

AI's potential for your family business

February 2025

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With You Today

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Agenda



AI: The Future is Here



Key Trends for 2025 - Getting Ahead Of The Wave



The Shift: AI In Your Day



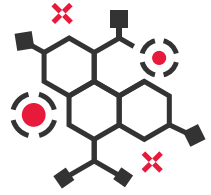
AI Strategy: Roadmap To Impactful AI



Conclusion: Wrap-Up & Next Steps

The Future is Here





The Future of AI

LogisticsAI

GreenAI

SalesAI

OPSAI

SourcingAI

LegalAI

MarketingAI



The Future is Now

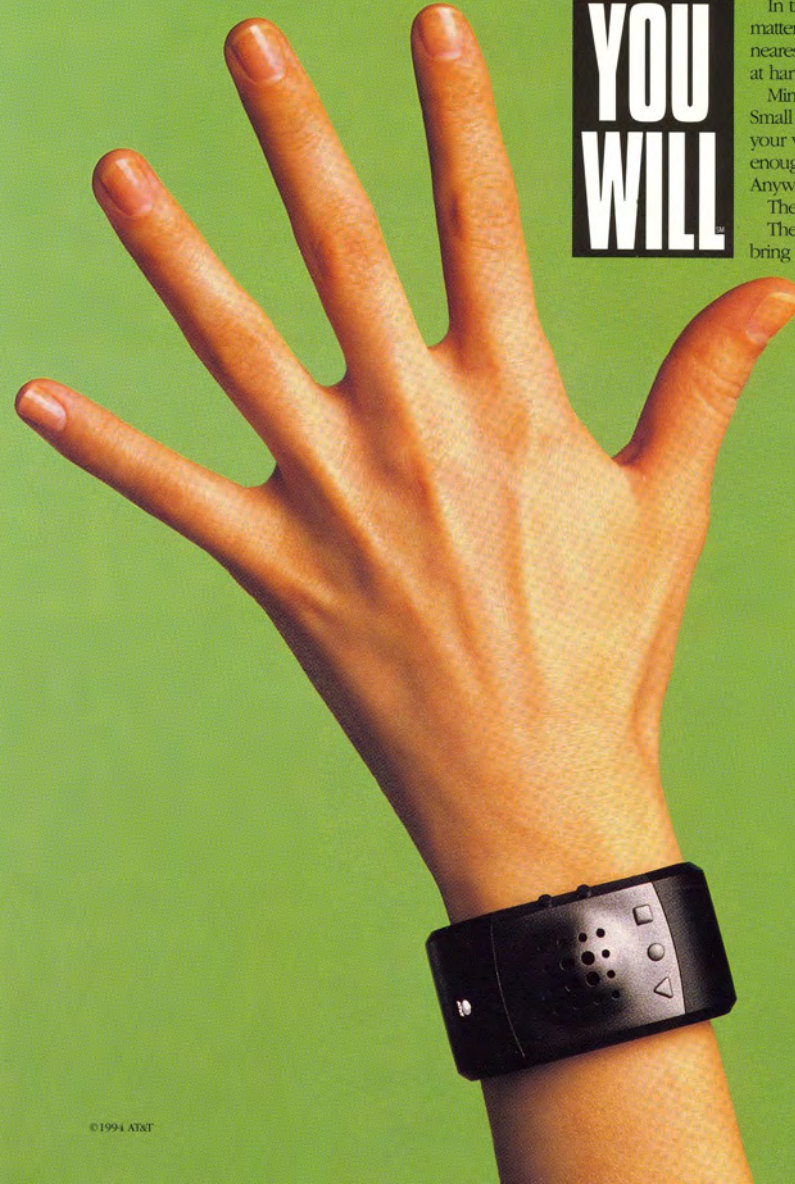
Have you ever installed a phone on your wrist?

**YOU
WILL**

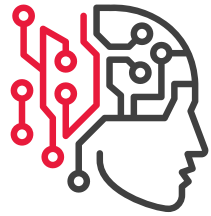
In the near future, no matter where you are, the nearest phone will be close at hand.

Miniature. Wireless. Small enough to wear on your wrist. Yet powerful enough to reach anyone. Anywhere in the world.

The strap-on telephone. The company that will bring it to you is AT&T.



AI is here to stay...



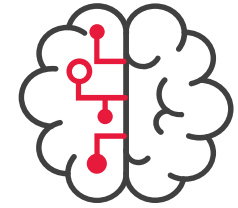
AI is no longer a trend but a shift in how we approach:

- ▶ Decision-making
- ▶ Risk management
- ▶ Operational excellence
- ▶ Innovation



AI is driving efficiency and unlocking new insights across businesses:

- ▶ Process automation
- ▶ Data extraction
- ▶ Predictive analytics
- ▶ Risk assessment
- ▶ Compliance monitoring
- ▶ Audit optimization



AI is rapidly expanding.

Generative AI and Agentic AI are changing the playing field, creating new conclusions and taking into consideration massive amounts of data with trillions of variables.

Everyone continues to grappling with questions...



**Why do we need
this technology?**



**What do I need
to consider?**



**How do I use
this technology?**



**What are
the risks?**

The Relevance of AI: Getting Ahead of the Wave

Automation/AI Market Trends and Key Insights

MARKET TRENDS

- ▶ Share of companies that are at least experimenting with AI has surged this year to 98% from 47% last year
- ▶ Only 4% of companies adopting AI reap full value from the technology
- ▶ Gen AI has spread across a range of professions since its debut less than two years ago, with 28% of workers now using the technology on the job
- ▶ 22% of organizations that have implemented an AI strategy have begun to yield substantial gains
- ▶ AI leaders expect 60% higher AI-driven revenue growth and 50% more in cost cuts than companies less focused on the technology

Source: Boston Consulting Group

BDO OBSERVATIONS

- ▶ Most organizations struggle to define AI and applicable use cases that accelerate change
- ▶ The hardest step is the first step, and most organizations lack an AI strategy that articulates a roadmap forward
- ▶ Organizations need to scale automation for meaningful impact, however, many are still in “tinker” mode
- ▶ Success stories clearly connect AI usage to corporate strategy and metrics that matter
- ▶ The war on talent for automation skills is only in the beginning stages
- ▶ Employees are tired of Excel, manual effort and are requiring a different approach to work via evolving technologies and proper training

The 2025 UiPath AI + Automation Trends

1. AI moves from thought to action as the age of agentic AI dawns.

Agents gain the capacity to understand, plan, and act on their own. And that changes everything.

2. Strike up the orchestration: the agentic ecosystem takes shape.

Tech providers create an environment where agents, robots, and people can work together.

3. Agents get to work on long-tail automation opportunities.

Going live in '25: valuable use cases across the enterprise that require agents AND robots.

4. Job sharing with the machine: the great work reallocation begins.

Who can best do the task—people or machines? Enterprises rethink jobs from the ground up.

5. 'Built-in AI' lifts enterprises from the trough of disillusionment.

Companies still struggle to capture AI value by themselves—but tech companies make up the gap.

6. From RAGs to riches: new tools tame the data deluge.

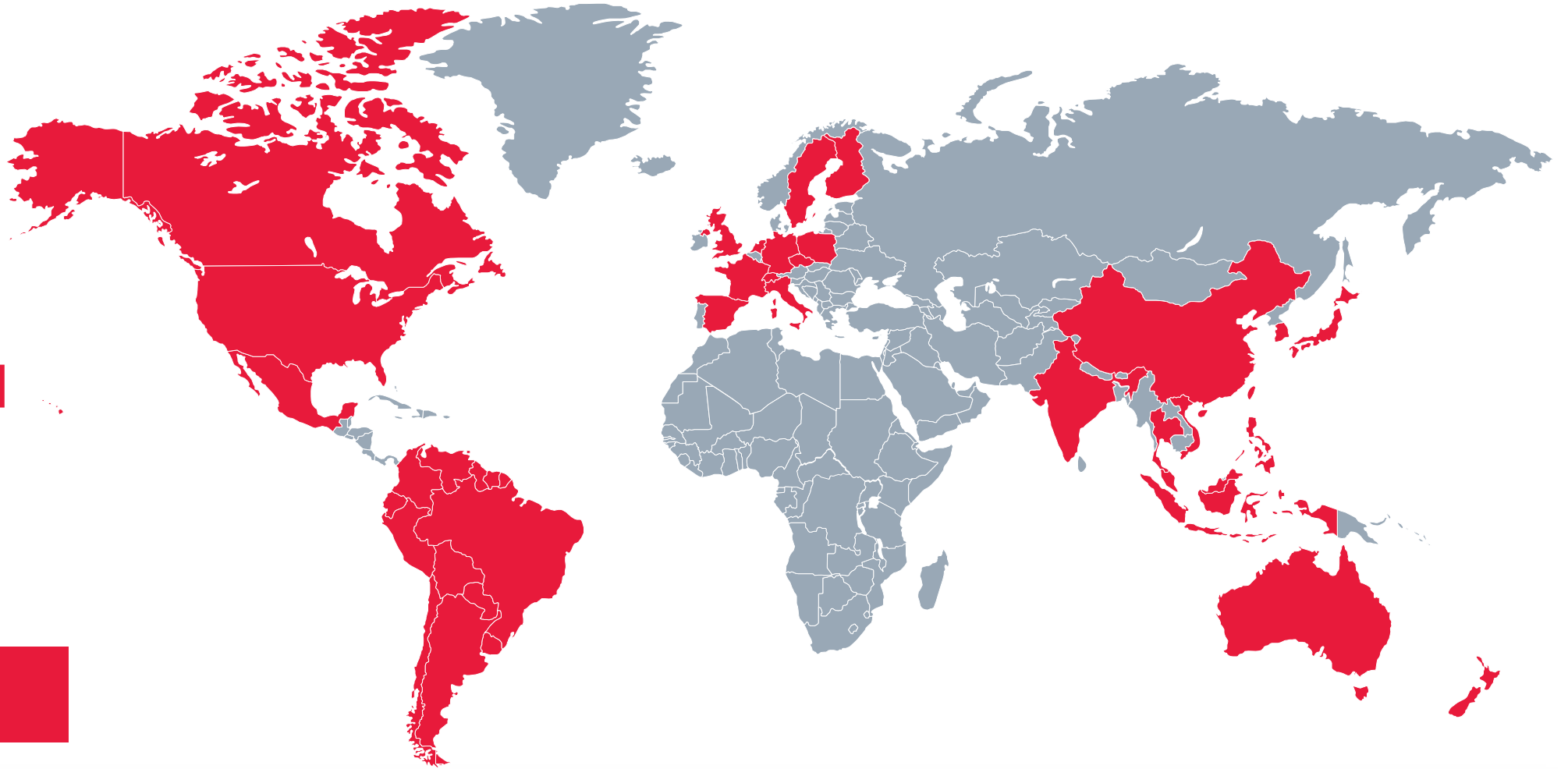
This year, context is king; knowledge (graphs) are power; and LLMs are living larger.

7. Regulation escalation: the world acts to rein in AI's power.

Lawmakers and the courts press on in their quest to regulate the virtual world.

Microsoft Work Trend Index

aka.ms/wti



31,000 people



31 countries



Microsoft 365, LinkedIn,
Glint People Science + academic research

FINDING 1:

Most Employees are Already Using AI at Work...



3 out of 4 people use AI at work.
Usage nearly doubled with the last six months

75% Of people are **already using AI at work**

45% Of them started using it **less than 6 months ago**

Survey questions:

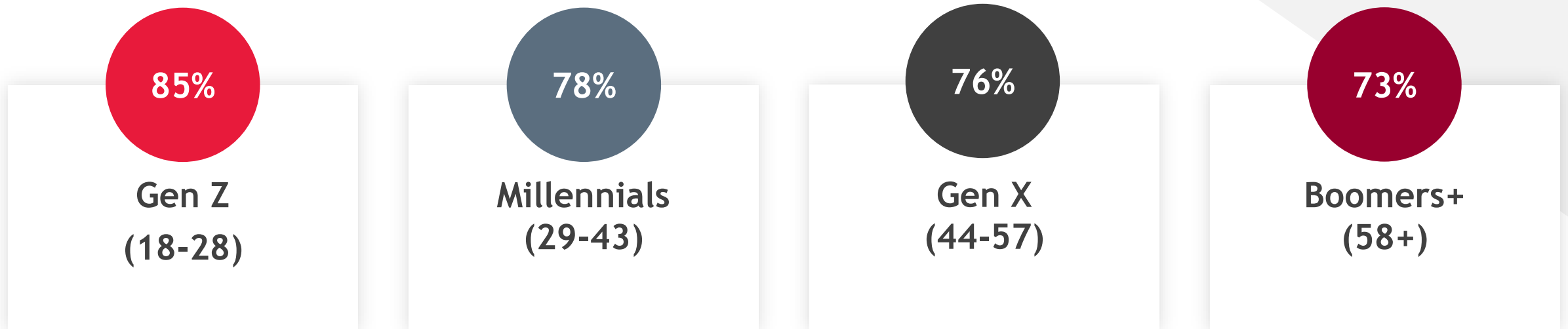
How often to you use generative artificial intelligence for your work?

How long have you been using generative artificial intelligence at work?

...and it isn't just Gen Z



Share of survey respondents who are using AI tools at work not provided by their organization:



Survey question:

Are the generative artificial intelligence tools that you use at work provided by your organization?

2024 Work Trend Index Annual Report from Microsoft and LinkedIn

FINDING 2

For Employees, AI Raises the Bar

2024 Work Trend Index Annual Report
From Microsoft and LinkedIn

Survey question: To what extent do you agree or disagree with the following statements about generative artificial intelligence's impact on skills?

- A. I would be more likely to hire a less experienced candidate with AI skills than a more experienced candidate without AI skills
- B. In considering job candidates, I would not hire someone without AI skills
- C. Because they can delegate more work to AI, early-in-career talent will be given greater responsibilities

77%

Leaders say early-in-career talent will get greater responsibilities due to AI



66%

Leaders would not hire someone without AI skills



71%

Leaders are more likely to hire a less experienced candidate with AI skills than a more experienced one without them



FINDING 3

Power Users Are On the Rise: What AI is doing for them

How I use AI

When I don't get the response, I want from the first prompt, I try again

Novices

are only somewhat familiar with AI (if at all) and use it a few times a month (if ever). They say AI saves them 30 minutes or less per day.

Explorers

are only somewhat familiar with AI (if at all) and use it once a week. They say AI saves them between 5 and 30 minutes per day.

How AI impacts my experience at work

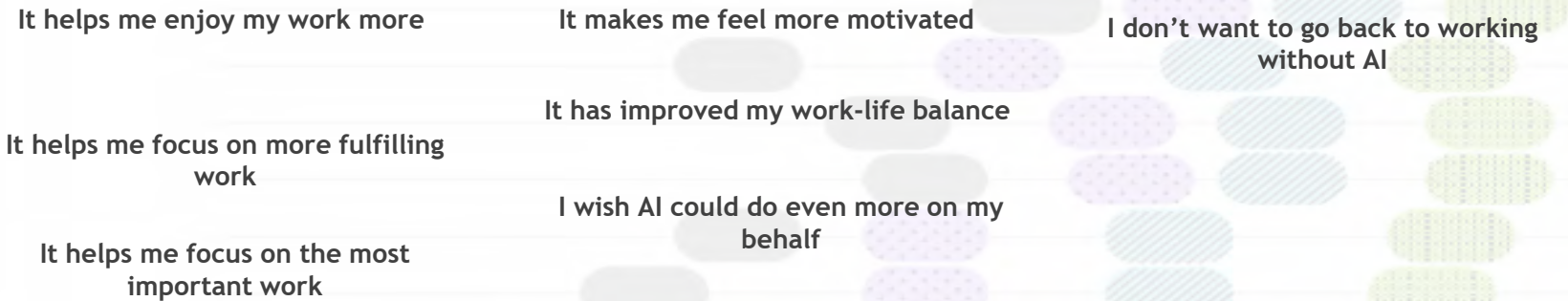
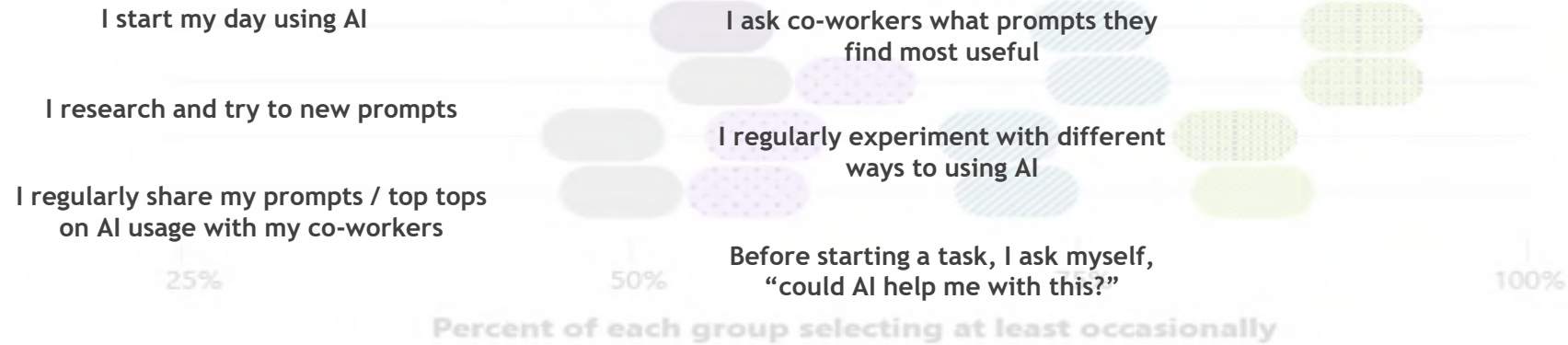
It makes my overwhelming workload more manageable

It helps me be more creative

Power users

are at least familiar with AI and use it at least several times per week. They say it saves them more than 30 minutes per day.

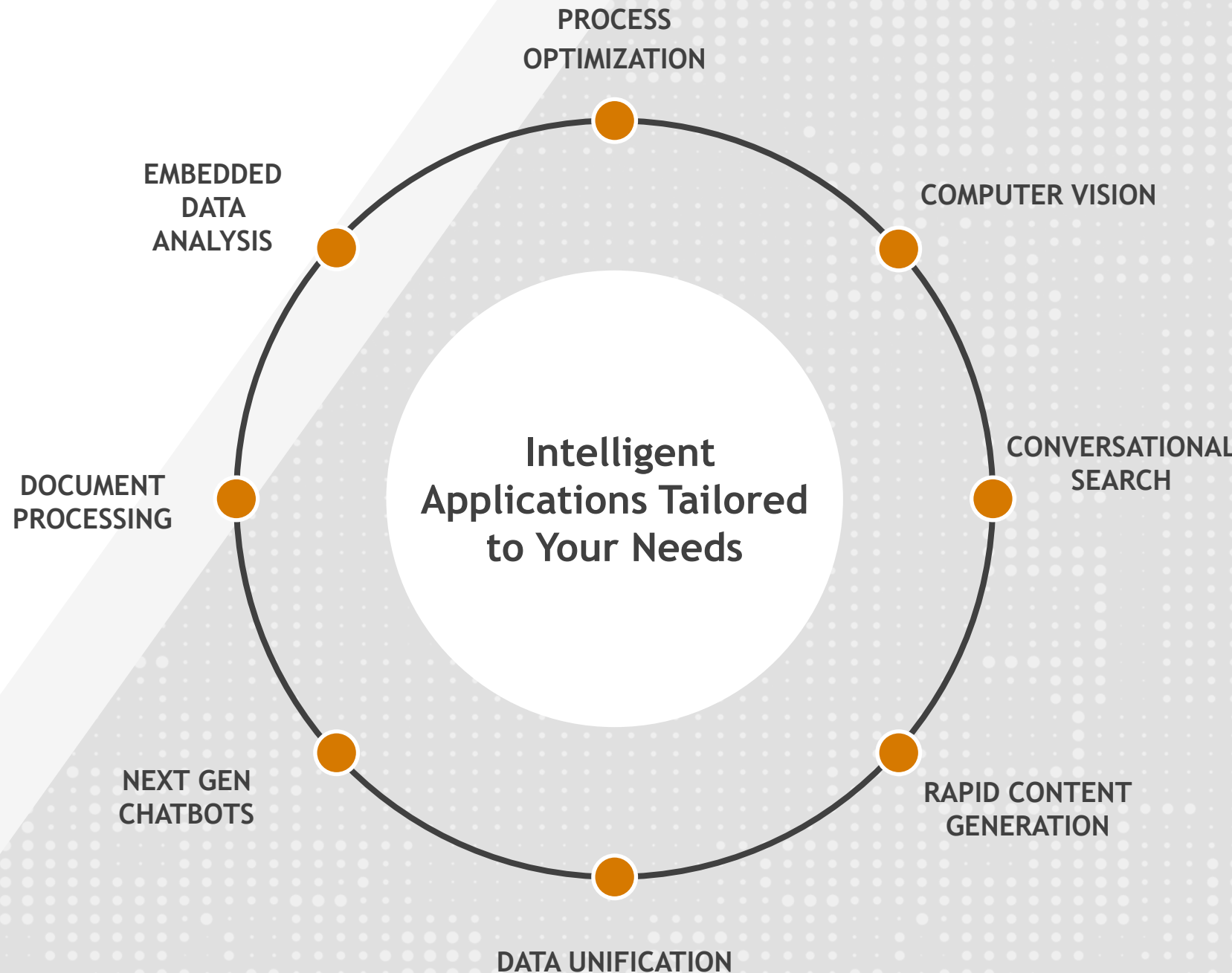
It helps me be more productive



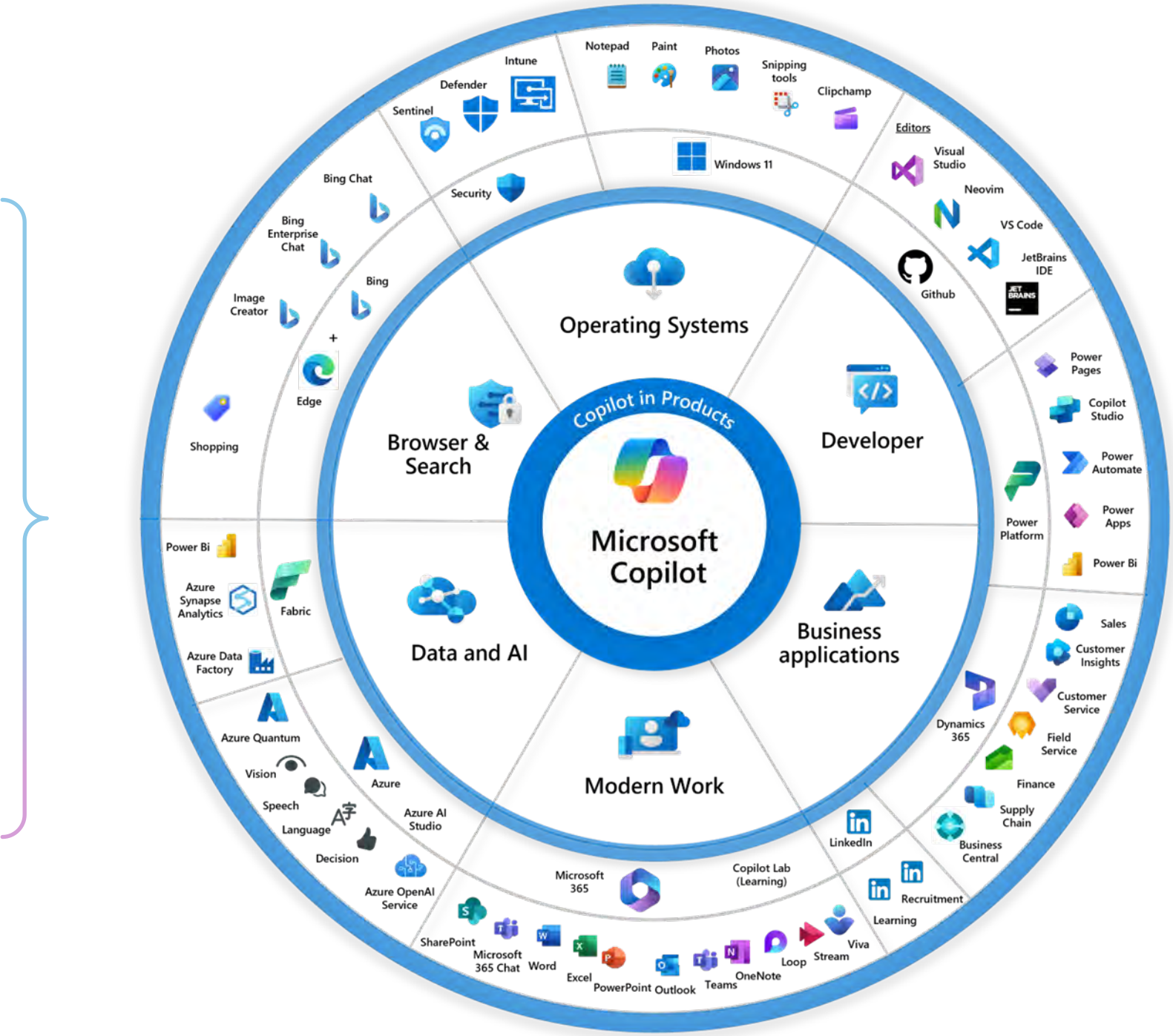


**Take a different
approach: AI in your day.**

Infuse AI into Your Business in the Right Place, at the Right Time



A copilot for every Microsoft experience



AI ENABLED PLATFORMS



Copilot in Dynamics 365 - Insights and Analysis

The screenshot displays the Dynamics 365 Finance and Operations dashboard. The browser address bar shows the URL: <https://salesdemo-01.sandbox.operations.dynamics.com/?cmp=USMF&mi=DefaultDashboard>. The dashboard is titled "Finance and Operations" and features the BDO Digital logo. The main content area is organized into several sections:

- APPS:** A row of five application tiles: Business performance analytics (preview), Business performance planning, Copilot for Finance (Preview), Demand planning, and Invoice capture.
- WORKSPACES:** A grid of 48 workspace tiles, each representing a different business process such as Work order management, Compensation management, Engineering change management, Lease management, Product readiness for process manufacturing, Subscription billing, Bank management, Confirmed purchase orders with changes, Expense management, Leave and absence, Product variant model definition, Supply risk assessment, Benefits management, Cost accounting ledger administration, Feature management, Ledger budgets and forecasts, Production floor management, System administration, Benefits, Cost administration, Financial analysis - all companies, Maintenance request management, Project management, Task management, Budget planning, Cost analysis, Financial analysis - current company, Master planning, Purchase order confirmation, Vendor bidding, Business document management, Cost control, Financial period close, My business processes, Purchase order preparation, Vendor information, Business processes for human resources, Customer credit and collections, Fixed asset management, Optimization advisor, Purchase order receipt and follow-up, Vendor invoice automation, Business processes for payroll, Customer invoicing, Flintfox customer, Outbound work monitoring, Recruitment management, and Vendor invoice center.
- Calendar:** A calendar for October 2024 is visible on the left side of the dashboard.
- Work items assigned to me:** A section below the calendar with the text "Work items will be displayed here after they are assigned to you."
- To-do list:** A section below the work items with the text "You're all caught up on your tasks."

The Windows taskbar at the bottom shows the time as 9:07 AM on 10/10/2024.

AI enabled RPA



AI IN YOUR DAY @ BDO



441,304 Hours

The estimated time saved using Chat BDO firmwide since June 2023.

Chat BDO

Available to all BDO Employees

Since its August 2023 launch, Chat BDO, our safe and secure in-house GPT:

- Dramatically enhanced productivity
- Saved costs
- Provided unprecedented ROI



USER ENGAGEMENT & IMPACT

- ▶ 8,000+ unique users; 5,000+ active users/month
- ▶ 1,000,000+ messages sent
- ▶ 300,000+ hours saved, enhancing focus on high-value work and work/life balance



EFFICIENCY GAINS

- ▶ Nearly a full work week saved per active user annually
- ▶ Consistent, safe, and secure platform for improved knowledge management, quality, and productivity

FINANCIAL IMPACT

- ▶ An average ROI of **1,130%**

Click here to view important usage information.

Chat BDO

Estimated time saved using Chat BDO:

Firm-wide savings: 432,072.3 hours Your savings: 29.3 hours

Choose a Chat Persona:

Chat

A regular chat session. Ask about topics, or perform tasks like write an email, summarize text, brainstorm, and more.

Has limited knowledge of world and events after October 2023.

! My Files Training [HERE](#)

Details...

Consultative Selling

User Training [HERE](#)

Helps prepare you for consultative buyer discussions – connecting buyer needs with relevant BDO services & solutions. Quick access to industry trends, business issues, opportunity triggers, BDO services, and key contacts – tapping into the firm's expertise and enabling growth.

Details...

Horizon - Policies & Procedures

Ask questions about policies and procedures related to being an employee of BDO USA.

Not appropriate for reporting workplace concerns.

Details...



You can now attach files to the Chat persona using the paper clip below. Training [HERE](#).

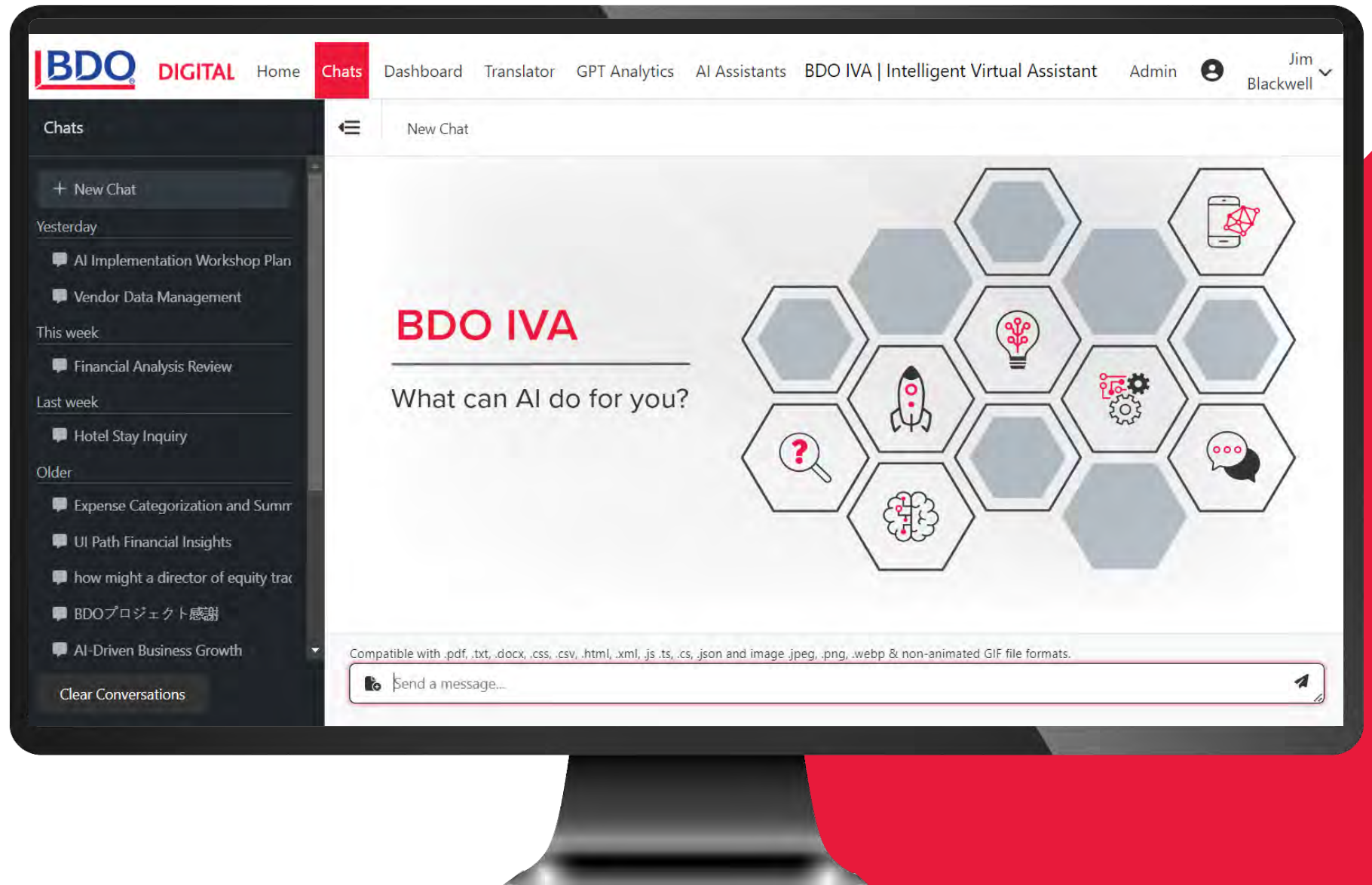
12:31 PM

Warning: Chat BDO uses small, relevant sections of your file(s) to assist you, NEVER the full file. This means it can miss details. Don't expect it to perfectly analyze or accurately answer questions about the whole file.

Type your message



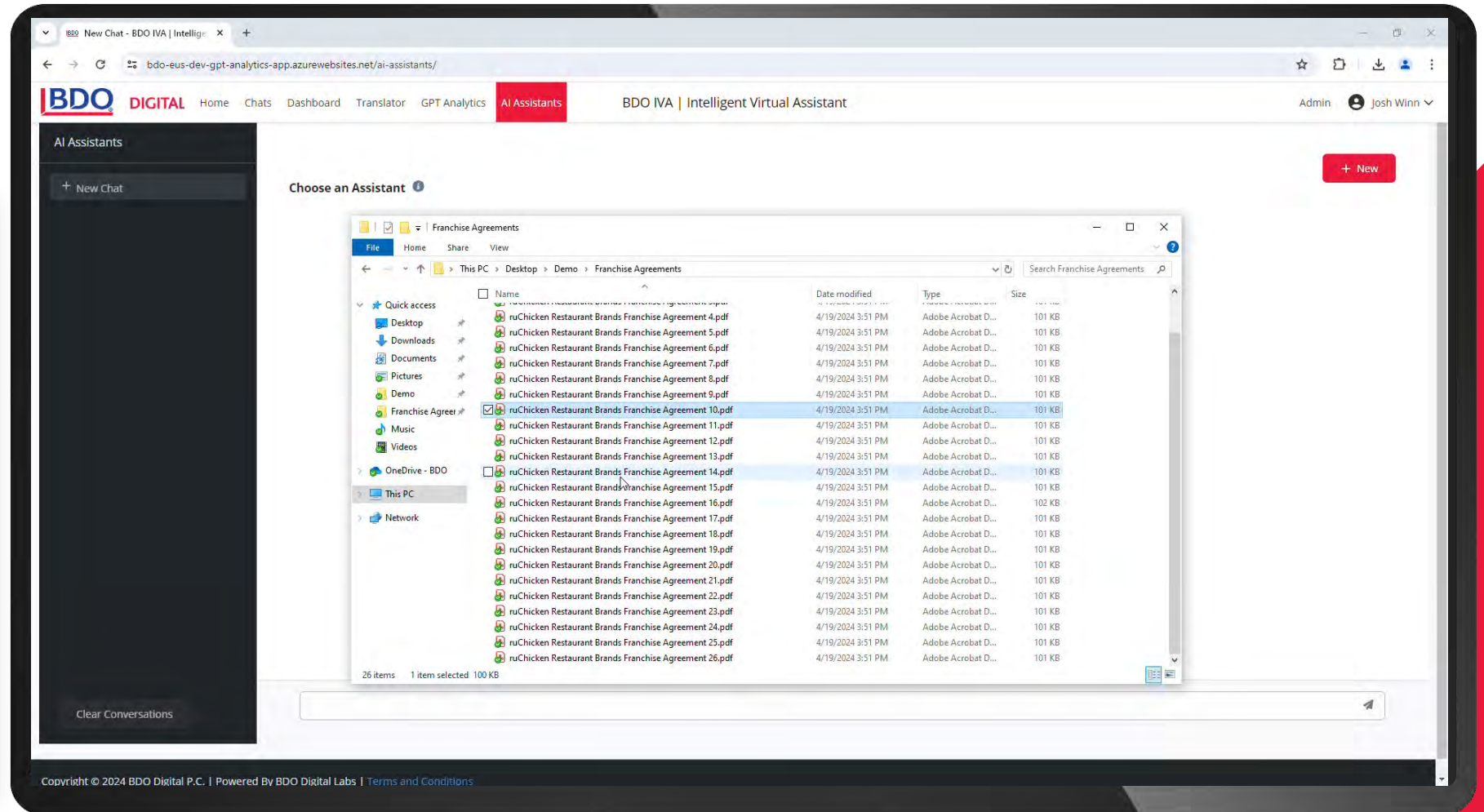
Intelligent Virtual Assistant



Build your AI Assistant

WHAT CAN IVA DO?

- ▶ Expedite your essential day-to-day tasks
- ▶ Conduct outreach
- ▶ Prepare memos
- ▶ Extract and summarize data
- ▶ Search and compare sets of documents
- ▶ Perform advanced analytics functions
- ▶ Conceptualize content



Voice of Customer



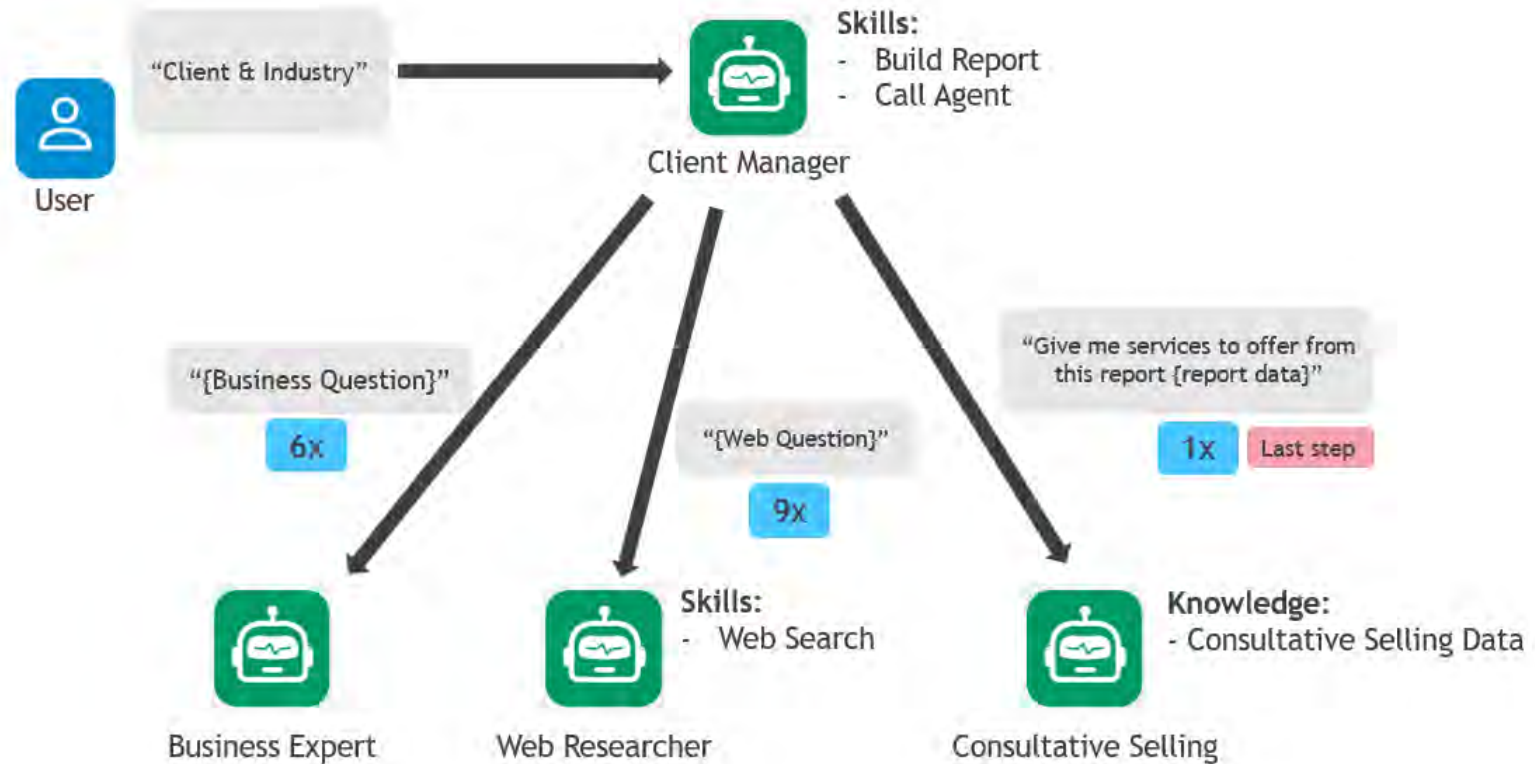
Part 3: Report Building with Agents

How it Works:

- **Build Report** - Runs code that queries 15 personas at same time. Gathers data on client.
- **Call Agent** - Sends report to Consultative Selling Agent.

Implications:

- Large reports can be generated in greater detail.
- Many queries can be executed at once leading to faster responses.
- We can use existing services for data like ZoomInfo.



Report Breakdown

1. Company Overview
 1. Overview of client in around 40 words. [Generated]
2. Company Information
 1. Address of {client} headquarters. [Generated]
 2. Annual Sales this year [Web]
 3. Total Assets this year [Web]
 4. Company Type [Generated]
 5. What companies are affiliated? [Web]
 6. NAICS Code and its description [Generated]
3. Key Competitors
 1. Key Competitors [Generated]
4. Scoops
 1. News Articles [Web]
 2. Active and recent projects for client [Web]
5. Key Industry Trends
 1. Business Challenges facing client [Web]
 2. Business trends facing client [Web]
 3. Industry Opportunities [Web]
 4. SWOT Analysis [Generated]



NOTEBOOKLM

Audio Overview / Podcast



Potential AI Use Cases

MARKETING

Creates email copy, social media posts, and blog articles



SENTIMENT ANALYSIS & BRAND REPUTATION

Processes text to identify sentiment toward a brand or product

HEALTHCARE

Analyzes patient symptoms and medical history and generates a list of possible conditions



FINANCIAL ANALYSIS AND REPORTING

Generates financial reports from data, Assists analysts and investors in decision-making

LEGAL

Drafting legal documents & contracts



FRAUD DETECTION & RISK ASSESSMENT

Analyzes financial data for unusual patterns, identifies potential fraud

RECRUITING

Screens resumes for relevant skills and experiences, Generates clear and detailed job descriptions



0110101
1011010
1101001

TECHNOLOGY

Software development and code generation

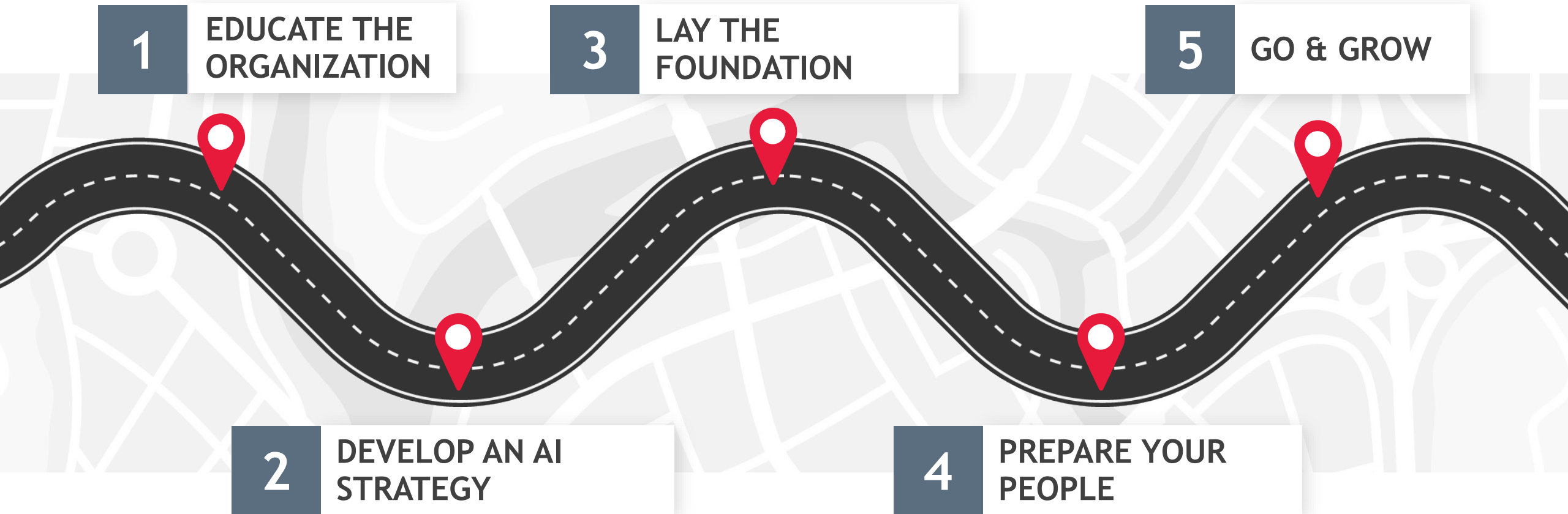
CUSTOMER EXPERIENCE

Instant customer support and personalized assistance

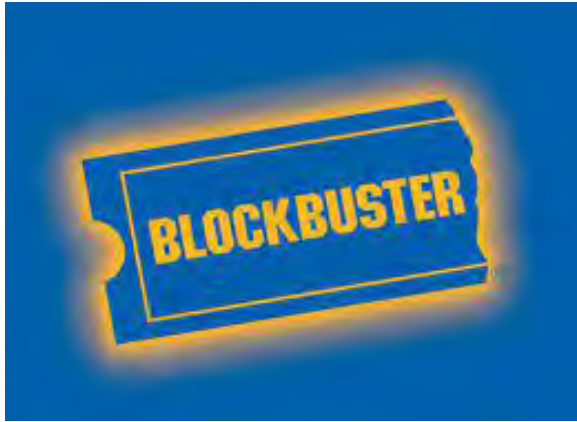


The Road to Impactful AI

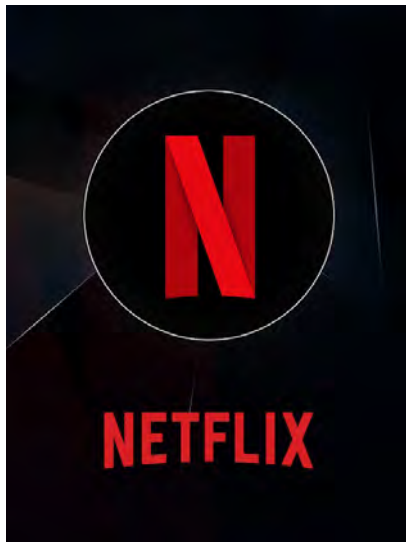
Wherever you are in your AI adoption journey, BDO Digital can help you seize opportunities, solve business problems, and drive growth with AI.



AI isn't just a tool.



It's a mindset.



Next Steps

1

ALIGN OPPORTUNITY TO NEEDS

AI or Copilot Workshop

BDO Digital's AI & Copilot Workshops can help you better understand your business pain points and focus areas and connect AI or Copilot solutions to help you achieve immediate impact and value.

2

SECURE GENERATIVE AI ENVIRONMENT IVA

Our Intelligent Virtual Assistant (an in-house GPT solution) offers a secure and tailored generative AI environment hosted within your own Microsoft Azure environment. This setup mitigates risks associated with data breaches and safeguards sensitive information.

3

DEVELOP AN AI STRATEGY AI Strategy Assessment

BDO Digital creates tailored AI Strategies to meet you where you are. From an initial assessment to defining an AI vision with measurable goals, creating a staffing and implementation roadmap, and developing a governance plan, BDO can help navigate the changing terrain.

Thank You!

Questions?





About BDO USA

Our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes and value for our people, our clients and our communities. BDO is proud to be an ESOP company, reflecting a culture that puts people first. BDO professionals provide assurance, tax and advisory services for a diverse range of clients across the U.S. and in over 160 countries through our global organization.

BDO is the brand name for the BDO network and for each of the BDO Member Firms. BDO USA, P.C., a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

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Material discussed is meant to provide general information and should not be acted on without professional advice tailored to your needs.

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Black & Decker - The rest of the story

1990 Total Awareness of Power Tools Suppliers Among Tradespeople

Brand Awareness			
Black & Decker	98%	Hitachi	77%
Milwaukee	95%	Hilti	73%
Skil	93%	Porter Cable	67%
Mikati	90%	Ryobi	50%
Bosch	87%		

Black & Decker - What story is the data telling?

Segment/size	Brand	Share of Segment	Revenue of Segment
Professional/Industrial \$550M	B&D Industrial	20%	\$110M
Professional/Tradesmen \$420M	B&D Professional	9%	\$35M
Consumer \$530M	B&D	45%	\$250M

DEWALT®

