

POCKET GUIDE

An Executive's Pocket Guide to Organisational AI

Written for company owners, founders and senior executives who know they need to do something with AI, and want to know where to start.

BRICOLEUR TECHNOLOGIES

bricoleur-ai.com · hello@bricoleurtech.com



AI: From Personal Tool to Organisational Platform

AI represents a fundamental shift in the way people interact with technology.

It's a seismic change that we haven't seen since the advent of web pages in the 1990s and cloud computing then mobile computing in the 2000s.

However, there's a big difference between using AI, Claude/ ChatGPT / Gemini as a replacement search tool for Google and leveraging AI as an organisational solution.

In this guide, we explore the challenges and considerations in implementing AI within businesses today. If you're a company owner, founder or senior executive and are wondering how to get started with an AI implementation, or have recently purchased Claude or ChatGPT subscriptions for your team and aren't sure what's next, or have already experienced frustrations in implementing something that works, this guide is for you.

We've written it based on conversations we've had with company owners and C-Suite executives, and thirty years of experience building and implementing software solutions for small businesses, SME's and Enterprise accounts.

The Rise of SaaS

There was a time before cloud computing and software as a service (SaaS) when organisations installed and ran software locally. Significantly more companies had customised software that they had built themselves, or had customised for them.

With the advent of the internet, large software companies moved to the cloud. “Is it Cloud”? became the first question that was asked when evaluating new software. Now the first question is, “does it have AI?”

For the software vendor, there was an advantage to this. It removed the complexities of developing and supporting applications on the desktop, it eliminated the complexity of adding an e-commerce site to an in-house database. For the organisation, it also removed the cost and expense of managing servers, backups, remote access and technical support in house. The web browser became the default user interface for software, with all its limitations.

Since then, the web browser as user interface has been the baked in assumption for the subsequent 25 years. Web as the default, with a downloadable application if available, effectively a skin over a web-based experience.

And one of the side effects of that assumption is that organisational silos and operational complexity have arguably increased rather than been eliminated. And businesses have accepted that. They've accepted the challenge of having a separate ERP to a CRM. Of running marketing and e-commerce as separate solutions. And what we've seen more and more recently is the continued fragmentation of an organisation's tech stack. There might be “an app for that”, but each of these software solutions, each of these applications is another licensing component. Multiply that by the number of users in your organisation and it starts to add up.

And the frustrating thing is because these applications are cloud, because you're locked into a vendor solution, the ability to design and deploy something that's simple but totally aligned to what you need it to do is always one small step, one licensing tier out of reach.

This is common thread in conversations we're having with many organisational leaders - how can I rationalise my tech stack, reduce my licensing spend and increase productivity? They sense that their current architecture is allowing productivity to silently leach out of their organisations. Information in disparate systems. Spreadsheets papering over the cracks. Automations grappling with the limitations of each vendor's solution.

Do I need AI?

There was a time even before online software when few businesses had a website. There was a time when not every store had an e-commerce portal.

There were companies that made a declaration that they would never, ever need to have a website. We heard that quite often, and now we work with companies that have a “no AI” policy.

Then Google happened. And suddenly people were searching for things online. They did it at home, and then they started to do it (sometimes surreptitiously) at work. If they couldn't use the internet at work, they would ask their boss or the IT department why not.

For the companies that did build websites, some of them were quite rudimentary. Others spent incredible amounts of money on building their first site. Then rebuilding it. The cutting edge can be expensive if you talk to the right consultants.

Our view is simple. If your competitors are already using AI, then you need to be looking at it. Either way, the learning curve won't go away. And if you leave it too long, then you'll be playing catch up.

And if your customers are already using AI, then you should be meeting them where they are, in ChatGPT, in Claude, in Gemini.

Our advice is to start finding opportunities to build organisational capability in AI over time. AI technology has now matured to the point that - used well - it can unlock significant operational benefits.

The Return of the Desktop

Now AI is happening, and it's gone mainstream. And one of the most interesting things is that it is happening on the desktop. While many traditional SaaS companies appear to be struggling to gain traction with in-built, bolt-on AI (we suspect some companies are having their Kodak moment right about now), Claude, Chat GPT and Gemini have arguably unlocked the desktop at an individual level.

Without jumping from application to application, you can just get things done. Can't find that email? Just ask. Need to fix some data in a CSV file? Just ask. Need to build a presentation? Just ask. Goodbye Powerpoint, we have Claude deck envy. And all from a single chat-based user interface that feels comfortable.

So the potential is there, and this is where companies are seeing the first benefits from AI.

We're seeing genuinely transformational solutions designs becoming possible across applications, partially due to the genuinely new capabilities that both AI and automation now make possible, but also partially due to the appetite for employees to leverage AI to build solutions to problems directly. And this is largely happening on the desktop.

Let's look past the obvious organisational questions this raises, when Olivia vibe-codes a solution to solve her own personal productivity problem and then shares it with Liam. Let's instead welcome Gen Z to the workforce. And is the solution they've cooked up “cloud”? Probably not, the entry-level apps that AI will devise are typically on the desktop.

The human brain is an amazing thing. It looks for the most efficient solution to a problem. So the paradigm shift we're seeing in companies is not necessarily due only to the capabilities of the technology, it's also a result of employees having a willingness to use the new AI tools to find grass-roots solutions to problems that question or ignore allegiance to a 25-year-old software marketing-mantra-turned-paradigm.

The Importance of Organisational Memory

If you can design a way to provide AI access to up-to-date organisational memory, and to keep that memory current, then you have unlocked a way to improve both the quality and efficiency of your process. Better, quicker, cheaper.

This is the potential of AI, this is the challenge, and this is what we're working with our customers on currently.

- Imagine if AI could identify prospective customers, qualify them, identify the individuals within that organisation, understand their context within their organisation, provide their phone number and/or email, connect with them on LinkedIn, prepare a briefing for your salesperson before the meeting, prompt the salesperson while on the call for answers to objections, wrap the outcomes of that call back into the overall brief, create and update the lead or opportunity in your CRM and ultimately prepare a draft of the commercial presentation, the pricing and the statement of work, layering contextual content into your standardised template.
- Imagine if you could automatically pre-generate suggested orders and a customer-specific promotional brochure based on the suggested order before a site visit.
- Imagine if when you text your clients that weekly orders close Tuesday at 10:00am and they text back “Same as last week but only two boxes of the small ones”, you could automatically create the sales order in your ERP and assign it to the delivery run. Imagine if emailed orders did the same thing.

- Imagine if your website could genuinely engage customers, provide a quote at 11pm on a Thursday evening, check availability and book an appointment.
- Imagine if when your trade customer sits down with ChatGPT or Claude after dinner, they can place an order with you on their phone without visiting your website.
- Imagine if for an account check-in or support call, AI participated in the call and followed-up on next steps.
- Imagine if your inbox was triaged for you.

The common thread across most of these scenarios is that the AI needs to have access to organisational memory across multiple systems to generate actions with context.

The shape of the solution implies an architecture that combines employees working with both desktop-based agents and centralised organisational level agents across multiple software applications.

We call this “Organisational AI”, and implicitly it presupposes that organisational memory - the current status of a conversation with a customer, whether it be lead generation, the sales process, project management, customer service, technical support - is accessible by both AI and staff, and is centralised.

Unlocking organisational memory is the difference between realising individual productivity gains and truly transformational solutions.

Where to Start?

Most of the conversations we have with businesses begin the same way.

“We know we need to do something with AI. We just don't know where to start.”

AI presents enormous opportunities, but not every opportunity is worth pursuing. The challenge isn't implementing more technology - it's identifying where it will create the greatest impact for your business, while respecting the context of your existing processes and systems.

We recommend starting by looking across the business and identifying areas where AI can create meaningful impact and/or add capacity to your team.

Rather than aim for a “big bang” design that could take months to finalise and potentially years to implement, we recommend identifying areas where there are quantifiable benefits.

For some companies, it's reclaiming hours every week through automation.

For others, it's giving their team AI tools that improve quality and consistency.

Sometimes it's connecting systems that have never spoken to each other.

Sometimes it's redesigning a process that's frustrated people for years.

Identify the opportunities worth pursuing and prioritise them based on business impact, implementation effort and expected return on investment.

Initially, look for projects that can be implemented within a reasonably short time frame and achieve a measurable outcome.

This allows you to develop organisational competency progressively, to build organisational muscle in using AI.

Iterate — Then Do It Again

We believe that an iterative approach gets you further, quicker in comparison to implementing a larger, more complex project.

The learnings from early projects will inform later ones, while you can continue to extend and build on the solutions you have already deployed as you get real-world feedback.

The AI and automation landscape is changing rapidly, so this approach also allows you to adjust and adapt as platforms evolve.

A final thought

AI will continue to change. The models will improve, today's tools will be replaced by better ones, the way customers and employees use technology will evolve.

The more enduring opportunity is organisational.

Businesses have spent years accumulating software, systems, data and processes. AI gives us an opportunity to reconsider how all of those things work together - and, perhaps more importantly, how people work with them.

The organisations that benefit most from AI won't necessarily be those that make the biggest investment or adopt the most technology. They will be the ones that learn how to make their organisational knowledge accessible, connect it to the work being done, and progressively build the capability to use it.

That doesn't require having the final architecture worked out today.

Start somewhere useful. Build something that makes a measurable difference. Learn from it. Then build the next thing.

Organisational AI isn't a project with a finish line. It's a capability.



About Bricoleur Technologies

SALESFORCE PARTNER

Founded in 2018, Bricoleur Technologies is one of Australia's leading CRM consultancies across Sales, Service, Field Service, Consumer Goods, ERP and Marketing.

We have a reputation for elegant solutions that are no bigger or more complicated than you need them to be.

With over 500 projects successfully completed, we work with businesses from startups and solopreneurs, to SMB and SME, to ASX Top 50 companies, and we bring that experience to your project.

AI AND AUTOMATION

Bricoleur Technologies specialises in AI and Automation, helping businesses understand and implement AI agents.

OUTSOURCING

Bricoleur Technologies provides dedicated full-time technical and administrative outsourced staff via our operational centres in India and the Philippines.

GET IN TOUCH

Wayne Macartney

+61 438 929 635

wayne@bricoleurtech.com

www.bricoleur-ai.com

www.bricoleurtech.com