The Trifecta of AI
Dealers: Start here or get left behind

by: West McDonald, GoWest.ai

Office technology dealers are creatures of habit and that is a good thing. Whether it is leveraging e-automate for service and contract management, deploying data collection agents (DCAs) to keep managed print services (MPS) engagements humming, or structuring deals with providers like GreatAmerica Financial Services to lock in long-term contracts, these are fundamentals that generate additional revenue streams and lock in customer relationships for years. But in 2024, there is another tool set that should be just as automatic: artificial intelligence (AI).

Just like you wouldn't run an MPS program without data collection or send out lease agreements without solid financing, AI needs to be a core part of your business toolkit. And while you should always begin with a full assessment to determine your specific needs by department, let's talk about the three foundational AI services — what I like to call the "AI trifecta" — that will make sure you are set up for a successful and safe start.

(1) Develop AI Policies and Guidelines — First things first: Before you even think about jumping headfirst into AI, you need some guardrails. Just like every good MPS contract includes terms to protect both you and the customer, you need AI policies to protect your data, intellectual property and operational integrity.

AI policies are not just about locking down data; they are about creating an environment where creativity can thrive without exposing your business to unnecessary risks. Based on the GoWest.ai AI standard operating procedure (SOP), here is what you should do:

■ Assess your current usage: It is likely that someone (a whole bunch of "someones," in fact) in your office is already using AI. Maybe a sales rep is generating email templates with ChatGPT or a marketing manager is using AI to brainstorm social media ideas. Start by understanding how and where AI is being used across your business.

■ Set clear rules for data security: AI tools, particularly free ones like the public version of ChatGPT, store data in ways that may not be secure. Your policies should explicitly forbid entering sensitive client data or intellectual property into unapproved AI tools. Instead, mandate the use of secure, corporate-grade tools like ChatGPT Team, which ensures data is not used for model training and adheres to SOC 2 compliance standards.

■ Approved tools only: Corporate tools like ChatGPT Team offer critical security benefits. Unlike its consumer counterparts, these tools keep your data private and encrypted, preventing
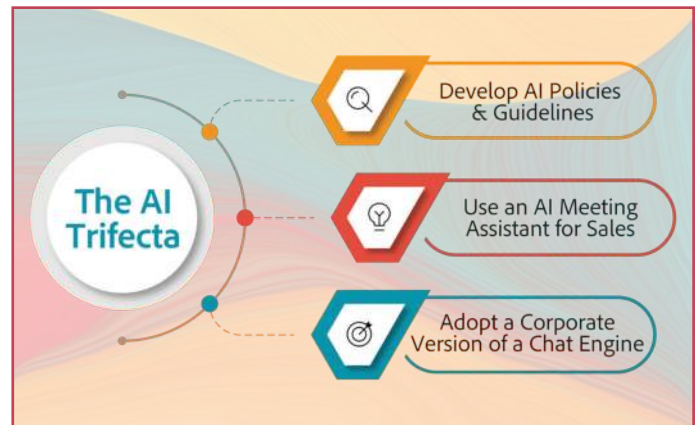
any exposure to third parties. Plus, you get admin controls to manage who has access and how the AI is being used. We will talk more about this later, but this is non-negotiable for secure business use.

■ Ongoing training and monitoring: AI evolves quickly and your policies need to keep up. Make sure your team is not only trained on the initial rollout, but that there are regular reviews and updates to both the tools and the policies you are using.

Developing these guidelines does not have to be difficult and we have made it even easier. Reach out to me at west@gowest.ai and I will send you our complimentary AI SOP document, complete with customizable templates and best practices.

(2) Use an AI Meeting Assistant for Sales — Now, let's focus on your sales team. If there is one universal truth in the office technology dealer channel, it is that sales reps are not known for their attention to detail when it comes to note taking or updating the CRM. And that is OK — salespeople excel at building relationships, not data entry. But you still need accurate records of those client conversations and that is where an AI meeting assistant comes in.

Take timeOS for example. It is an AI-powered meeting assistant that integrates directly with your CRM and task management platforms like Asana. Here is what makes it indispensable:

■ Automated summaries: Forget about scribbled notes or spotty CRM updates. TimeOS records and transcribes meetings, then summarizes the most important takeaways, ensuring that nothing slips through the cracks.

■ Action item assignment: After each meeting, timeOS automatically assigns tasks and next steps, so your team does not have to manually update Asana or the CRM. This kind of

automation means fewer missed follow-ups and more closed deals.

- CRM sync: TimeOS integrates with leading CRMs, so every client interaction is logged and trackable. This ensures no client interaction goes undocumented.

Other tools like Fireflies.ai and Otter.ai offer similar features, but timeOS's seamless task management integration makes it a top pick for busy sales teams — a reason we use it at GoWest.ai. Automating these processes ensures that your sales team members can focus on what they do best — building relationships and closing deals — while the AI handles the administrative load.

(3) Adopt a Corporate Version of a Chat Engine (Like ChatGPT Team) — The third pillar of the AI trifecta is adopting a corporate-grade AI tool, like ChatGPT Team. Here is where many businesses slip up: they use free, consumer-grade AI tools that do not provide the necessary privacy, security or control. That is a big mistake, especially when tools like ChatGPT Team are available for just $25 per user per month (at the time of this writing).

Here is why ChatGPT Team is worth every penny:

- Data security and privacy: With ChatGPT Team, your data stays yours. It does not get used to train models, and it is encrypted both in transit and at rest, ensuring compliance with rigorous data security standards like SOC 2. GoWest.ai uses ChatGPT Team internally and recommends it to clients for precisely this reason — it offers peace of mind that the consumer versions simply cannot match.

- Admin controls and team management: One of the standout features of ChatGPT Team is the administrative dashboard, which allows you to manage who has access, what they can do and how AI is being used within your organization. This gives you full control, ensuring that no one is using AI in ways that could expose your company to risk.

- Collaborative GPTs: You can create custom GPTs tailored to specific workflows within your business. These are custom versions of ChatGPT designed for your team's unique needs — whether that is streamlining project management, generating proposals or assisting with onboarding.

Using a corporate version is a small investment that pays off big in security and productivity. If you are serious about AI (and you should be), the cost is minimal compared to the potential risk of using free versions.

Maximizing the AI Opportunity With Assessments

As an office technology dealer, you are already familiar with the value of conducting assessments — whether for fleet management or print usage. But here is a new twist: AI assessments. Just like your clients needed help managing their print

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environments, they also need guidance on AI. Most businesses are in the same boat you were in a few months ago (or still are today) — unsure of what AI tools to use, how to protect their data and how to integrate these new technologies without creating more problems.

Offering AI assessments is a fantastic way to add monthly recurring revenue (MRR) and project-based income to your business. You can position yourself as an AI advisor, helping clients implement the right tools and policies to navigate this new world safely. Plus, the projects that come out of these assessments — whether it is helping them roll out secure versions of GPT or setting up AI-driven sales processes — create long-term value for both you and your clients.

We can help you develop your model in partnership with Keypoint Intelligence. If you are looking to sell your business soon or if you are more interested in maximizing value in your existing offerings by simply tightening your belt, maybe it is not for you. But if you are looking to grow your business, diversify and remain relevant beyond print services — or if you are going to pass the torch to the next generation and not just sell in the near future to a mega dealership — we should talk.

The Time to Act Is Now

AI is not just the future — it is happening right now, and the businesses that adapt first will have a significant advantage. By focusing on these three foundational services — developing AI policies, using AI meeting assistants and adopting secure, business-grade AI tools — you will position yourself as a leader in the office technology space.

Do not let AI be an afterthought. Get proactive and start implementing these tools today. If you are looking for guidance, reach out to me at west@gowest.ai. We are offering a complimentary AI policies SOP, along with advice on how to get started. Let's embrace this new era of AI together, ensuring your business — and your clients — are set up for success. ∎

As a leading authority in AI training and business solutions, West McDonald, founder of GoWest.ai, helps organizations navigate the uncertain world of generative AI, implementing game-changing internal and external AI solutions. Featured as an AI expert in top publications like The Imaging Channel and The Cannata Report, and having spoken at numerous events on AI and business use (Global Big Data Conference, FP Mailing National Kickoff, BTA events, Konica Minolta Top 25, Executive Connection Summit and the ANA Advertisers Association, to name a few), he is a thought leader in AI applications in various business channels. McDonald can be reached at west@gowest.ai. Visit www.gowest.ai.