

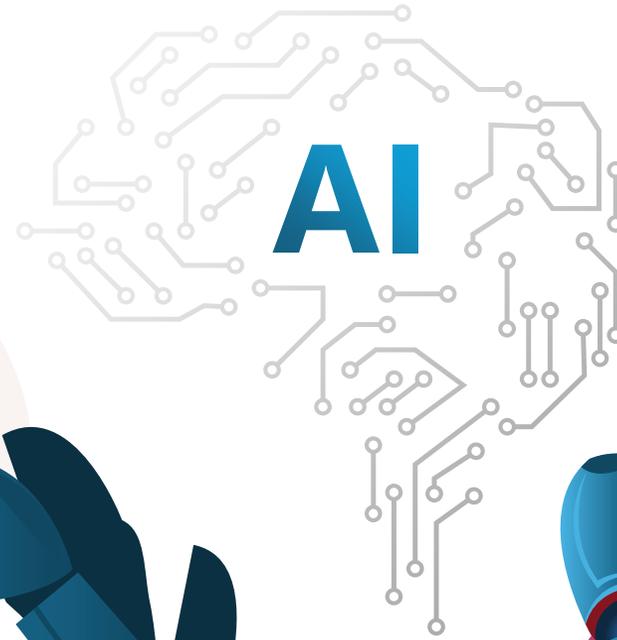
AI

Updates and SMB Transformation

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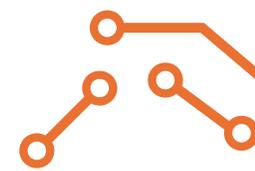
BEST RESULTS AI
Your People. Your Organization.

Current Reality



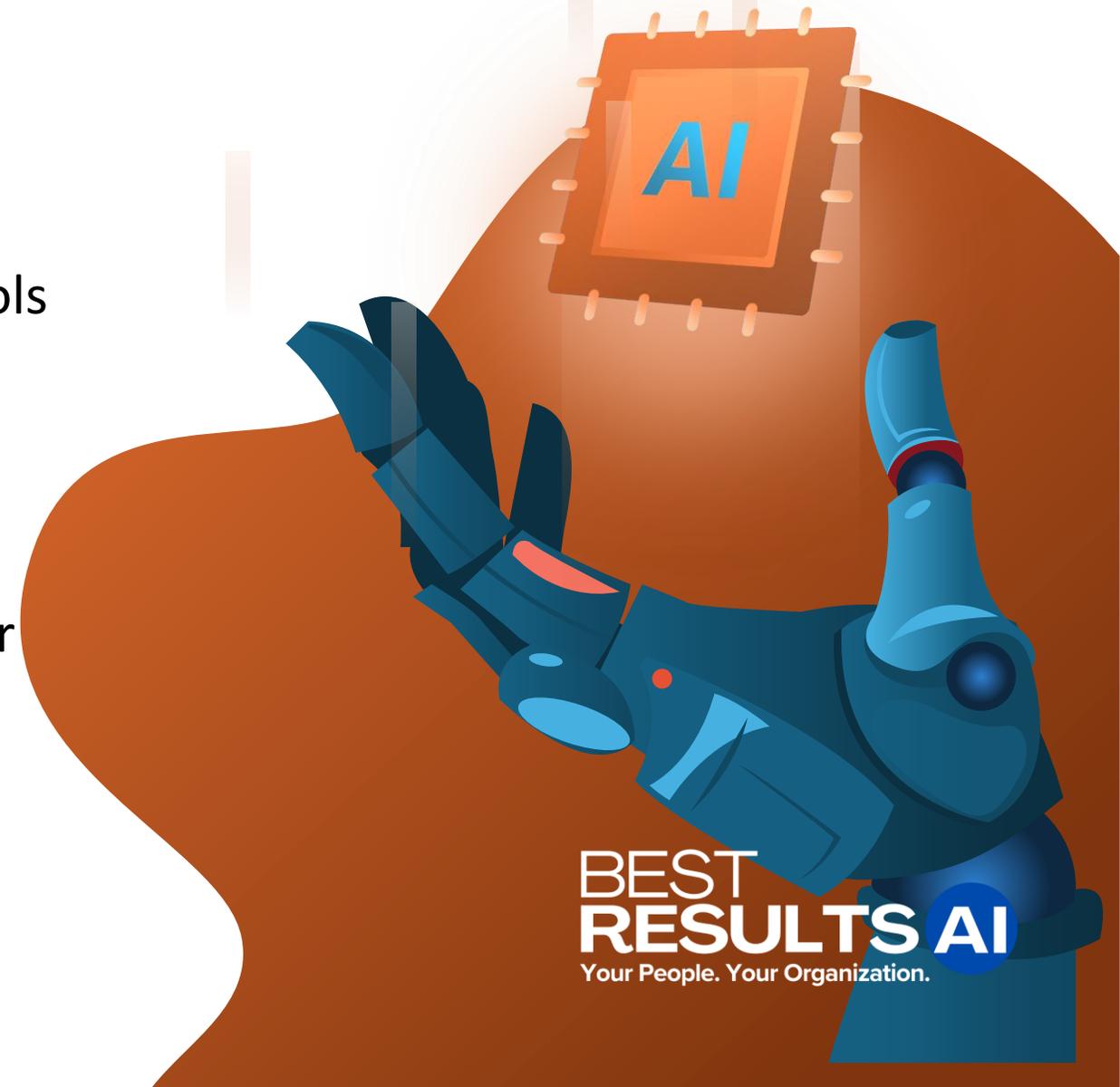
**BEST
RESULTS AI**
Your People. Your Organization.

Reality:

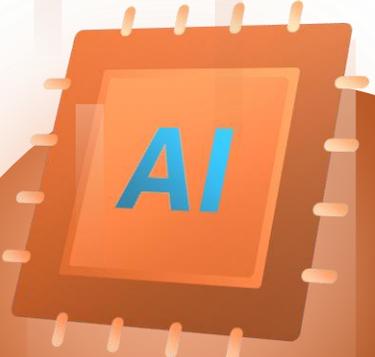


YOUR Employees Already Use AI

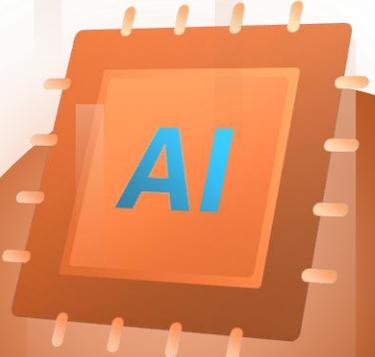
- Over 75% of knowledge workers currently leverage “Bring Your Own AI” (BYOAI) & AI tools
- Usage and outcomes are inconsistent (“hit or miss”)
- Employees often don’t communicate AI use or outcomes, creating hidden risks and missed opportunities for the organization



**BEST
RESULTS AI**
Your People. Your Organization.



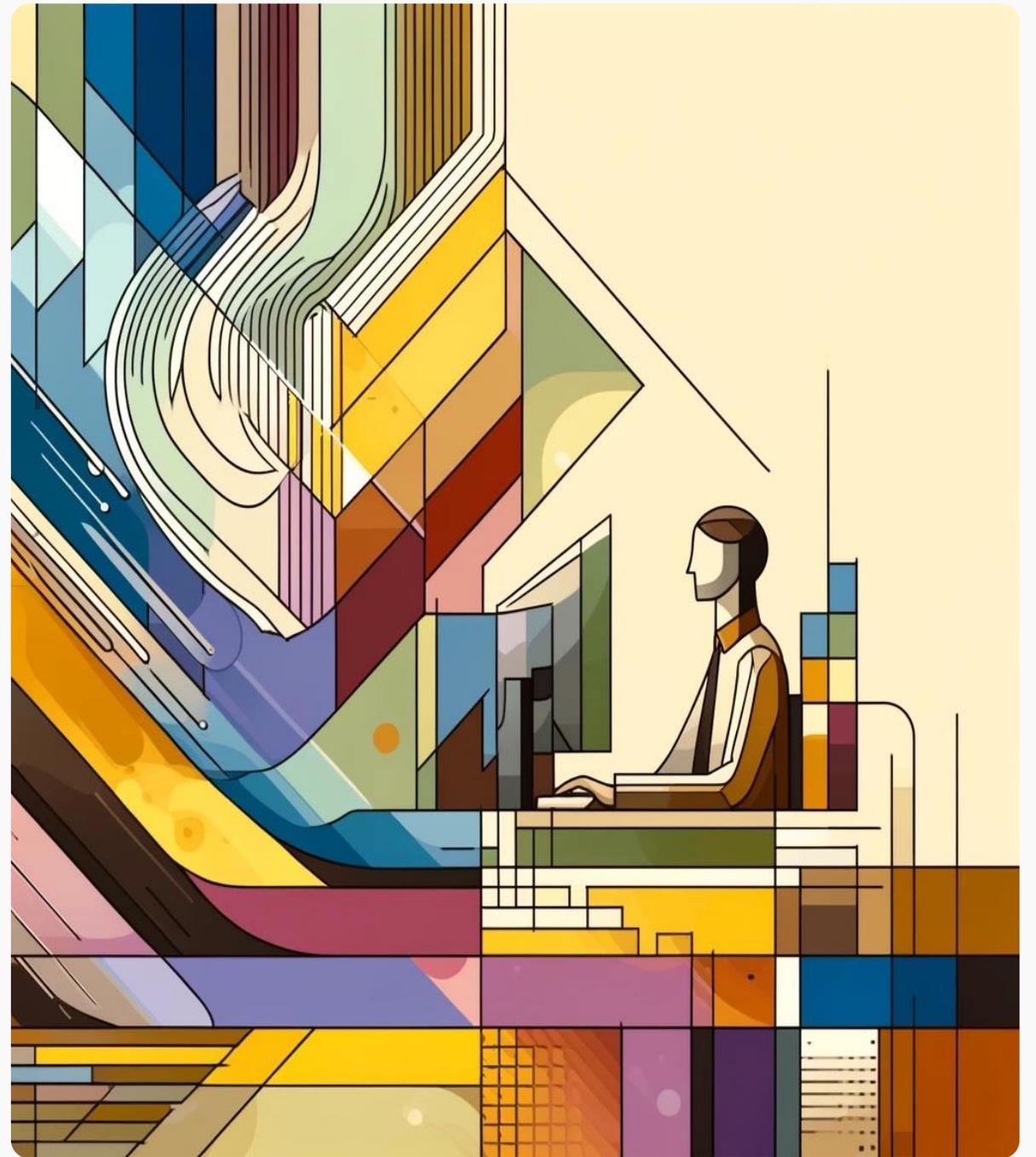
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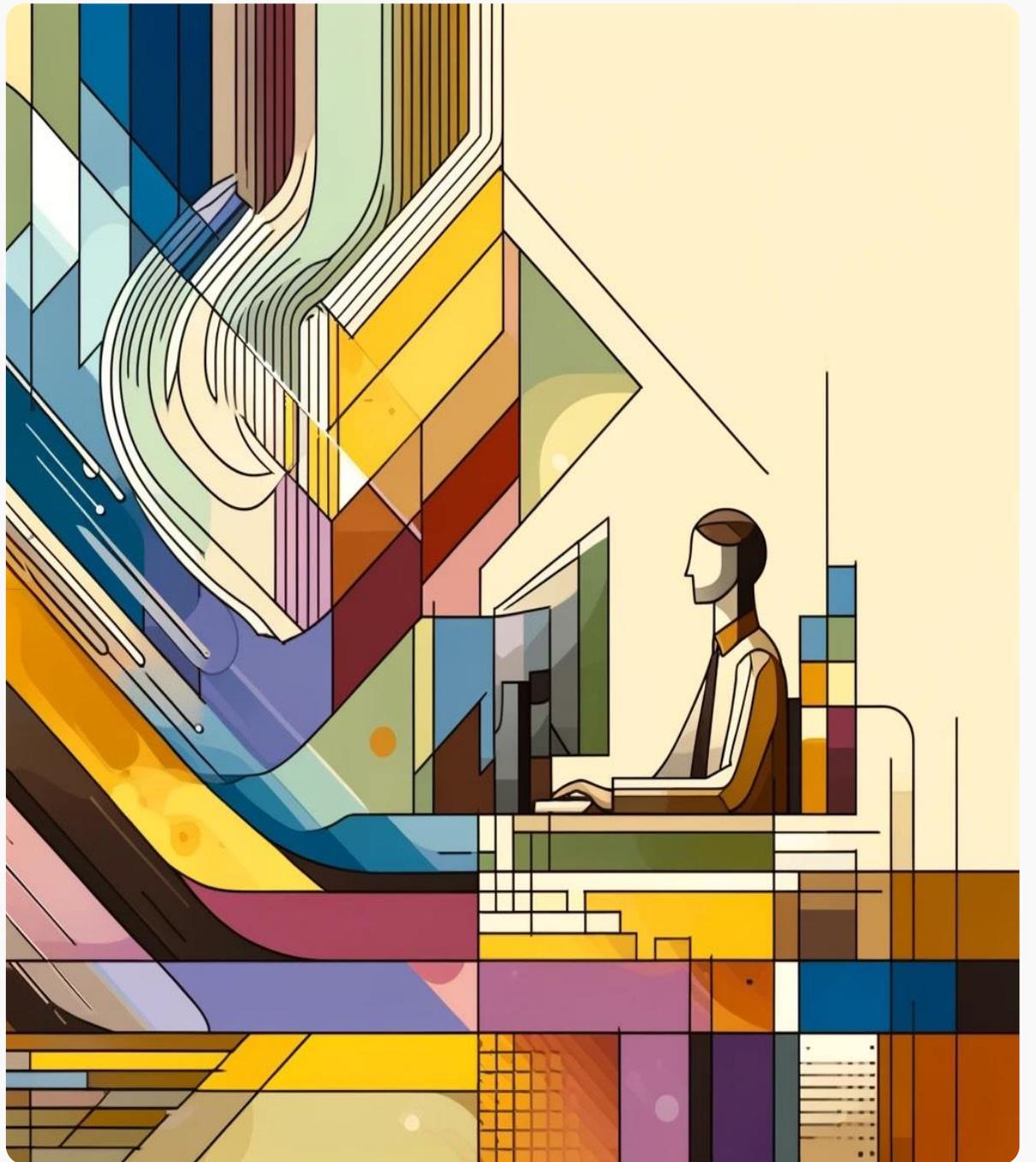
AI by the numbers...

Not the numbers most people look at.



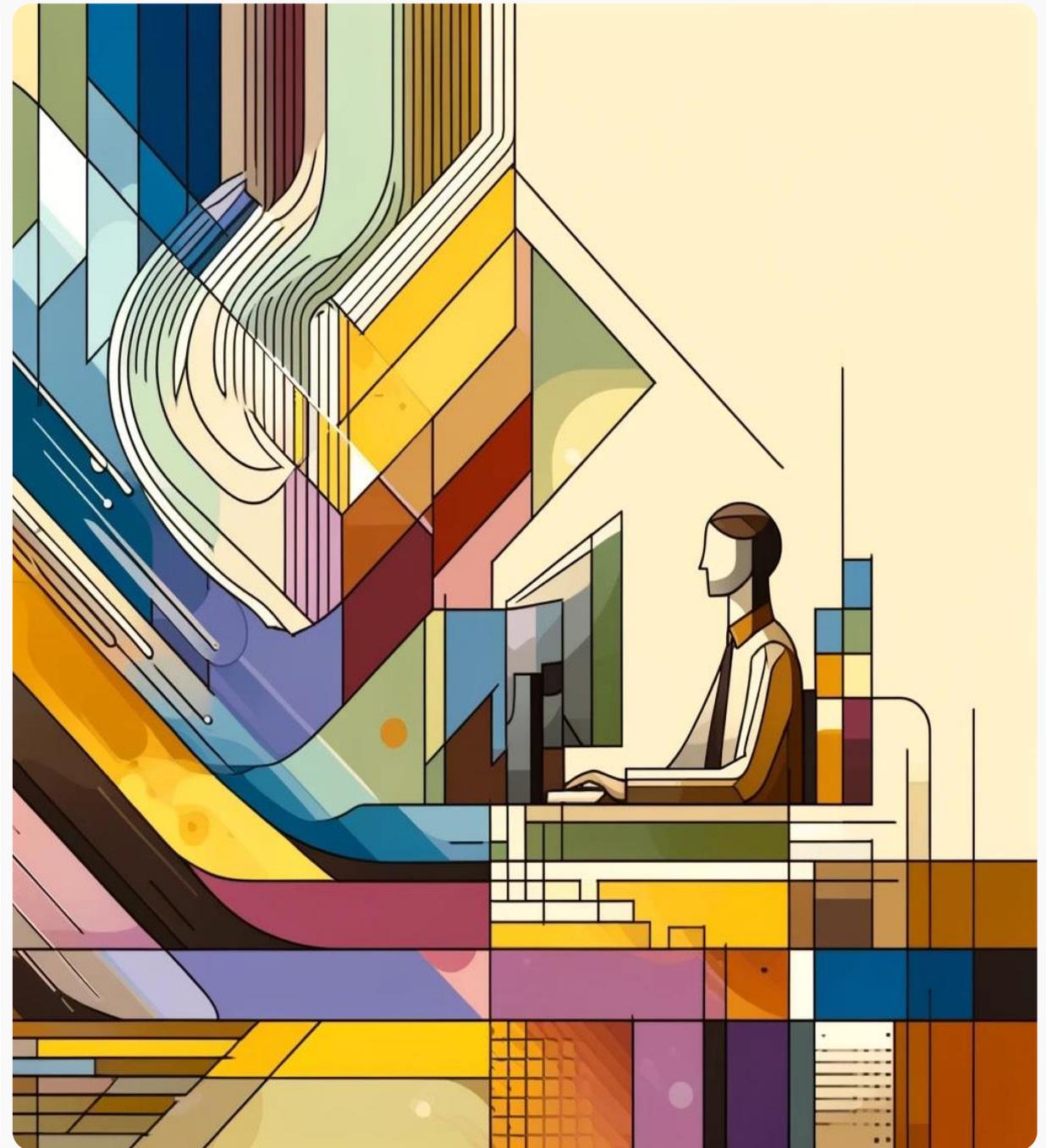
1. Employees want it

75% of global knowledge workers are using AI at work. The majority of these users started using it in the last 12 months



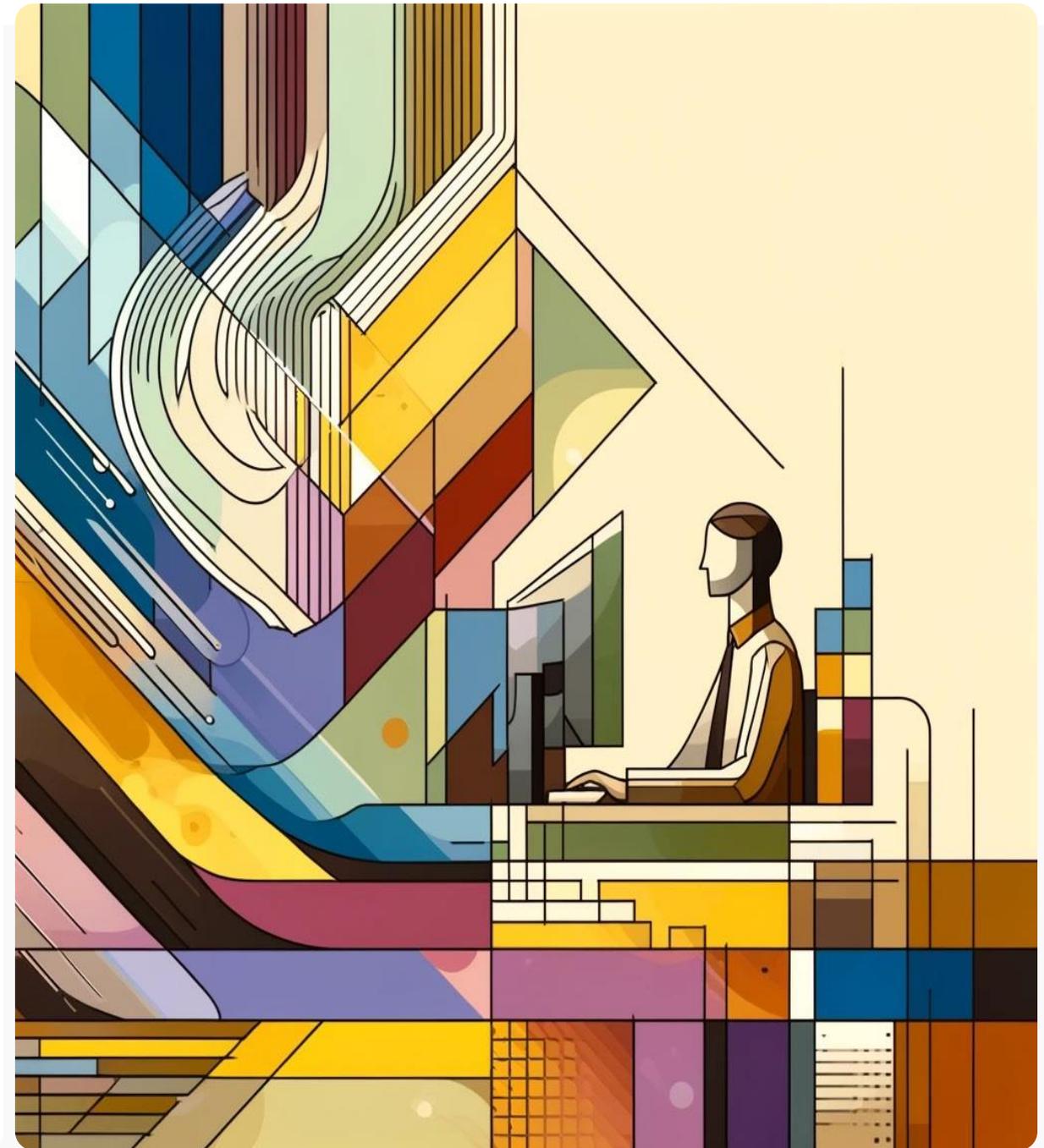
2. Gains Reported by Power Users

91% say AI helps them save time, 93% say it helps them focus on their most important work, 92% say it helps them be more creative, and 91% say it helps them enjoy their work more.



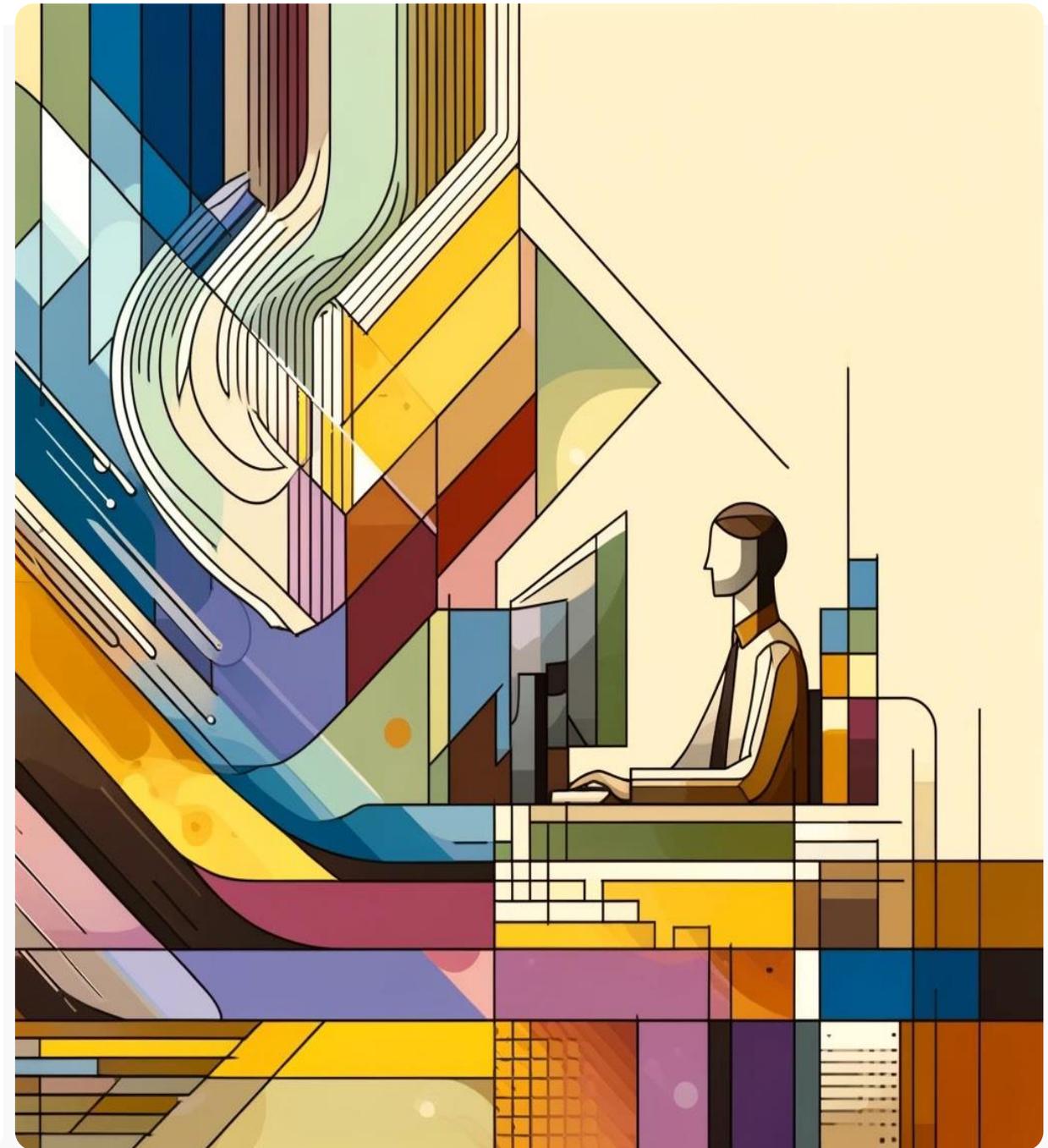
3. Companies are hiring for it

66% of leaders say they wouldn't hire someone without AI skills. 71% say they'd rather hire a less experienced candidate with AI skills than a more experienced candidate without them.



4. These numbers will only go up

These numbers have gone from 0 to >70% in less than 18 months, and...
the AI is as bad as it's ever going to be.



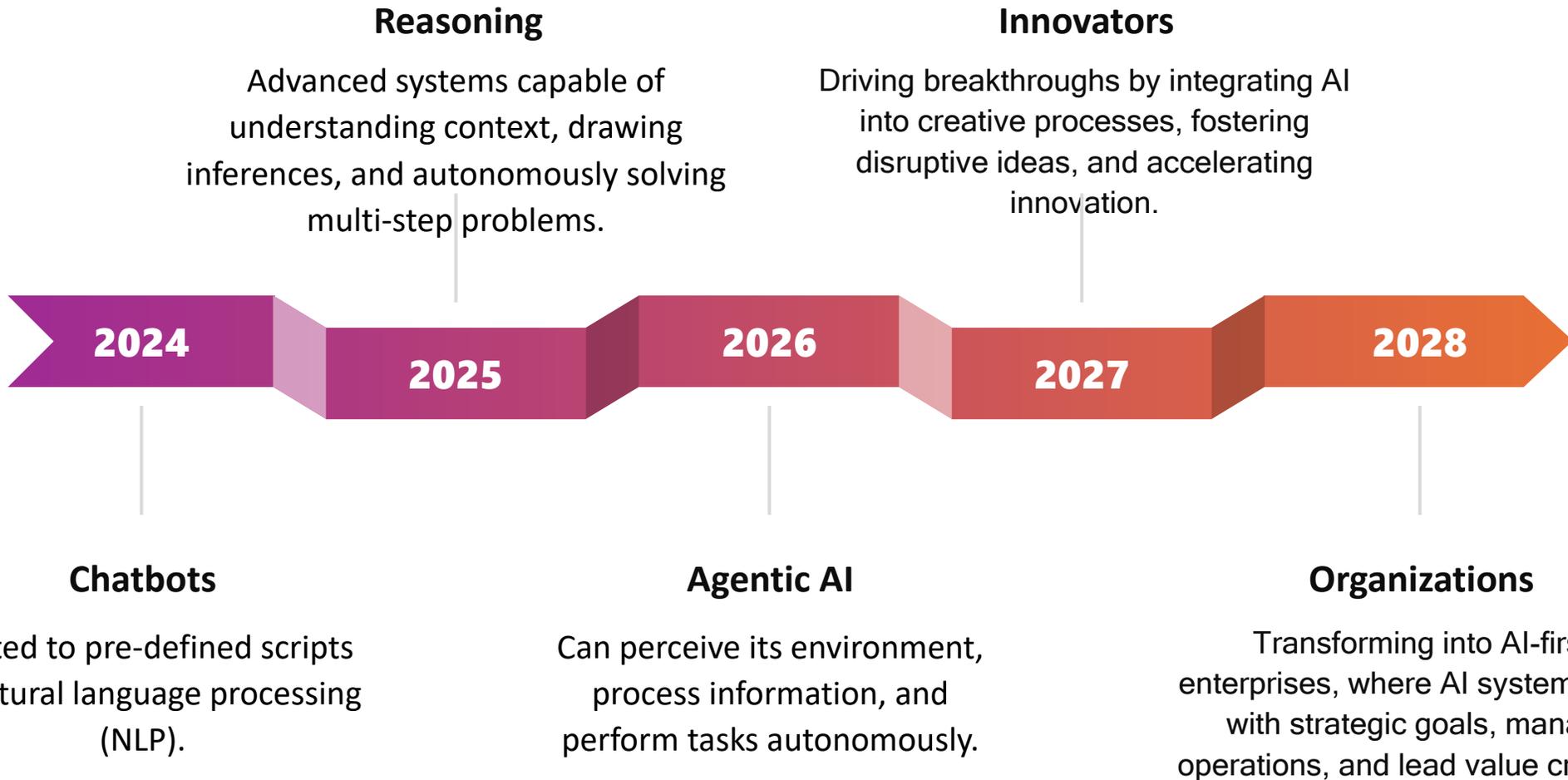
OpenAI Imagines Our AI Future



Stages of Artificial Intelligence

Level 1	Chatbots, AI with conversational language
Level 2	Reasoners, human-level problem solving
Level 3	Agents, systems that can take actions
Level 4	Innovators, AI that can aid in invention
Level 5	Organizations, AI that can do the work of an organization

AI Timeline



Which AI to choose?

Claude

Good for chats

(fast, but not as smart)

Claude 4 Sonnet

Good for work

(smarter, lower errors, but slower)

Claude 4 Opus

Good for hard problems

(very slow, very limited use)

Claude 4 Opus Extended
thinking

ChatGPT

Good for chats

(fast, but not as smart)

GPT5 Auto

Good for work

(smarter, lower errors, but slower)

GPT5 Auto

Good for hard problems

(very slow, very limited use)

GPT5 Pro

Gemini

Good for chats

(fast, but not as smart)

Gemini 2.5 Flash

Good for work

(smarter, lower errors, but slower)

Gemini 2.5 Pro

Good for hard problems

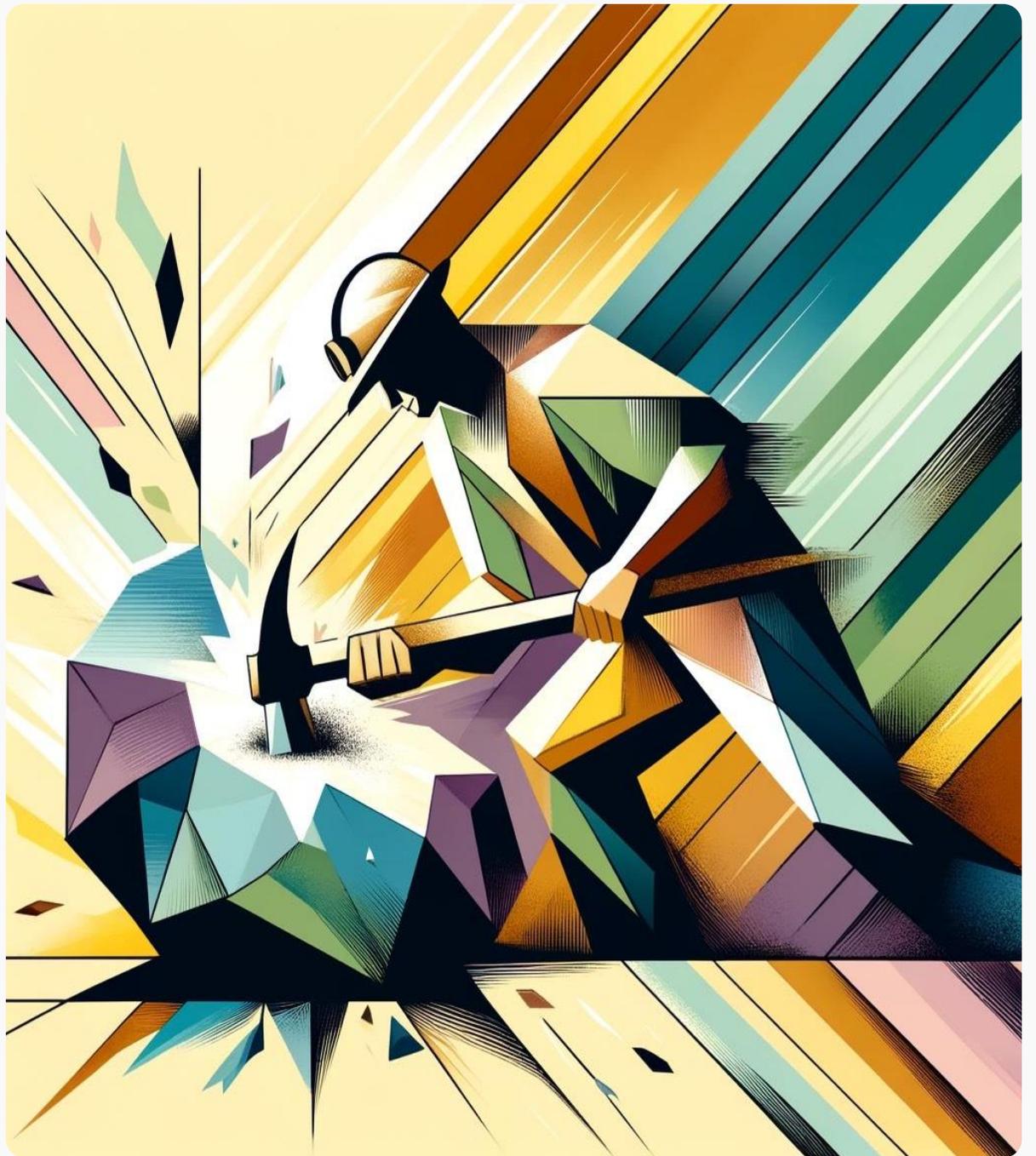
(very slow, very limited use)

Gemini 2.5 Pro

(right now, there is no extended thinking
version, probably coming soon)

Real Work Now Getting Done With AI

AI can now get real work done,
better, faster, and cheaper.



//What's holding you back?

AI Psychological Journey

Human -> Human^{AI} empowerment.

Indifference

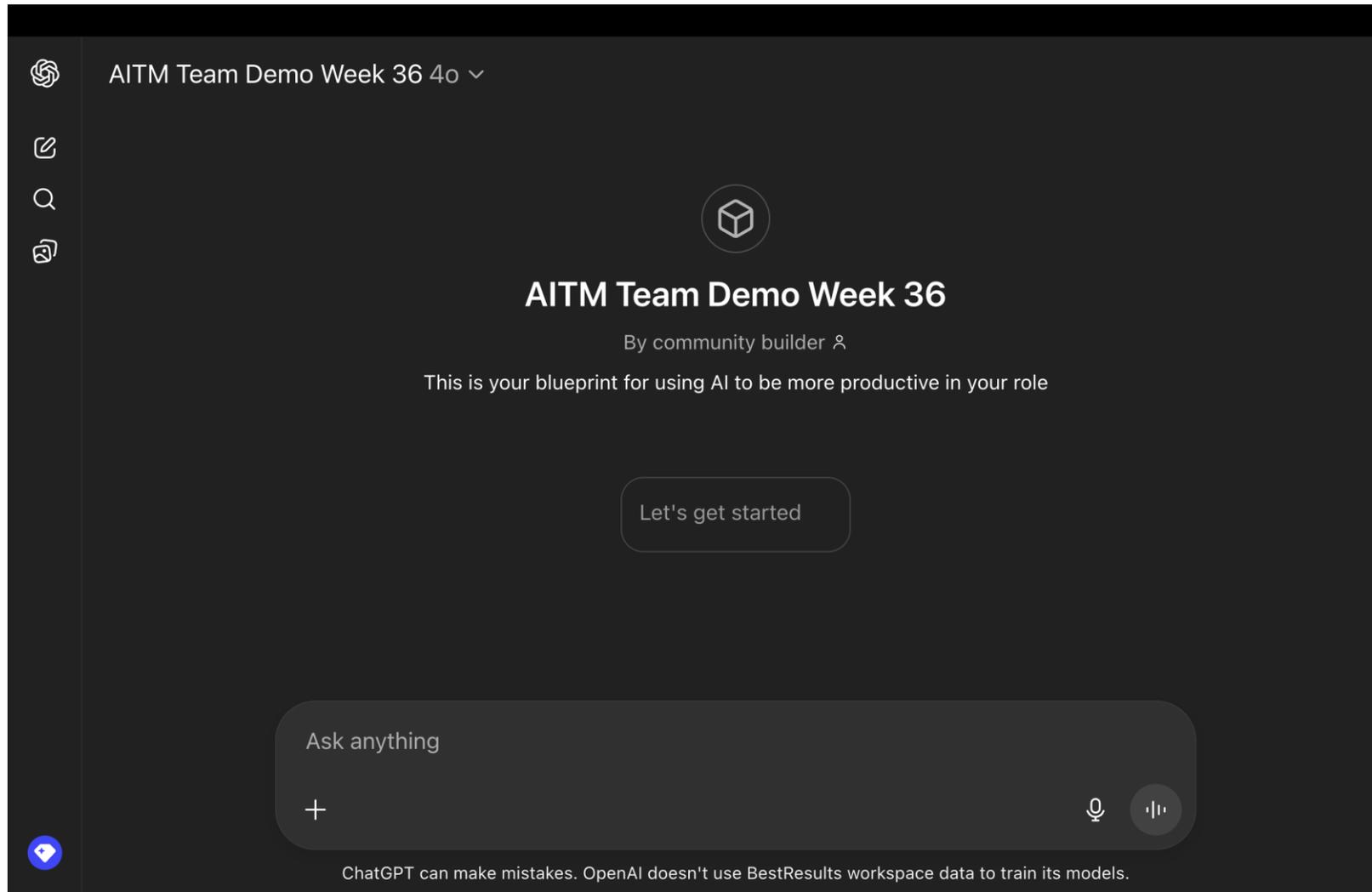
Fear

Letting Go

Confidence

Transformation





Demo: Outbound sequence of high conversion emails...

Prediction: What's going to happen in 2025?

EVALUATE

Fire people

Hire people

The three things all organizations will do

Prediction: What's going to happen in 2025?

EVALUATE

Fire people

Hire people

How can AI help us
be more productive?

Business Insider goes 'all-in on AI,' laying off 21% of staff

By **Olivia Hebert**, News Reporter
May 30, 2025



n in 2025?



A Democratic senator grilled OpenAI CEO Sam Altman about his private comment that **up to 70% of jobs could be replaced by AI**, during a congressional hearing this week. IBM and Duolingo are cutting jobs due to AI, automating HR and phasing out contract roles. 9 May 2025



PYMNTS.com

<https://www.pymnts.com> > artificial-intelligence-2 > sen... ⋮

Senator Grills Altman on if AI Could Eliminate Up to 70% of Jobs

FILE: Business Insider laid off about one fifth of its workforce Thursday, department and drew swift criticism.

James Gritz/Getty Images

Prediction: What's going to happen in 2025?

EVALUATE

Fire people

Hire people



38 out of their 40
data scientists...

Almost all companies
will make decisions
based on AI skills.



Andrew Wilkinson ✓

@awilkinson

Subscribe



I'm hiring an AI-first Director of Finance for one of my companies.

You:

- Don't use Google (maybe Gemini)
- Can do the work of 10 people by using AI - you are advanced with ChatGPT/Claude/Perplexity
- Have automated all drudge work and book keeping with AI tools
- Would never hire a lawyer unless you absolutely had to
- Have trained custom projects/GPTs on company financials / analysis and know how to build on the fly models and dashboards

Most of all:

- Are a strategic thinker/conductor vs an accountant. Bean counter < Bean grower.

Is this you? Email ben@follypartners.com

Example of a \$billionaire hiring manager post

Prediction: What's going to happen in 2025?

EVALUATE

Fire people

Hire people

You will be launched
into a market that
requires these skills

What Is Happening?



Needed Skilled Prompt Engineers

What Is Happening?



Needed Skilled Prompt Engineers

Need AI Workflow Masters

What Is Happening?



Needed Skilled Prompt Engineers

Need AI Workflow Masters

Will Need Agentic Workflow Masters

AI ROI Opportunities for CPA Offices

AI Opportunity	Mechanism	Reported Benefit
Transaction automation (Basis)	Auto-entry and validation	~30% time savings
AI agents in QuickBooks	Workflow automation	~12 hours/month saved
Big Four agentic platforms	Task automation and risk focus	Administrative reduction + enhanced value
Roll-up integration (Crete)	Scaling via acquisitions + AI embedding	Efficiency, expansion
AI tax helpers	Chatbots for common queries	~20% time savings, 65% AI query handling
Generative agents in ERP (FinRobot)	Autonomous workflow orchestration	40% less time, 94% fewer errors

//[The elephant in the room](#)

Can AI really help me and my team do our jobs better?

Our work with 80+ organizations proves that AI can do 10-70% of your knowledge work for you so you can expand your territory with your newly freed up time.



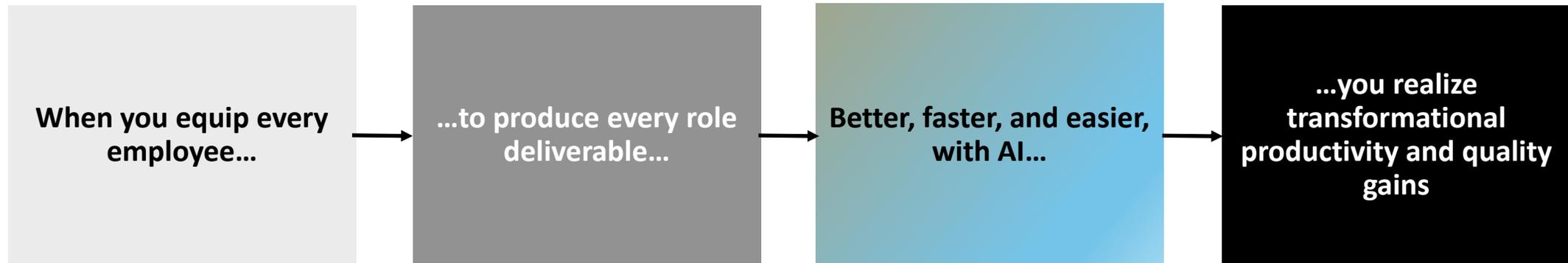
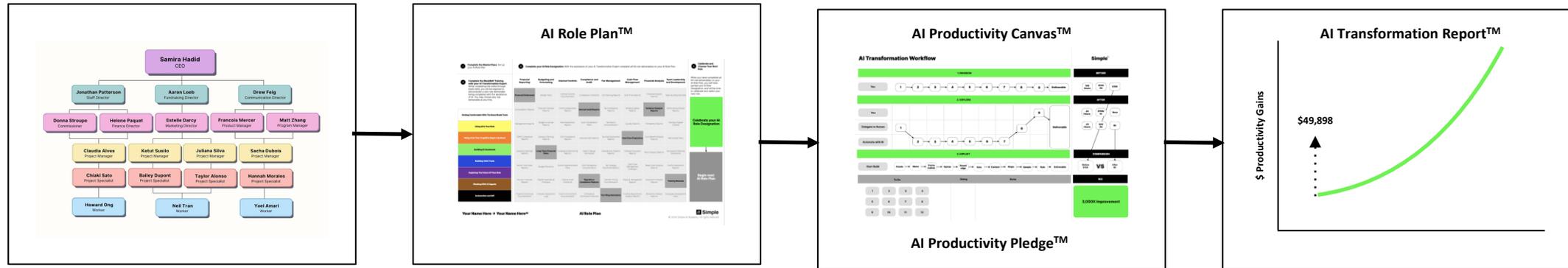
It knows your job

It knows how it can help you do it better, faster, and easier

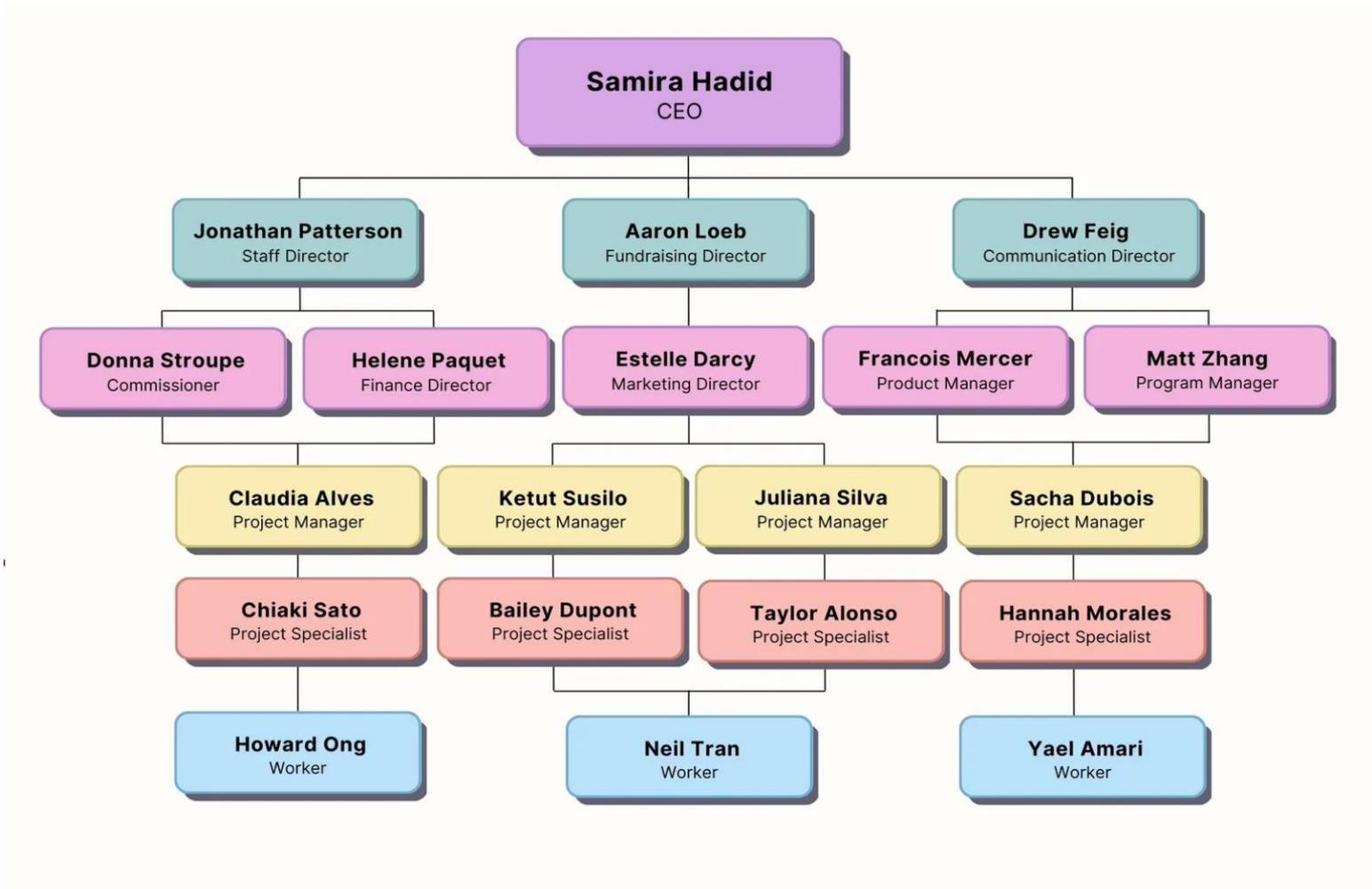
For every deliverable, for every role, in every organization

AI Empowerment Method™

Our Philosophy and Approach



When you enable every knowledge-oriented employee.



...to produce each of their role deliverables...

Courses	AI Skills Black Belt	Financial Planning	Budgeting and Forecasting	Financial Reporting	Internal Controls	Compliance and Audit	Cash Flow Management	Financial Analysis	Team Leadership and Development
White Belt	Getting Comfortable With The Base Model Tools	Financial Planning Templates	Budget Plans	Monthly Financial Reports	Internal Controls Documentation	Compliance Checklists	Cash Flow Statements	Financial Analysis Reports	Team Meeting Agendas
Yellow Belt	Using AI In Your Role	Departmental Financial Plans	Forecast Reports	Quarterly Financial Reports	Control Assessment Reports	Internal Audit Schedules	Liquidity Reports	Variance Analysis Reports	Performance Review Templates
Orange Belt	Using AI As Your Cognitive Super Assistant	Strategic Financial Plans	Budget vs. Actual Reports	Year-End Financial Statements	Risk Assessment Reports	Audit Preparation Documents	Working Capital Reports	Profitability Reports	Employee Training Schedules
Green Belt	Building AI Assistants	Scenario Planning Documents	Budget Revisions	Consolidated Financial Statements	Control Implementation Plans	Audit Findings Reports	Cash Flow Projections	Cost-Benefit Analysis Reports	Succession Planning Documents
Blue Belt	Building 100X Tools	Capital Allocation Plans	Long-Term Financial Forecasts	Ad-Hoc Financial Reports	Compliance Monitoring Reports	SOX Compliance Documentation	Treasury Management Plans	Break-Even Analysis Reports	Mentorship Program Outlines
Purple Belt	Exploring The Future Of Your Role	Financial Risk Management Plans	Scenario Analysis Reports	Financial Disclosure Documentation	SOX Compliance Reports	External Audit Coordination	Forecast Accuracy Reports	Sensitivity Analysis Reports	Conflict Resolution Plans
Brown Belt	Working With AI Agents	Investment Planning Documents	Forecast Adjustment Logs	Management Reports	Regulatory Compliance Checklists	Regulatory Compliance Reports	Funding Requirement Analysis Reports	Investment Analysis Reports	Training Materials
Black Belt	Mentoring through the Human → Human^{AI} process	Cost Management Strategies	Capital Expenditure Forecasts	GAAP Compliance Reports	Control Environment Documentation	Compliance Certification Records	Cash Flow Management Strategies	ROI Analysis Reports	Employee Development Plans

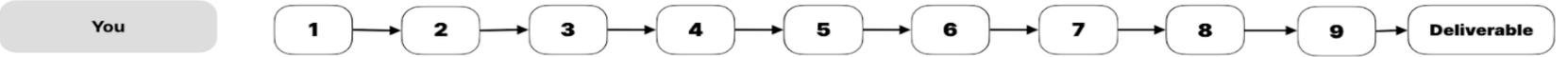
AI Transformation Path

Finance Manager → Finance Manage^{AI} (AIHRSP)

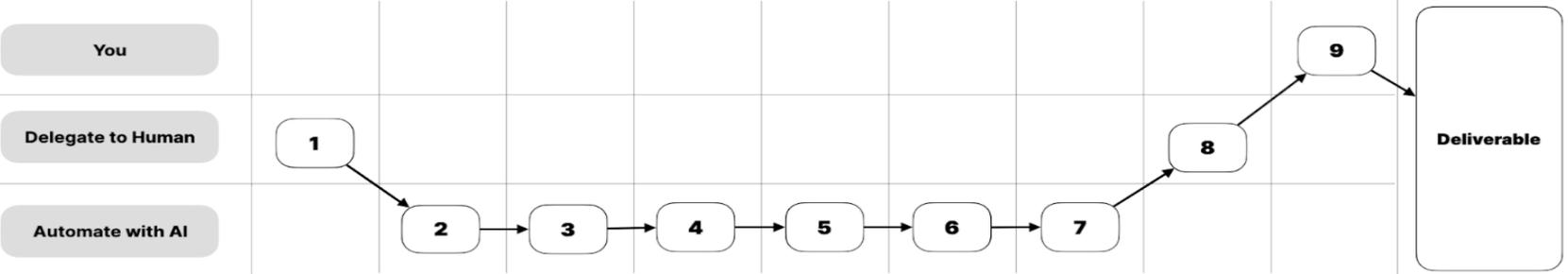


AI Transformation Workflow

1. ENVISION



2. EXPLORE

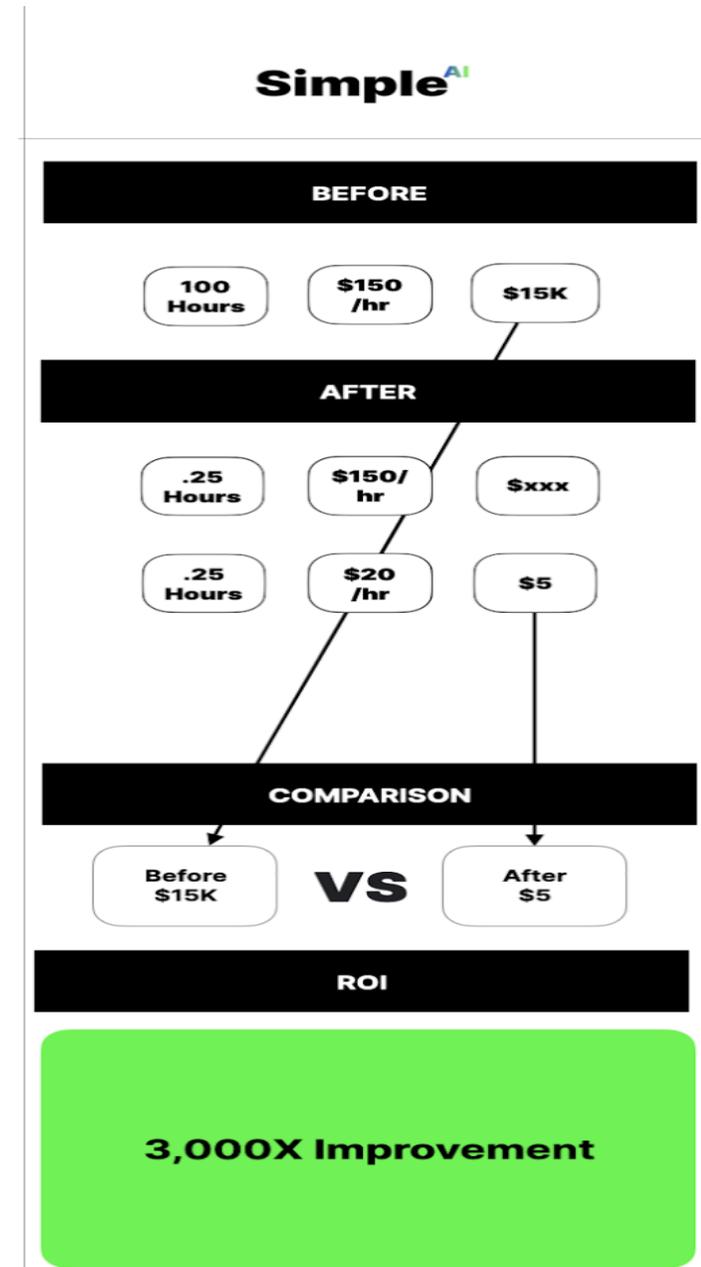


3. EXPLOIT



...better, faster,
and easier
with AI...

...transformational results occur.



// [What's in it for me?](#)

A more efficient, engaged, and effective way of working.

After completing the 10-Session Empowerment Workshop series, you and your team will be **more efficient**, **more engaged**, and **more effective**.

These scores are averaged from groups of AI Empowerment Workshop Series™ Graduates, reflecting on AI and its impact on their work life and results.

Increased Efficiency	Using AI saves me at least 30 minutes per day.	8.4
	Using AI makes my workload more manageable.	7.8
	AI has improved my work-life balance.	7.7
Increased Engagement	AI helps me focus on more fulfilling work.	8.7
	AI helps me enjoy my work more.	8.2
	Using AI makes me feel more motivated.	7.8
Increased Effectiveness	AI has helped me be more "creative" in my role.	9.0
	AI helps me be & feel more productive.	8.8
	The quality of the AI responses I have gotten are equal to or better than responses I would have gotten on my own.	8.2



// How do I get started?

Book an AI Role Plan Conversation

I will help you craft a custom AI Role Plan for you and up to 5 of your direct reports in less than 15 minutes.

OR

You can connect to discuss any questions on the presentation or the AI Skills Black Belt cohort and certification.



// [Moving Forward](#)

AI Empowerment Workshops™

Empowering you and your team to greater performance, quality and impact:

10 Workshop sessions, AI Certification:

- Live 75 min. Virtual Workshops
- ~ 60 min. individual “homework” weekly
- Valuable super-powered “meta prompts”
- Increasing AI “muscle” and confidence
- Focused on participants’ real work deliverables
- 1-year LMS access to workflows and assets

~~\$2,995~~ per participant, Discounted to \$2,495



[ACCESS THE DISCOUNT](#)

