

# THE AI PLAYBOOK



## AI is the Latest Digital Gold Rush: Here's How to Win

Everywhere you look, companies are racing to implement shiny new AI features. The fear of falling behind is palpable. From global tech giants to even local tile stores, everyone is rushing to claim their stake in the latest digital gold rush. But just like the prospectors of the 19th century, today's organizations are confusing the shine of fool's gold for the real thing.

There is a distinct divide in how businesses of today approach this technology. "Big Tech" behemoths like Microsoft or Meta are employing a "spray and pray" strategy. They have billions in R&D budgets to shoehorn AI into every possible tool, hoping something, anything, sticks. For them, a failed experiment is just a line item.

But for mid-sized businesses, there is no such luxury. You don't have the budget to make big, expensive mistakes. If you waste your budget on a "cool" feature that provides zero ROI, that money is gone, and with it, your chance to innovate. At Saritasa, we believe AI shouldn't be a gamble. We build AI the same way we build all software: intentionally, practically, and responsibly.

### The 3-Parts of a Successful AI Implementation

For AI to truly add value to your organization, it must pass three critical tests:

- **Intentional AI:** AI must solve a specific business objective, whether that's driving revenue, improving customer satisfaction, or recapturing lost time. Experimentation was fun back when ChatGPT launched in 2022, but now the real world comes into play. Every implementation must have a solid strategy and reasoning behind it.
- **Practical AI:** AI must work within your real-world practices and processes. If an AI tool doesn't integrate with your existing workflows or requires your team to jump through hoops to use it, it will fail. You shouldn't change your entire workflow around AI, it should fit naturally into how your team already works and make your jobs easier.
- **Responsible AI:** Long-term success requires transparency and human oversight. You must know where the data comes from and how the output is determined to ensure accountability. Otherwise, you run the risk of pointing fingers and the blame game when something inevitably goes wrong.

### A Case Study in AI Implementation

These lessons come from real, hard-earned experience. In 2024, we built **Tessa**, an internal chatbot designed to help our Project Managers and Sales teams access our vast portfolio and internal project management knowledge base. Technically, Tessa was a triumph. She was accurate, secure, and fast. But we quickly realized that technical feasibility doesn't translate to success. Why? No one used her.

Our team already had a "human" workflow: they asked colleagues in group chats. To our team, there was nothing broken in their process. To use Tessa, our team had to open a new tab, log in, and, most importantly, change their habits. The friction outweighed the benefit. We realized that even the most "intelligent" software will fail if it ignores human psychology.

But we learned from this. Rather than scrapping the project, we evolved it into **Tessa 2.0**. We pivoted from a "reactive" chatbot to a "proactive" AI agent. Now, Tessa doesn't wait for a question; she anticipates the need. When a new sales lead enters our CRM, Tessa automatically scans our database of hundreds of projects and pushes relevant examples directly into the record. Our reps now enter discovery calls with the perfect case studies already in hand, without spending a second searching.

Meanwhile, for our Project Managers, we identified a notorious "productivity killer": end-of-month unbillable hour reporting. Previously, PMs spent hours manually reconciling logs across different systems. It wasn't a hard process, but it was extremely manual. Now, Tessa identifies these hours, calculates the totals, and pings the PM via their existing chat tool, Slack, to ask, "I've prepared your End of Month Unbillable Report; should I submit it?" **The result? An 80% reduction in time spent on these administrative tasks**, allowing our PMs to focus on what they do best: delivering quality software.

### Scaling Customer Support with Sports Thread

This intentional, responsible, and practical philosophy translates directly to our clients across sports, medical, finance, and more. A prime example is our work

with **Sports Thread**, a leading sports team and event management platform for youth and amateur organizations.

As their user base surged, their customer support team faced a common challenge: how to maintain high-quality service without an exponential increase in headcount, especially during peak times like large events. Because most of the inquiries required immediate answers, rather than just creating backlogs of tickets, they needed a solution that was more than a scripted FAQ bot. The system had to not only understand but also be able to resolve cases quickly.

We built a custom AI-powered support solution that didn't just point users to links, but resolved issues in real-time. By training the AI on Sports Thread's unique data and support history, we ensured the responses were accurate and on-brand.

**The Impact:** Sports Thread reported an **83% time savings** on addressable cases.



Nik Froehlich, CEO & Founder of Saritasa

This scenario was about more than saving money; it was about creating a scalable solution that could keep up with the demands of Sports Thread's growing user base. It's the difference between a business being held back by its own growth and one that is empowered by it.

### A Strategic Checklist for AI Implementation

If you are auditing your own workflows for AI potential, use these tips to avoid settling for "fool's gold":

1. **Identify friction, rather than roles:** Don't try to replace a person. Look for manual, repetitive, or "fragile" workflows where data gets stuck.
2. **Verify data quality:** AI is only as good as its fuel. Do you have high-quality historical data to train the system? If not, start by organizing your data first.
3. **The "quick win" priority:** Focus on incremental improvements that win internal support. One successful, small automation is worth more than a failed "total transformation."
4. **Meet the user where they are:** If the AI requires more than two new steps for an employee to use, it will likely fail. Integrate it into the tools they already use (Slack, CRM, Email).

### Finding the Mother Lode

The AI digital gold rush is far from over, but the era of mindless prospecting is coming to an end. For mid-market businesses today, the goal shouldn't be to have the most AI, but rather the right AI. By applying a rigorous litmus test and auditing your workflows for genuine friction, you can bypass the "fool's gold" of flashy, superficial features.

The promise of technology is vast, and the potential for a "Mother Lode" of efficiency and revenue is real. But to strike it, you must build intentionally, practically, and responsibly. Don't just join the rush; build something better.

### Company Profile

**Saritasa** is a full-service technology partner that believes in being "Builders of Better." For over 20 years, we've helped businesses bridge the gap between complex challenges and elegant software solutions. We specialize in custom software, mobile apps, and intentional AI integration. Based in Newport Beach, our team approaches every project with a commitment to building technology that is practical, responsible, and designed to drive measurable business value.

### Author Biography

Nik Froehlich is the Founder and CEO of Saritasa. With decades of experience in the technology sector, Nik has guided hundreds of organizations through the shifting tides of digital transformation. He is a firm believer in using technology to empower humans, not replace them, and maintains a "hands-on" philosophy toward building software that solves real-world problems.

### Contact Information

**Website:** [www.saritasa.com](http://www.saritasa.com)

**Address:** 19900 MacArthur Blvd, #650, Irvine, CA 92612

**Phone:** (949) 325-7571

**Email:** [info@saritasa.com](mailto:info@saritasa.com)

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## AI That's Changing How Business Gets Done

In today's B2B world, customer experience is the real differentiator. Speed, simplicity, and reliability are no longer "nice to have." They are expected.

At Ingram Micro, we're creating AI solutions to make it easier for our customers and partners to do business through our AI-powered digital platform, Xvantage™. It brings together hardware, software, cloud, and services into one connected experience, helping companies find what they need, place orders, and move faster with more confidence.

The goal is simple: remove friction and make doing business easier.

### Innovation That Solves Real Problems

We're not just applying AI to an existing system, we're building it. We're proud to say we've earned four U.S. patents for innovations that address real-world business challenges.

- One of those innovations, Dynamic SKUs, automatically updates product information in real time, so customers always have up-to-date information, delivering a smoother experience.
- Another, Generative AI-Powered Email-to-Order, reads incoming emails and attachments, understands what's being requested, and converts that into a structured order quickly and accurately.
- A third, centered on vendor-agnostic data, simplifies how we connect with our partners, accelerates integration, and enables consistent scale across

regions.

- Our latest patent, an Automated Configure-to-Order (CTO) and Quote-to-Order (Q2O) platform, provides a single, unified experience, intelligent pricing, and automated validation to significantly improve speed, accuracy, and operational efficiency.

Together, these innovations help businesses work smarter, faster and with fewer roadblocks.

### Designed Around People

What sets our approach apart is how intentionally human it is. We're designing AI to fit into the way people already work, not forcing them to adapt to complicated systems.

At the same time, we recognize that relationships still matter. Technology should enhance those connections, not replace them.

### Building the Future of B2B

With more than 35 patents filed and a continued investment in innovation, we're helping our partners grow and deliver better experiences to their own customers.

Because in the end, AI isn't just about technology, it's about making business work better for everyone.

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# From Curiosity to Return On Investment, What Middle Market Companies Must Get Right While Deploying AI

Artificial intelligence is everywhere. The real question isn't whether to adopt it, it's whether most organizations are structurally ready to actually utilize it and get results.

Most companies have been experimenting with AI tools, automation platforms, RPA, and predictive analytics for quite some time. But most don't have a clear strategy, clear data structure, or a defined framework. And they haven't really defined the use cases. As a result, these AI initiatives stall and don't deliver a strong ROI. In worst-case scenarios, they expose the organization to risk.

The organizations that are seeing measurable results from AI share some common characteristics.

- 1. Start with the problem:** They want to understand what the business outcome is going to be. They look at bottlenecks, margin pressure and forecasting gaps. Whatever the issue may be, they clearly identify it first, and then they align the technology to support the objective.
- 2. Prioritize data integrity and governance:** AI is only as powerful as your data, and that data has to be extremely clean. Organizations with inconsistent data, siloed systems, or weak controls struggle to move past a pilot. Without governance around information, AI doesn't scale; it creates noise and distraction.
- 3. Stay focused on outcomes:** It's great to have a tool that helps with forecasting or planning, but unless it's accurate, it's useless. If a solution is not delivering value, organizations walk away. It is imperative to recognize that tools alone don't drive transformation. Measurable outcomes do.

The middle market is in the middle of a real transformation. AI adoption is accelerating across finance, supply chain, HRIS, and customer analytics. But leadership teams are increasingly recognizing that implementation without structure creates more complexity than clarity.

AI has evolved beyond a technological shift into an operational model shift. Organizations have to approach that shift strategically if they want to create a competitive advantage.

### Are you ready?

The question isn't whether AI matters. The question is whether your organization is ready, structurally, operationally, and strategically to deploy it in a way that actually drives return on investment.

If you're experimenting but not seeing measurable value... if your data isn't governed... if use cases aren't clearly defined... you're not alone. But those gaps need to be addressed before scaling.

The organizations that win with AI build readiness. They diagnose the problem, align strategy, clean their data, define real outcomes, and they execute with precision.

### Take the Next Step

Complete our survey to find out if you are ready to embark on your AI journey by scanning the QR code.



Cory McNeley  
UHY Consulting  
Managing Director  
National Technology  
Innovation Lead

## AI Isn't Optional Anymore. Are You Ready?

### Key considerations for business leaders today

- AI readiness & enablement
- Data governance & advanced analytics
- Intelligent automation & AI orchestration
- ERP modernization & system integration

Take Our AI Readiness Survey Today:



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## Wright Ford Young & Co. Hosts First Annual Swing for a Cause Charity Golf Tournament

Wright Ford Young & Co. (WFY) is proud to host its first annual Swing for a Cause Charity Golf Tournament, presented by FBFK Law. More than just a day on the course, this event serves as a meaningful tribute to the legacy of our late founder, Bob Wright, whose generosity and dedication to community continue to inspire our firm.

Bob Wright firmly believed in the importance of giving back. His leadership was defined by compassion, integrity, and a commitment to creating opportunities for others. This tournament honors his legacy by carrying forward the values he instilled—service, impact, and community involvement.

All proceeds from the event will benefit two outstanding organizations: Free Wheelchair Mission and Laurie's Scholars. Free Wheelchair Mission provides mobility to individuals in developing countries, transforming lives by opening doors to independence, education, and employment. Laurie's Scholars supports students through scholarships and mentorship, empowering them to achieve their academic and personal goals.

The Swing for a Cause Charity Golf Tournament represents the power of community coming together for a greater purpose. Sponsors, participants, and volunteers each play a critical role in the success of this event and in supporting these meaningful causes.

For more information about WFY's Swing for a Cause Charity Golf Tournament, please visit [cpa-wfy.com](http://cpa-wfy.com) or contact us at (949) 910-2727.

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**Paul Johnson**

✉️
**Contact:**  
**AIPT4BIZ@gmail.com**

📞
**Phone:**  
**CALL NOW!!**  
**949-500-2005**

🌐
**Website:**  
**WWW.AIPT4BIZ.COM**