



AI Without the Hype:

A Practical Framework for Governed, Real-World Adoption

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Introductions



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Firm Overview

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Everyone Is Talking About AI

AI is everywhere in the conversation. But most organizations are still asking the wrong question.

"The question is not whether AI is coming. The question is whether it is already operating inside your business — without structure."

The Better Question

Most organizations ask: "**Should we allow AI?**"

The better question is:

"Where is AI already being used – and do we have visibility into it?"

This immediately moves the conversation from hype to governance.

Wrong Question

Should we allow AI?

Right Question

Where is it already being used – and who knows?

The Risk Is Not Adoption

It Is Unmanaged Acceleration

Good Processes

AI makes them faster and more consistent

Weak Processes

AI makes bad assumptions, inconsistent decisions, and data exposure happen faster



AI accelerates whatever system it lives inside.



AI Is Already Inside Your Business

This is already happening – with or without approval.



Communication

Drafting emails, preparing customer responses, writing job postings



Documents & Reports

Summarizing meetings, building reports, creating training content



Research & Analysis

Researching vendors, analyzing spreadsheets, reviewing policies



Operations & Procedures

Interpreting procedures, reviewing requirements, formatting documents

AI Is Arriving as Experience Is Leaving



Experienced employees are retiring or moving on. Newer employees are expected to ramp faster. Critical knowledge is rarely captured in formal documents.

- Customer preferences built over years
- Vendor history and context
- "Why we do it this way"
- Lessons learned from past failures
- Operational judgment



AI can either widen the knowledge gap — or help preserve what is walking out the door.

A Practical Framework for Real Adoption

Three stages. In order. Every time.



1. Govern It

Policy, tools, data boundaries, human review



2. Remove the Drain

Use AI for repetitive, text-heavy, reviewable work



3. Build Institutional Intelligence

Capture knowledge, make it searchable, improve over time

STAGE 1

Govern It

Governance is not bureaucracy.

Governance is what makes AI safe enough to scale.



Shadow AI Is the New Shadow Process

If organizations do not provide a safe path, employees will create their own. You cannot govern what you cannot see.

When employees use personal tools without guidance:



→ Sensitive data enters
unknown systems

→ No audit trail, no
review process

→ No standard output or
cost visibility

→ No way to learn what
is working

Start With a One-Page AI Policy

Do not wait for a 20-page policy. Answer these six questions first.

1

Approved Tools

What AI tools are approved for use?

2

Prohibited Data

What data is never allowed in AI systems?

3

Permitted Uses

What can AI be used for today?

4

Human Review

What outputs require human review before use?

5

Approval Path

Who approves new use cases?

6

Ask Questions

Where do employees go when they are unsure?

Sample language: "AI may be used to draft, summarize, organize, and analyze information using approved tools. AI may not be used to make final legal, regulatory, employment, financial, or product decisions without documented human review."

Not All AI Use Carries the Same Risk

The goal is not to ban AI. The goal is to classify and control it.

Risk Level	Examples	Approach
Low	Brainstorming, summarizing internal notes, formatting, first-draft training material	Approved tools, standard review
Medium	Customer/vendor support, policy interpretation, HR drafts, financial analysis	Human review required before use
High	Legal decisions, employment decisions, customer commitments, sensitive data processing	Documented approval + accountable owner

AI Can Assist the Process. It Cannot Own Accountability.

AI Can Do

Draft · Summarize · Organize · Compare · Retrieve

Humans Own

Judgment · Approval · Accountability · Final decisions · External commitments

"AI output should be treated as draft until a qualified person reviews it."



Guardrails Keep AI Useful, Safe, and Affordable

Governance should define practical boundaries – not just prohibitions. Match the tool to the task.

Approved Tools
Named, vetted, licensed

Prohibited Data
PII, legal, financial, confidential

Review Points
Who reviews, when, and how

Cost Rules
Right-size the model to the task

i You do not need an F1 car to go to the grocery store. Do not use the most expensive AI model for every routine summary or formatting job.





STAGE 2

Remove the Drain

Start by eliminating the work that drains your best people.

Where AI Actually Works Today

AI is strongest when work is text-heavy, repetitive, pattern-based, and reviewable. It performs best in roles adjacent to human judgment – not in place of it.

- ✓ **AI should take the administrative drag off the people who already know what good looks like.**



Drafting



Summarizing



Comparing



Classifying



Searching



Turning Notes Into
Docs

Stop Wasting Your Best People on Low-Value Work

Your top performers are often stuck doing work that anyone – or any tool – could handle.

- Rewriting notes into reports
 - Searching old documents and answering the same repeat questions
- Formatting and preparing summaries
 - Building training material from scratch and turning experience into documentation

"The opportunity is not replacing experts.

It is giving experts more time to do expert work."



Use Case: Meeting Notes to Action Plan



Capture

Summarize

Identify Risks

Review

Follow-up

Faster Follow-Up

Less time reconstructing what was said

Less Lost Context

Decisions and risks documented immediately

Better Accountability

Cleaner handoffs with named owners

Use Case: Policies, Procedures, and Internal Q&A

Give People a Safe Place to Ask

AI can help employees and managers get answers from approved internal documents – without guessing or emailing HR for the fifth time.

- Employee handbook and SOPs
- Benefits documents and policies
- Customer requirements and training manuals

Controls That Matter

Approved Source Documents Only

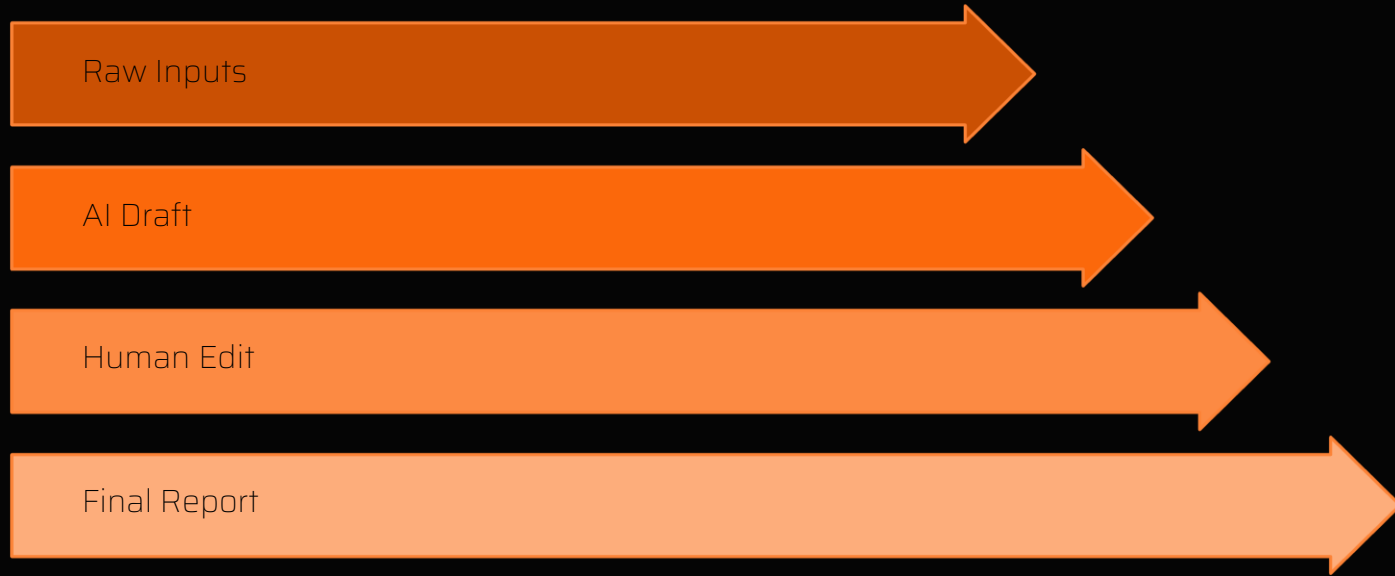
Show Sources When Possible

Escalate Uncertain Answers

Final Interpretation Stays Human

Now add the tribal knowledge...and think of that value.

Use Case: Reports and Leadership Briefs



Applies to board updates, grant summaries, operational reports, customer summaries, financial analysis, project status, and risk reviews.

"AI helps leaders move from scattered information to usable decisions faster."

Monthly Financial Reporting Automation

From ERP exports to audit-ready Excel and executive PDF reports



1. Upload Monthly Exports

Income Statement • Budget vs Actual • Balance Sheet • Cash Flow



2. Apply Mapping Template

Standard categories, account matching, validation rules



3. Generate Report Pack

Summary + detail sheets, calculations, checks



4. Deliver Outputs

Audit-ready workbook + polished PDF



SAMPLE DATA OUTPUT



Net Sales
\$1,245,000



Gross Margin
\$412,000



Operating Income
\$138,000



Net Income
\$96,000



Cash at End of Period
\$522,000



Validation: 0 unmapped rows • 0 formula errors • PDF ready

Upload source document

Generate Draft

AI generates objectives, lesson content, and a quiz. Review and edit before approving.

Edit Course approved

Title *

Quality System Awareness (ISO 9001:2015)

Code

TRN-001

Category

Quality

Recurrence (months)

12

Passing score (%)

80



Requires e-signature

Short description

Annual refresher on Fred's Factory QMS, customer focus, and ISO 9001 fundamentals.

Learning objectives

+ Add

Identify the 7 quality management principles



Explain when to issue a Non-Conformance



Use Case: Training and Onboarding

AI can generate first drafts of training guides, quizzes, onboarding checklists, supervisor talking points, and role-specific learning paths – faster than most teams can do manually.

Controls

- Source content from approved materials only
- Review before use – always
- Keep competency decisions human-owned



AI can turn existing knowledge into usable training, competency evaluation and structured pathways.

STAGE 3

Build Institutional Intelligence

The long-term win is not the chatbot. The long-term win is building organizational intelligence that compounds.



Tribal Knowledge Is a Business Asset

The most valuable knowledge is often not in any procedure or manual. It lives in people's heads — and walks out when they do.



Customer Context

Why a customer prefers things done a certain way



Vendor History

Which vendor has a pattern of late delivery — and why



What Went Wrong

Hard-learned lessons that never made it into a document



Expert Judgment

How a senior person diagnoses a problem that stumps others

"If knowledge only lives in someone's head, the business does not truly own it."

From Documents to Institutional Intelligence

AI becomes dramatically more valuable when it can work from the organization's actual knowledge — not just generic training data.

- Policies, procedures, and past decisions
- Lessons learned and customer/vendor history
- Training materials and examples of good work
- Meeting notes and management decisions

i The goal is not just faster answers. The goal is better organizational memory.



Capture Tribal Knowledge

Combine notes, a voice recording and photos in one entry — use any or all.

AI-generated — review before use.

Notes / lesson learned

e.g. When the press throws an E-204, raise the dwell to 1.2s before resetting—saves 15 min vs full reboot.

Voice recording

Record

Photos

Add photo(s)

AI: suggest title, summary & tags

Title *

Short summary

Knowledge Base

Tribal knowledge, manuals & quality records — searchable by AI.

+ Capture Knowledge

Ask AI Browse Contributors

Question

Broader industry knowledge

e.g. How do we handle E-204 alarms on the press?

Ask

Show leaderboard to all employees

Off by default. Managers always see it.

Top Contributors

Week Month All-time

1	Sarah Chen	50 pts
2	Mike Rodriguez	50 pts
3	Jenna Okafor	30 pts
4	Tom Bauer	30 pts
5	Priya Patel	30 pts
6	Adam Marsh	

Leaderboard visible to all members

Automation Is Earned

Do not automate a process you do not understand. Start small, prove value, then scale with confidence.



Crawl

Identify current AI use · Approve tools ·
Define data boundaries · Write one-
page policy · Name an owner



Walk

Choose one repetitive workflow · Build
a controlled prompt · Require human
review · Measure before and after



Run

Connect systems · Add audit trails ·
Use role-based access · Automate only
after the workflow is stable

A Practical 90-Day Path

Days 1-30: Gain Visibility

Ask where AI is already being used · Identify approved and unapproved tools · Draft one-page policy · Define prohibited data · Name an owner

Days 61-90: Build the Rhythm

Review the first workflow · Share the win · Update guardrails · Pick the next use case · Create a regular AI review cadence



Days 31-60: Ship One Workflow

Pick one painful, repetitive, reviewable task · Build a prompt or template · Define human review · Measure time saved and quality improved

AI Adoption Needs a Rhythm, Not a One-Time Launch

Monthly cross-functional review – keep it practical and short.



Recommended team: Leadership, IT, HR, Operations, Finance, Quality/Compliance, and two practical power users.



What To Do Tomorrow Morning

01

Ask Where AI Is Already Being Used

One honest, non-punitive conversation with your team

02

Write One Paragraph of AI Guidance

Do not wait for a 20-page policy. One paragraph is a start.

03

Pick One Repetitive Task

Look for pain, repetition, low risk, and an obvious review point

04

Assign One Owner

Give someone two weeks to test a controlled workflow and report back



Discovery before discipline. Control before scale. Value before complexity.

AI Should Not Replace Judgment.

It Should Strengthen the Organization.

Govern the Tools

Remove Administrative Drag

Capture Institutional
Knowledge

Build a Repeatable Cadence

Keep People Accountable

"The risk is not AI adoption. The risk is unmanaged acceleration. The opportunity is governed intelligence that compounds."

Questions & Discussion

Let's make this practical for your organization.



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AI POLICY



Meet with Adam

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