

Getting AI projects right in mid-sized businesses

A decision brief for managing directors

AI can ease the load in the back office, sales, service, knowledge management and customer communication. Success comes not from a single tool, but from a clear use case, clean data, defined responsibility and controlled operation.



Mid-sized businesses don't need a tool demo, they need a decision framework.

36 %

of companies in Germany already use AI

47 %

are planning or discussing its use

THE QUESTION FOR MANAGING DIRECTORS

Where does AI create real value in the business without compromising data protection, quality or responsibility?

Source: Bitkom Research — Artificial Intelligence 2025

DECISION FUNNEL



The right starting point is a concrete bottleneck in day-to-day operations.

Good first use cases emerge wherever information is regularly captured, searched, summarised or prepared.

AI telephony

Answer calls, qualify them and document them in a structured way

Quote preparation

Capture enquiries and prepare quotes faster

Company memory

Knowledge centrally accessible and reliably summarised

Customer interface

Bring email, WhatsApp and phone together in one place

NOT IDEAL AS A STARTING POINT

fully automated decisions · complex edge cases · sensitive data without a concept

AI projects often fail not because of AI, but because of unclear processes.



? Who captures the information?

? Where is it handed over?

? Who reviews the results?

? Who signs off?

Workflow redesign has the greatest influence on the EBIT effect of AI.

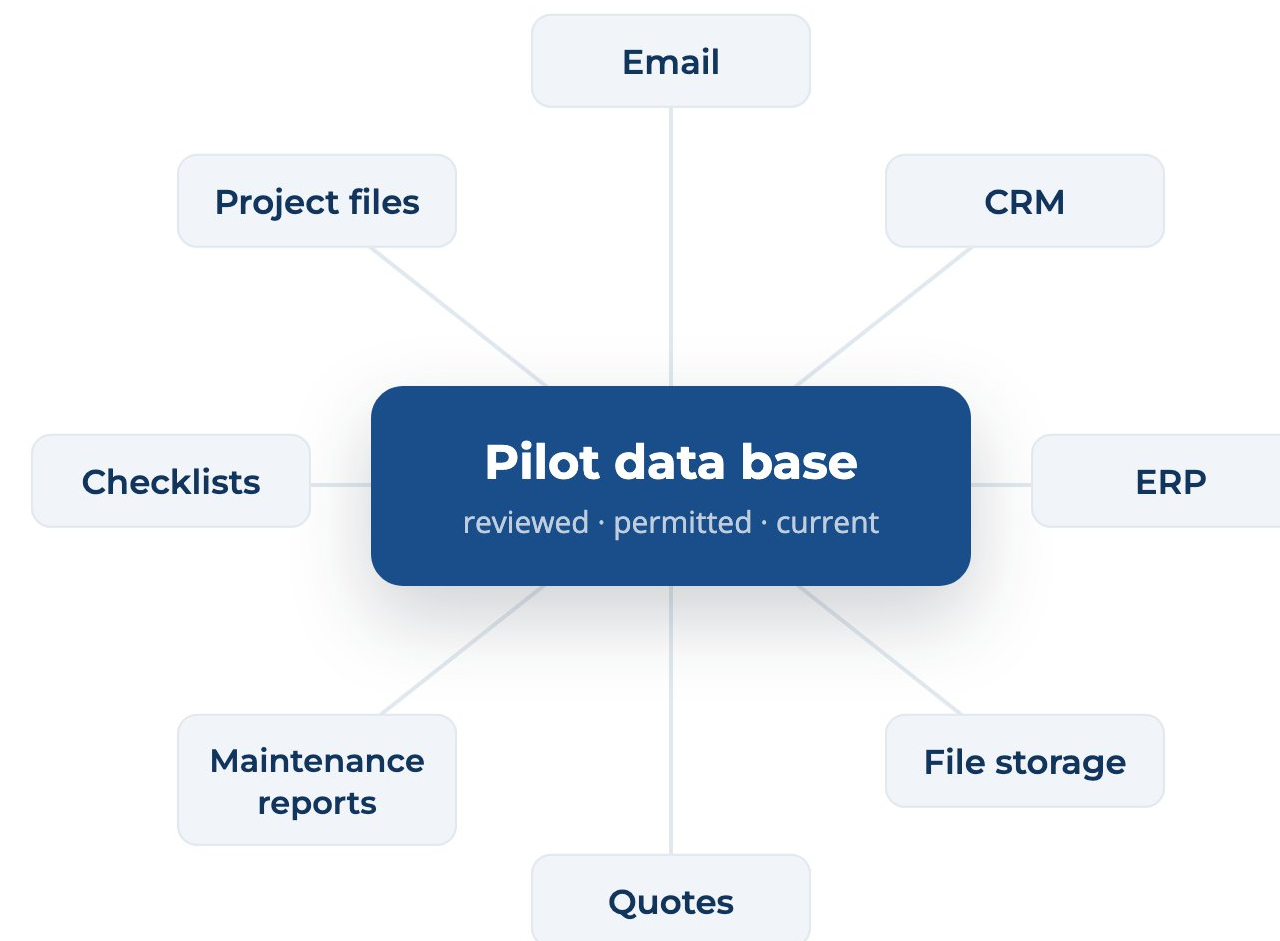
Source: McKinsey — The State of AI

Data quality determines the quality of results.

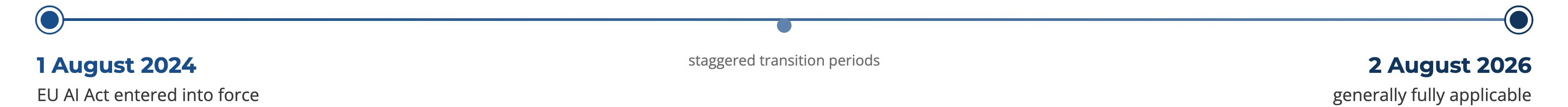
An AI pilot doesn't need a perfect data landscape. But it does need suitable, permitted and professionally reliable information.

CLARIFY BEFORE STARTING

- Which data sources are used?
- Which content is up to date?
- Which information is confidential?
- Who provides the expert review?



Data protection and the AI Act belong at the start, not at the end.



MANAGING DIRECTORS MUST CLARIFY

- Which data is processed?
- Where is it stored?
- Which providers are involved?
- Which roles and approvals apply?

Source: European Commission — EU AI Act timeline

AI needs clear responsibility in operation.

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Management

Goal, priority, budget scope

Department

Test cases, assessment, sign-off

IT / Data protection

Systems, permissions, data flows

Operations

Usage, feedback, improvement

AI pilot

at the centre

PRINCIPLE

**AI prepares.
People decide.**

A clean pilot is small, verifiable and scalable.

PILOT PROFILE

Goal	one concrete bottleneck
Users	defined roles
Data	reviewed sources
Handover	clearly defined
Review	by the department
Success	easy to measure

SUITABLE SUCCESS CRITERIA

- ✓ more complete enquiries
- ✓ better call-back notes
- ✓ less time spent searching
- ✓ faster assessment
- ✓ traceable handovers

Common wrong decisions can be avoided.

✗ Tool first

Buying a tool before the use case is defined

Connecting all data without review

Sorting out data protection later

Leaving departments out

No plan for upkeep after the pilot

✓ Clean start

1 Use case

2 Data

3 Process

4 Responsibility

5 Pilot

6 Operation

— NEXT STEP

The AI Potential Report as a basis for decisions

KrambergAI works with you to assess which AI use case is sensible, feasible and responsible.

prioritised use cases

benefit and risk assessment

data and process review

recommended pilot

next implementation steps

Request the AI Potential Report

krambergai.com