
AI Is Already In Your Business. Now What?

Smarter AI Starts Here: A Practical Guide
for Accounting, Financial, Legal &
Professional Services Firms.

July 2025

Smart Businesses Use AI Strategically. Others Get Burned.

How To Sort Through The Confusion And Complexity Of AI And Start To Take Steps To Integrate It Into Your Business Strategy.

What every SMB leader needs to know about AI before it's too late:

- ✓ **AI is already in your business even if you didn't approve it.**
Discover how unsanctioned tools and employee experiments may be creating hidden risks.
- ✓ **Why doing nothing about AI is risky and rushing in without a plan is worse.**
The two biggest mistakes SMBs are making right now (and how to avoid both).
- ✓ **The top AI-related threats facing small businesses today.**
From data leaks to compliance gaps to reputational damage and what to watch out for.
- ✓ **Real ways business leaders are using AI to boost communication, operations, and cybersecurity.**
See how smart firms are gaining an edge, safely.
- ✓ **A quick checklist to assess your AI readiness (and what your IT company might be missing).**
Practical questions to help you take control, or spot red flags.
- ✓ **What the FTC and other regulators expect when it comes to responsible AI use.**
Avoid penalties by understanding how compliance intersects with AI.
- ✓ **How to move forward with AI without compromising security, compliance or trust.**
Security, strategy, and peace of mind aren't mutually exclusive.

**Never Ask an I.T. Services Company,
“Do You Use AI?”**

**Instead, Make Sure You Ask,
“How Are You Securing AI Use Across Our Business?”**

**And Know the Difference Between *Responsible AI Governance*
And Unchecked Tool Adoption**



From the Desk of:
Farzon Almani
Founder & CEO
One82, LLC.

Dear Colleague,

Everyone is talking about AI. Boardrooms, podcasts, and news headlines - it's everywhere. But amid all the hype and buzzwords, I see something worrying. Most small business leaders are being left behind.

They either don't know where to start, or they jump in blindly, trusting the latest shiny tool without understanding the risks. AI can absolutely help your business thrive. Though used carelessly, it can also expose you to serious data breaches, compliance violations, and reputational harm.

This guide was written to help you cut through the noise. To give you the clarity, practical insight, and real-world context to make AI work for you, not against you.

Let's get into it.

Dedicated to serving you,

Farzon Almani,
Founder & CEO
One82, LLC.

About The Author

"Leadership is not about a title or a designation. It's about impact, influence and inspiration. Impact involves getting results, influence is about spreading the passion you have for your work, and you have to inspire team-mates and clients." Robin S. Sharma

Farzon is the Founder and CEO of One82, LLC, a client-driven IT & Cybersecurity services company in Northern California. He has over 30 years of experience in the IT field, with multiple industry credentials. He is an expert in AI, cloud computing, cybersecurity, IT service management, and new business development, and has helped hundreds of companies achieve their IT goals and improve their profitability.



As a seasoned entrepreneur, Farzon is passionate about delivering innovative and customized solutions to his clients, and inspiring his team to excel in their work. He believes that leadership is about impact, influence, and inspiration, and that balance is a key to success.

Farzon founded One82 in 1999 as one of the first IT & Cybersecurity Managed Service Providers. Since then, One82 has grown into a full-service managed I.T. services company serving small & medium businesses, but with a specialty in Accounting, Financial, Legal, and other professional services markets.

With a focus on the California Bay Area, Central Coast, and nearby regions, One82 provides services to customers across the US and various global markets such as AMER, EMEA, and APAC.

For several years, Farzon has proudly held the role of Captain of TruMethods TruPeer, leading and collaborating with the very best MSPs in the business. Additionally, Farzon is a proud member of ProVisors, an exclusive community of trusted advisors, where he engages in professional growth and business networking with leaders in various industries. He is also a member of TAG (Trusted Advisors Group), in which he collaborates closely with experts in several fields including valuation, finance, banking, employee benefits, insurance, capital markets, and commercial real estate.

AI: What It Is And What It's Not

AI isn't science-fiction; it's a screwdriver - **a tool that turns effort into impact** and is changing how businesses operate at lightning speed.

At its core, AI is pattern recognition. It analyzes huge sets of data, learns from it, and predicts or generates outcomes. It is a tool that enhance human capabilities, not replaces them.

If you treat AI like a fully capable team member, you'll set yourself up for disaster. But if you treat it like the powerful tool it is, it can help your business compete and win.

AI Is

Pattern Recognition

- Capable of writing basic content
- Able to automate repetitive tasks
- A tool that analyzes data to find trends
- Useful for flagging anomalies and threats
- Fast at summarizing or generating output

Critical thinking

- Guaranteed to be accurate
- A business strategist
- A context-aware decision-maker
- A replacement for human judgement
- Ethically responsible

AI Isn't

Bridging the Gap Between Interest and Action

Most SMB leaders see the potential - nearly 90% say AI could give them a competitive edge. But only about half are actually using it. And even then, it's often ad hoc: a curious employee trying out ChatGPT or dabbling in a tool without much oversight.

So, what's holding businesses back? In short: overwhelm. There's too much hype, too many tools, and no clear roadmap for how to adopt AI safely and strategically.

Privacy concerns, misuse risks, and the fear of falling behind keep many on the fence. And even if you figure out what to use, chances are the landscape has already shifted again. That's why you need more than interest - you need a plan.



The Perception

87% of organizations believe AI offers a competitive edge.

The Discrepancy

Only 52% of SMBs currently use AI in their workflows. Of those, 79% reported improved efficiency.

The Risk

60% of AI adoption is driven internally by team members. Over 50% of firms using AI rely on staff with no training.

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Avoiding The Hidden Risks

Navigating The AI Landscape Safely

AI can be a powerful advantage, but only if it's used wisely. Without the right guardrails, even well-meaning efforts can backfire. From data privacy to employee misuse, here are the most common pitfalls to watch out for and how to stay ahead of them.

Privacy & Security

When employees feed sensitive data into AI tools, whether it's client information or internal files, it can expose your business to data leaks, breaches, and compliance issues. Not all AI tools are secure, and most were never designed with your privacy standards in mind.



Bias & Accuracy

AI reflects the data it's trained on, which is human content and that means bias. That means all our assumptions, stereotypes, and blind spots can be baked right into the output. Bias isn't just possible with AI, it's inevitable without oversight. Just because something sounds right doesn't mean it is right.

Over-Reliance

AI is a tool, not a decision-maker. When teams start treating it as a magic bullet, critical thinking takes a back seat. That leads to missed nuances, shallow analysis, and a false sense of security. AI should support your team, not replace their judgment.



Human Error & Misuse

AI is only as good as the people using it. Employees can unintentionally misuse AI due to lack of training, unclear policies, or simple inexperience. And even when used correctly, AI is only as good as the input. Vague, incomplete, or context-free prompts can lead to useless results.

Disconnected Tools Create Disconnected Workflows

If your AI tools don't integrate with your existing systems, you'll end up with more silos, not less. Manual workarounds, inconsistent data, and lost time quickly erase any promised efficiencies. AI should simplify operations, not add new friction points.

Legal & Regulatory Compliance

From FTC rules to industry-specific standards, the legal landscape around AI is tightening. If your tools or practices violate data handling laws, you could face fines or lawsuits, even if it was unintentional. Compliance needs to be baked into your AI strategy, not bolted on later.



Bad Actors Are Using AI Too

Cybercriminals are using AI to level up creating more convincing phishing emails, fake identities, deepfakes, and even automated scams. Your firewall won't stop social engineering. If your team isn't trained to spot AI-enhanced threats, they'll fall for them faster and more often.

AI doesn't remove risk. It shifts it. And if you're not prepared, you're more vulnerable than ever.

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How Smart Firms Are Using AI With Strategy Not Chaos

The best-performing SMBs aren't just using AI - they're doing it with intention. They know what's approved, what data is protected, and how to double-check outputs. Here's how our clients are integrating AI securely, practically, and with clear business goals in mind across roles and industries.

By Industry

Accounting

- Generate financial summaries & reports
- Extract & categorize data from source documents
- Detect anomalies or red flags in financials
- Draft tax filing notes & client communications
- Automate routine tasks (reconciliations or reminders)

Legal

- Draft & review contracts
- Draft client communications
- Summarize case law & discovery documents
- Draft memos, motions & briefs
- Accelerate legal research

Financial

- Generate client-ready reports and summaries
- Automate compliance checks and audit prep
- Analyze investment performance and trends
- Draft client communications and insights
- Fraud detection & prevention

Energy

- Summarize regulatory updates
- Analyze sensor & usage data
- Draft SOPs & safety documents
- Assist with technical proposals
- Monitor industry news & legislation

Professional Services

- Drafting proposals and project briefs
- Summarizing meeting notes and action items
- Creating marketing or thought leadership content
- Automating repetitive admin tasks (scheduling & follow-ups)
- Create client-ready deliverables from raw notes & data

By Function

Executive

- Draft strategic updates & board materials
- Track competitor activity
- Draft strategy outlines
- Summarize reports & decision-making data
- Automate calendar coordination & inbox triage

Sales

- Write prospecting emails & follow-ups
- Identify client patterns & deal risks
- Analyze CRM notes & activity logs
- Research prospect & industry trends
- Draft call scripts & objection handling

Marketing

- Generate blog posts, emails & social content
- Repurposing content across formats & channels
- Brainstorming campaign & creative ideas
- Analyzing engagement metrics & trends
- Generating presentations & images

HR & Recruiting

- Analyze employee feedback
- Draft job descriptions & interview questions
- Screen candidates & extract role-matching criteria
- Compare & summarize resumes
- Draft HR policy documents & onboarding guides

Operations & Admin

- Transcribe & summarize meetings
- Generate & automate follow-ups & reminders
- Scheduling & communication
- Organize data from spreadsheets & reports
- Draft SOPs & internal documentation

Most businesses are using AI without oversight, strategy, or compliance; and they're exposing themselves to serious risk. Our clients don't dabble. They lead with structure, security, and results.

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Quick Self-Assessment Is Your Business AI Ready?

Quick self-check for business owners & leaders:

If you can't answer "yes" to all of these, it's time for an AI Risk & Readiness Assessment.

- Do you know which AI tools your team is using?
- Do you have an AI Acceptable Use Policy in place?
- Have you trained staff on what data is safe to input into AI?
- Are your vendors using AI and are they using it securely?
- Do you have cyber insurance that covers AI-related incidents?
- Have you reviewed your compliance obligations (FTC Safeguards Rule, GLBA, HIPAA, etc.) in light of AI?



If You're Ready - Don't Start With "What AI Should We Use?"

Start with "Why?"

Before adopting AI, **you need clarity on your business case** not just curiosity. Too many organizations dive in without direction, chasing tools instead of solving problems. That's how you burn time, money, and trust.

The first step is defining your "why." **What are you actually trying to improve?** Is it efficiency? Client responsiveness? Security? Strategic growth?

Ask yourself:

- What **specific challenges** are we trying to solve?
- What **outcomes** do we want to achieve and can AI help us do that?
- Do we have the **people and processes** to use AI responsibly?



If the answers aren't clear, that's your signal to slow down, not because AI isn't valuable, but because it only delivers value when it's aligned to real goals. But if you can articulate a clear "why", you're already ahead of the curve. That clarity will guide what tools to explore, what policies to build, and what success actually looks like, so you can invest wisely and lead with purpose.

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12 Steps To Implement AI Effectively For Your Business

At One82, we know that successful AI adoption isn't about chasing trends or piling on new tools, it's about solving real problems for real people. That's why **our approach puts your business goals and your team at the center**. This 12-step guide is designed to keep things simple, practical, and focused on what works, so you can get results without the overwhelm.

1. Define Your “Why”

Start with **purpose**. What problem are you trying to solve? Increased efficiency? Better customer experience? Cost savings? Get specific. If you can't tie AI to a real business goal, stop here.

2. Identify High-Impact Use Cases

Look for **repeatable, data-rich tasks** like:

- Automating responses (e.g., customer service)
- Streamlining operations (e.g., scheduling, inventory)
- Generating insights (e.g., sales trends, churn prediction)

3. Audit Your Data Readiness

AI runs on data. Do you have **clean, structured data**? Where is it stored? Who owns it? If your data's a mess, fix that first.

4. Get Stakeholder Buy-In

Loop in your **leadership team, department heads, and any end users** early. AI works best when people are bought in - not blindsided.

5. Choose The Right Tools (Start Small)

Pick **low-risk, easy-to-integrate tools** like:

- ChatGPT or Claude for writing, ideas, or emails
- Zapier or Make for simple automation
- Microsoft Copilot or Google Workspace AI for productivity boosts

Avoid custom AI models unless you're further along.

6. Assign A Pilot Owner

Designate **someone to own the AI pilot**. They'll coordinate setup, testing, documentation, and feedback.

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7. Run A Pilot Project

Test one use case. Measure outcomes like:

- Time saved
- Errors reduced
- Customer satisfaction

Keep it simple and track progress

8. Train Your Team

Provide clear training. Make AI tools part of the workflow, not a scary side project. Focus on practical how-to's and real use cases.

9. Document Results & Iterate

Did it work? Capture the results. What needs tweaking? Can it scale? Share wins and lessons learned.

10. Scale What Works

Once you've proven success, expand to other departments or tasks. Always tie each expansion to business goals and keep measuring impact.

11. Stay Compliant

Make sure your AI use respects privacy laws, ethical guidelines, and industry-specific regulations.

12. Keep Evolving

AI is fast-moving. Set a cadence (quarterly or bi-annually) to review tools, test new features, and sunset what's not working.

One82's Perspective

We've helped dozens of firms recover from ransomware, phishing attacks, and vendor breaches. What's become clear in the past 12 months is this:

AI isn't just another shiny tech trend. It's an accelerant. It will magnify whatever systems - good or bad - are already in place.

That's why we're building AI security, compliance tie-ins, and responsible use policies into every managed IT and cybersecurity plan we deliver.

AI can help you serve clients better, scale faster, and operate more efficiently. But it must be governed. And it must be secured.



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The IT Firm Checklist: Are They A Fit For Your AI Needs?

Don't ask: "Do you use AI?" Ask: "How are you securing AI across our business, our data, and our vendors?" **Your IT firm should be your AI safety net not your blind spot**



Does Your IT Provider:

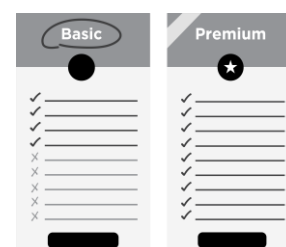
Requirement	Does Your IT Firm Meet This?
Help you create and enforce an AI Acceptable Use Policy for your team?	<input type="checkbox"/>
Actively monitor what AI tools are being used in your environment and by whom?	<input type="checkbox"/>
Provide staff training on how to use AI tools securely and avoid data leaks or misuse?	<input type="checkbox"/>
Understand and apply compliance frameworks like FTC Safeguards Rule, GLBA, HIPAA, and more in the context of AI?	<input type="checkbox"/>
Vet third-party vendors and ensure they aren't using AI in ways that put your firm at risk?	<input type="checkbox"/>
Secure your data inputs and outputs to prevent AI from exposing sensitive or proprietary information?	<input type="checkbox"/>
Integrate AI responsibly into your workflow instead of letting employees "go rogue" with tools like ChatGPT or Copilot?	<input type="checkbox"/>
Offer clear guidance on what data is off-limits and how to verify AI-generated results?	<input type="checkbox"/>
Maintain a plan for governance, ongoing review , and adaptation as the AI landscape evolves?	<input type="checkbox"/>

If you can't confidently say "yes" to all of the above, it's time for a readiness check.

You might be using AI already - but without guardrails, oversight, or strategy. That's not innovation. That's exposure.

Don't Be The Last One To Act

You don't need to be an AI expert. But you do need to be AI-aware. We can help you assess your risk, map out opportunities, and put simple, smart guardrails in place. Let's make sure you're not left behind.



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Are You Done With Frustrating I.T. Support And Never-Ending I.T. Problems?

You deserve competent, responsive I.T. support with the strategic guidance to help you navigate AI, compliance, and what's next.

You've just read how AI is already reshaping the way SMBs work and why poor governance, unclear policies, and unchecked tool use could be putting your business at serious risk.

Most IT companies aren't talking about this. But we are! - and we're helping forward-thinking firms build AI-aware, security-focused strategies that actually support your growth.

If you're not confident your current provider is addressing:

- AI-related data security and employee misuse.
- Compliance with FTC Safeguards, HIPAA, GLBA, and more.
- Shadow AI tools being used across your team.
- Gaps in backup, recovery, or endpoint protection.

...then it's time for a second opinion.

What Our Free Assessment Includes:

- ✓ A deep dive into your current I.T. infrastructure and AI exposure
- ✓ A compliance check against FTC, GLBA, HIPAA, and other applicable frameworks.
- ✓ A review of backup, business continuity, and system vulnerabilities.
- ✓ Recommendations to reduce risk, improve efficiency, and eliminate blind spots.

All without interrupting your current provider or team.

You don't need to switch I.T. providers today. But you do need to know what's going on beneath the surface and whether you're truly protected. Schedule your FREE 103-Point I.T. Risk & Readiness Assessment at www.one82.com/call or call us at 408-335-0388.

At a minimum, our free Assessment is a completely risk-free way to get a **credible third-party validation** of the security, stability and efficiency of your I.T. systems. There is no cost and no obligation. We are here to earn your trust and demonstrate a far better way to get you **the I.T. services and support you need.**

Fresh eyes see what others miss.

Let's make sure your I.T. is working for you - not quietly putting you at risk.

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Dedicated to serving you,

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See What Other Business Leaders Are Saying:

You will not find better service for the price



The thing that I appreciate the most is the level of experience of the techs. I never feel like I know more about something than any person I work with at One82. They are able to quickly access all of our computers and systems to support us, and they make it easy. You will not find better service for the price.

– Michelle C.

One82 is a champion of the customer



The single largest benefit I've experienced with One82 is control. One82 does a great job providing a controlled work environment to protect the company from Cybersecurity threats and downtime. Their professionalism is top-notch, too. They are very friendly and professional, while also maintaining our company's best interest. Also, One82 is responsive and quick to tackle any issue. One82 is a champion of the customer/firm, and I would highly recommend them to anyone.

– Robbie M.

Our partner for over 15 years



One82 has been our dedicated IT provider for over 15 years. The team is super knowledgeable and keeps up with new technology to help our business keep its competitive edge. They are proactive in solving problems that might come up instead of waiting for foreseeable issues to arise.

– Erika L.

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See What Other Business Leaders Are Saying:

Their techs treat you like family



One82 is the best IT firm I have ever worked with, and we have been working with them for more than 10 years. They moved us to Microsoft 365 Cloud and made our work so much easier. I always feel confident that my issues will be resolved in a timely manner. Each technician devotes more personal attention to my issues than any IT I have ever worked with in the past. Their Techs treat you like Family. There isn't another IT Company out there that will take care of you in the same way One82 does.

– Tricia M.

One82 is simply amazing!



One82 is simply amazing! Our working relationship is a beautiful mix of friendliness, professionalism, and expertise coupled with the confidence that my problem will be resolved quickly. Their entire staff has always been extremely patient and gracious with working with me and my team. Beyond the routine running of my business, One82 is also concerned about our future whether it be hardware, software, cloud options, or cybersecurity concerns. It is deeply reassuring to know that they are vigilant regarding our safety. Honestly, I couldn't be happier to be taken care of by One82 and recommend them wholeheartedly.

– Kathy W.

One82 Understands how to partner with CPA firms



One82 understands how to partner with CPA firms. They understand our peak seasons and our deadlines. One82 is always very responsive when we need help and they meet with us on a quarterly basis to go over our systems and make recommendations on how to make things more secure. The single biggest benefit of partnering with One82 for our IT and Cybersecurity needs is peace of mind. We can always count on working with experienced technicians who are on time.

– Brian R.

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See What Other Business Leaders Are Saying:

They know their stuff when it comes to cybersecurity



I have had the pleasure of working with Farzon and his team for the last couple of years. Not only do they provide great IT support but they know their stuff when it comes to cybersecurity.

– Roger W.

Expertise that greatly benefited our operations



I must say that their services were quite impressive. Farzon's expertise and knowledge has greatly benefited our operations. Their team's dedication and quick response to technical issues were commendable. Overall, a reliable IT partner for any business.

– Chad R.

One82 delivers high quality results



We used to have an in-house IT team, but our business needs changed, and we decided to outsource our IT and Cybersecurity to One82. It has been nearly a year now and I can confidently say It was one of the best decisions we ever made. One82 is a professional and trustworthy IT partner that delivers high-quality results. They have a great team of experts who are friendly, have excellent attitudes and skills, and have very fast response. If you are on the fence about who you should choose, I highly recommend One82.

– Zoya S.

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