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Building Business Readiness with AI

How business intelligence and AI agents can strengthen decisions and automate everyday work

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A business can have a full order book and still struggle to see what comes next. Customer information sits in one system, financial information in another, and the explanation for a missed opportunity lives in someone's inbox. By the time leadership has assembled the picture, a decision may already be overdue. Closing that gap is a practical opportunity for business intelligence and artificial intelligence.

At Iversen | Martin, we offer business intelligence, AI and agentic AI services as an extension of our strategic advisory work. We help clients identify where these capabilities can improve performance, then design and introduce automation around the way their businesses operate. The objective is a higher state of readiness: clearer visibility, more capacity to respond, and better execution of the decisions that matter.

Business intelligence provides a foundation by bringing relevant information together and making performance easier to understand. It can show how margins vary by customer, where inventory is accumulating, or how sales activity compares with expectations. Its usefulness depends on consistent definitions and reliable data. Leadership needs to know what a number represents before making a decision from it.[1]

AI expands what can be done with that information. Depending on the application, it can help analyze patterns, summarize documents, organize customer inquiries and prepare material for review. A manager can ask questions about the business in ordinary language and examine the evidence behind an answer. The work still needs appropriate checks, especially when calculations, forecasts or consequential decisions are involved.

Agentic AI adds the ability to carry out a sequence of tasks using connected tools. Within an agreed scope, an agent can gather information, choose a next step, use a business system and check the result. A conventional automation follows a prescribed sequence; an agent can adapt its sequence as new information appears. Both have a place. A straightforward bot or fixed workflow is often sufficient for a predictable task.[2]

Consider a distributor whose sales are growing while cash remains tight. A useful starting point might be a combined view of orders, inventory and receivables. An AI assistant could help investigate unusual changes and prepare questions for the finance team. An agent could then assemble an exception report, assign follow-up tasks and draft customer reminders, with external messages subject to the company's approval rules. This is an illustrative application, with value to be tested against the distributor's actual systems and needs.

The same approach can support commercial growth. A sales team could use approved company information to prepare prospect briefings and first drafts of proposals. An opportunity-monitoring workflow could identify relevant tenders, extract deadlines and requirements, and flag missing information for review. An internal assistant could help employees find current procedures and identify the person responsible for an unresolved issue. Each application should remove a specific obstacle to serving customers or completing work.

Our role begins with understanding that obstacle. We examine the business objective, the existing process and the information available to support it. We help clients determine which opportunities justify investment, what can work with their current tools, and where a process or data problem needs attention first. That connects AI adoption to the same questions we address in growth strategy, organizational effectiveness and executive decision support.

A practical engagement can produce a readiness assessment, a prioritized business case and a pilot built around a defined workflow. We help select and configure the appropriate tools, establish responsibilities, and support implementation and staff adoption. The scope includes how the system will be maintained and how its performance will be reviewed. Clients should understand what is being introduced, who owns it and what successful operation looks like.

The economics need to be explicit. Before a pilot begins, we establish a baseline such as time spent preparing reports, response time to customer inquiries, or the number of corrections a process requires. We then compare results with the cost of software, integration, oversight and maintenance. Time recovered creates useful capacity; its financial value depends on whether that capacity supports more business, better service or an actual reduction in costs.

Control belongs in the design. An agent should have access only to the information and actions required for its assignment. Approval points, activity records and a clear route for exceptions allow people to supervise the work. Testing must include incomplete information and failed actions, because a system that performs well in a demonstration still needs to prove itself in daily use.[2]

Readiness also depends on people. Employees need to understand how an automated process fits their responsibilities, how to challenge an output and when to take over. Their knowledge of customers and recurring problems helps determine where automation will be useful. Giving that experience a place in the design makes adoption more practical and keeps accountability clear.

We believe the advantage develops through disciplined use. A business that starts with a valuable problem, measures the result and improves its process builds experience it can apply to the next challenge. Over time, that can strengthen its ability to recognize change and respond while there is still room to choose.

Iversen | Martin brings this work into the broader conversation about your company’s direction, resources and growth. If your team is spending too much time assembling information or coordinating repetitive work, we can help identify a sensible starting point and build a plan for putting intelligence into practice.

Discuss business intelligence and AI services with Iversen | Martin at info@iversenmartin.com or visit iversenmartin.com.

Sources

[1] IBM — What Is Business Intelligence

[2] Anthropic — Building effective agents