

What Managing Directors Should Know Before Adopting AI

A management briefing for small and mid-sized businesses

AI can create real value in mid-sized businesses – but not every project makes sense, not every process is suitable, and not every tool fits the company. For managing directors, the point is not to adopt some solution as quickly as possible, but to determine whether AI can be embedded in a way that is **commercially sound, legally manageable, organisationally viable and technically clean**. This brief outlines what matters before you begin.

1 Where can AI genuinely add value?

Value emerges wherever information has to be processed, searched, summarised or prepared again and again.

- Capturing customer enquiries faster and in full
- Structuring calls, emails and form submissions
- Preparing quotes, callbacks and service notes
- Making internal knowledge searchable
- Easing recurring back-office tasks
- Improving handovers between sales, office and field
- Simplifying documentation and shortening response times

Value rarely comes from one spectacular application, but from many small reliefs in daily work.

2 Which risks should you be aware of?

AI projects rarely fail on the technology, but on expectations, processes and accountability.

- Confidential data entered into external systems unchecked
- AI output is not reviewed thoroughly enough
- Unclear when AI may be used
- No ownership of approvals and quality
- Undocumented processes, missing integration
- Data protection and deletion concepts considered too late

AI needs guardrails – not as bureaucracy, but as protection for the company, its customers and its staff.

3 How should you think about cost?

Cost is more than monthly fees – what counts is the total logic across rollout, operation and value.

- Analysing and selecting use cases
- Designing processes and permissions
- Technical setup and integration
- Adapting to language, workflows and templates
- Training, maintenance, control and support
- Licence and usage cost of the AI models

Not “What does the tool cost?” but: which efforts fall, which errors disappear, which processes become more reliable?

4 What matters for data protection?

SMEs process personal, customer and contract data. Clarify up front:

- Which data may the AI process?
- Where is the data stored?
- Are external AI services used (DPA)?
- Which roles and permissions apply?
- May staff enter customer data?
- How is output reviewed?
- Are there deletion and documentation rules?

Data protection does not block AI – it ensures AI fits the company and its obligations.

5 Which organisational conditions apply?

AI does not work in isolation from organisation, processes and accountability.

- A concrete business use case
- Access to the relevant information
- Clear responsibilities and approvals
- Rules for use and control
- Willingness to adjust workflows slightly
- A realistic understanding of the limits
- Engaged staff and prioritising leadership

Without these conditions AI stays an experiment – with them it becomes a tool for better workflows.

6 Typical wrong turns

- 01 Tool first, problem later** – bought before the problem is clear.
- 02 Starting too big** instead of a manageable case.
- 03 No accountability** for quality and maintenance.
- 04 Data protection too late** – reviewed only after rollout.
- 05 Staff not involved** – introduced top-down.
- 06 Automation without control** – no review points.
- 07 No operating concept** – maintenance lapses after the pilot.

7 A recommended way to start

- 1 Assess the status quo** — where do tasks consume time, and where do queries and delays arise?
- 2 Identify use cases** — 3 to 5 areas with near-term value.
- 3 Assess value, effort & risk** — commercially sound, feasible, compliant.
- 4 Define the pilot cleanly** — goal, owners, data sources, success criteria.
- 5 Plan operation & rollout** — extend, adapt and transfer to further areas.

8 Decision questions

- Which concrete problem should AI solve?
- Which area benefits first?
- Which data is required?
- Which risks to data protection and quality?
- Who is responsible internally?
- How is success measured?
- Which decisions stay with people?
- Which systems must be connected?
- What happens after the pilot?
- Which solution fits the company – not just the technology?

9 How KrambergAI helps

AI as a structured company project – not as a standalone tool.

- Analysis of suitable use cases
- Assessment of value, effort and risk
- Data protection and governance review
- Design of practical, workable solutions
- AI employees, company memory, AI telephony, digital customer interfaces
- Guidance across pilot, operation and improvement

CONCLUSION

AI delivers in mid-sized businesses when it is introduced cleanly – through suitable use cases, clear accountability, realistic cost logic and controlled operation. Treat AI not as a software purchase, but as an **organisational decision**. Those who start in a structured way reduce risk and raise the chance that AI is used for the long term.

NEXT STEP

KrambergAI AI Initial Check

Have us assess which AI use cases in your company are sensible, cost-effective and responsible.