

AI AS A SERVICE

# AI Readiness Guide

The framework for deploying AI safely,  
strategically, and with measurable results.

## WHAT'S INSIDE

- AI Governance Checklist — 20 controls every business needs
- Compliance Risk Assessment — HIPAA, PCI, SOC 2, GDPR, CMMC
- Top 10 SMB AI Use Cases ranked by ROI and implementation speed
- Secure Deployment Framework — five-phase methodology
- Workforce Adoption Playbook — 30/60/90 day milestones

**77%**

of employees already using AI  
without IT approval

**40%**

avg. productivity gain in  
AI-augmented workflows

**\$0**

internal AI infrastructure  
required to get started



# The AI Opportunity Is Real. So Is the Risk of Getting It Wrong.

Artificial intelligence is no longer a future technology. It's already inside your business — whether you've authorized it or not. 77% of employees report using AI tools at work without explicit IT approval. Sensitive data is being processed through public models. Compliance exposure is accumulating quietly.

The businesses winning with AI aren't the ones moving fastest. They're the ones moving deliberately — with governance frameworks, secure deployment environments, and workforce training that turns AI from a liability into a competitive advantage.

This guide gives you the framework SiloTech uses to assess AI readiness, identify governance gaps, and build a deployment roadmap that creates measurable business outcomes without compromising security or compliance.

***“AI without governance is not a competitive advantage.  
It’s a liability waiting to be discovered.”***

— SiloTech AI Practice Team

## How to Use This Guide

- 01 Complete the AI Governance Checklist**  
Identify which controls are in place and which are missing.
- 02 Run the Compliance Risk Assessment**  
Map your regulatory exposure against your current AI usage.
- 03 Review the Top 10 SMB AI Use Cases**  
Identify where AI creates the highest ROI for your business.
- 04 Evaluate the Deployment Framework**  
Understand the structured approach to secure AI rollout.
- 05 Plan Your Workforce Adoption**  
Use the adoption playbook to prepare your team for AI integration.



SECTION 01

# AI Governance Checklist

20 governance controls every business should have before deploying AI at scale.

### POLICY & GOVERNANCE

- Acceptable Use Policy (AUP) for AI tools documented and distributed
- AI tool inventory — all tools in use are known and approved
- Data classification policy defines what can be processed by AI
- AI governance owner or committee designated
- Policy review cadence established (at minimum annually)

### DATA SECURITY & PRIVACY

- Sensitive data is prohibited from being entered into public AI models
- Data residency requirements identified and enforced
- AI vendor data handling agreements reviewed and signed
- Access controls limit who can use which AI tools
- Audit logging enabled on all AI platform access

### COMPLIANCE & REGULATORY

- Applicable regulations identified (HIPAA, GDPR, PCI, CMMC, etc.)
- AI use cases mapped against compliance requirements
- Legal review completed for AI-generated content use
- Incident response plan updated to include AI-related breaches
- Third-party AI vendors assessed for compliance posture

### WORKFORCE & TRAINING

- All staff trained on AI acceptable use policy
- Role-specific AI training delivered to key departments
- AI output review process defined — human-in-the-loop established
- Reporting mechanism exists for AI misuse or concerns
- Leadership briefed on AI risk and strategic opportunity



## SECTION 02

# Compliance Risk Assessment

Map your regulatory exposure against your current AI usage patterns.

## HIPAA

Healthcare data · Patient records · PHI processing

- AI tools processing patient data must be covered under a BAA
- De-identification required before using data for AI model training
- Audit logs required for all PHI access through AI systems

## PCI DSS

Payment card data · Financial transactions · Cardholder info

- Cardholder data must never be entered into public AI models
- AI vendor environments must meet PCI scoping requirements
- Access to AI tools processing payment data must be role-limited

## SOC 2

Security · Availability · Confidentiality · Privacy

- AI tool usage must be documented in system descriptions
- Vendor risk assessments required for all AI platforms
- Change management applies to AI model updates and integrations

## GDPR / CCPA

Personal data · EU/CA residents · Privacy rights

- AI processing of personal data requires legal basis documentation
- Right-to-deletion applies to data used in AI training sets
- Transfers to AI vendors outside jurisdiction require safeguards

## CMMC / NIST

Government contracts · CUI · Defense supply chain

- AI tools processing CUI must meet CMMC Level 2+ requirements
- FedRAMP authorization required for cloud AI platforms
- Supply chain risk assessment must include all AI vendors



## SECTION 03

# Top 10 SMB AI Use Cases

Ranked by ROI, implementation speed, and risk profile for SMB and mid-market businesses.

01

ROI: High

Speed: Fast

## Help Desk & IT Support Automation

AI-powered tier-1 support routing, FAQs, and resolution — reducing ticket volume and response time.

02

ROI: High

Speed: Fast

## Document Summarization & Analysis

Contracts, reports, RFPs, and policy documents processed and summarized in seconds, not hours.

03

ROI: High

Speed: Medium

## Customer-Facing Chat & Support

24/7 AI chat agents handling inquiries, routing, and resolution across web, email, and messaging.

04

ROI: High

Speed: Medium

## Sales & CRM Intelligence

AI enrichment of CRM data, deal scoring, follow-up drafting, and pipeline analysis for sales teams.

05

ROI: Medium

Speed: Medium

## Financial Reporting & Forecasting

Automated report generation, anomaly detection, and scenario modeling from financial data sets.

06

ROI: Medium

Speed: Fast

## HR & Recruiting Automation

Resume screening, candidate scoring, onboarding documentation, and policy Q&A automation.

07

ROI: Medium

Speed: Fast

## Marketing Content at Scale

First-draft generation for email, social, blog, and ad content — human-reviewed before publishing.

08

ROI: High

Speed: Slow

## Compliance Documentation

Automated policy documentation, audit trail generation, and compliance gap reporting.

09

ROI: High

Speed: Slow

## Predictive Maintenance & Operations

AI analysis of operational data to predict equipment failure, optimize scheduling, reduce downtime.

10

ROI: Medium

Speed: Slow

## AI Phone Agents

Natural language voice agents for inbound call handling, appointment scheduling, and routing.



## SECTION 04

# Secure AI Deployment Framework

The five-phase approach SiloTech uses for every managed AI engagement.

## PHASE 01 Assess — Discover & Evaluate

- Current AI tool inventory and shadow AI audit
- Business process mapping for AI opportunity identification
- Compliance and regulatory requirement mapping
- Security posture baseline assessment
- Stakeholder interviews and priority alignment

## PHASE 04 Train — Workforce Adoption

- Role-specific training program delivery
- Use case workshops by department
- Governance and acceptable use training
- AI champion program for internal advocacy
- Feedback collection and adoption measurement

## PHASE 02 Design — Architecture & Governance

- AI governance policy development
- Secure deployment architecture design
- Tool selection and vendor evaluation
- Data handling framework and access control design
- Compliance control mapping to deployment plan

## PHASE 05 Optimize — Measure

- Quarterly business reviews and ROI measurement
- Model performance and output quality monitoring
- Policy updates as AI landscape evolves
- New use case identification and prioritization
- Continuous security posture review

## PHASE 03 Deploy — Controlled Rollout

- Pilot group deployment with monitored usage
- Security controls validation and testing
- Integration with existing IT infrastructure
- Initial user training and onboarding
- Performance baseline establishment



SECTION 05

# Workforce Adoption Playbook

How to turn your team from AI skeptics into AI practitioners.

## The Three Adoption Killers — and How to Avoid Them

**Killer: Fear of replacement**

Frame AI as a tool that handles tedious work so your team can focus on work only humans can do. Make that concrete and specific for each role.

**Killer: No clear use case**

Generic AI training fails. Role-specific workshops with hands-on practice on actual work tasks produce adoption. Abstract demos produce skepticism.

**Killer: No ongoing support**

One-time training events don't create habits. Champions, peer support, and regular check-ins sustain adoption past the launch excitement.

## The AI Champion Program

Designate one AI Champion per department. Their role:

- Serve as the internal AI resource and first point of contact for questions
- Test new use cases and report results back to the broader team
- Surface adoption barriers to leadership before they become culture problems
- Connect with the SiloTech AI team monthly for updates and guidance
- Recognize and share team wins that demonstrate AI value

## 30 / 60 / 90 Day Adoption Milestones

|                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                              |
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| <p><b>Day 30</b></p> <ul style="list-style-type: none"> <li>● All staff complete foundational AI acceptable use training</li> <li>● AI champions designated in each department</li> <li>● At least one use case piloted per department</li> <li>● Baseline productivity metrics captured</li> </ul> | <p><b>Day 60</b></p> <ul style="list-style-type: none"> <li>● Role-specific training completed across all teams</li> <li>● Use case library of 5+ documented, measured workflows</li> <li>● First adoption review meeting held with leadership</li> <li>● Governance policy reviewed and updated based on usage</li> </ul> | <p><b>Day 90</b></p> <ul style="list-style-type: none"> <li>● ROI measured against pre-deployment baseline</li> <li>● Top performers sharing use cases internally</li> <li>● Roadmap for next AI use case wave approved</li> <li>● Annual training and review cadence established</li> </ul> |
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# Ready to Deploy AI the Right Way?

Schedule a free AI Strategy Session with the SiloTech team. We'll assess your readiness, identify governance gaps, and build a clear deployment roadmap — no obligation, no pitch.

**SCHEDULE YOUR FREE AI STRATEGY SESSION**

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