for creating custom images from text descriptions, in both standard and premium quality tiers. No design skills or stock photo subscriptions required.

A good rule of thumb: start with a frontier model to get the quality right, then test whether a cheaper model can produce comparable results. Often it can, especially for simpler tasks.

The Power of Model Flexibility

This is one of the most underappreciated advantages of a multi-model platform. When your agents and workflows are built on a platform that supports dozens of models, you can swap the underlying model with a single click. That means your solutions are never locked to a specific vendor or a specific moment in time.

When a new model launches that is faster, cheaper, or better at a specific task, you do not need to rebuild anything. You do not need to obtain a new subscription, migrate your data, or retrain your team on a new interface. You change the model selection and your existing agent or workflow immediately runs on the new model.

This matters because the AI landscape is evolving rapidly. The best model for a given task today may not be the best model 6 months from now. Organizations that lock themselves into a single-vendor platform are betting that one provider will always be the best at everything. That has never been true in technology, and it is not true in AI.

CHAPTER 07

Prompt Engineering: Getting Better Results from AI

The skill that multiplies everything else

AI is only as good as the instructions you give it. A vague prompt produces a vague answer. A specific, well-structured prompt produces output that's genuinely useful, sometimes startlingly so.

Prompt engineering is the practice of writing effective instructions for AI, and it's a communication skill more than a technical one. A few core principles go a long way.

The Fundamentals

Be specific about what you want. Instead of "Write me an email," try "Write a 3-paragraph follow-up email to a prospect who attended our webinar on cybersecurity. The tone should be professional but conversational. Include a specific reference to the webinar topic and end with a clear call to action to schedule a 15-minute call."

Assign a role. AI performs better when you tell it who to be. "You are a senior financial analyst with 15 years of experience in mid-market professional services firms" produces dramatically different output than a bare request to "analyze this data."

Provide examples. If you want output in a specific format or style, show the AI what good looks like. Paste in a previous email you liked, a report structure you want replicated, or a writing sample that matches your brand voice. AI is excellent at pattern matching.

Break complex tasks into steps. Instead of asking AI to "write a marketing plan," walk it through the process: "First, analyze the target audience. Then identify 3 key messages. Then outline the channel strategy. Then create a content calendar." Step-by-step instructions produce step-by-step quality.

Iterate, don't start over. Your first prompt rarely produces a perfect result. That's normal. Refine the output by giving follow-up instructions: "Make the tone more direct." "Add a section on budget." "Shorten each paragraph to 2 sentences max." Iteration is faster than starting from scratch.

Advanced Techniques

Chain of thought prompting. Ask AI to show its reasoning before giving a final answer. "Walk me through your analysis step by step before providing your recommendation." This produces more thoughtful, accurate outputs and makes it easier to spot errors.

Few-shot prompting. Provide 2 or 3 examples of the input-output pattern you want, then ask AI to follow the pattern with new input. Especially powerful for standardizing formats across your team.

Constraint-based prompting. Tell AI what not to do. "Do not use jargon. Do not exceed 200 words. Do not include unverifiable claims." Constraints sharpen the output and prevent common problems.

Template prompts. Build reusable prompt templates for tasks your team performs regularly. A standardized prompt for writing client status updates, drafting proposals, or summarizing meeting notes ensures consistent quality across the team.

Hallucinations and AI Accuracy

One of the most important things to understand about AI is that it can be confidently wrong. AI models sometimes generate information that sounds plausible but is factually incorrect. The industry calls these hallucinations, and they happen because the model is predicting what text should come next based on patterns, not consulting a verified database of facts.

Hallucinations are more likely when you ask AI about very specific facts (names, dates, statistics, legal citations), niche topics with limited training data, or questions that require real-time information the model does not have. They are less likely when you give the model reference material to work from, ask it to stick to the provided context, or use it for tasks like summarization, drafting, and analysis where the source material is right there in the conversation.

Reducing the Risk

Ground your prompts in source material. When you paste a document and ask AI to summarize or analyze it, the model works from your source material rather than generating facts from memory. This dramatically reduces hallucination risk.

Ask the model to flag uncertainty. Add a line like "If you are unsure about any fact, say so rather than guessing" to your prompts. Most models will flag uncertainty when explicitly asked to.

Request sources and reasoning. For high-stakes outputs, ask AI to provide sources or reasoning for key claims. If it cannot point to where it got the information, treat the claim with skepticism.

Always verify critical facts. The most effective hallucination prevention is a human who reads the output critically. AI should draft; humans should verify. This is especially important for anything client-facing, financial, or legally significant.

Evaluating AI Output Quality

Knowing how to write a good prompt is half the skill. The other half is knowing how to evaluate whether the output is actually good. As AI becomes a regular part of your team's workflow, building a habit of critical review is essential.

When reviewing AI-generated content, ask yourself these questions:

Is it factually accurate? Does the output contain any claims that you cannot verify? Any statistics that seem too perfect? Any names, dates, or references that could be fabricated? If you are not sure, check.

Is it appropriately detailed? Is the output at the right depth for the audience? Does it include the right details without unnecessary padding? AI tends to be thorough, sometimes too thorough. Edit for relevance.

Does it match your voice? Does it match the tone, terminology, and style your organization uses? AI can mimic many voices, but it defaults to a generic professional tone unless you direct it otherwise.

Is the reasoning sound? If AI is analyzing data, performing calculations, or drawing conclusions, trace the logic. Does the reasoning hold up? Would you reach the same conclusion from the same inputs?

Would you sign your name to it? Would you be comfortable putting your name on this and sending it to a client, your board, or a regulator? If not, it needs more work, either from AI with a better prompt or from a human editor.

The goal is not perfection on the first try. The goal is an 80% draft that a knowledgeable human can refine in a fraction of the time it would take to create from scratch. That is where the real productivity gain lives.

Prompt Libraries and Shared Resources

One of the most underused features of enterprise AI platforms is the ability to save and share prompts across your organization. When someone on your team writes a prompt that produces great results, it shouldn't live in their head. Save it, share it, and let the whole team benefit.

Managed Framework AI supports shared prompt libraries and prompt templates, so your best prompts become organizational assets rather than individual tricks.

Understanding Context Windows

Every AI model has a context window, which is the maximum amount of text it can process in a single conversation. Think of it as the model's working memory. Everything you type, everything it responds with, and any documents or data you paste in all count toward that limit.

Context windows have gotten dramatically larger over the past 2 years. Early models could handle a few pages of text. Today's leading models can process the equivalent of a 200-page book in a single conversation. But bigger does not always mean better.

Why Context Window Size Matters

When a conversation or document gets long enough to consume most of the context window, the quality of AI outputs starts to degrade. The model may lose track of instructions you gave earlier, miss important details buried in the middle of a long document, or produce responses that repeat itself or contradict something it said earlier. Research shows that models tend to pay the most attention to what came first and what came last, with information in the middle getting less focus.

Tips for Working Within Context Limits

Start new conversations for new topics. If you have a long conversation going and the responses start getting less focused, start a new chat and restate your key instructions. A fresh context produces sharper results.

Break large tasks into smaller pieces. Instead of pasting a 50-page document and asking a vague question, break it into sections and ask specific questions about each one. You will get better, more precise answers.

Front-load your most important instructions. If you have a system prompt or set of standing instructions, put them at the very beginning of the conversation, not buried after 10 rounds of back and forth.

Trim unnecessary content before pasting. If you are pasting a long report, remove the parts that are not relevant to your question. Less noise means more focus on the content that matters.

Use the right model for the job. Higher-end models like GPT-5 and Claude Opus 4.6 generally handle long contexts more reliably than smaller, faster models. If your task involves large documents, choosing the right model matters.

CHAPTER 08

AI Security, Privacy, and Governance

Protecting your organization in the age of AI

Security is the foundation everything else sits on. Every other benefit of AI, the productivity gains, the cost savings, the competitive advantages, means nothing if your data is exposed, your compliance posture is compromised, or your organization faces a breach because someone pasted client information into an unsecured tool.

The Shadow AI Problem

Shadow AI is probably already happening in your organization: employees using AI tools like ChatGPT, Gemini, Claude, and Copilot without your knowledge, approval, or oversight.

The risk has nothing to do with employee curiosity. The risk is what they're putting into those tools. When someone pastes a customer list, a financial model, or a proprietary strategy into a free AI tool, that data may be used to train the model. There's no visibility, no audit trail, and no legal recourse.

When your cyber insurance carrier or auditor asks how your organization governs AI, you need a documented, auditable answer. A policy, a platform, and a paper trail.

The 5 Pillars of an AI Governance Framework

1. Policy. A written AI use policy defining approved tools, prohibited data types, and acceptable use cases. Without a policy, you can't enforce your position or defend it legally. It doesn't need to be a 50-page document. It needs to exist, be communicated, and be enforceable.

2. Access Control. Role-based permissions ensuring the right people have access to the right AI capabilities. An intern shouldn't have the same AI access as your CFO. A well-designed permission structure prevents confusion, limits risk, and ensures appropriate guardrails from day 1.

3. Data Protection. Contractual zero-data-training guarantees and Data Processing Agreements (DPAs) with every AI provider. If it isn't in writing, it doesn't exist. Your platform should guarantee that your data is never used to train any public AI model, full stop.

4. Auditability. Full, searchable logs of who used AI, what prompts were entered, and what was returned. This is required by most compliance frameworks and increasingly by cyber insurers. If you can't produce an AI governance report when asked, you have a gap.

5. Training. Ongoing education so your policies are understood and followed, not quietly worked around by well-meaning employees. A policy memo doesn't count. Real training means structured onboarding, recurring support sessions, and a culture where people know the rules and the reasons behind them.

The Security Architecture Behind Managed Framework AI

Managed Framework AI is built on Hatz AI, a platform that has achieved SOC 2 Type I, SOC 2 Type II, and SOC 3 certifications. Independent auditors have verified enterprise-grade security controls across infrastructure, application security, access management, encryption, monitoring, and incident response.

Your data is never used for AI model training. Managed Framework AI has contractual agreements with all AI model providers (OpenAI, Anthropic, Google, Meta, xAI, Amazon, and others) that explicitly prohibit training on your data. When you submit a prompt, your data is processed and returned. It isn't stored by the provider. It can't improve their models or appear in responses to other users. This is a contractual guarantee.

Encryption. All stored data encrypted using AES-256 encryption (the same standard used by financial institutions and government agencies). All data in transit uses TLS 1.2+ encryption. Encryption keys managed separately and rotated regularly.

Data isolation. Each organization's data is logically isolated. Your data is never commingled with other clients' data. Administrators have full visibility into usage, workflows, credit consumption, and audit trails.

Compliance. The platform supports compliance with GDPR, CCPA, HIPAA (with Business Associate Agreement), and SOX. DPAs and BAAs are available upon request.

24/7 monitoring. Security monitoring with intrusion detection and anomaly detection, backed by an incident response plan with immediate containment, notification, root cause analysis, and remediation. Regular third-party penetration testing.

Managed Framework AI is SOC 2 Type I and II certified, SOC 3 certified, and HIPAA and GDPR ready. It includes contractual zero-data-training guarantees, and Business Associate Agreements and Data Processing Agreements are available for every deployment.

CHAPTER 09

Your AI Adoption Roadmap

The Crawl-Walk-Run Framework: from zero to measurable ROI

The organizations that succeed with AI follow a deliberate methodology, one that meets teams where they are, builds confidence through early wins, and progressively expands capability.

Gartner research shows 80% of AI licenses go unused without structured adoption support. The Crawl-Walk-Run framework makes sure your investment produces results, not shelfware.

Why Crawl-Walk-Run?

Reduces risk. Resolve governance and security questions before AI reaches a broad audience, not after something goes wrong.

Builds confidence. Give people time to learn the basics before asking them to do something complex. They adopt tools more readily and with greater enthusiasm.

Delivers measurable wins early. Target a high-value, low-complexity pilot workflow in the Walk phase to create tangible proof of value that funds further investment.

Creates internal expertise. Each phase develops champions, power users, and eventually an internal community of practice, so the organization is never solely dependent on external help.

Scales sustainably. By the time you reach the Run phase, the governance, cultural habits, and technical skills are already in place to support broader, more ambitious AI initiatives.

Crawl-Walk-Run is about going smart, not slow. The fastest path to transformational AI outcomes runs through a foundation of trust, capability, and organizational readiness.

The People Side of AI Adoption

Every successful technology rollout is a change management exercise. AI is no different, and in some ways it is harder because it touches how people think about their own expertise and value.

Expect a spectrum of reactions. Some employees will be enthusiastic early adopters who want to automate everything by Friday. Others will be skeptical, worried that AI is a threat to their role or a tool that will create more work than it saves. Both reactions are normal and both need to be managed.

Win over the skeptics with relevance, not hype. Skeptics often become the strongest advocates once they see AI solve a problem they personally care about. Do not try to convince them with theory. Give them a use case that saves them time on a task they find tedious. Let the tool speak for itself.

Channel the enthusiasts. Enthusiastic early adopters can accidentally create risk by moving faster than governance allows. Channel their energy into the AI Champion role where they can lead by example within established guardrails.

Make it participatory. If people feel like AI is something being done to them rather than something being built with them, adoption will stall. Involve department leads early. Let teams nominate their own use cases. Make adoption feel like an opportunity, not a mandate.

Celebrate wins publicly. When someone on the team saves 3 hours a week using AI, share that story widely. Visible wins create social proof and make AI feel accessible rather than abstract.

Data Readiness: Garbage In, Garbage Out

AI amplifies whatever it works with. If your SOPs are well-written and current, AI will produce great results when it references them. If your CRM data is messy, your templates are outdated, or your documentation is scattered across 5 different platforms, AI will amplify those problems too.

You do not need perfect data to start. But you should be honest about where your information gaps are, because they will show up quickly once AI starts working with your content.

Clean inputs produce better outputs. When building a knowledge base agent or automating a process, AI needs clear, current source material. Outdated SOPs, conflicting policy documents, or incomplete records produce unreliable outputs.

AI adoption drives documentation improvement. Use AI adoption as a forcing function to get your documentation in order. The act of preparing content for AI often reveals gaps, contradictions, and outdated information that needed to be fixed regardless.

Start small and iterate. You do not need to clean everything before you start. Focus on the source material for your first 2 or 3 use cases. Let the cleanup happen incrementally alongside your AI rollout.

Phase	Timeline	Key Milestones
FOUNDATION	Weeks 1-4	**Set up and activate. 100% access live. 90%+ onboarded. AI Champion identified. Baseline measured.**
CRAWL	Months 1-2	**Build daily habits. 80%+ daily users. 10+ uses/user/week. 3+ quick wins documented.**
WALK	Months 2-4	**Create workflows. 5-10 use cases. 3+ automations live. 10-20 hours saved/week.**
RUN	Months 4-6+	**Scale and automate. 10+ workflows. 100+ hours saved/month. 3-5x ROI achieved.**

Phase 1: Crawl - Building the Foundation

Timeline: Weeks 1-4

The Crawl phase lays the groundwork. Before anyone builds a workflow or automates a process, the organization needs to answer fundamental questions: Who is allowed to use AI, and under what rules? How will access be governed? Where will people go for help?

1. Establish an AI Acceptable Use Policy. Create or update a formal AI Acceptable Use Policy covering data handling, privacy, access controls, and compliance requirements. It doesn't need to be perfect on day 1. It needs to exist and be communicated.

2. Define roles, permissions, and user structure. Define who will use the AI platform and what they'll be able to do. A typical structure includes administrators, workshop/builder users, general users, and chat-only users. Organize users into logical groups by department or function.

3. Onboard users and deploy general-purpose AI applications. Bring users onto the platform through a controlled, deliberate process. Deploy a curated set of general-purpose applications to all users: writing assistants, summarization utilities, brainstorming aids, and research helpers.

4. Create a central AI resource hub. Build an internal site dedicated to AI resources: getting-started guides, links to the platform, your AI use policy, a place to log and celebrate wins, and contact information for support.

5. Identify and develop AI Champions. Select a small group of enthusiastic, influential employees and invest in their skills early. Champions should complete the AI Champion Certification to build credibility and depth.

6. Encourage basic platform exploration. Before asking teams to automate anything, give them space to explore. Encourage everyone to use the platform as a conversational assistant. This is where most people have their first "this is actually useful" moment.

7. Establish an AI-forward culture from leadership. Culture change doesn't happen by memo. Leadership must visibly commit to AI adoption by using the tools themselves, sharing their own experiences, and actively encouraging teams to experiment.

8. Launch recurring support sessions (Office Hours). Recurring, low-pressure sessions where users can ask questions, get hands-on coaching, troubleshoot prompts, and share discoveries. These accelerate individual learning and surface the use cases that will inform the Walk phase.

Phase 2: Walk - Guided Exploration and First Wins

Timeline: Months 1-4

The Walk phase is where AI moves from curiosity to capability. The organization tackles real workflows with guidance, selecting the right problems, building solutions collaboratively, testing in controlled environments, and measuring results.

1. Review and deploy pre-built applications. Review the library of available agents and workflows (including Framework IT's 100+ Standard Apps) and deploy the ones relevant to your organization's needs.

2. Customize applications for specific teams. Introduce specialized applications tailored to specific departments. Schedule working sessions to walk through how each tool would be used in practice.

3. Identify your first pilot workflow. Working with your AI champions and your Framework IT team, identify the first workflow to target for AI-powered automation. The ideal pilot is high value, low complexity, visible, and measurable. Document the current state in detail before building anything.

4. Develop the AI solution with guidance. Build the pilot solution as a collaborative, guided effort. The emphasis is on learning by doing. The people involved develop skills they carry into future projects.

5. Test with a controlled pilot group. Deploy the solution to a small group first. This group uses the solution in real conditions, surfaces edge cases, and provides feedback before a broader rollout.

6. Measure ROI and document your first win. After the pilot has run long enough, measure results against your baseline. How much time was saved? How many errors were avoided? Share the results widely. This first documented win turns skeptics into supporters.

7. Maintain a living use case repository. Capture every AI use case, successful and unsuccessful, in a structured document. Update it regularly.

Phase 3: Run - Scaling, Independence, and Continuous Improvement

Timeline: Months 4-6+

The Run phase marks the transition from guided experimentation to organizational self-sufficiency. The guardrails are still in place, but the organization is driving.

1. Develop a power users program. Identify employees with strong AI skills, creative problem-solving, and a willingness to help others. Invest in their development through advanced training and a clear role as departmental AI leads.

2. Explore custom integrations. Connect AI to other business systems: CRMs, ERPs, ticketing systems, databases, and communication platforms. Treat each integration as a mini-project with clear objectives.

3. Formalize business case analysis. Move from informal estimates to formal business case analysis for new AI initiatives. Assess expected time savings, cost reduction, revenue impact, and implementation complexity.

4. Enable proactive workflow discovery. Encourage every department to maintain a short list of candidate workflows. The shift from "tell me what to automate" to "here's what we want to automate next" is one of the clearest signs of a mature AI culture.

5. Build custom AI applications. Your team is now capable of building custom agents and workflows that go beyond the standard library to solve challenges unique to your organization.

6. Execute broader deployments. Roll out successful solutions to additional departments, offices, or user groups. Each deployment should include clear communication, onboarding support, and a feedback mechanism.

7. Track ongoing value and adoption metrics. Continuously monitor adoption rates, active users, time savings, cost reductions, and user satisfaction. Report regularly to leadership.

8. Establish a continuous improvement and governance loop. Create a formal, recurring forum where leadership, power users, and program managers review adoption metrics, prioritize new use cases, share wins, and plan upcoming training and enhancements.

CHAPTER 10

Managed Framework AI

The complete, managed AI adoption program built for your organization

Managed Framework AI is a full managed AI adoption program that combines the most powerful multi-model AI platform available with a proven adoption methodology, structured training, and the ongoing guided support that turns platform access into measurable business outcomes.

You get enterprise-grade tools, governance, and a named Framework IT team accountable for your results.

Three Pillars: Safe. Governed. Productive.

Safe. We help organizations adopt AI in a way that reduces risk around security, data exposure, inappropriate use, and policy misalignment, so that leadership can approve AI with confidence and employees can use it without creating invisible liability.

Governed. We give leadership and IT greater visibility, control, standards, and guardrails so AI use is managed intentionally rather than emerging chaotically. When a cyber insurance carrier, auditor, or board member asks "How is AI governed here?" your organization has a documented, defensible answer.

Productive. We turn AI into practical business outcomes through enablement, use-case alignment, workflow improvement, and measurable gains in efficiency and execution, so that the investment in AI compounds over time instead of quietly gathering dust.

Everything Included

Feature	What It Means for Your Organization
67 AI Models	ChatGPT, Claude, Gemini, Llama, DeepSeek, and more. Never locked into one vendor.
Unlimited Users	No per-seat pricing surprises. Every team member included.
100+ Standard Agents	Purpose-built tools covering sales, marketing, finance, HR, ops, legal, and productivity. Easily cloned and customized for your organization. Ready on day 1.
500+ Community Apps	Additional workflows created and shared by the user community.
No-Code Workflows	Build powerful automations with drag-and-drop. 50+ native integrations plus thousands via Zapier.
AI Phone Agent (ADEL)	Voice AI for call handling: consistent, governed, available around the clock.
AI Champion Certification	Structured training curriculum that takes your team from first-time users to confident power users.
AI Navigator Training	Advanced training for your power users and future builders who want to create agents, workflows, and automations.
Quick Tips Training	Short, focused training sessions on specific AI skills and techniques to keep your team sharp and progressing.
Office Hours (3x/week)	Live coaching, use case workshops, and peer learning sessions with the Framework IT team.
Monthly AI SBR	Strategic Business Review to track adoption, identify opportunities, and update your AI roadmap.
SOC 2 Type I and II	CPA-audited over 6+ months. Independently certified.
Zero Data Training	Your prompts and data never train any public model. Contractually guaranteed.

Office Hours: 3 Sessions Per Week

Most AI platforms hand you a login and wish you luck. Managed Framework AI includes 3 live Office Hours sessions per week, and they're one of the most valuable parts of the entire program.

Office Hours are working sessions, facilitated by Framework IT's AI team, where your people get hands-on help with real work. The format rotates across 3 types:

Live Coaching and Q&A;

Bring your questions. Get answers. Whether you're struggling with a prompt, trying to figure out which model to use, or wondering how to approach a specific task, our team works through it with you in real time. No question is too basic. This is the fastest way to get unstuck and build confidence.

Use Case Workshops

Structured sessions where we work through building a specific workflow, agent, or automation together. We build live, with your input, on problems that matter to your business. Your team can bring their own use cases and we'll help architect and build custom agents or workflows right there in the session. This is where people go from "I understand what AI can do" to "I just built something that saves me 3 hours a week."

Show and Tell and Peer Learning

Users share wins, discoveries, tips, and creative applications with each other, facilitated by our team. This is where the best ideas spread organically. Someone in accounting shows how they automated invoice processing. Someone in marketing shares a prompt that generates 80%-complete blog drafts. The collective intelligence of the group accelerates everyone's learning.

Monthly AI Strategic Business Review (SBR)

Every month, your Framework IT team conducts a Strategic Business Review (SBR) dedicated to your AI program. This is a structured strategic session designed to keep your AI adoption on track and continuously expanding.

During each SBR, we:

Review adoption metrics. Active users, usage patterns, credit consumption, and engagement trends. We identify who's using AI heavily, who has dropped off, and where the opportunities are to re-engage.

Assess progress against your AI adoption roadmap. Where are you in the Crawl-Walk-Run framework? What milestones have you hit? What's the next phase of work?

Identify new use cases and automation opportunities. Based on what your team has learned, what new workflows should be built? Which departments are ready for deeper adoption? What pain points have surfaced that AI can address?

Update and refine your AI roadmap. Your roadmap is a living plan that evolves as your organization's AI maturity grows. Each SBR produces an updated roadmap tailored specifically to your organization and processes.

Plan training and enablement activities. What Office Hours topics should we prioritize? Are there specific teams that need targeted training? Should we schedule a custom workshop?

The SBR keeps AI adoption moving forward as an ongoing strategic initiative with a named partner who stays accountable for results and guides roadmap implementation across your organization.

Accelerator Plans: Go Deeper, Build Faster

For organizations that want to accelerate their AI maturity, Framework IT offers Accelerator Plans: packages of consulting hours where our AI team works directly with yours to develop custom agents, workflows, and automations.

The key word is "with." Accelerator Plans are collaborative engagements designed so your team learns and upskills along the way. We build together so your people develop the expertise to keep building on their own.

The goal isn't to create a permanent dependency on consulting hours. It's to get your organization to the point where your own team can identify opportunities, architect solutions, and deploy them independently. Accelerator Plans are the bridge between the structured support of Managed Framework AI and full organizational self-sufficiency.

Typical Accelerator Plan engagements include:

Custom agent development. We design and build AI agents tailored to your specific processes, terminology, and business rules, working alongside your team so they understand how the agent works and can maintain and improve it.

Workflow automation. We help your team build multi-step automated workflows that connect AI to your business systems, from scoping and architecture through testing and deployment.

Department-specific rollouts. We work with a specific department to identify their highest-value AI use cases, build the solutions, train the team, and measure results.

Advanced use case development. For organizations in the Run phase, we help tackle complex, high-value automations that require deeper technical guidance.

How Managed Framework AI Compares

Feature	Microsoft Copilot	ChatGPT Team	Managed Framework AI
Users Included	25 seats	25 seats	**Unlimited**
AI Models	1 model	1 model	**67 models**
Adoption Support	None included	None included	**Crawl-Walk-Run framework**
Data Training	May use your data	May use your data	**Zero training, guaranteed**
Contract	Annual	Annual	**Month-to-month available**
Dedicated IT Partner	No	No	**Named Framework IT team**
Ongoing Enablement	No	No	**Office Hours 3x/week, monthly SBR**
Pre-Built Agents	Limited	Limited	**100+ Framework IT + 500+ community**

The Transformation

Before Managed Framework AI: The organization is operating in the dark. Employees are using AI tools nobody approved. Leadership has no visibility into what's being exposed. The pressure to "do something with AI" is growing without a clear plan. There's skepticism, risk, and quiet anxiety.

After Managed Framework AI: The organization has a named partner, a documented roadmap, and a trained team actively using governed AI every day. Outputs are consistent and trusted. Workflows are automating what used to take hours. Leadership can see adoption dashboards and prove ROI. The anxiety is gone, replaced by confidence and momentum.

> ***The platform is Hatz AI. The methodology is Crawl-Walk-Run. The difference is Framework IT.***

67	16+	SOC 2
AI models in one platform	years of trusted IT partnership	Type I and II certified

CHAPTER 11

AI Governance Readiness Checklist

Use this checklist to assess where you stand today

Use this checklist to assess your AI governance readiness. If you can't confidently check every box, you have gaps that need to be addressed before scaling AI adoption. Score yourself honestly. Most organizations start with fewer than half of these checked, and that's normal.

Policy and Leadership

- We have a written AI use policy that defines approved tools and prohibited data types
- Our leadership team has formally endorsed our AI strategy
- We have designated an internal AI Champion to lead adoption
- Our AI policy has been communicated to all employees
- Employees have acknowledged receipt and understanding of the AI policy
- Our AI policy is reviewed and updated at least annually
- Leadership actively uses AI tools and visibly supports the initiative

Data Protection and Privacy

- We have contractual zero-data-training guarantees from our AI providers
- We know which AI tools our employees are currently using (including free tools)
- Sensitive data categories (client data, financials, IP) are defined as off-limits for public AI
- We have Data Processing Agreements in place with every AI vendor
- We have a Business Associate Agreement in place if we handle PHI
- We have a defined process for classifying data sensitivity levels for AI use
- Employees know which types of data they can and can't enter into AI tools

Access Control and Permissions

- AI access is role-based, not everyone has the same permissions
- We maintain searchable logs of AI usage (who, what, when)
- We can produce an AI governance report if asked by an auditor or insurer

- We have a process for reviewing and approving new AI tools before deployment
- User permissions are reviewed and updated when roles change
- Administrative access is restricted to authorized personnel only
- We have a defined offboarding process that includes revoking AI platform access

Training and Adoption

- Our team has received formal AI training, not just a policy memo
- We have shared prompt templates and best practices documented
- We are tracking AI adoption metrics (usage, time saved, ROI)
- We have a structured plan to expand AI usage over the next 6 months
- New employees receive AI onboarding as part of their standard orientation
- We maintain a use case repository documenting AI wins and lessons learned
- Our team has access to recurring support (Office Hours, coaching, help desk)

Compliance and Insurance

- We can answer "How does your organization govern AI?" with a documented response
- Our cyber insurance provider is aware of our AI usage and governance framework
- Our AI governance aligns with our existing compliance requirements (HIPAA, NIST, CMMC, etc.)
- We have reviewed whether our industry has specific AI regulations or guidelines
- Our vendor management program includes AI-specific evaluation criteria

Workflow and Automation Maturity

- We have identified our top 3 to 5 high-value AI use cases
- We have documented baseline metrics (time, cost, error rates) for at least 1 target workflow
- We have completed at least 1 AI pilot and measured results
- We have a pipeline of future automation opportunities
- We have mapped which pre-built agents and workflows align with our highest-value use cases
- Our AI automations include human review checkpoints for critical outputs

Governance and Continuous Improvement

- We have a recurring forum (steering committee, review meeting) for AI governance
- We review AI adoption metrics and ROI data at least monthly
- We have a process for prioritizing new AI use cases based on business impact
- We regularly share AI wins and best practices across the organization
- We have a feedback loop between users and the team managing the AI program
- Our AI roadmap is a living document that is updated based on progress and new opportunities

How to Read Your Results

0-15 boxes checked: You're in the early stages. Most organizations start here. The Crawl phase of the Crawl-Walk-Run framework is designed exactly for this.

16-30 boxes checked: You have meaningful progress but significant gaps remain. You're likely ready to move into the Walk phase.

31-40 boxes checked: Your organization has a mature AI governance posture. You're in or approaching the Run phase.

41+ boxes checked: You're operating at a high level of AI maturity. Focus on continuous improvement and deepening the complexity of your automations.

If you have unchecked boxes, you're not alone. Most organizations do. Managed Framework AI was built to help you check every one of them. As a managed AI adoption program, our team handles the platform, the governance framework, the training, and the ongoing enablement so you can adopt AI with confidence, with a named partner who stays accountable for results.

CHAPTER 12

Next Steps

You have the playbook. The question now is what you do with it.

If your organization is ready to move from unmanaged AI usage to a structured, governed, productive AI program, here's how to start:

Request a Consultation

We'll walk through where your organization stands today, identify the highest-value opportunities, and show you exactly how Managed Framework AI works. No pressure, no pitch deck. Just a conversation about what makes sense for your business.

Take the Readiness Checklist to Your Leadership Team

Use it to start an internal conversation about AI governance, risk, and opportunity. The checklist alone is often enough to surface gaps that nobody was talking about.

Stop the Bleeding on Shadow AI

Every day your employees use unmanaged AI tools is another day your data is at risk. Getting onto a governed platform is the single highest-impact step you can take, and it doesn't require a long procurement cycle.

Framework IT has spent more than 16 years helping small and midsized businesses get technology right. AI is the next chapter, and we're here to help you write it.

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Book a Consultation