ALPINE
BUSINESS SYSTEMS, INC.

FREE WEBINAR

AI with Serious ROI

The state of AI in Business Today
What the Data Shows
How to use it well
An AI Playbook for your business

Ben Bizzarro
Chief Solutions Officer

Bill Blum
CEO and Founder

Tuesday, November 3, 2026 | 6:00 PM

PRESENTED FOR

STATEWIDE HISPANIC CHAMBER OF COMMERCE OF NEW JERSEY™

TONIGHT

Tonight: putting AI to work safely inside Microsoft 365

01 Who is Alpine?

02 AI in Business Today What the Data Shows

03 A quick prompting refresher

04 Microsoft Copilot

05 Protecting your data

06 A Simple Plan to get started

07 Peak Intelligence Your AI Playbook for Business Success

Copilot
Researcher Agent

My Favorite!

SHCCNJ Attendee Research

Professional background and organization briefing for tonight's presentation

Event	Computer Support NJ, Managed IT Services Provider, IT Support NJ
Date	November 3, 2026 | 6:00 PM
Registrants	19 approved attendees
Prepared for	Alpine Business Systems

Research note

Profiles distinguish registration-verified facts from reasonable business inferences. Where a public identity or organization could not be matched with confidence, the uncertainty is explicit.



My Next Favorite!

Alpine Business Systems - SHCCNJ Attendee ICP Ranking

Scored against Alpine's typical managed-services ICP | 19 attendee rows | As of November 3, 2026

Scores rank organizations, not individuals. Duplicate SHCCNJ attendees retain the same organization-level score and rank.

Organization Rank	Attendee	Organization	Registered / Verified Role	ICP Score (1-10)	Recommended Priority	Key Reasons
1	Iveth Mosquera	Matheny	Director of Marketing and Communications	10	High	Mission-critical nonprofit; sensitive client/health-related information; multiple programs and user groups; high uptime, security, governance, and support needs; strong NJ fit.
2	Yogesh Patel	Reliance Electronics Inc.	VP - Operations	9	High	Operations-intensive, technology-dependent company; likely multiple users/devices and vendor/customer data; strong NJ fit; executive operations contact.
3	Marta Fernandez	A. M. Capen's Co., Inc.	Vice President	8	High	Executive contact and established corporate form suggest meaningful operations; likely recurring security/support needs; NJ/regional fit not yet fully verified.
3	Aixa López	Statewide Hispanic Chamber of Commerce of New Jersey (SHCCNJ)	Role not provided	8	High	Verified SHCCNJ domain; statewide reach and strong relationship leverage; direct environment may be small but operational and reputational impact is high.
3	Daniela Gonzalez	Statewide Hispanic Chamber of Commerce of New Jersey (SHCCNJ)	Program & Administrative Assistant	8	High	Statewide NJ reach; member/program data; event and communications dependence; recurring M365/security needs; exceptional channel and referral value despite likely modest internal seat count.
3	Elisa Charters	Statewide Hispanic Chamber of Commerce of New Jersey (SHCCNJ)	Board Member	8	High	Same organization-level fit as other SHCCNJ attendees; statewide ecosystem reach and program dependence offset likely smaller internal environment.
6	Luis Abad	ENAT Transportation & Logistics	Operations Manager	7	High	Time-sensitive operations; likely mobile/remote users and document flows; downtime has immediate business impact; good NJ/regional fit; operations-level contact.
7	Tania Quevedo	PEIMCO (inferred from peimco.com email domain)	Role not provided	6	Medium	Business domain suggests established operations, but company identity, scale, location, industry, and needs are not sufficiently verified.
8	Danny Perez	Ditek Solutions	Founder	5	Medium	Technology company with founder contact; potentially capable in-house or competitive, reducing core MSP fit; possible security, AI, licensing, or channel partnership.
8	Monica Martinez	Stumpy's Hatchet House - Green Brook	Owner	5	Medium	Owner decision-maker and strong NJ network; venue depends on booking/payment/connectivity, but likely modest user and endpoint count.
10	Jonathan Huerta	Educator Evolve Consulting, LLC	Founder, Evolution Partner	4	Medium	Knowledge-work and cloud dependence; founder access; likely small team limits recurring MSP value; good AI/productivity relevance.
10	Karem Ospino	Ospino Consulting LLC	CEO	4	Medium	CEO contact, client-data and cloud-workflow dependence, strong AI relevance; uncertain scale may limit full MSP economics.

01

Who is Alpine?

What are the business problems we solve?

ALPINE
BUSINESS SYSTEMS, INC.

Comprehensive Technology Management Powering Business Success since 1987

WHAT WE DO

Your outsourced IT team

Managed IT and AI for privately held small and midsize businesses

Basking Ridge NJ

2027 Our 40th Year!



Most owners call us about one of four problems

1

“Technology is slowing us down.”

Aging computers, unreliable Wi-Fi, and nobody who really owns IT.

2

“We’re one bad email away from a bad week.”

Phishing, invoice fraud, and ransomware aimed at small businesses.

3

“Everyone’s talking about AI. We have no plan.”

Staff are using free AI tools on their own, with no rules.

4

“We grew, and our IT didn’t.”

New hires, new locations, and customers asking about security.

02

AI in Business Today

What the Data Shows

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Nearly half of small businesses use AI. Only 7% have it built in.

46%

of small employer businesses say the business or its employees use AI

Federal Reserve Small Business Credit Survey, 2026 report

7%

of those AI users have fully built it into how they work. About half are still experimenting.

Federal Reserve Small Business Credit Survey, 2026 report

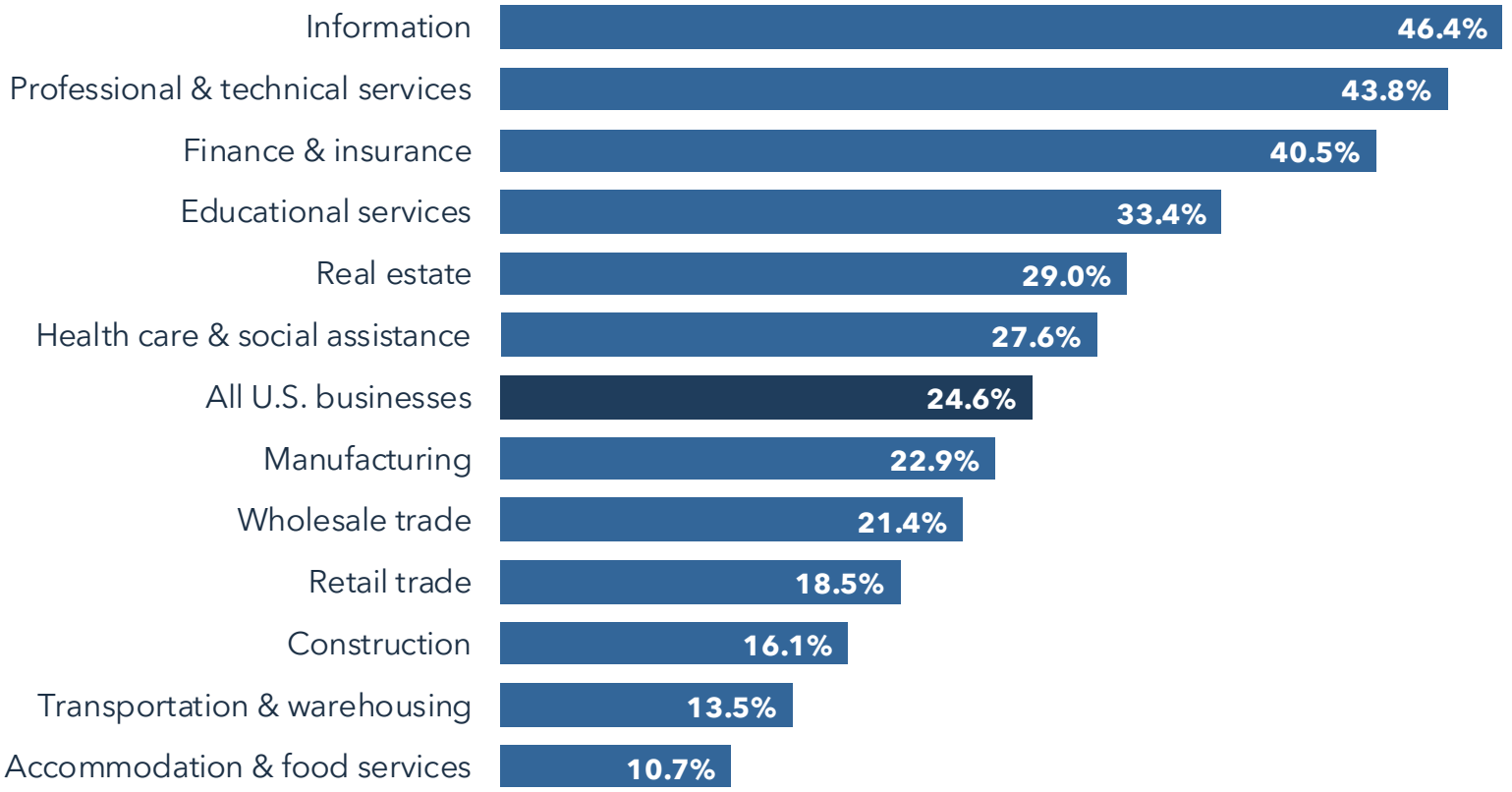
4 in 10

U.S. workers use generative AI for their jobs

St. Louis Fed, Real-Time Population Survey, Q3 2026 (40.5%)

Lots of trying, very little planning. That gap is what tonight's roadmap is for.

AI use varies widely by industry
Small Main Street Businesses Trail the Average



Source: U.S. Census Bureau, Business Trends and Outlook Survey, two weeks ending Oct. 4, 2026

1 in 4

U.S. businesses overall use AI, by the Census Bureau's strictest measure.

Restaurants, construction, and retail sit well below that. The opportunity is wide open.

03

A quick prompting refresher

Four ingredients that work in any AI tool, including Copilot

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Great prompts have four ingredients



1

Goal

What do you want done?

Start with a clear action: write, summarize, compare, plan, or explain.

"Draft an email…"



2

Context

Who is it for, and why?

Tell it who the audience is, what the situation is, and why it matters.

"…to a customer whose order is late…"



3

Source

What should it use?

Point it to the facts: an attached file, an email thread, a spreadsheet, or details you type in.

"…using the shipping update below…"



4

Expectations

What should it look like?

Set the length, tone, format, and language you want back.

"…under 100 words, apologetic but upbeat."

Here’s what all four look like in one prompt

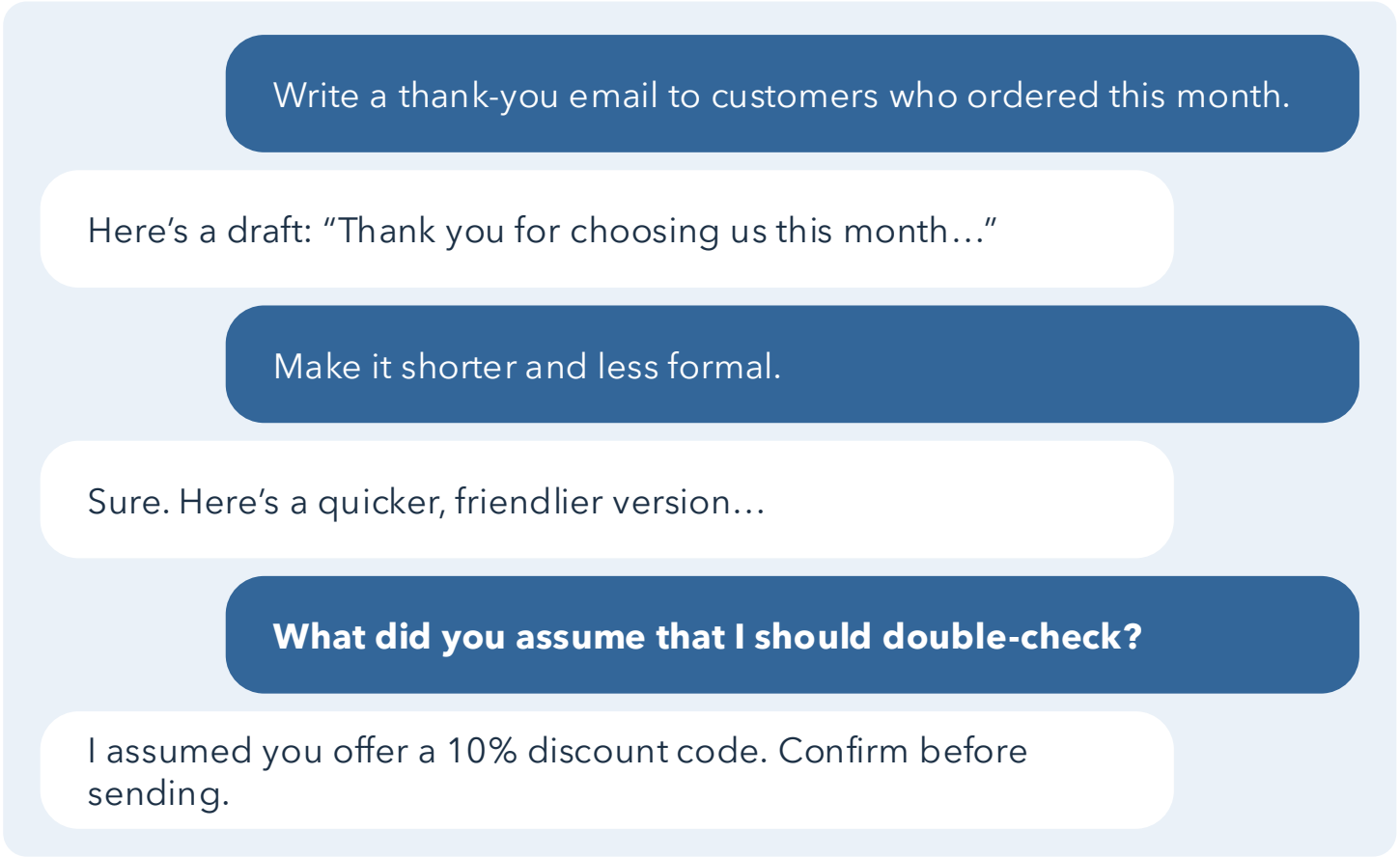
GOAL	Write a Facebook post announcing our new Saturday hours, 9 AM to 2 PM, at our bakery.
CONTEXT	Our customers are local families and people who work nearby.
SOURCE	Use the hours above. (Or attach a file, menu, or past post.)
EXPECTATIONS	Keep it warm and under 60 words. Give me one version in English and one in Spanish.

Most people only type the goal: “Write a social media post about our new hours.”

The first answer is a first draft
Keep the conversation going!

Follow-ups that work

- “Make it shorter.”
- “Now write it for an upset customer.”
- “Put that in a table.”
- “Give me three other options.”
- “What did you assume that I should double-check?”



04

Microsoft Copilot

AI inside the Microsoft 365 tools you already own

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Got Microsoft 365? You have Copilot!



STEP 1

A Microsoft 365 business plan

Business Basic, Standard, or Premium, with each person signed in to their own work account.



STEP 2

Copilot Chat, included

No added cost. Lives in the Microsoft 365 Copilot app and Outlook, and as a side pane in Word, Excel, and PowerPoint.



STEP 3

Microsoft 365 Copilot, paid

Added per person. Copilot can then work with your own email, files, chats, and meetings.

Not on Microsoft 365, or using personal email accounts for work? That's the first thing to fix.

Copilot comes in two versions: one included, one paid
Both include Enterprise Grade Security!

INCLUDED WITH MICROSOFT 365

Copilot Chat

- Secure AI chat grounded in the web
- Works with files you attach or have open
- Data protection with a work account
- No added cost on a business plan

PAID ADD-ON, PER PERSON

Microsoft 365 Copilot

- Finds your email, files, chats, and meetings on its own
- Teams meeting recaps and follow-ups
- Researcher and Analyst agents for deeper work
- Licensed per person on a business plan

Microsoft 365 Copilot

The paid version answers using all your work But only what you have permission to access

1

You ask

"What did we promise the Garcia account last month?"

2

Copilot checks your access

It searches only the email, files, chats, and meetings you can already open.

3

You get an answer with sources

A summary that links back to the emails and files it used, so you can verify.

WHERE IT LOOKS

- Email
- Files
- Chats
- Meetings
- Calendar

Copilot lets you pick the AI model, or leave it on Auto

AUTO (DEFAULT)

Let Copilot choose

Copilot picks a model for each request. The right setting for most everyday work.

OPENAI



GPT models

The models behind ChatGPT, and Microsoft's preferred choice for everyday work.

ANTHROPIC



Claude models

Microsoft offers these for long documents, complex analysis, and careful writing.

Your admin controls which models are available, including Claude.

Model choice is part of the paid license, with usage limits on the heaviest models.

Researcher and Analyst take on the Deep Work and SAVES HOURS!

Your research assistant



- Builds a research plan for your question
- Searches your work files and the web
- Returns a report with sources you can check

Best for: market research, competitor checks, client briefings

Your data analyst



- Works through spreadsheets and data files
- Runs the analysis and shows its steps
- Returns charts, tables, and plain-English findings

Best for: sales trends, forecasts, messy data

Included with paid Microsoft 365 Copilot. Find them under Agents. Expect minutes, not seconds.

Get a cited research brief without spending an afternoon on Google

TRY THIS IN RESEARCHER



"We're thinking about expanding our catering into Middlesex County. Research local competitors, typical pricing, and demand, and combine it with our past catering proposals. Give me a two-page brief with sources."

WORKS WITH

Researcher agent, Microsoft 365 Copilot (paid)

YOU GET BACK

A cited brief built from the web and your own files

BEFORE YOU USE IT

Open the sources behind anything you'll act on

Turn two years of sales data into a forecast you can explain

TRY THIS IN ANALYST



"Here's two years of our sales data. Find the seasonal patterns, flag our slowest months, and forecast next quarter. Show your work."

WORKS WITH

Analyst agent, Microsoft 365 Copilot (paid)

YOU GET BACK

Charts, a forecast, and the steps it took

BEFORE YOU USE IT

Sanity-check the forecast against what you know

Where does Copilot live?

Microsoft 365 Copilot app

Chat, the model picker, and the Agents list

Word, Excel, PowerPoint

The Copilot button that opens the side pane

Outlook

The Copilot button in your inbox and calendar

Which version do you have?

How to tell if you're on Copilot Chat or the paid license

Teams

Copilot in chats and meetings





Catch up on a long email thread in seconds



TRY THIS IN OUTLOOK

"Summarize this email thread, list any questions still open, and draft a reply confirming Thursday's delivery."

WORKS WITH

Copilot Chat in Outlook (included)

YOU GET BACK

A short summary, open questions, and a draft reply

BEFORE YOU USE IT

Check the dates and promises in the draft

Never wonder who owns a follow-up again



TRY THIS IN TEAMS

"Recap this meeting: the key decisions, who owns each follow-up, and any deadlines that were mentioned."

WORKS WITH

Microsoft 365 Copilot (paid)

YOU GET BACK

Decisions, owners, and deadlines in one list

BEFORE YOU USE IT

Confirm owners before sending it to the group

Never miss a requirement buried in an RFP



TRY THIS IN WORD

"List every requirement and deadline in this RFP as a checklist, and flag anything we'd need outside help with."

WORKS WITH

Copilot Chat in Word, with the RFP open (included)

YOU GET BACK

A checklist of every requirement and deadline

BEFORE YOU USE IT

Read the original for anything legal or binding

See which customers are growing and which are slipping



TRY THIS IN EXCEL

"Show me our top 10 customers by revenue this year, which ones are down from last year, and by how much. Add a chart."

WORKS WITH

Copilot Chat in Excel, with the workbook open (included)

YOU GET BACK

A ranked list, the changes, and a chart

BEFORE YOU USE IT

Spot-check a few numbers against the source

Turn a proposal into a client-ready deck



TRY THIS IN POWERPOINT

"Create a six-slide presentation from our proposal document for Friday's client meeting. Keep the text short and add speaker notes."

WORKS WITH

Microsoft 365 Copilot (paid)

YOU GET BACK

A first-draft deck with speaker notes

BEFORE YOU USE IT

Fix the design and check every number

Ask one question across your email, chats, and meetings



TRY THIS IN THE COPILOT APP

"What did the Garcia account and I agree to over the last month? Check my email, chats, and meetings, and list anything still open."

WORKS WITH

Microsoft 365 Copilot (paid)

YOU GET BACK

One summary pulled from every source, with links

BEFORE YOU USE IT

Open the linked sources to confirm

Copilot works in Spanish
For your team and your customers

TRY THIS PROMPT

"Write an email to our customers announcing our new Saturday hours, 9 AM to 2 PM. Use a warm tone and keep it under 80 words. Give me one version in English and one in Spanish."

INCLUDED

Ask and answer in Spanish

Prompt in Spanish, get answers in Spanish.

INCLUDED

Draft in both languages

Customer emails and flyers in both languages.

PAID LICENSE

Live interpretation in Teams

Real-time spoken translation, Spanish included.

05

Protecting your data

Simple rules for everyone, and the setup work before Copilot goes live

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Five rules keep your business data out of the wrong hands

1	**Use business tools with work accounts**	Free personal AI tools may keep what you paste in and use it to improve their models.
2	**Know what never gets pasted in**	Customer personal details, Social Security or bank numbers, passwords, anything under NDA.
3	**A person reviews everything before it goes out**	AI writes the draft. Your name goes on the final version.
4	**Put it in writing**	A one- or two-page AI policy: which tools, what data, and who to ask.
5	**Clean up access before you turn on Copilot**	It sees what each person can see, so overshared folders become overshared answers.

Data Governance is ESSENTIAL!
Copilot follows your permissions
All files you can access become easy to find!



THE SETUP

Years ago, someone shared the payroll folder with the whole company. Nobody noticed.



THE QUESTION

An employee asks Copilot, “What do our managers get paid?”



THE ANSWER

Copilot answers, because that employee could technically open the file all along.



The fix: Copilot didn’t break anything. Fix who can open the folder, and Copilot can’t find it either.

Before Copilot goes live, get your house in order

Find overshared files

Check who can open what in SharePoint, OneDrive, and Teams.

Lock down sign-ins

Turn on multifactor sign-in everywhere and remove old employee accounts.

Label sensitive files

Mark payroll, HR, financial, and customer files as confidential so they're handled correctly.

Clean out old data

Archive or delete files nobody needs. Less clutter means better, safer answers.

Start with the right people

Give paid licenses first to the people with the most to gain, then expand.

Watch for AI scams

Teach staff to verify any request to move money or change bank details.

Criminals use AI!
Verify every financial transaction BEFORE sending money!



Flawless phishing emails

Perfect grammar in English or Spanish, personalized with details about your business.



Cloned voices

A few seconds of audio can copy an owner's voice asking staff to wire money.



Fake payment changes

A "vendor" emails new bank details right before a big invoice is due.

YOUR DEFENSES



Call back on a number you already have



Set a code word for urgent money requests



Multifactor sign-in on every account



Teach staff it's OK to slow down

06

A Simple Plan to Get Started

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Start this week yourself with three small steps

1

Ask your team

Find out which AI tools people already use, and for what.

2

Find your Copilot

On Microsoft 365? Open the Copilot app and sign in with your work account.

3

Check one folder

Pick your most sensitive folder and find out who has access to it.

Set the rules

Small wins

Scale



Set the ground rules

- Ask what AI the staff uses, with no penalty
- Write an AI policy
- Copilot Chat: The first approved tool
- Fix permissions, turn on multifactor

Pilot with a few people

- Choose 2 or 3 tasks that take the most time
- Give 2 or 3 champions the paid license
- Train on your real work
- Track the time before and after

Measure and expand

- Document the time saved
- Provide paid licenses to the best users
- Share your best prompts
- Choose the next round of tasks

07

Your Playbook for AI-Powered Business Success



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Calculating ROI is Essential
The math is simple

Hours saved

per person, per month

×

Cost of their hour

wage plus benefits

=

Monthly value

of time won back

Example: 8 hours a month × $35 an hour = $280 a month of time back, for one person. Compare that to the license cost.

Measure 2 or 3 real tasks before and after your pilot. Real numbers beat vendor promises.

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PEAK
INTELLIGENCE

KNOW WHICH AI TOOLS

YOUR EMPLOYEES ARE USING



Discover unsanctioned AI tools already in use

Monitor prompts and data leaving your organization

Govern with policy, not guesswork

66%
of office workers have used unauthorized AI tools at work

$670K
higher average breach cost when shadow AI is involved

YOUR TRUSTED PARTNER FOR AI-DRIVEN BUSINESS SUCCESS

ALPINE
BUSINESS SYSTEMS, INC.

PEAK
INTELLIGENCE

SECURE YOUR DATA

PROTECT YOUR AI FOUNDATION



Ensure data privacy

Implement robust data governance and compliance frameworks

Mitigate security risks

Governance

Privacy

Risk Mitigation

Alpine Business Systems: Your TRUSTED PARTNER for AI-Driven BUSINESS SUCCESS

ALPINE
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PEAK
INTELLIGENCE

EDUCATE AND TRAIN YOUR TEAMS



Upskill your workforce on AI capabilities and safety

- Conduct a 2-hour In-Person Microsoft M365 Copilot Workshop
- Create a culture of AI-driven Innovation

72%
of companies say AI skills gaps are their top barrier to adoption

3.5×
more likely to be AI leaders when teams receive AI training first

YOUR TRUSTED PARTNER FOR AI-DRIVEN BUSINESS SUCCESS

ALPINE
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PEAK
INTELLIGENCE

IDENTIFY USE CASES
WITH DEFINED OUTCOMES



A 2-Hour In-Person AI opportunity Workshop with your team leaders

Identify Workflows that can be Automated with AI

Establish clear **metrics** and KPIs for measurable ROI

Revenue Growth

91% of AI-adopting SMBs say AI directly boosts revenue

Salesforce SMB Trends Survey, 2024

Scale & Margin

87% of SMBs say AI helps scale operations

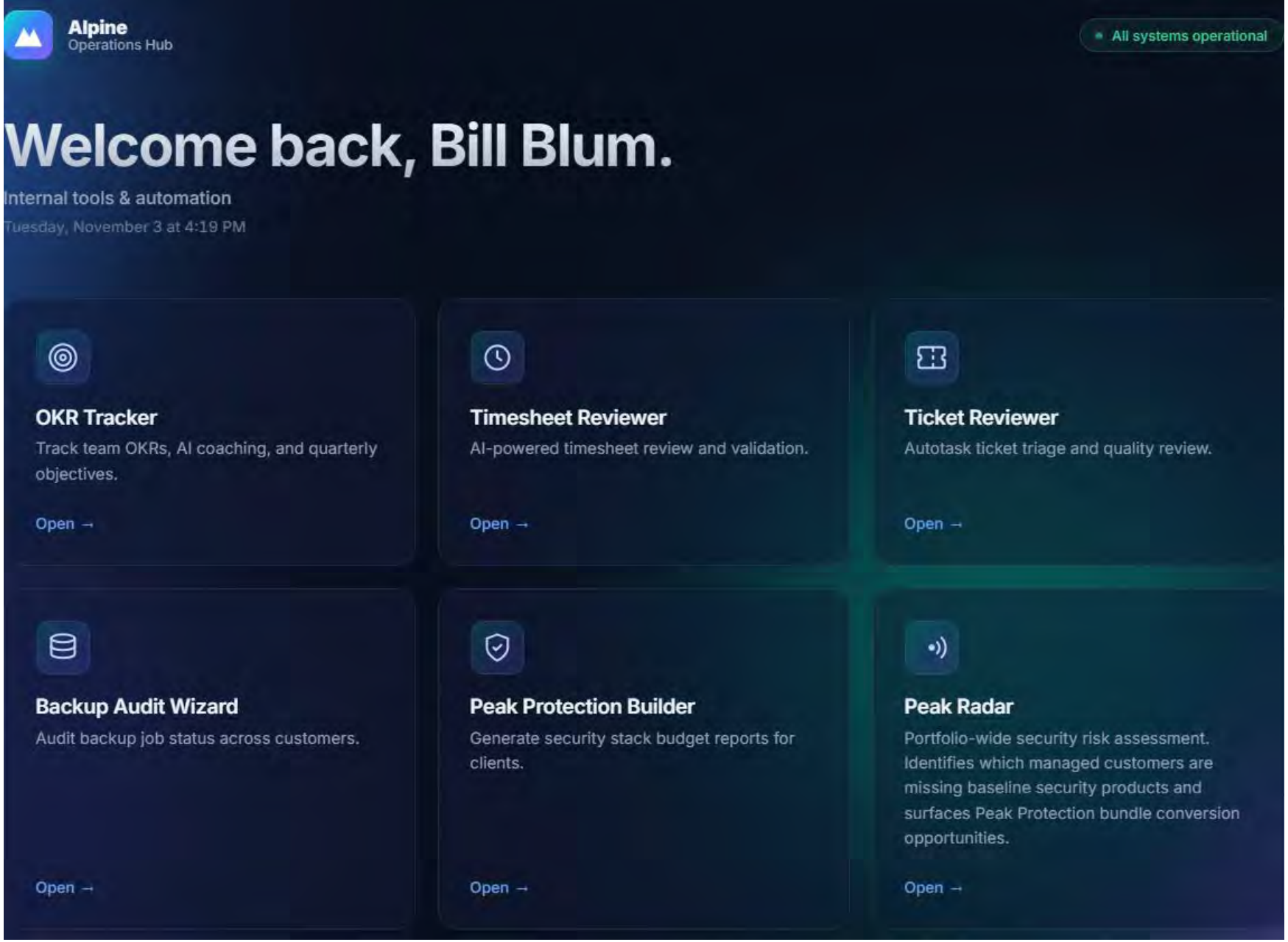
86% see improved margins

Salesforce SMB Trends Survey, 2024

Proven ROI

+$53.8K Add'l annual revenue per small business per 10% AI workforce exposure

Gusto Economist Study, 2026


Alpine
Operations Hub
All systems operational
Welcome back, Bill Blum.
Internal tools & automation
Tuesday, November 3 at 4:19 PM
OKR Tracker
Track team OKRs, AI coaching, and quarterly objectives.
Open →
Timesheet Reviewer
AI-powered timesheet review and validation.
Open →
Ticket Reviewer
Autotask ticket triage and quality review.
Open →
Backup Audit Wizard
Audit backup job status across customers.
Open →
Peak Protection Builder
Generate security stack budget reports for clients.
Open →
Peak Radar
Portfolio-wide security risk assessment. Identifies which managed customers are missing baseline security products and surfaces Peak Protection bundle conversion opportunities.
Open →

Our results
One tool saves our accounting team 12 to 15 hours a week

12 to 15

hours a week saved by an AI-built tool that audits and corrects timesheets

One of about a dozen internal apps we've built with AI coding tools.

Timesheet auditing

Finds and fixes errors, then tells consultants what changed

Client onboarding automation

New client details flow straight into our documentation system

Client time insights

Shows where our team's hours go, client by client

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Thank you. Questions?

You'll get these slides after the session, with every prompt from tonight to try on your own.



Free AI consulting chat

For Chamber members and attendees: a no-cost conversation about where AI fits in your business and where to start.

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