



**KINGSPPOINT
ALLIANCES**

AI READINESS FOR SMBs

**A Practical Framework for
Competitive Growth**

www.kingspointalliances.com

Executive Summary

Small and mid-sized businesses (SMBs) are under increasing pressure from customers, competitors, and investors to transform—especially to show a clear path to adopting artificial intelligence (AI). Yet most SMBs lack the clarity, trusted partners, and resources to begin. This white paper presents Kingspoint Alliances’ practical framework for AI-led transformation. The approach emphasizes quick wins that build momentum while laying the foundation for long-term capability and growth through our AI-first platform, OpenConnections, and a curated ecosystem of vendors and on-demand experts.

The Challenge

- Rising pressure to adopt AI: Competitors are using AI for automation, personalization, forecasting, and insights. Delays risk customer churn and lost relevance.
 - Fragmented vendor ecosystem: Thousands of tools, overlapping claims, and limited guidance make selection risky and slow.
 - Investor expectations: Many capital providers now expect tangible AI progress and visible outcomes in roadmaps.
 - SMB resource constraints: Tighter budgets, lean teams, and less tolerance for failed experiments.
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The Framework for Readiness

Kingspoint Alliances recommends a five-step path to move from intent to impact.

1) Assess AI Readiness

- Evaluate people, process, technology, and data maturity.
- Identify constraints (data quality, integrations, security, skills).
- Align on business outcomes and success measures.

2) Identify Quick Wins

- Target low-risk, high-ROI initiatives (e.g., service chatbots, intelligent routing, RPA for repetitive tasks, predictive alerts, assisted analytics).
- Time-box pilots; instrument them with clear KPIs (cost/time saved, conversion lift, SLA adherence).

3) Leverage OpenConnections

- Use OpenConnections to generate a high-level solution blueprint (modular building blocks across AI/ML, ERP, CRM, HCM, data, compliance).
- Instantly match with vetted vendors and advisors across categories such as ERP, CRM, HCM, FSM, Fund Accounting, Patent Matching, AI/ML, and more—prioritized to your blueprint and constraints.

4) Engage On-Demand Experts

- Work with fractional C-suite advisors (former enterprise leaders) for strategy validation, vendor fit, negotiation, and risk mitigation.
- Choose advisory formats that fit SMB budgets: workshops, retainers, milestone-based support.

5) Iterate & Scale

- Start small → prove value → expand to core processes.
- Build internal capability (skills, governance, data standards) while keeping trusted partners for specialized needs.
- Evolve KPIs from pilot outcomes to portfolio-level impact (margin, revenue, risk).

Quick-Win Use Cases (Examples)

- Customer Support: AI-assisted chat, triage, and knowledge search to reduce handling time.
- Sales & Marketing: Lead scoring, content drafts, smart routing, and win-loss insights.
- Operations: RPA for invoicing, reconciliations, order updates, or ticket deduplication.
- Finance: Cash-flow forecasting, variance explanations, and anomaly alerts.
- HR/HCM: Candidate screening summaries, policy Q&A, skill matching, and LMS content boosts.

Implementation Path (90-Day Plan)

Phase 0 (Weeks 0–2): Readiness Assessment & Target Definition

- Stakeholder alignment, KPI baselining, data/integration inventory.

Phase 1 (Weeks 3–6): Blueprint & Vendor/Expert Matching

- Generate blueprint in OpenConnections; shortlist vendors/experts; select 1–2 pilots.

Phase 2 (Weeks 7–10): Pilot Build & Validate

- Configure solutions, integrate light data, instrument KPIs; advisor checkpoints.

Phase 3 (Weeks 11–13): Results, ROI, Scale Plan

- Report outcomes; refine governance; plan Phase-2 rollout.
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Data, Security & Governance (Essentials)

- Data foundations: Define sources, quality rules, retention, and lineage.
 - Security: Authentication, role-based access, encryption in transit/at rest, vendor risk review.
 - Compliance: Respect regional privacy requirements (e.g., GDPR/CCPA); document processing purposes.
 - Model oversight: Track prompts, outputs, feedback, and drift; implement human-in-the-loop where needed.
 - Measurement: Establish a consistent benefits model (time saved, error reduction, revenue impact).
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The Kingspoint Advantage

- Curated product ecosystem: AI, ERP, CRM, HCM, and niche solutions vetted for SMB fit.
- Corporate warriors: On-demand C-suite experts with enterprise pedigree for strategy and execution guidance.
- OpenConnections platform: AI-first blueprinting and matchmaking that compresses cycle time from months to weeks.

Together, these let SMBs bypass guesswork and plug directly into a tested framework for transformation.

Conclusion

AI adoption is no longer optional for SMBs seeking durable advantage. With a structured approach—readiness, quick wins, expert-guided selection, and iterative scaling—SMBs can compete with larger enterprises, meet investor expectations, and grow with confidence. Kingspoint Alliances is your partner on this journey—delivering clarity, quick wins, and long-term capability via OpenConnections and a trusted partner network.

Get started: www.kingspointalliances.com

Appendix A: Readiness Checklist (Short)

- Objectives & KPIs defined
- Data sources mapped; quality rules set
- Security & privacy requirements understood
- Candidate use cases prioritized by value/effort
- Pilot scope, timeline, and owners confirmed
- Vendor/expert shortlist created in OpenConnections

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Appendix B: Glossary (Selective)

- OpenConnections: Kingspoint Alliances' AI-first platform for solution blueprinting and vendor/expert matching.
- RPA: Robotic Process Automation—software bots for repetitive tasks.
- Human-in-the-Loop: Human review/approval in AI workflows for quality and safety.

