Platform 365

AI Unlocked

The SME guide to AI that actually works

Thursday 29 October 2026
South Place Hotel, The Members Lounge

Real conversations. Practical AI.



BEFORE WE START

How tonight works

45 mins

A short, plain-English chat

No jargon and no product demos. Just what we have seen work in real businesses.

Ask away

Interrupt us

Questions, challenges and stories from your own business are welcome at any point.

5:15pm

Then food and drinks

The real conversations usually happen at the bar. We will be around all evening.

YOUR HOSTS

Dan and Chris, the Platform 365 team



Dan Roots

Business Development Manager

Chris Skinner

Technical Solutions Manager

JOINED BY



Dave Sutton

Joining the conversation tonight to share a few real-world examples from the businesses he works with

LET'S START WITH YOU

Quick show of hands

1 Who has used an AI tool in the last week?

2 Who has used one for work?

3 Who knows exactly which AI tools their team is using?

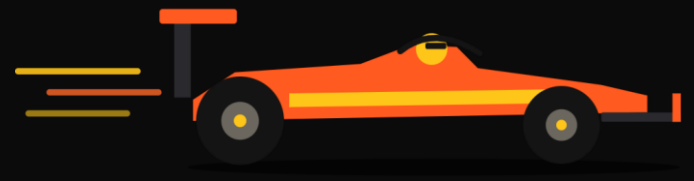
Bonus: keep your hand up if you have a written AI policy

WHERE MOST SMES ARE

AI is the most talked about and least acted on topic in business right now.

AN ANALOGY

Everyone has been handed the keys to an F1 car



No track

We are driving it on everyday roads, potholes and all. Our data, systems and security were not built for it.

No instruction

Nobody has shown the team how to drive it, or agreed where it should and should not go.

The result

Without the right approach it becomes expensive, time-consuming and risky.

TWO CAMPS

Most businesses we meet sit in one of two places

Experimenting without a plan

People are using free tools on their own. No policy, no oversight and no clear picture of what information has gone where.

Holding back

Worried about cost, security or choosing the wrong tool, so nothing really happens and the gap quietly grows.

Which one sounds like your business?

BUILDING THE TRACK

Three things to take back to the office

01

Pick the problem before the tool

02

Know where your data is going

03

Decide what staff can use

All three are on the card in front of you

01

Pick the problem before the tool

Start with a piece of work that takes too long or regularly gets held up. Decide what needs to improve before you look at any software.

> **Then ask: does it need AI, automation, or both?**

THE BIGGIE

AI will not fix a bad process.

It won't paper over steps that are undocumented, disjointed or full of exceptions.
Know your workflow, map it out, then digitise it one step at a time.

WHERE TO START

Map it out, together

1

Map the process

Write down every step, who does it, which system it lives in and where it gets stuck.

2

Form an AI steering group

A small group that sets priorities, approves tools and owns the policy.

3

Involve the people who do the work

Someone from each department. They know the nuances, the workarounds and how teams hand over.

WORTH KNOWING

AI and automation are not the same thing

AUTOMATION

"If this, then that"

Follows fixed rules you set. When a form is submitted, add the contact to the CRM and alert the team.

Power Automate (in Microsoft 365), Zapier, Make

AI

Reads, writes and judges

Makes sense of messy, unstructured information like emails, documents and meeting transcripts.

Copilot, Claude, ChatGPT

Together: automation moves the information, AI makes sense of it.

AI PLUS AUTOMATION

Where they work well together

Meeting follow-ups

Transcripts summarised and actions pushed straight into your task list or CRM.

Lead enquiries

New enquiries researched for context and intent, so sales start the conversation informed.

Making sense of your data

Data you already hold but could never easily dig into, with exceptions flagged to you automatically.

Data entry between systems

An action in one system copies the details into another, with no retyping.

GETTING GOOD OUTPUT

AI is only as good as what you give it

Think of it like briefing a new starter: bright and quick, but with no memory of your business, your clients or the bigger picture.

A THIN BRIEF

"Write a proposal for this client."

A PROPER BRIEF

Who they are, what they care about, what we have done before, the tone to use and what good looks like.

02

SECURITY AND RISK

Know where your data is going

The more context you give AI, the better the answer, and the more you could be giving away.

WHAT IS AT STAKE

- **Personal data**
- **Regulated data**
- **Intellectual property**
- **Commercial secrets**

⚠ WHERE IT GOES WRONG

Free public tools that may keep or learn from what you type

Paid tools that are not locked down inside your own environment

AI that can see more of your files than the person using it should

⚠ SECURITY AND RISK

Four risks to close off before you switch AI on

"What does my manager earn?"

AI can see every file the user can, so it answers.

Fix: need-to-know permissions and conditional access

The forgotten folder of ID copies

Passports, bank details and card numbers sit unlabelled, so nothing stops AI reading them.

Fix: data classification and DLP rules

Pasting in the client spreadsheet

Customer records go into a free tool to save ten minutes.

Fix: anonymise, redact or generalise first

The contract says no

Government or regulated clients restrict where their data can go.

Fix: check client terms before choosing a tool

AI does not create these problems. It exposes them.

THE QUESTION WE GET MOST

What is the best AI tool?

It depends on the job, but even more on your environment.

Where does your data live?

Which cloud services do you use?

Are you regulated, or bound by client contracts?

There is no right or wrong answer. It is about what your team finds easy to use, what connects to your apps and what keeps you compliant.

TWO COMMON ROUTES

How the main options fit

Microsoft 365 Copilot

Built into Outlook, Word, Teams, SharePoint and OneDrive. Strongest when your data already lives in Microsoft 365, and it respects your existing permissions.

Claude or ChatGPT

Independent of your cloud platform. Connects to your business apps, file storage and even Microsoft 365 through direct integrations and MCP.

Confusingly: Copilot can also run on OpenAI and Anthropic (Claude) models underneath, inside Microsoft's own environment.

WORTH CHECKING FIRST

You may already be paying for AI.

AI features are turning up inside software many SMEs already own: email, documents, CRM, accounting and phone systems.

Find out what you have before buying anything new.

03

Decide what staff can use

Agree which AI tools are approved, what information can go into them and who signs off new ones. Then give people proper instruction, so they know how to use them well.

That is how you build the track.

AT SME SCALE

What good looks like

Start small

One task, one team, one tool.

Measure it

Note how long it takes before and after.

Give it an owner

A named person who keeps an eye on it.

Review it

Check back after a month, then decide what is next.

OVER TO YOU

What would you like to ask?

Big or small, technical or not. If you would rather ask quietly, grab one of us over a drink.



WHEN YOU ARE READY

See what Dan and Chris could find in your business

Start with a relaxed call. Where it helps, the team can follow up with a read-only readiness check and a plain-English report, with a clear plan for what to fix first.

Scan to book a call

platform365.co.uk/ai

Or just grab us at the bar shortly.



Based on findings from a real anonymised assessment

Thank you.
The bar is open.

Good drinks. Better ideas.

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