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# The Power Shift: How Small Businesses Compete In A World Gone Digital

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*Summer  
Summit*  
AN MBE GROWTH & READINESS FORUM

AI Powered.  
Customer  
Driven.

The Power Shift:  
How Small Businesses Compete  
In A World Gone Digital



## WE WORK WITH COMPANIES AND ORGANIZATIONS SEEKING TO LEAD IN AN INCREASINGLY DIGITAL AND CHANGING WORLD



**Every person in this room is using AI wrong.  
Not because you're not smart.  
But because nobody told you what it's actually for.**





**In the early 1980s, consumer goods manufacturers controlled the retail relationship.  
They decided what got made, how it was priced, and what went on shelves.  
Retailers like Walmart were essentially order takers.**



COLGATE-PALMOLIVE



Unilever



**Walmart** 





**Walmart took control of inventory ordering. They told manufacturers what to make and when to ship it. The power in the entire consumer goods ecosystem flipped from manufacturer to retailer, not because Walmart automated a task, but because **Walmart used data to coordinate an ecosystem.****

Most people  
think AI is an  
automation  
tool.

It is not. Or at least, that  
is the least important  
thing it does

# AI's real power is coordination — connecting people, data, decisions, and systems that used to operate in silos



## Not Automation

**Replacing manual tasks is the least valuable thing AI does.** Most businesses stop here and wonder why the hype doesn't match the results.



## Coordination

AI connects the parts of your business — and your ecosystem — that have never talked to each other. **That is where the real value lives.**



## Your Advantage

The tools that gave Walmart a structural edge over entire industries are now accessible to **every small business owner in this room.**

# Three Layers of AI Value



## The mistake most small businesses make is treating AI like a faster employee

Ask it to write something; Ask it to summarize. But that is not where the money is.

**The money is in what happens when AI connects the dots between the parts of your business that have never talked to each other.**

1



### Layer 1: Task Automation

AI handles what used to be manual – writing, summarizing, formatting. This is where most people are. It saves time, but it does not change your business model.



### Layer 2: Workflow Coordination

AI connects information across your team so fewer things fall through the cracks. Systems talk to each other. Decisions get made faster with better data.

2

3



### Layer 3: Ecosystem Control

AI gives you intelligence about your customers, suppliers, and competitors that used to require a full data team. This is where Walmart lives. **This is where you are headed.**

A man's profile is shown in a three-quarter view, looking towards the right. His head is partially transparent, revealing a complex digital brain structure. The brain is composed of various icons and symbols, including a globe, a person, a Wi-Fi signal, a speech bubble, a mail icon, and a gear. The background is a dark blue gradient with a subtle grid pattern.

**Augmented Artificial Intelligence**

**Communication**

**10<sup>x</sup>**

**Collaboration**

**Collective Intelligence**

**Humans + Machines = Intelligent Organization**



## **Construction: Winning the Coordination War**

### **The problem most MBE construction firms face:**

- You win a bid, then spend the next three weeks chasing subs, reworking takeoffs, and managing document chaos.
- **Margins in construction average just 5%.**
- There is almost no room for error and almost no tolerance for the coordination failures that eat into that margin every day.



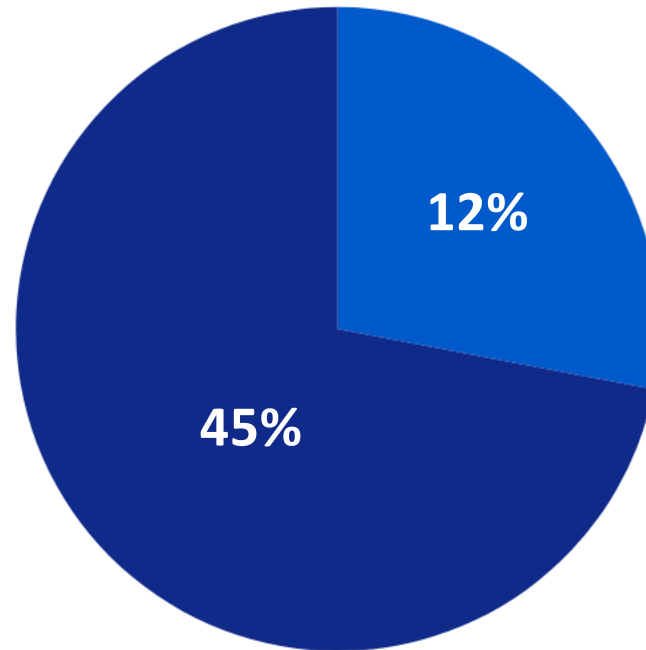
# Construction Industry AI Adoption



● Email Marketing    ● SEO

# 45%

- 45% have zero AI implementation
- Massive opportunity for differentiation



# 12%

- Only 12% of construction professionals currently use AI tools
- Early adopters gaining competitive edge

# Construction AI: Real Numbers, Real Results



## Before the Bid: Faster Takeoffs

A plumbing subcontractor on a 250-unit apartment complex — a job that would typically take a senior estimator **three full days** of manual blueprint review — used an AI-enabled takeoff tool and completed the same task **in under eight hours**. Result: 15% less material waste, roughly **\$25,000 saved** on that single project, and the estimation team freed up 24 hours to pursue new bids. *(Source: Contractor Magazine, December 2024)*

## During the Bid: Catching Costly Errors

AI can flag scope gaps before you submit. One contractor nearly submitted a bid that excluded rebar costs for a concrete slab — the AI system caught it. In another case, when steel prices jumped **15% overnight**, the system flagged the change immediately, giving the firm time to adjust their number before submitting. *(Source: AlterSquare, 2025)*

## Across the Project: Safety & Productivity

AI-driven scheduling tools are producing **10–15% productivity improvements** through better coordination of subs and fewer delays. Firms using AI for risk management are seeing **30–35% reductions in safety incidents** on job sites. *(Source: Grand View Research / Datagrid, 2025)*

**Construction has always been a fragmented coordination problem — the GC, the subs, the suppliers, the inspectors, and the client all operate on different timelines with different information. AI connects those parties into a shared real-time picture.**

**The contractor who controls that information layer is the one who wins the next bid.**

# Professional Services: Stop Selling Time. Start Delivering Outcomes

**The problem most small professional services firms face:**

You sell time. And most of your time goes to things that are not actually what clients pay you for — writing proposals, researching, formatting deliverables, chasing information between systems.

**We are essentially billing for overhead and calling it expertise.**

**AI changes that equation fundamentally — not by making you faster at the same work, but by eliminating the overhead entirely and upgrading what you deliver to clients.**



# Stop Selling Time. Start Delivering Outcomes. How AI coordinates every layer of a professional services firm



## AI Coordination Layer

The connective intelligence hub linking every function of your firm — delivery, capacity, growth, and retention — into one unified ecosystem.

CLIENT DELIVERY INTELLIGENCE

# 25,000

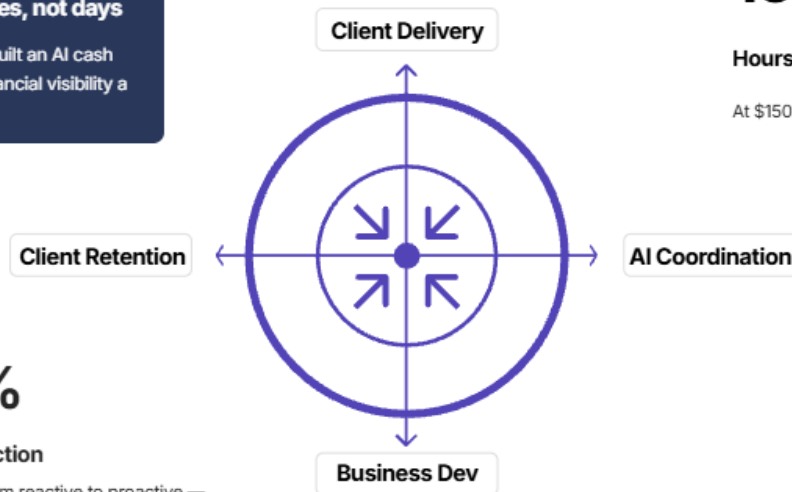
**Transactions processed in minutes, not days**

Armanino, a CA-based accounting firm, built an AI cash flow model that gives clients real-time financial visibility a full data team couldn't match.

# 15–20

Hours per week reclaimed per person with AI automation

At \$150/hr, that's \$2,250–\$3,000 in recovered revenue potential per person, every single week.



# 20%

Revenue Growth

AI-powered retention strategies drive measurable top-line impact.

# 30%

Churn Reduction

AI-driven engagement shifts you from reactive to proactive — clients stop looking elsewhere.

BUSINESS DEVELOPMENT

# 73%

**Of clients prefer outcome-based pricing over hourly billing**

AI makes outcome-based pricing possible because now you can track and prove the result you delivered.

5 · Firm of the Future / Armanino Case Study · SuperAGI 2025 · Leanware 2024

AI tracks which clients are disengaging *before* they call to cancel, giving you time to act while you still can. When the relationship deepens, loyalty follows.



# Food Business: Turning Data Into Loyalty

The problem most small food businesses face: thin margins, unpredictable demand, high turnover, and a customer base that forgets you exist between visits.

**The average restaurant loses nearly 79% of first-time guests.** They never come back.

*(Source: Bloom Intelligence, 2025)*

## The food industry is splitting into two groups:

Operators using unified data platforms, and everyone else.

The gap in customer retention and lifetime value between those two groups is growing.

**Getting in now — even with one AI tool — puts you in the right group before the gap becomes impossible to close.**

# Food Business AI: Revenue Recovery & Retention



## AI Coordination Layer – The Connective Tissue

One intelligence hub unifying Customer Intelligence · Revenue Recovery · Inventory & Waste · Guest Retention & Growth into a single operating system for your food business

### Recovering Missed Revenue

65% of calls to restaurants go unanswered during peak hours. For a restaurant receiving 1,500 calls/month with a 25% miss rate, that is ~131 lost connections per month. At a \$45 average check, that is nearly \$6,000 in monthly missed revenue per location. AI phone and reservation systems recover that revenue automatically, 24/7.

*(Hostie AI / iovox, 2025)*

### Keeping Customers Coming Back

Restaurants using integrated guest data platforms – pulling together POS data, reservations, online orders, and reviews – are achieving first-visit return rates of 35–45%, vs. the industry average of 25%. The top 12% of customers generate roughly 40% of total revenue. AI identifies who those customers are and keeps them engaged.

*(Bloom Intelligence, 2025)*

### Reducing Waste & Improving Margins

AI inventory management is producing 35–50% reductions in food waste for restaurants that adopt it. At current food costs, that is one of the fastest payback investments in the industry. Restaurants using AI report a 25–60% increase in predictable revenue streams driven by smarter marketing and customer behavior analytics. *(NRA*

*Technology Report, 2024)*

**Panera's AI loyalty program members visit 70% more often than non-members.**

**Chick-fil-A's AI-driven recommendation feature produced a 50% jump in upsell revenue.**

**These are large brands – but the same tools are available to independent operators today. *(ReachifyAI, 2025)***

# The Coordination Opportunity Across All Three Sectors

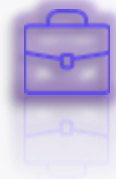
**Every business model we just walked through shares the same underlying pattern. The AI tool is not the point.**

**The coordination layer it creates is the point.**



## Construction

GC, subs, suppliers, inspectors, and client all operating on different timelines with different information. AI creates a shared real-time picture. The contractor who controls that information layer wins the next bid.



## Professional Services

Information scattered across email, spreadsheets, proposals, CRM notes, and people's heads. AI coordinates it into a single picture – which clients are at risk, which projects are stalling, which opportunities are untouched.



## Food Business

Enormous data – what sold, when, to whom, at what price, tied to what weather, event, or promotion – sitting unused in a POS system nobody reads. AI turns that data into decisions coordinating inventory, staffing, marketing, and menu.

**"Every business in this room already has the data. Your POS system, your emails, your invoices, your customer history.**

**AI doesn't give you new information. It connects the information you already have into a picture you have never been able to see before.**

**That picture is your advantage. But only if you're willing to bring it together in a cohesive system that works seamlessly together."**

# AI Agents: What They Are & How To Use Them To Build Coordination

**You have been hearing about AI agents everywhere. Here is what they actually are, which tier is right for where your business is today, and what a realistic ramp looks like.**

The agent space has split into **three tiers**. Most people either default to ChatGPT and wonder why the hype doesn't match reality, or hear about the more powerful options and do nothing. **Both are mistakes.**

## Tier 1- Personal Assistants

"Think of Tier 1 agents as a chief of staff in your pocket. You give them a goal, they figure out the steps, and they come back with the work done."



## Tier 2- Workflow Automation

"Tier 2 agents connect your existing business tools and trigger actions between them automatically. A new lead comes in, research gets done, a summary lands in your folder, all before you look up from your coffee."



## Tier 3- Custom Build

"Tier 3 turns your business ideas into working software. No developer, no IT department, no six-month timeline. Just a goal, a conversation, and a finished product."



# Personal Assistant Tools: Start Here



**These are for non-technical business owners who want real output without needing IT support. No setup, no consulting required.**



Think of it as an AI that orchestrates multiple models at once. Give it a complex research prompt — it draws up a plan, browses the web, pulls data, and returns a fully structured, interactive deliverable. Not a text document. **An actual report with navigation, charts, and sourced data.**

What makes it sticky: the **skill system**. Once it completes a task you like, you can package that process into a reusable workflow. **Same output, different topic, zero re-prompting.**



This one touches the files on your actual computer. You point it at a folder, give it a task, it executes without asking follow-up questions.

**Example:** Feed it 300 unsorted photos and tell it to rename, categorize, and organize everything. It does that. For a professional services or construction firm: **every proposal, every contract, every client folder — organized and searchable.**

**If you want to do things faster with less effort, start here. These tools are accessible, affordable, and immediately useful.**

# Workflow Automation: Connect Your Tools



**These are for non-technical business owners who are done doing manually what a machine should be doing automatically.**

**Just pick the pain point and let it run.**



You describe what you want in plain language — its AI copilot builds the automation, and you usually need one or two follow-ups to fix edge cases. Best for connecting the SaaS tools you already use.

**Real example:** Every time a new client inquiry hits your inbox, a Zapier agent fires, researches the company across multiple sites, and drops a one-page summary into your Google Drive before you ever look at it. That kind of repeatable research work, automated, is where Zapier earns its place.



The more powerful sibling. The interface shows you the logic — which means more complexity but a higher ceiling. Multi-agent pipelines with branching logic and built-in quality review.

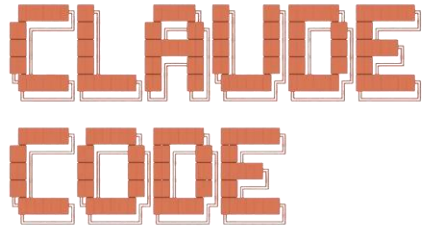
If you run content or operations at any scale and need control over the workflow, this is where to go eventually.

**Start with Zapier. One workflow. One pain point. Prove it works, then build from there.**

# Custom Software: Build Without a Developer



**"These are for business owners who always had an idea for a custom tool but were told it would cost \$50,000 and six months to build. Now you describe it, AI builds it, and you own it by the end of the week."**



You describe what you want in plain language, Claude Code figures out how to build it, writes the code, tests it, fixes what breaks, and hands you back a working tool. No developer needed, no technical knowledge required. Best for business owners who need something custom that no off-the-shelf software does quite right.



You describe what you want in plain language, Base44 builds the entire app, front end, back end, database, and login system, all in one browser tab. No developer, no setup, no infrastructure required. Best for business owners who want a custom client portal, internal dashboard, or booking system built and live the same day they think of it.

**Real example:** A catering company needed a client portal where customers could submit event details, track order status, and receive invoices, without emailing back and forth. They described it to Base44 like they were explaining it to an assistant. The app was live that afternoon. What a developer would have quoted at \$8,000 took one conversation."

**Non-technical business owners can now build functioning software. Not mockups. Working apps. Start simple.**

**One feature at a time. Test before you move on.**

# Custom Software: Build Without a Developer



## Construction Firm

A custom estimating tool built to your exact workflow — not a generic SaaS product, but software that reflects how your firm actually operates.



## Food Business

A custom inventory tracker that connects to your POS data, flags waste patterns, and alerts you before you over-order.



## Consulting Firm

A client-facing dashboard that shows measurable outcomes in real time — the proof that makes outcome-based pricing possible.

# The Ramp-Up Framework: Your 90-Day Plan

**Here is the mental model for how to start. Not AI strategy. Not a transformation roadmap. A practical sequence that builds momentum without overwhelming your team.**

## Weeks 1-2

**Pick one pain point.** Not AI strategy – one specific thing that wastes your time or costs you money. Missed calls? Proposal writing? Estimating time? Pick that one thing.

## Month 2

**Connect your tools.** Once you have proven value with a single task, use Zapier to automate the workflow around that task. Now you have a system, not just a tool.

1

2

3

4

## Weeks 3-4

**Start with a Tier 1 tool.** Manus or Claude Cowork. No setup, no IT, no consulting required. Run one real task through it. Measure the time or money saved.

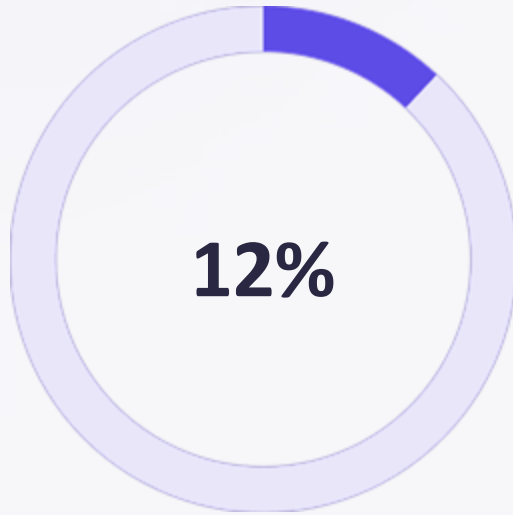
## Month 3+

**Think like Walmart.** What data does your business generate that you are not reading? What would change if your inventory, customer behavior, scheduling, and marketing were all talking to each other?

# The MBE Opportunity: Why Now Matters

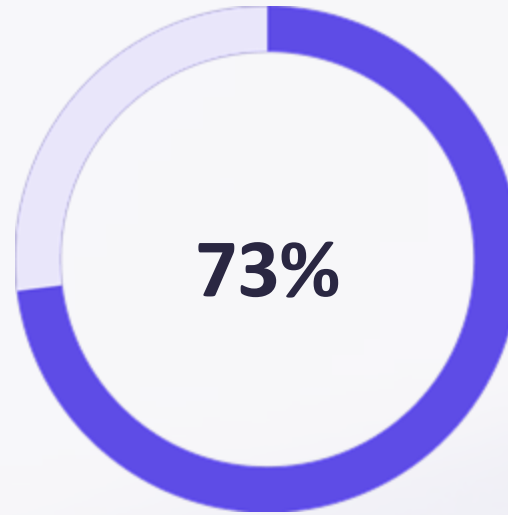
**The window for early-mover advantage is open right now, but it will not stay open.**

**Across every sector represented in this room, the data tells the same story.**



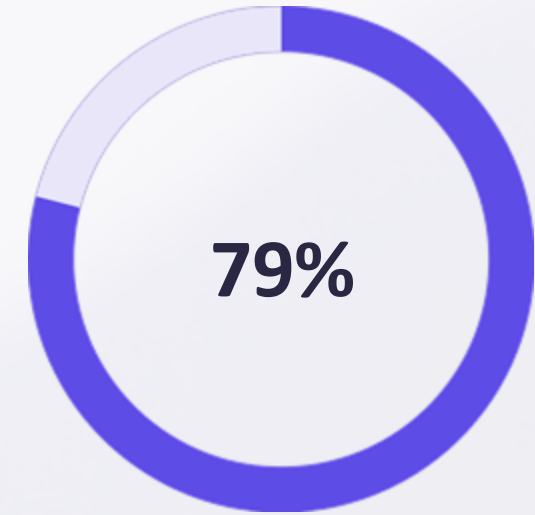
**Construction AI Adoption**

Only 12% of construction professionals regularly use AI. 45% of firms have zero implementation. **The gap is your advantage.**



**Outcome-Based Preference**

Of professional services clients now prefer pricing tied to measurable outcomes. **AI makes this possible at small firm scale.**



**Restaurant First-Visit Churn**

Of first-time restaurant guests never return. **AI-powered retention platforms cut that rate dramatically for operators who adopt them.**

**Companies leading on AI are 2.6x more likely to report business model reinvention  
Getting in early means you are not catching up — you are setting the standard.**

# The Closing Argument

**"Walmart did not need AI to shift the power in the consumer goods industry. They just needed the discipline to collect data and act on it consistently. You have tools today that Walmart could not have imagined in 1985."**

## The Tactical Path

Use AI to save a few minutes here and there — faster writing, quicker summaries, slightly less manual work. This is fine. But it does not change your competitive position.

## The Strategic Path

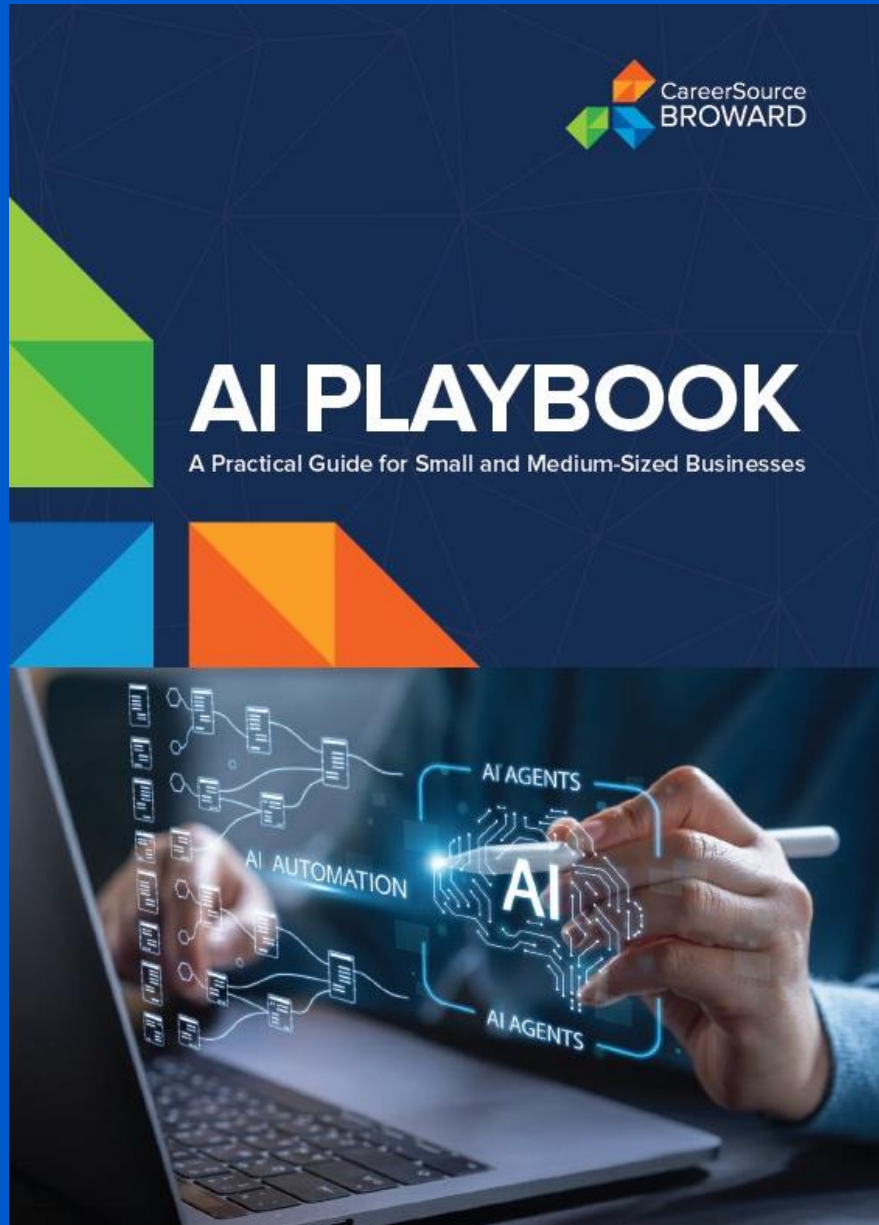
Use AI to coordinate your business — connecting your inventory, your customer behavior, your scheduling, and your marketing into a single intelligence layer. This is your moat. This is how you scale.

**One of these paths leads to scale. The other just makes you a little faster at being small.**

**The question is not whether to use AI.**

**The question is whether you are going to use it **strategically** — to coordinate your business or **tactically** — to save a few minutes here and there.**

# Your AI Playbook is Here.....





"The digital imperative is no longer an option, it is now critical for survival for any business."

**Marvin Dejean**

