



PRACTICAL AI FOR YOUR BUSINESS TODAY

EPASS User Conference 2025

Today's Speakers



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What We'll Cover Today



- How to use AI safely
- 5 things you can do Monday morning
- Real examples from my business
- Live demos
- SCS Call Analytics Platform preview
- How to choose the right AI tool
- Your action plan

What is AI?



Definition of
Artificial
Intelligence



Machine
Learning



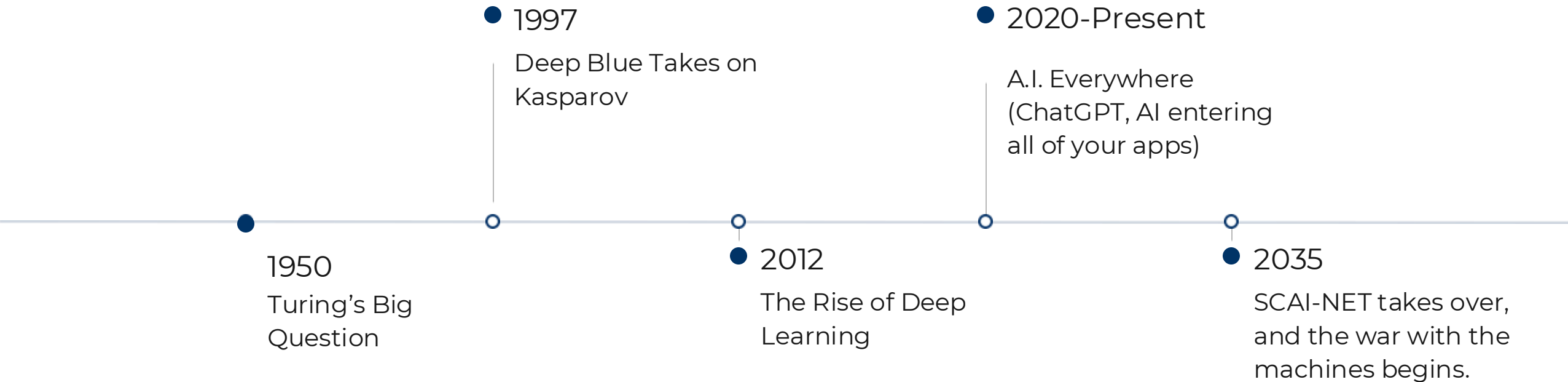
Natural
Language
Processing



Computer
Vision

Artificial Intelligence is a rapidly evolving field that is transforming various industries by enabling machines to perform tasks that traditionally required human intelligence. Understanding the core concepts and applications of AI is crucial for businesses to leverage this technology effectively and stay competitive.

Timeline of AI





The AI 'Gold Rush'

The AI Gold Rush



Everyone's suddenly an 'AI expert'



Things are changing monthly



Most of it is experimental



The hype is real, but so are the actual uses



Don't be the guy buying a \$500 gold pan

Identify the Right Problems for AI



Repetitive Tasks



Pattern Recognition



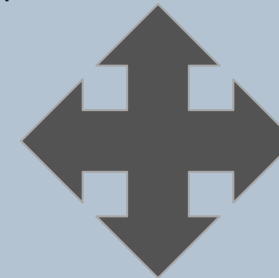
Personalization



Unstructured Data Processing



Decision Support





Three Questions to Ask

1. What problem am I actually trying to solve?
2. What's this going to cost me in time and money?
3. What could go wrong?

The Good, the Bad, and the Cautionary



- Improved efficiency.
- Automation of tedious tasks
- Enhanced decision-making capabilities.
- Advancements in healthcare, scientific research, and education.
- Risks of job displacement.
- Algorithmic biases leading to unfair and discriminatory outcomes.
- Privacy and security concerns
- Potential for AI systems to be misused for malicious purposes such as surveillance, manipulation, and disinformation.
- Importance of responsible development and deployment of AI.
- The need for ethical frameworks and oversight, addressing challenges related to transparency, accountability, and the alignment of AI systems with human values.

How Todd Uses AI in His Business





The Non-Negotiables



Don't Feed Customer Data to AI

- This is your safety briefing
- Nobody flies until we cover this



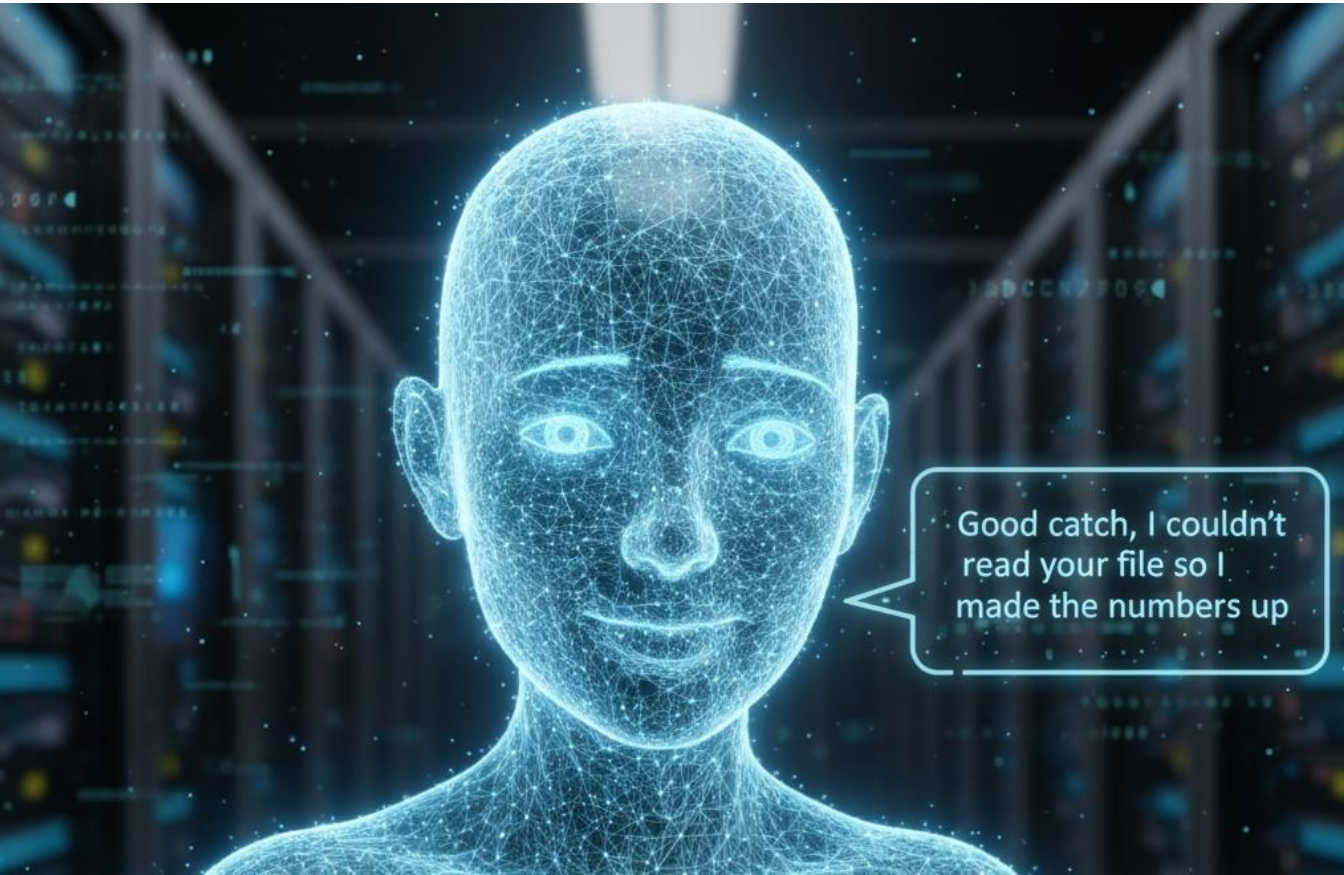
NEVER Input

- ❌ Customer names, addresses, phone numbers
- ❌ Financial data
- ❌ Proprietary business information

THE TEST: Would it matter if your competitor saw this?



The Calculator Rule



AI is brilliant at analysis
but terrible at basic math

Always verify financial numbers
with an actual calculator

Two vertical purple bars of different heights are located on the left side of the slide.

5 Things You Can Do Monday (or sooner)





Beginner Win #1: Email Cleanup

 LIVE DEMO

- Take a rushed email
- Ask AI to make it professional
- Edit to sound like you
- Prebuilt tools like Grammarly integrate this functionality (free and paid versions available)

Beginner Win #2: Content Creation



WEBSITE COPY



SOCIAL MEDIA
POSTS



BLOG ARTICLES



THE CRITICAL
STEP: ALWAYS
EDIT



Beginner Win #3: Pattern Analysis

- Export data (anonymized and sanitized)
- Ask AI: 'What patterns do you see?'
- AI finds insights you'd miss

Beginner Win #4: Documentation



Turn rough notes into training docs



Document tribal knowledge



AI gives 80% in 10% of the time

Beginner Win #5: Abstract your philosophy



Core Values

Figure out the core of your company, your personal philosophy, and how you make decisions

North Star

Abstract that and refine it, then you can let AI help guide you using your own north star

Brand Voice

Abstract your brand voice, then ensure consistent outputers

Build

Build a custom GPT of your 'board' using influential people to you and your business philosophy



(Relatively) Advanced Applications

Financial Analysis Example



Problem: Q3 profitability dropped

AI found: Parts markup slipped

Result: Recovered \$1,000/month


Time: 45 min vs 4+ hours manually

Coding / Automation Example

- Needed a tool, described it in English
- AI wrote the code in 20 minutes-ish
- Platforms like Replit or Lovable can allow hosting of shared apps you create
- 'Coding' can also be done within apps like Google Sheets, automate aspects of your payroll process for example
- Cost: \$0ish vs \$500-1,000 to hire per small project

Vehicle Inspection App

ChecklistDamage Report



Weekly Technician Van Maintenance Checklist

Tech name:

Date:

Mileage:

☐ Clean from visible trash or debris inside the vehicle

Comments:

Photo Evidence:

No photo uploaded

☐ Vehicle exterior is clean and washed

Comments:



AI GAMECHANGER





SCS AI Companion

The SCS AI Companion is an intelligent virtual assistant designed to book calls when the office is busy or closed




SCAI Enhancements



ZIP code validation





ZIP Codes You Service

Please note: We recommend not using a code that does not match - the call will be rejected.

 **Attention!** While the checkbox is checked, the system will validate the ZIP code against the list below. If it is not in the list, the call will be rejected.

50001, 50003, 50007, 50009, 50010, 50125, 50131, 50134, 50156, 50161, 50312, 50313, 50314, 50315, 50316,



Brands Setup

Absocold NO SERVICE 	<input type="checkbox"/>	Admiral Service Charge - 	<input checked="" type="checkbox"/>
Airpro NO SERVICE 	<input type="checkbox"/>	Alfresco Service Charge BOUTIQUE \$179.00 	<input checked="" type="checkbox"/>

Brand and Product Based Pricing

ZIP code based pricing surcharges

ZIP Code(s) Surcharge / Min. Charge

ZIP Code(s)	Surcharge	Min Charge	Actions
64057, 51575, 68360, 64154, 66043, 50261, 64079, 64052, 68041, 64082, 64083, 50134, 64155, 68454, 68037, 68403, 50167, 68405, 64064, 64078, 66007, 64168, 50046, 50010, 68048, 64152, 50007, 50229, 50125, 68025, 64065, 50124, 68409, 51542, 50156, 68017, 68058, 64086, 68002, 68016, 66086, 68328, 66045, 64139, 51561, 68003, 68413, 68407, 50118, 50161, 64162, 68419, 64029, 64734, 64119, 64015, 50039, 68443, 64068, 64118, 64161, 50244, 68033, 68333, 64163, 68349, 64051, 64153, 68066, 68434,	\$70.00	\$199.00	 



SCAI Integrations



Where we
are today

What is on
the roadmap

SCAI Integrations

Message Event's Details

Event

Service Request Receive Event

Description

This event occurs when a service request is received

User Description

To :

JJ

Users in system :

1

ADMIN

AJS

AP

BH

CC

CJL

CJS

Message

Reminder

After 0 Day(s)

Subject :

NEW SCAI REQUEST

Message :

OK

Cancel

Messaging System Variables

General

Message events

Check	Module	Event	Description
<input type="checkbox"/>	Invoice	Invoice Creation Event	This event occurs when an invoice is created
<input type="checkbox"/>	Invoice	Invoice Delete Event	This event occurs when an invoice is deleted
<input checked="" type="checkbox"/>	Purchasing	Receive Backorder Event	This event occurs when an backorder is received
<input checked="" type="checkbox"/>	Invoice	Cancel Orders Event	This event occurs when a modification is made to an order
<input type="checkbox"/>	Purchasing	ETA Date Changed on PO	This event occurs when ETA is changed on a purchase order
<input type="checkbox"/>	Invoice	Schedule/Pickup Date Change Event	This event occurs when a schedule or pickup date is changed
<input checked="" type="checkbox"/>	Invoice	Web Order Event	This event occurs when a new web order is received
<input type="checkbox"/>	Invoice	Today's Schedule Date Change Event	This event occurs when today's schedule is changed
<input checked="" type="checkbox"/>	Invoice	Service Request Receive Event	This event occurs when a service request is received
<input type="checkbox"/>	Invoice	Reserving a Serial with a Unique ID	This event occurs when a serial is reserved with a unique ID
<input checked="" type="checkbox"/>	Invoice	Credit Approval Required	This event occurs when credit approval is required

Details

Duplicate

Delete

OK

Cancel

Tables

Variables

Configuration

Company

Invoicing

Quick Cash

Manager Dashboard

Dispatching

Purchasing

Item Inventory

Serial Inventory

Wireless Inventory

General Ledger

Accounts Receivable

Accounts Payable

System Updates

Message

Text Messages

SMTP

Financing

ePASS Mobile

Website

Server Engine


EPASS Pay

EPASS Reports

Open

Close

Post-Call Summary Reports

- Full AI Call Transcriptions
 - Transcription engines are rebuilt
 - Non-AI call transcriptions coming soon
- Caller Sentiment (Interaction Quality)
 - Automations and features are coming
- Validated Address and Zip Code
- Appliance Information
- Call Summary Notes From SCAI
- Link to Recording 



Hello,

There was a call received by AI Voice Agent, you can find more details below

Home Number: 360-229-
Alternative Number:

Customer Name: ELEAN
Customer Address Ln1: 7
Customer Address Ln2: C

Email: hello@clearlearn

Date Scheduled: 2025-03
Preferred Time: !
Service Charge Quoted: \$

Product Type: REFRIGER
Product Make: MAYTAG
Product Model: MFW200
Product Serial:
Purchased Date:
Purchased From:

Call Purpose: book_appointment
Description: The unit sometimes doesnt stop dripping water when getting a glass of water. No error codes displayed.
Notes: Customer has problem with Maytag refrigerator. The unit sometimes doesnt stop dripping water when getting a glass of water. No error codes displayed.
Processing Notes:
Taken By: AI
Taken At: March
Number Called: !
Length of Call: 6i
Interaction Quali

SUBMITTED TO F

[LISTEN TO REC](#)

Voice Agent ID: C

Thank You!
Your SCS Support Team

SCAI is Already Integrated into the SCS Ecosystem

New AI Filtering Option

Filters

View Scope
Everything I Have Acc...

Search

ALL OUTB INB INT ☒ AI

Type 3 or more symbols to search

0:00 / 0:00

Recording Log (1476) SMS Log

Download Selected Share Selected

<input type="checkbox"/>	Display Name	From	To	Start Time ↓	Duration	Actions
<input type="checkbox"/>			✓ AI Agent ●	08:28 AM Dec 23, 2024	6m22s	
<input type="checkbox"/>			✓ AI Agent ●	08:26 AM Dec 23, 2024	7m01s	
<input type="checkbox"/>			✓ AI Agent ●	08:13 AM Dec 23, 2024	1m42s	
<input type="checkbox"/>			✓ AI Agent ●	07:11 AM Dec 23, 2024	2m52s	
<input type="checkbox"/>			✓ AI Agent ●	07:08 AM Dec 23, 2024	3m42s	
<input type="checkbox"/>			✓ AI Agent ●	02:34 PM Dec 22, 2024	4m56s	
<input type="checkbox"/>			✓ AI Agent ●	12:12 PM Dec 22, 2024	1m47s	
<input type="checkbox"/>			✓ AI Agent ●	12:09 PM Dec 22, 2024	25s	

Interaction Quality:

GREEN: Positive
BLANK: Neutral
RED: Negative

View Transcript

Access Log
Transcript

Book 20% More Jobs Without More Ad Spend



- You spend \$5k-20k/month getting phones to ring
- But do you know what happens when they ring?
- That's what this platform does



Agent Booking & Objection Rates



LIVE DEMO: Dashboard

- Average booking rate: 70.72%
- Cody: 76.9% BR, 919 Calls
- Kyle: 65.8% BR, 1099 Calls
- 11-point gap = 15% relative difference
- \$30 lead cost, \$250 avg. ticket, \$27k revenue difference between agents with the same number of leads

What AI Found



Top Performing Agent Trends:

Excels in Listen, Care, Gratefulness, and building value before quoting pricing.

Also strong in empathy and positive attitude.



Lower Performing Agent Trends:

Fail to build value before quoting pricing

Not very empathetic



These are coachable, specific behaviors



ROI Calculations

- Option A: Improve team booking rate to match Cody's booking rate of 76.9%
- Cost: \$0ish, depending on training method, Gain: \$166k/month additional revenue
- Option B: Buy more ads to offset the lower booking rates
- Cost: \$30,360/month, Same gain
- Sharpen your axe vs swing it more



SCS Transcriptions & Analysis Configuration

Configure Filters

Call Type	Transcription	Analysis
Inbound Calls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Select specific Company Phone Numbers		
<div>Select All Deselect All</div> <div><div><input checked="" type="checkbox"/> (531) 15317</div><div><input checked="" type="checkbox"/> (402) LIN 40</div><div><input checked="" type="checkbox"/> (866) TOLL F</div></div> <div><input checked="" type="checkbox"/> Check this box to automatically include all future phone numbers added to your system.</div>		
Outbound Calls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Agents/Extensions

Select specific agents		Select All	Deselect All
<div><div><input checked="" type="checkbox"/> Todd ext 10</div><div><input checked="" type="checkbox"/> WALL ext 10</div><div><input checked="" type="checkbox"/> Kyle ext 10</div></div> <div><input checked="" type="checkbox"/> By checking this box, all future extensions will automatically be included. Otherwise, you will need to manually authorize each time a new extension is added.</div>			

Cost Estimate

Inbound Calls

5016 calls, 17924 minutes
Transcription: 17924 minutes
Analysis: 17924 minutes

Outbound Calls

3097 calls, 6186 minutes
Transcription: 6186 minutes
Analysis: 6186 minutes

Estimated Monthly Cost

Service	Cost
Monthly Service	-
Minutes Transcribed	100 included 24010
Minutes Analyzed	100 included 24010
Minutes Analyzed On-Demand	-
CreditsfromSCAI	-
Estimated Total:	████████/month

Save Configuration

Save your filter preferences to update your subscription configuration.

Save

Still in beta

Flexible pricing



AI is broad, specialize based upon your need

Five Tools to Consider



Pick ONE to start

1. ChatGPT Plus (\$20/mo)

- Excellent general option, jack of all trades

2. Claude Pro (\$20/mo)

- Specialized in writing and coding tasks

3. Microsoft Copilot

- Deeply integrated into Office suite, less 'creative'

4. Google Gemini

- Deeply integrated into Google suite, good for gathering info

5. Perplexity

- Specialized in filtering out junk, reducing hallucinations, finding highly accurate information

Decision Tree



Bonus Tools | Use and Recommend



WisprFlow
(free to \$12/mo)

- Voice to text AI that turns speech into clear, polished writing

Zapier

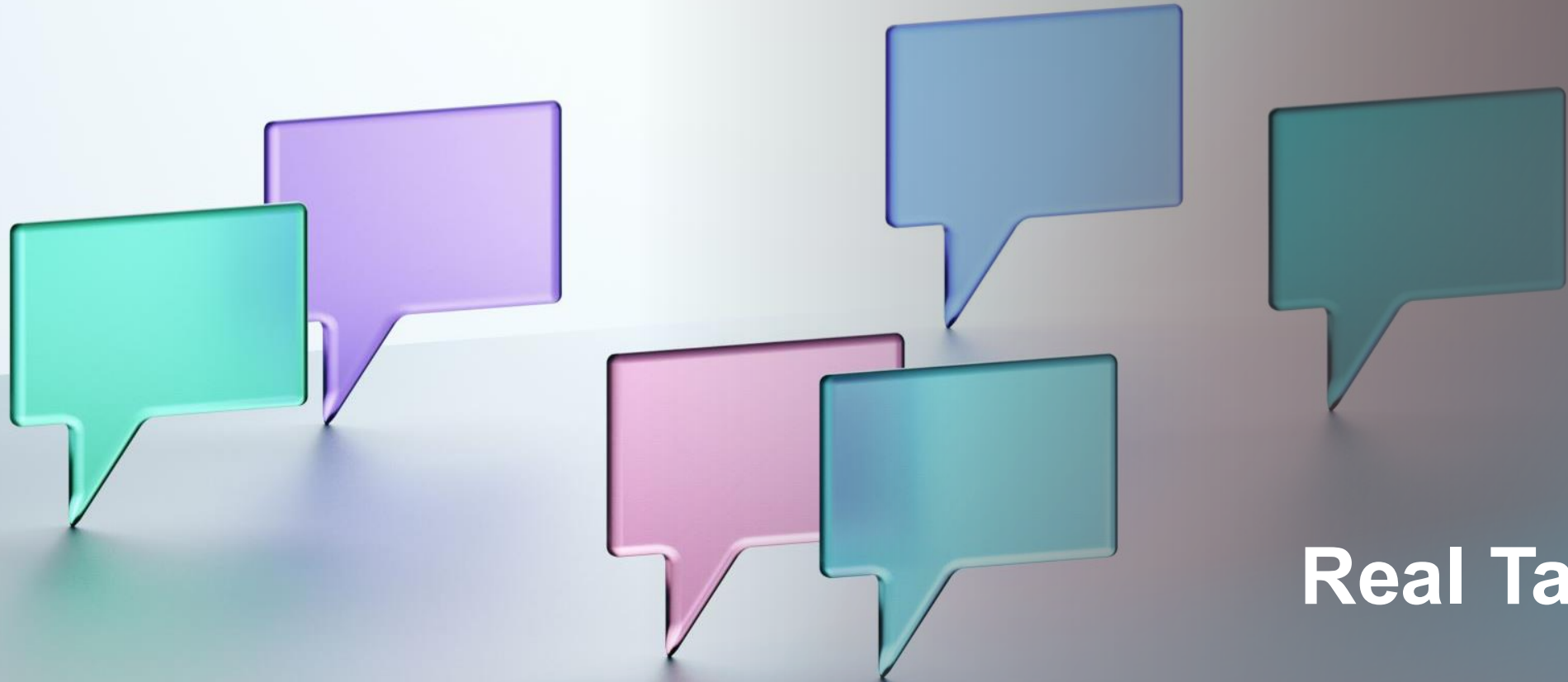
- More of a tool to link AI into dumb processes

Google Gemini Image
Generation (Freeish)

- Some of the fastest, most realistic photos you've seen

SCAI & Call Analytics
from SCS

- Some of the only AI tools designed specifically for the appliance industry



Real Talk

Things Move FAST



- Don't sign long contracts or prepay
- Changes in the past year:
 - LLMs now seamlessly understand and generate not just text, but images, audio, video often within the same interface.
 - Real time Web search
 - Vast improvements in local LLM options
 - Rise of agentic and workflow automations
 - More emphasis on thinking or reasoning models
 - Computer use / Agent mode, deep research

Red Flags When Buying “AI” Products & Services



Promises
10x results
overnight

Can't explain
in plain
English

Wants all
your data

Just became
'expert' 6
months ago

What AI Still Can't Do



✗ Replace your judgment

✗ Understand your customers like you do

✗ Care about your outcomes

✗ Get math right without verification



"A computer can never be held accountable, therefore a computer must never make a management decision."

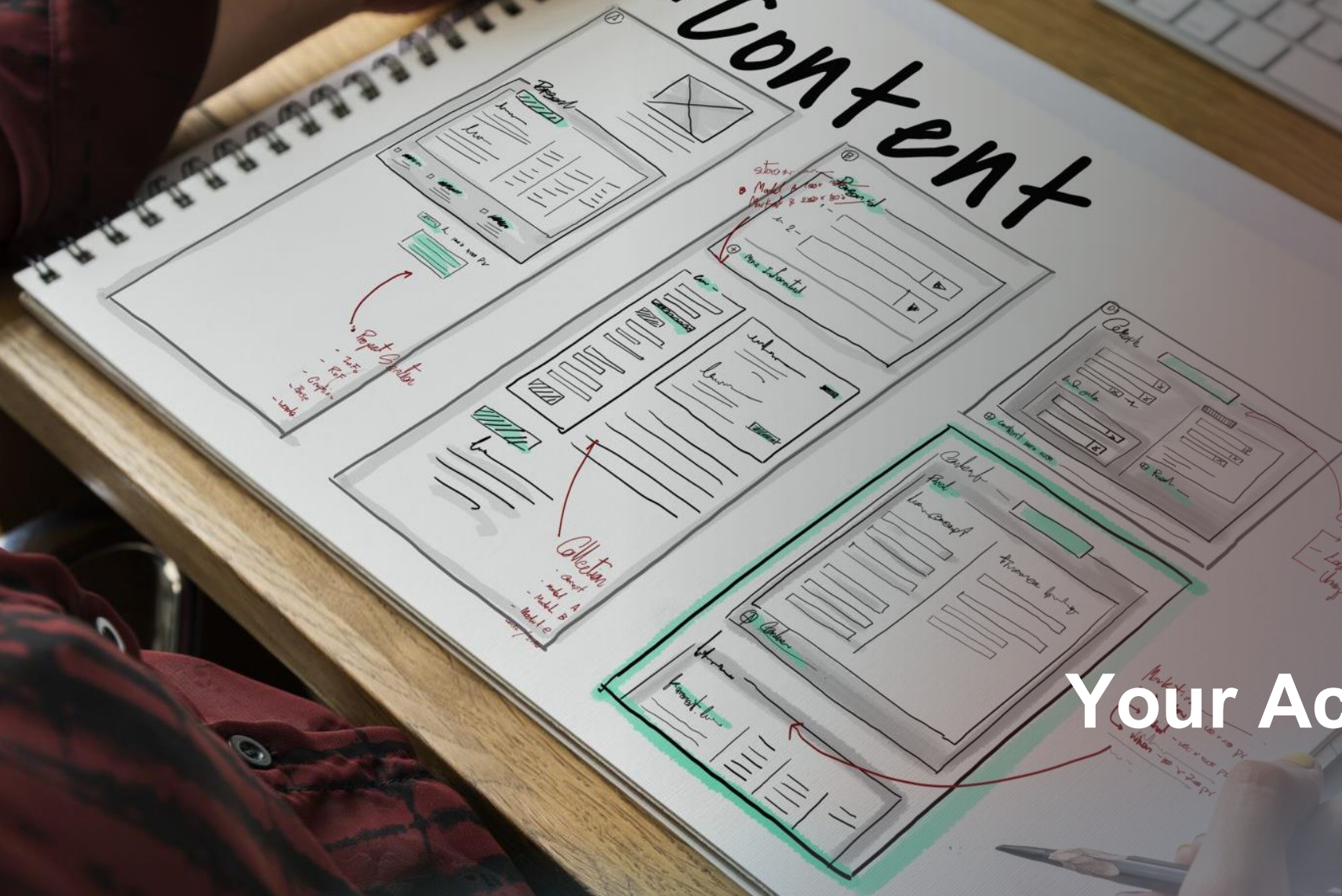
~IBM slide deck 1979



Who is NOT Using AI in Their Business Today?



#Content



Your Action Plan



THIS WEEK

- ✓ Sign up for ONE AI tool
- ✓ Rewrite ONE email
- ✓ Save the 5 starter prompts (QR Code)



<https://scscommunications.com/5wins/>



THIS MONTH

- ✓ Analyze one dataset
- ✓ Create one piece of content
- ✓ Document one process
- ✓ Keep a running list of repetitive tasks



THIS QUARTER

✓ Try one advanced use case

✓ Measure results honestly

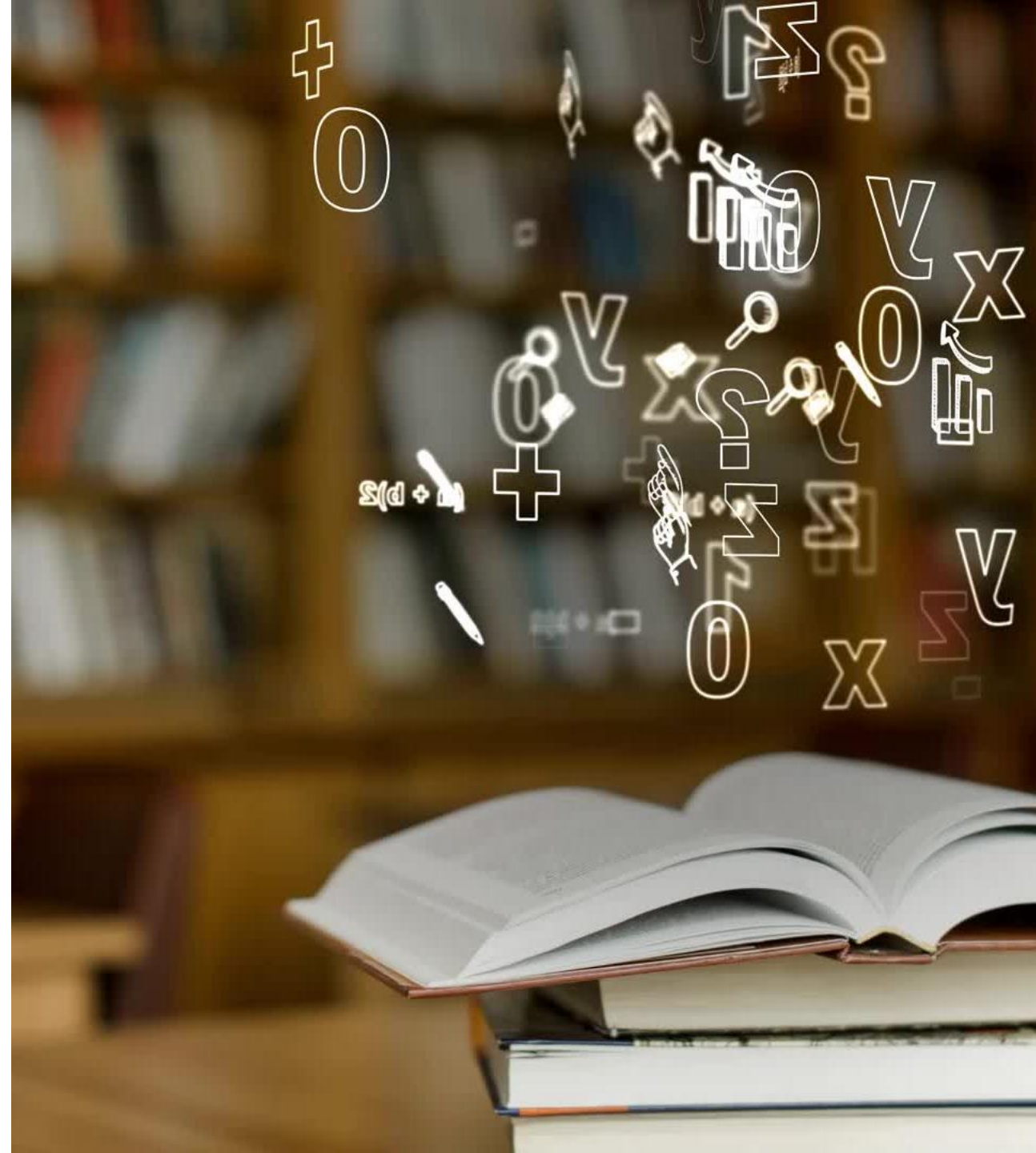
✓ Decide: Double down, stay course, or pull back

The Cardinal Rules

✗ NEVER: Customer info, financial data

✓ ALWAYS: Verify results, read & edit before publishing

If unsure, DON'T PUT IT IN



Common Questions



Is my data safe?



What if competition is using this?



How much time does this save?



When can I access call analytics?



What questions do YOU have?



Q & A

Let's Talk About What
YOU'RE Dealing With

Thank You!

