2026 EDITION · FREE GUIDE

# The AI Advantage

## For every business

How businesses in every industry can find where AI pays off, and make it work.

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INTRODUCTION

# Where AI pays off first

AI is no longer a future project. In 2026 it sits inside the email, spreadsheet, CRM and help desk software most companies already pay for. The question has shifted from whether to use it to where it pays off first.

This guide walks through ten questions business leaders ask most, each with a common scenario, what AI can do about it, and an example tool worth a look. Use the readiness checklist to see where you stand before you spend.

**1. Take the checklist**

Ten yes-or-no questions show where you stand today.

**2. Read the ten answers**

Each pairs a common problem with what AI can do about it.

**3. Pick one place to start**

The last page shows how to turn a good idea into a working result.




ABOUT THE AUTHOR

## Toby S. Reeves

Toby has spent about 30 years in technology sales and executive leadership. He founded IndyLogic Technologies, which helps mid-market companies find where AI creates practical value and put it to work, starting with how work actually gets done.

He holds an MBA in Information Technology Management and has studied generative AI through Vanderbilt University and Google Cloud. He leads the Indiana chapter of the International Trade Council, teaches Google AI Essentials to business and community leaders through Ivy Tech Career Link, and wrote *The Quantum Leap: Transforming Commerce for the Future*.

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AI READINESS CHECKLIST

# Ten questions to answer before you spend

Answer each one honestly for your organization today. The goal is not a perfect score. It is a clear view of where AI could help first.

| | | |
|---|---|---|
| 01 | Have you listed the repetitive tasks that eat the most staff hours each week? | ☐ Yes ☐ No |
| 02 | Does your team have approved AI assistants, or are people using personal accounts? | ☐ Yes ☐ No |
| 03 | Do you have a written AI use policy covering customer and employee data? | ☐ Yes ☐ No |
| 04 | Do customers get answers outside business hours? | ☐ Yes ☐ No |
| 05 | Do you use AI-assisted analytics to spot trends in sales and operations? | ☐ Yes ☐ No |
| 06 | Is your cybersecurity monitoring able to catch unusual activity in real time? | ☐ Yes ☐ No |
| 07 | Are your marketing campaigns adjusted using performance data, not guesswork? | ☐ Yes ☐ No |
| 08 | Do you watch transactions for fraud automatically? | ☐ Yes ☐ No |
| 09 | Can you see early warning signs before a customer leaves? | ☐ Yes ☐ No |
| 10 | Do you have a short list of AI projects ranked by payoff and effort? | ☐ Yes ☐ No |

**0 to 3 yes**
You are early. Start with one high-volume, low-risk task.

**4 to 7 yes**
You are building. Connect your wins and put a policy in writing.

**8 to 10 yes**
You are ready to scale. Focus on measurement and governance.

THE TOP 10 QUESTIONS, ANSWERED

# What leaders ask most

## 01

### How can AI automate repetitive tasks?

**THE SITUATION**

Staff spend hours copying data between systems, answering routine emails and building the same reports every week.

**WHAT AI CAN DO**

AI automation tools connect your apps, read incoming documents and emails, and complete routine steps on their own, with a person reviewing the exceptions.

**Worth a look:** Zapier, connects thousands of business apps, with AI agents that can run multi-step tasks.

## 02

### How can AI improve customer support?

**THE SITUATION**

Customers wait hours for simple answers, and support staff spend their day on the same ten questions.

**WHAT AI CAN DO**

AI agents answer common questions instantly from your own help content, at any hour, and hand complex cases to a person with the full conversation attached.

**Worth a look:** Intercom Fin, an AI agent that resolves customer questions inside the Intercom help desk.

## 03

### How can AI help us make better decisions with our data?

**THE SITUATION**

Leaders have plenty of data but no time to dig through it, so decisions rest on instinct and last month's report.

**WHAT AI CAN DO**

AI-assisted analytics let managers ask questions in plain English, flag unusual changes automatically and summarize what moved and why.

**Worth a look:** Tableau, business intelligence with built-in AI that explains trends and answers plain-language questions.

## 04

### How does AI strengthen cybersecurity?

**THE SITUATION**

Phishing attempts and account takeovers keep rising, and a small IT team cannot watch every login.

**WHAT AI CAN DO**

AI security tools learn what normal activity looks like across email, devices and the network, then flag or block what does not fit.

**Worth a look:** Darktrace, self-learning AI that detects and responds to unusual activity across a business.

## 05

### Will AI replace our employees?

**THE SITUATION**

Leadership wants the gains from AI, but staff are worried about their jobs and quietly resist new tools.

**WHAT AI CAN DO**

Most gains come from AI taking over the dull parts of a role, such as drafting, summarizing and searching, so people spend more time on judgment and customers. Training and clear rules matter more than the tool.

**Worth a look:** Microsoft 365 Copilot, ChatGPT or Claude, general AI assistants for drafting, summarizing and analysis. Pick one, set rules, and train people on it.

## 06

### How can AI improve marketing?

**THE SITUATION**

Ad spend keeps rising while leads stay flat, and nobody is sure which campaigns actually work.

**WHAT AI CAN DO**

AI marketing tools segment your contacts, draft and test content, and shift budget toward what converts.

**Worth a look:** HubSpot Breeze, AI agents and assistants built into HubSpot's marketing, sales and service software.

## 07

### How does AI help prevent fraud?

**THE SITUATION**

Payment fraud and fake accounts are getting harder to spot by hand, and each loss hits the margin directly.

**WHAT AI CAN DO**

AI fraud tools score every transaction in real time against known patterns and flag the unusual ones before money moves.

**Worth a look:** Feedzai, AI-based fraud and financial crime prevention for payments and transactions.

## 08

### How can AI make our supply chain more reliable?

**THE SITUATION**

Late suppliers and surprise demand swings leave you choosing between stockouts and excess inventory.

**WHAT AI CAN DO**

AI supply chain tools forecast demand, model what-if scenarios and suggest where to adjust inventory and suppliers before a problem lands.

**Worth a look:** Coupa Supply Chain Design and Planning, AI-driven supply chain modeling, formerly known as LLamasoft.

## 09

### How can AI improve pricing?

**THE SITUATION**

Prices are set once a year in a spreadsheet, while costs and competitors change every month.

**WHAT AI CAN DO**

AI pricing tools analyze demand, costs and win rates to recommend prices and discounts that protect margin.

**Worth a look:** PROS, AI-driven pricing and quoting software for B2B and travel companies.

## 10

### How can AI predict which customers will leave?

**THE SITUATION**

You only find out a customer is unhappy when they stop ordering or cancel.

**WHAT AI CAN DO**

AI analyzes usage, orders and support history to flag customers at risk early, so your team can act while there is still time.

**Worth a look:** ChurnZero, customer success software that uses AI to spot churn risk and growth signals.

### Ground rules for any AI project

- Keep customer and employee data out of tools your company has not approved.
- Put a short AI use policy in writing, and train people on it.
- Keep a person responsible for decisions that affect customers, money or safety.
- Measure the before and after, so you know what actually paid off.

Tools change quickly. The examples in this guide were checked in October 2026 and are starting points, not endorsements. IndyLogic is vendor-neutral and earns no commissions from any vendor named here.

WHERE TO START

# From a good idea to a working result

AI pays off fastest when it starts with how work actually gets done, not with a tool. Pick one painful, repetitive process, measure it, fix it, and build from there.

1. **Look at the work, not the tools**
   Map the tasks that take the most time or cause the most errors. That is where the payoff is.

2. **Pick one use case and size it**
   Estimate the hours or dollars at stake, and the risk if it goes wrong. Start where the payoff is high and the risk is low.

3. **Run a small pilot and measure it**
   Test with a few people for a few weeks. Compare the results with how the work was done before.

4. **Write the rules, then scale**
   Document what the AI may and may not do, who reviews it, and how it is monitored. Then roll it out.

## Want a second opinion on where to start?

Run the free AI opportunity scan at indylogic.com. Enter your website and see three places AI could pay off first, in about 20 seconds. Or book a short call with Toby.

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