Build the Blueprint Before the Bot

An AI strategy for your business

Why your business, not your software, decides what you get from AI.

A Zeta Sky guide for owners and leaders of manufacturing, construction and distribution companies.

A note before you start

Over the past two years I have had the same conversation with a lot of owners. It usually starts with a question about tools. Which assistant should we buy? Is Copilot better than Claude? Should we wait for the next release?

I understand the question. It is the one the advertising wants you to ask. After more than a decade of running technology and security for growing companies, and after getting into this work early, I have come to a simple conclusion. The tool is rarely the reason a project succeeds or fails.

The companies that get real results have something in common. Their information is organized. Their people know who does what. Their procedures are written down, and their permissions make sense. When they plug in an assistant, it has something solid to work with.

The companies that struggle usually bought the tool first and hoped it would sort out the rest. It never does.

This guide explains how we think about the problem at Zeta Sky, how we work with clients, and how to tell where your own business stands. The scorecard on page 16 takes about five minutes. It will tell you more about your next step than any product demo.

Adrian Francoz

CEO, Zeta Sky

The short version

1 The tools are converging. Copilot, Claude, ChatGPT, Grok Bot and Hermes are more alike than different, and the leader changes every few months.

2 Your foundation decides the result. Organized data, written SOPs, mapped workflows and permissions you control.

3 Start with a blueprint. Map the business, build one department properly, then plug in whichever tool your team prefers.

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Everyone has the tools. Few get results.

88%

of respondents in McKinsey's 2025 global survey say their organization uses AI regularly in at least one business function.

39%

say AI has had any effect on earnings (EBIT) at the level of the whole enterprise, and most of them put it under 5%.

Read those two numbers together. Almost everyone has the tools. Most are not seeing the money.

McKinsey's research points at how the work is organized. The companies getting the most value are nearly three times as likely as others to have fundamentally redesigned their workflows, rather than adding software on top of the old ones.

In our experience the gap comes from the business underneath the software. Files live in five places. Procedures live in people's heads. Nobody is quite sure who can open what.

60%

Gartner predicts that through 2026, organizations will abandon 60% of AI projects that are not supported by AI ready data.

Sources 1 and 2, page 22. McKinsey figures are survey responses; the Gartner figure is a prediction.

The tools are more alike than different

Copilot, Claude, ChatGPT, Grok Bot, Hermes. They can all read, write and summarize, but their ability to take action depends on the platform, its integrations and how it is configured. Each one has a release coming that leapfrogs the others. Six months later the order changes again.

At the time of writing, we are probably missing a few tools that already exist, and naming one or two that may be gone by the time you read this. That is rather the point.

Picking the permanent winner is like choosing a phone carrier from this month's coverage map. You will be revisiting the decision sooner than you think.

What does not change on that schedule is your business. Your customer records, your job files, your pricing rules, the way a quote becomes an order. That is what makes any of these tools useful to you, and it belongs to you.

So we start there. Build the foundation once, in a way you own, and treat the tool on top as a choice you are free to revisit.

The other path carries real risk. Put everything inside one provider's product and you are trusting that provider to keep your data safe, keep its prices steady and keep its product heading in a direction that suits you. If any of that changes, you start over.

Treat the tool as a choice you revisit. Treat the foundation as an asset you keep.

CONNECTIONS / MCP

The standard plug

Model Context Protocol, or MCP, is an open standard for connecting an assistant to your information and systems.

Think of the outlets in your building. Any appliance built to the standard plugs in, and the breaker panel still decides which circuits get power. With MCP, your permissions are the panel. An agent reaches only what it has been allowed to reach.

In December 2025 the protocol moved to a neutral home under the Linux Foundation, and Claude, Microsoft Copilot, Gemini and ChatGPT all support it. Connections you build today are not tied to one vendor.



You wouldn't hire this way

When results disappoint, owners blame the person or the tool. Usually the foundation was missing.

Picture hiring an excellent operations manager. Strong résumé, great interview. On day one you hand them a laptop and nothing else. No process documents. No org chart. Files spread across three drives and someone's inbox. Nobody has written down how a quote becomes an order, or who approves a change.

Ninety days later the results are poor, and most owners blame the hire. The real problem was the foundation that person walked into.

That is not to say the person makes no difference. They do. An excellent operations manager raises your odds of success, and a weak one lowers them. Talent is real.

The tools are the same. Copilot, Claude, ChatGPT, Grok Bot and Hermes are all capable. Some are better at certain tasks, and they will keep leapfrogging each other. So the tool has real substance, don't get us wrong. But point any of them at disorganized files, undocumented processes and loose permissions, and you get confident answers built on bad inputs. Without the right foundation, the tool won't matter.

The fix is the same in both cases: a clear structure, written procedures and the right access. Build that once, properly, and every tool you add afterward starts with what it needs on day one.

What a new hire needs	What an agent needs
A clear role and a manager	A defined task and a person who reviews its work
Written procedures	SOPs written for the agent as well as the person
Access to the right systems, and only those	Connections and permissions set by role
A place to find answers	A company brain it searches

What ready actually means

Ready has very little to do with software. It means the business is organized enough that a new person, or a new tool, finds what it needs and follows the same steps your best people follow.

1 Structured data

Your core records in the ERP, the CRM and other systems are clean, and each data set has a named owner. People trust the numbers.

2 File repository set up properly

SharePoint, Notion, Google Drive or whatever you use today. One structure by department or by job. Consistent names. Permissions cleaned up, no sharing with everyone by default, no stray copies on an old file server.

3 A clear SOP for every position

Written down, current and easy to find. If the person who does the job is out for a week, someone else follows the SOP and the work still gets done.

4 Defined workflows

Have you thought about your workflows? How a quote becomes an order. How a change gets approved. How an invoice goes out. On the growth side: how a new lead gets contacted, how that lead becomes a client, and what your onboarding looks like. Who does what, in which system. A rough map on a whiteboard is a fine start.

5 Access rules and a use policy

Who sees what, which tools are approved, and which information never leaves the building.

Set up the kitchen before you hire the chef

Put a great chef in a kitchen with an empty pantry, dull knives and no recipes, and you still get a slow, uneven dinner.

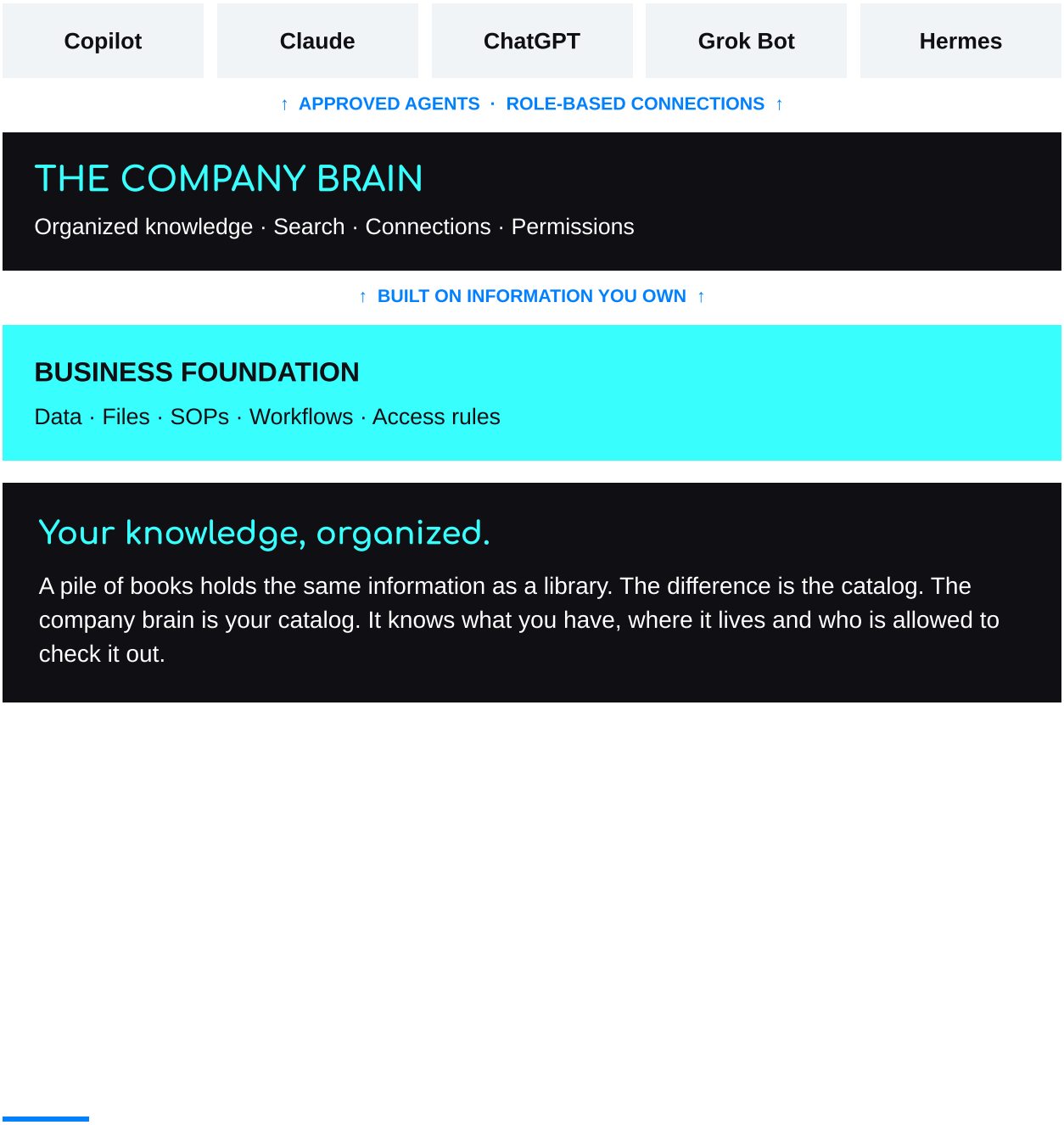
Stock the pantry, label the shelves and write the recipes down, and almost any capable cook does well.

Your foundation is the kitchen. The assistant is the cook.

The company brain

One layer you own. Different tools can connect.

Once the foundation is in place, we build a layer on top of it that we call the company brain: your organized knowledge, ready for any approved agent to use, and owned by you instead of a vendor.



Your knowledge, organized.

A pile of books holds the same information as a library. The difference is the catalog. The company brain is your catalog. It knows what you have, where it lives and who is allowed to check it out.

Under the hood, in plain terms

Knowledge repository

SOPs, process documents and agent instructions kept in one managed place with every change tracked, for example a GitHub repository.

Search and retrieval

Some companies need a search index, often called RAG, so agents find the right paragraph among thousands of documents. Many do not on day one. We decide based on your content.

Connections

MCP servers link agents to Microsoft 365, your ERP, your CRM and other systems, using the standard plug described on page 6.

Permissions

An agent sees only what the person using it is allowed to see. Read access comes before write access.

Start small. Build once.

Nobody pours a slab without a survey, and nobody frames walls on dirt. We build in the same order. Each room you add later sits on the same foundation.

1 Blueprint. Map your data, systems, files, SOPs and workflows. Agree on priorities.

2 Foundation. Pick one department. Organize its files in whatever system you use, write its SOPs and define one workflow.

3 First agent. Put one simple use case on that foundation and measure it against how the work runs today.

4 Expand. The next department reuses the same layer. No new tool project, no starting over.

Start with the simple workflows

Choose work that happens often, is well understood and carries little risk. Answering “where is this order?” is a better first project than automating your pricing.

Measure before you start: how long the work takes today and how often it goes wrong. Then compare. Small, early wins build confidence and show you exactly where the foundation still needs work.

Survey, foundation, frame, rooms. In that order.

The people side: Bring your people with you

Most AI plans miss a hidden challenge. Some of your people are quietly skeptical, and they may not say so or give the project their all. Some fear for their jobs. Some dislike new technology. Many picture the automated phone menu that never understood them, and expect this to fail the same way.

Small, quick wins change minds. When someone stops typing the same order in twice, they start to believe it will make their job easier. AI should give your people superpowers, with less mundane work, more accuracy and more time for what makes us human: understanding the business, being creative and working with other people.

52%

of U.S. workers say they are worried about the future impact of AI use in the workplace. And 32% think it will lead to fewer job opportunities for them in the long run.

Pew Research Center, 2025. Source 4, page 22.



WHAT THIS LOOKS LIKE IN PRACTICE

A manufacturer that built the foundation first

An illustrative example based on common challenges and improvements observed across multiple Zeta Sky client engagements.

Where they started

A Southern California manufacturer came to us with an ERP at the center of the business and data spread across everywhere else: shared drives, email, spreadsheets and a handful of other applications. Nobody was fully sure who could see what, because permissions had never been clearly set. Pulling reports out of the ERP and the other systems was harder than it should have been, and even a small tweak to a report needed custom development, just to get the numbers that drive better decisions.



What we did first

We did not start with a tool. We mapped where their data lived and agreed on how it had to be organized. Then we identified their workflows and started with the simple ones.

What became clear

Mapping the work showed the same data being entered more than once, in places where once was enough. With the foundation in place, the next decisions were obvious: where to organize information, what structure to build agents in, where to keep the data, and how to write standard operating procedures for both the people and the agents.

What changed

Fixing the double entry saves one department dozens of hours a week and cuts down on human error. It was a quick win, and it showed employees they could get time back from manual data processing. From there came a return on the investment and a more efficient sales process that helps revenue.

We built the foundation first. Then they picked the tools they wanted.

A strategy that survives the next tool

Their strategy is future proofed. If a better tool arrives next year, switching is far easier, because the knowledge, the structure and the permissions stay where they are. The alternative is to put all your trust in one of the big providers, hope they keep your data safe and hope nothing changes, and become completely reliant on a single provider.

Security belongs in the foundation

We came to this work from cybersecurity, and it shapes how we build. An assistant connected to your business is a new kind of user. Treat it like one.

If everyone can access payroll files, a connected assistant may expose sensitive information to unauthorized employees.

Read before write. An assistant allowed to look up orders should not be able to change them. We add write access only where a person reviews the result.

Clean up permissions first. Assistants find overshared files faster than people do. We fix sharing before we connect anything.

One identity system. Agents belong inside the same identity and access controls you use for people, never beside them.

A written use policy. Which tools are approved, what data stays inside, and who to ask. Most staff already use something. Better to know what.

A person in the loop. Anything that commits money, a customer or a schedule gets a human review.

A record of activity. We log the connections we build, so you see what an agent touched and when.

Why your IT partner builds it

As a managed services provider for more than a decade, we already run identity, Microsoft 365 and security for the companies we support. The team that builds your foundation is the same team that keeps it secure.

The AI Readiness Scorecard

Answer each question honestly and tick one circle per row.

Score each question: Yes is 2 points, Partly is 1, No is 0.

#	Question	Yes	Partly	No
1	Is your data well organized and easy to find?	○	○	○
2	Have you mapped out where your business data lives? ERP, CRM, file shares, email, databases, other applications.	○	○	○
3	Does every major department, position and workflow have a written SOP?	○	○	○
4	Have those SOPs been reviewed within the past year?	○	○	○
5	Are your workflows documented, even roughly?	○	○	○
6	Do you have named owners for your key processes and data?	○	○	○
7	Do you control who sees which files and systems, and review those permissions regularly?	○	○	○
8	Do you have a written AI use policy?	○	○	○

The AI Readiness Scorecard / continued

#	Question	Yes	Partly	No
9	Do you know which AI tools your employees already use?	○	○	○
10	Do you know what data each of those tools reaches?	○	○	○
11	Is your file structure intuitive enough that even a new employee could find a key document in five minutes or less?	○	○	○
12	Have you identified one simple, frequent workflow to start with?	○	○	○
13	Has your company already adopted an AI tool company wide (ChatGPT, Claude, Copilot, or similar)?	○	○	○

Your total: _____ points out of 26. Add 2 for every Yes and 1 for every Partly.

Score	Band	What it means
0 to 8	Build the foundation	The foundation needs work before any tool pays off. Map the business first.
9 to 17	Getting ready	Some pieces are in place. Close the gaps in one department before you add tools.
18 to 26	Ready to build	Pick one simple workflow, measure it, bring the team along and build on what you have.

A planning exercise, not a scientific assessment. Bring your score to the Blueprint conversation.

What becomes possible

Many owners picture AI as a tool that summarizes reports. That is the smallest part of it. Here is the kind of work we see it take on once the foundation is in place.

Customer service communication

Customer calls, texts and emails can be handled by an AI agent, with a person stepping in when it matters.

An expert on your own business

Staff or the owner ask a question and get the answer from your knowledge base, SOPs, ERP, database or CRM. Anything in those systems, just ask your agent.

Paperwork that enters itself

Invoices, purchase orders, checks and forms are read, matched and entered. A person approves before anything posts.

A calmer inbox

Email gets sorted, urgent items are flagged, and replies are drafted for you to approve and send.

Reports on demand

Ask your ERP or accounting data a plain question, like which jobs ran over last quarter, and get a chart back.

Onboarding that runs itself

New hire and new client checklists, paperwork and reminders run on their own, so nothing falls through the cracks in the first week.

Leads that never slip

A new lead gets a fast first response and a meeting on the calendar. Every follow up happens on time.

Quotes in minutes

A salesperson enters a new client or prospect and has a quote in minutes. The workflow already knows your products, pricing and approvals.

Underneath it all

Every one of these works better, and safer, on a foundation that is ready for it.

What they need underneath: clean data, clear permissions and written steps. Without them, the same tools make the same mistakes faster.

Working with Zeta Sky: the AI Blueprint

Zeta Sky is an integrator. We do not sell an AI product of our own, so we have no reason to steer you toward one. The AI Blueprint is how every engagement starts.

How the Blueprint works

1 Interview. We talk with your key stakeholders and the people who do the work about how it really gets done.

2 Review. We review your network, your data and your applications.

3 Discover. We map your workflows and find the simple ones to start with.

4 Plan. You receive a documented plan for your foundation and first steps.

What the plan covers

A current state map: systems, data, files and where key information lives

A file structure plan for SharePoint, Google Drive or whatever you use, with ownership and a permissions cleanup list

An SOP inventory by role: what exists, what is missing and the order to write them

Workflow maps for your priority workflows

A security and permissions design for agents: who sees what, read versus write, logging

A company brain design: repository, whether you need a search index, connections and which tools plug in

A starter roadmap for the first 90 days, with one small first win your team can see and feel

ZETA SKY / EXPERIENCE

Who you would be working with

More than a decade running IT and security for growing companies.

Early into this work, with hands on experience building agents and the foundations under them.

A cybersecurity background that shapes every connection we make.



Your next step: Start with a blueprint.

Book a 30 minute conversation. Bring your scorecard. We will tell you plainly where your foundation stands and what we would build first, whether or not you work with us.

Book a Blueprint conversation

ZetaSky Support: (909) 333 7455

About Zeta Sky

Zeta Sky is a managed IT and cybersecurity company in Southern California, and that is how we started. For more than a decade we have run IT, security and Microsoft 365 for growing companies. Over time our work has grown to include building AI strategies and AI tools, and developing custom software and workflows for the businesses we support. We are an integrator, and the tools you choose stay your choice.

Sources and notes

1 McKinsey & Company, “The state of AI in 2025: Agents, innovation, and transformation,” November 5, 2025. Global survey of 1,993 participants; figures are self reported. mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai-2025

2 Gartner press release on AI ready data, February 26, 2025. The 60% figure is a Gartner prediction, based in part on a survey of 1,203 data management leaders. gartner.com/en/newsroom/press-releases/2025-02-26-lack-of-ai-ready-data-puts-ai-projects-at-risk

3 The Linux Foundation, announcement of the Agentic AI Foundation and the contribution of the Model Context Protocol, December 9, 2025. linuxfoundation.org/press/linux-foundation-announces-the-formation-of-the-agentic-ai-foundation

4 Pew Research Center, “U.S. Workers Are More Worried Than Hopeful About Future AI Use in the Workplace,” February 25, 2025. Survey of 5,273 employed U.S. adults, conducted October 7 to 13, 2024. pewresearch.org/social-trends/2025/02/25/u-s-workers-are-more-worried-than-hopeful-about-future-ai-use-in-the-workplace

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