

Demystifying AI

Your Five-Step Roadmap to Success

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Data is your **greatest** untapped asset.

Now is the **greatest time** in history to do something about your legacy processes and systems.

Capable

Models reason, write code, and analyze data at expert level.

Affordable

What cost \$10M five years ago now runs on a single API call.

Accessible

Your teams can build and deploy without a PhD in ML.

The window between 'too early' and 'too late' is open right now

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Enterprise AI **AND** Individual Productivity

The opportunity is in both — and the winners will capture it on both fronts.

ENTERPRISE

Re-engineer how the business runs

Process automation

Document handling, billing, scheduling, reporting

Data unification

One view across legacy systems and silos

Decision support

Forecasting, exception detection, faster cycle times

INDIVIDUAL

Multiply what every person can do

Drafting & analysis

Proposals, summaries, research in minutes not hours

Coding & spreadsheets

Non-technical staff building useful tools

Meeting prep & recall

Notes, briefings, follow-ups handled in the background

You don't need a **\$10M AI platform** to transform the enterprise. There is no business case for it.

THE FOOL'S ERRAND

\$10M+ enterprise AI platform

- ✗ 12-month build before any user touches it
- ✗ Bespoke infrastructure that's expensive to maintain
- ✗ Boil-the-ocean scope, no clear first win
- ✗ Big-consultant bloat — slides, not shipped value

WHAT ACTUALLY WORKS

Focused pilots on real problems

- ✓ Start with one well-scoped, painful problem
- ✓ Use mature tools you already pay for
- ✓ Ship a working pilot in weeks, not quarters
- ✓ Let measured wins fund the next step



Most Organizations Feel Behind - You are not alone

And that's completely normal.

82%

of executives say AI
is a strategic priority

*Yet most companies have no
structured adoption plan*

~3x

productivity gains
in well-scoped AI pilots

*When applied to the right, clearly
defined problems*

< 20%

of AI projects ever
move to production

*The gap is process and people – not
technology*

The organizations that succeed don't have better AI – they have a better process for adopting it.

What AI Actually Is (and Isn't)



Cutting through the noise before we build a plan.

✓ AI CAN	vs.	✗ AI CAN'T
<ul style="list-style-type: none">✓ Automate repetitive, rules-based tasks✓ Find patterns in large datasets✓ Speed up document processing & extraction✓ Summarize and draft communications✓ Flag exceptions and anomalies for review✓ Support faster, more informed decisions		<ul style="list-style-type: none">✗ Replace human judgment on complex decisions✗ Work without reasonably clean data✗ Self-implement – it needs your team's input✗ Guarantee accuracy without human oversight✗ Solve problems you haven't clearly defined✗ Deliver value without a change management plan

The key insight: AI amplifies good processes. It exposes bad ones.

Construction Is One of the Most AI-Ready Industries



You already have the data — it's just locked in the wrong places.

Paper & Manual Processes

Handwritten deployment sheets, whiteboard resource tracking, PDF-based status reports — data waiting to be unlocked.

Fragmented Systems

Scheduling in Excel, GPS in one tool, accounting in another. No single view of projects and crews.

Repetitive Coordination

Supervisors spending hours on status calls and data entry that adds no field value.

Revenue Leakage

Invoicing errors, missed billing lines, untracked change orders — small percentages that compound at scale.

Institutional Knowledge Risk

Critical processes live in key people's heads. When unavailable, operations slow down.

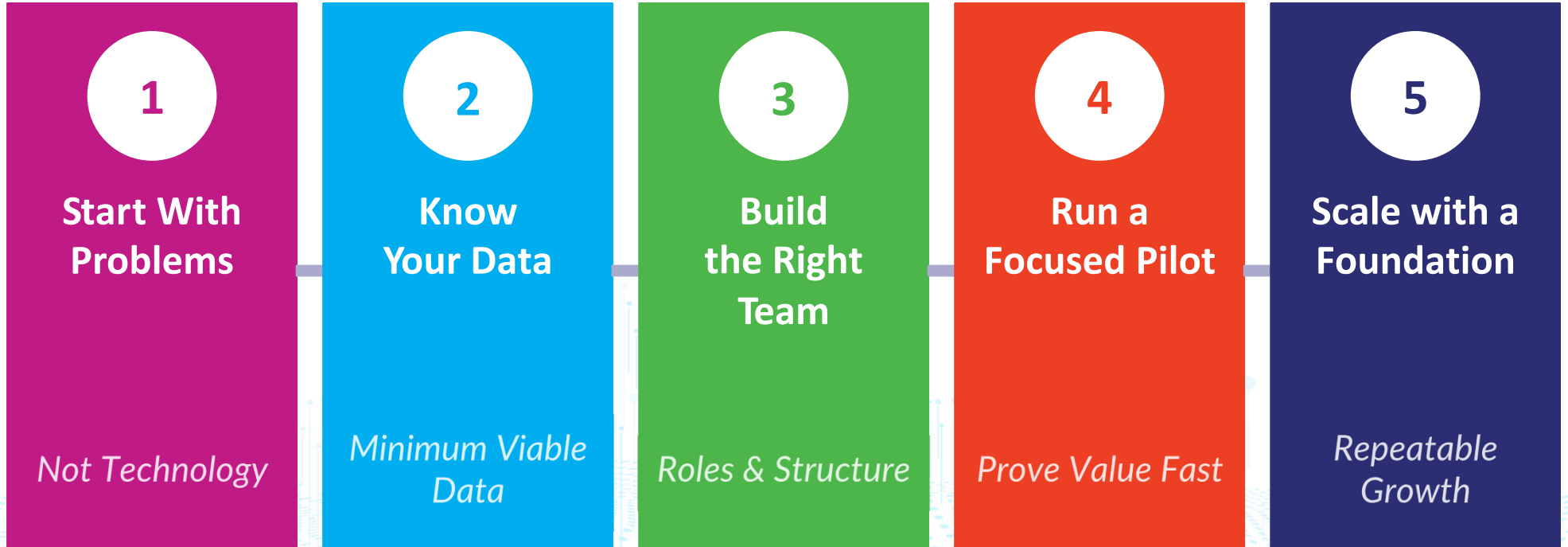
Scaling Pressure

More projects, more crews, more complexity. Manual processes won't survive a 2× scale event.

The Five-Step AI Adoption Roadmap



A practical sequence for moving from curiosity to measurable results.



Each step builds on the last. You don't need to complete all five to start seeing value.



1 Step 1: Start With Problems, Not Technology

AI is a solution looking for the right problem — your job is to find it.

HOW IT WORKS

Interview your departments. Run structured discovery sessions. Ask: where do you spend the most time? What breaks? Where do errors happen?

Rank by value + feasibility. Score each opportunity: time savings, revenue impact, risk reduction. Cross-reference with data availability.

Ignore the hype. "We need AI" is not a problem statement. "Tony spends 4 hours manually processing billing letters" is.



1 Step 1: Start With Problems, Not Technology

AI is a solution looking for the right problem — your job is to find it.

CONSTRUCTION EXAMPLE

A mid-size utility construction firm ran structured discovery sessions across 12 departments — from field operations and estimating to finance, HR, and safety.

What they found:

- ~90 discrete improvement opportunities identified
- Problems fell into clear patterns: coordination, data entry, visibility
- Field ops' biggest pain: a physical whiteboard and handwritten daily sheets
- Finance: 4+ hrs/week manually keying billing letters into accounting software

Outcome: A prioritized backlog — not a wish list.



2

Step 2: Know Your Data - The 'Minimum Viable Data' Concept

You don't need perfect data to start. You need enough of the right data.

MINIMUM VIABLE DATA

- Does it exist?**
Is the data being captured at all — even in paper or PDF form?
- Is it consistent?**
Does it follow a repeatable format? Structured PDFs, spreadsheets, and forms are all good starting points.
- Can it be accessed?**
Does your team have access to pull it into a tool? APIs, exports, and manual feeds all count.
- Is it representative?**
Does the data cover enough history and variation to reflect real-world conditions?

CONSTRUCTION EXAMPLE

Data audit findings:

Billing Letters (PDF)	✓ Consistent 14-page format — parseable
Job Tracker (Excel/SharePoint)	✓ Exists — needs structure cleanup
GPS / Fleet System	✓ Already integrated and live
Daily Deployment Sheets	⚠ Paper-based — needs digitization
Equipment Maintenance Costs	✗ Only parts tracked — labour missing
Change Order History	✗ Not systematically captured

The billing letter was the right starting point — consistent format, high value, MVP-ready.



3

Step 3: Build the Right Team

AI adoption is a people problem as much as a technology one

The Business Champion

A senior leader who owns the outcome and can make decisions. Without executive air cover, pilots stall.

→ *Operations VP, GM, or COO*

The Process Owner

The person who knows the current process cold. They define what success looks like and catch edge cases.

→ *Team lead, supervisor, or department head*

The Data / Tech Lead

Someone who can work with your systems — not necessarily a developer. Often a capable internal analyst or consultant.

→ *Internal analyst, consultant, or IT lead*

The Change Agent

An internal advocate who will use the new tool, report back, and bring their peers along. Often underestimated.

→ *Power user, field supervisor, team lead*

You don't need a data science team. You need the right four people in the same room.



4

Step 4: Run a Focused Pilot — Prove Value Fast

A pilot isn't a prototype. It runs on real data, against a real problem, with real success criteria.

GOOD PILOT DESIGN

Narrow scope. One process. One team. One measurable outcome. Resist the urge to boil the ocean.

Define success upfront. "Reduce billing processing time by 80%" beats "see if AI helps." You need a number to win.

Run it in parallel. Don't replace the old process immediately. Run both side-by-side to validate accuracy before switching.

Set a time box. Six to twelve weeks. If you can't prove value in that window, the problem or approach needs rethinking.

CASE STUDY: BILLING AUTOMATION

THE PROBLEM

Billing team spending 4+ hrs/week manually extracting data from 14-page PDF billing letters into accounting software.

THE PILOT

Build a PDF parsing engine to extract, categorize, and validate billing data — run it alongside the manual process for 6 weeks.

SUCCESS CRITERIA

Match rate vs. manual process >95%. Reduce processing time by 80%. Eliminate missed billing lines for cable & telecom services.

RESULT

Validated. Invoice-ready data produced automatically. Estimated 2–5% revenue recovery from previously missed service lines.



5 Step 5: Scale with a Repeatable Foundation

One successful pilot is a win. A repeatable framework is a capability.



Data Architecture

- ✓ Define where data lives and how it flows between systems
- ✓ Build integration patterns reusable across use cases
- ✓ Design for the second project while building the first



Governance & Policy

- ✓ Establish AI use guidelines before you need them
- ✓ Define data handling rules and human oversight requirements
- ✓ Train your team – not just on the tool, but on when not to use it



Cross-Functional Alignment

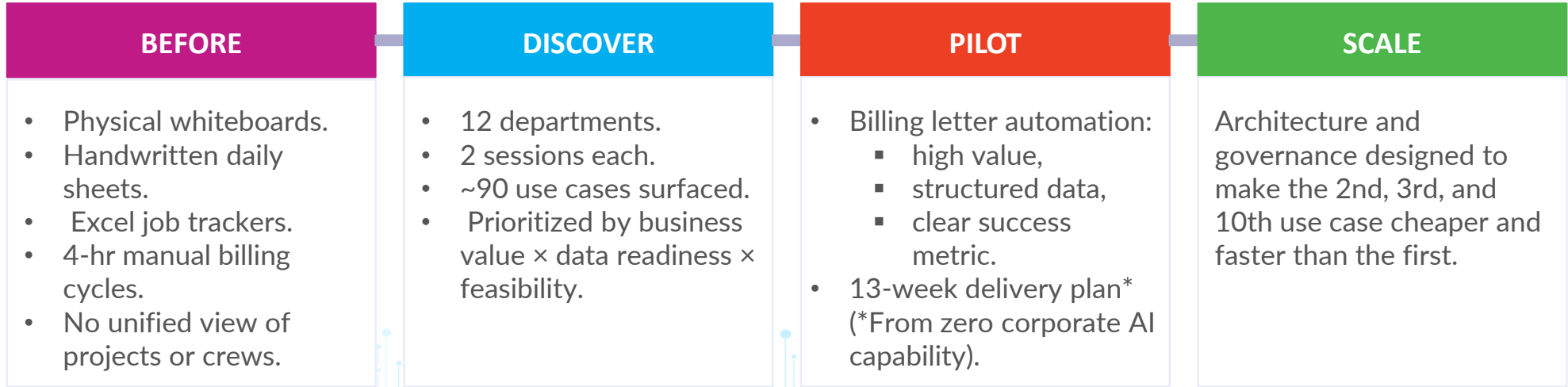
- ✓ Scale requires buy-in from ops, finance, IT, and field leadership
- ✓ Tie AI initiatives to KPIs leadership already cares about
- ✓ Build a prioritized backlog – not a project list, but a programme

Construction example: Three delivery streams – AI platform, data architecture, and billing pilot – designed to build on each other from day one.



Putting It Together: A Construction Case Study

A mid-size Canadian utility construction firm.



MEASURED OUTCOMES

~80%

Reduction in billing processing time

2–5%

Revenue recovery from missed invoicing

90+

Use cases identified across the organization

3 streams

Running in parallel – AI, data, automation



What Goes Wrong — And How to Avoid It

Most AI failures aren't technology failures. They're process and expectation failures.

Starting with the technology

- ✓ Start with the pain point. Let the problem drive the tool selection — not the other way around.

Treating AI as a one-time project

- ✓ AI adoption is a programme, not a project. The first pilot teaches you how to do the second one better.

Skipping human oversight

- ✓ Especially in early phases, keep a human in the loop for exceptions, edge cases, and quality checks.

Waiting for 'perfect' data

- ✓ Perfect data never arrives. Minimum viable data, clearly scoped, gets you started and teaches you what you need.

No clear success criteria

- ✓ Define what winning looks like before you start. Time saved, revenue recovered, error rate reduced.

Forgetting change management

- ✓ The tool is 20% of the work. Getting people to trust and use it is 80%. Budget for training and communication.



Your Roadmap: Take This Back to Your Team

Use these five questions to structure your first conversation about AI.

Step 1 What are our top 3 most painful, repetitive, or error-prone processes?

Pick the ones where time is being wasted or revenue is being left on the table.

Step 2 For each of those problems — what data do we already have, and what format is it in?

PDFs, spreadsheets, and system exports all count. You probably have more than you think.

Step 3 Who needs to be in the room — and who has the authority to make a decision?

Name your champion, your process owner, your data person, and your change agent.

Step 4 What would 'good' look like in 90 days — and how would we measure it?

Define one number: time saved, error rate reduced, revenue recovered.

Step 5 How do we design the first pilot so it becomes the foundation for the next one?

Think about architecture, documentation, and governance from day one — not as an afterthought.

Key Takeaways



01

AI is not magic — it's a **process tool** applied to the right problem. problem.

02

Start with **pain points**, not technology. Real problems drive the the roadmap.

03

Minimum viable data is enough to begin — don't wait to boil the ocean.

04

A well-scoped **pilot, run in parallel**, beats any proof of concept.

05

Build the **foundation right** — the second use case pays for the first.

THE PATH

From problem to programme

● Problems

● Data

● Team

● Pilot

● Scale

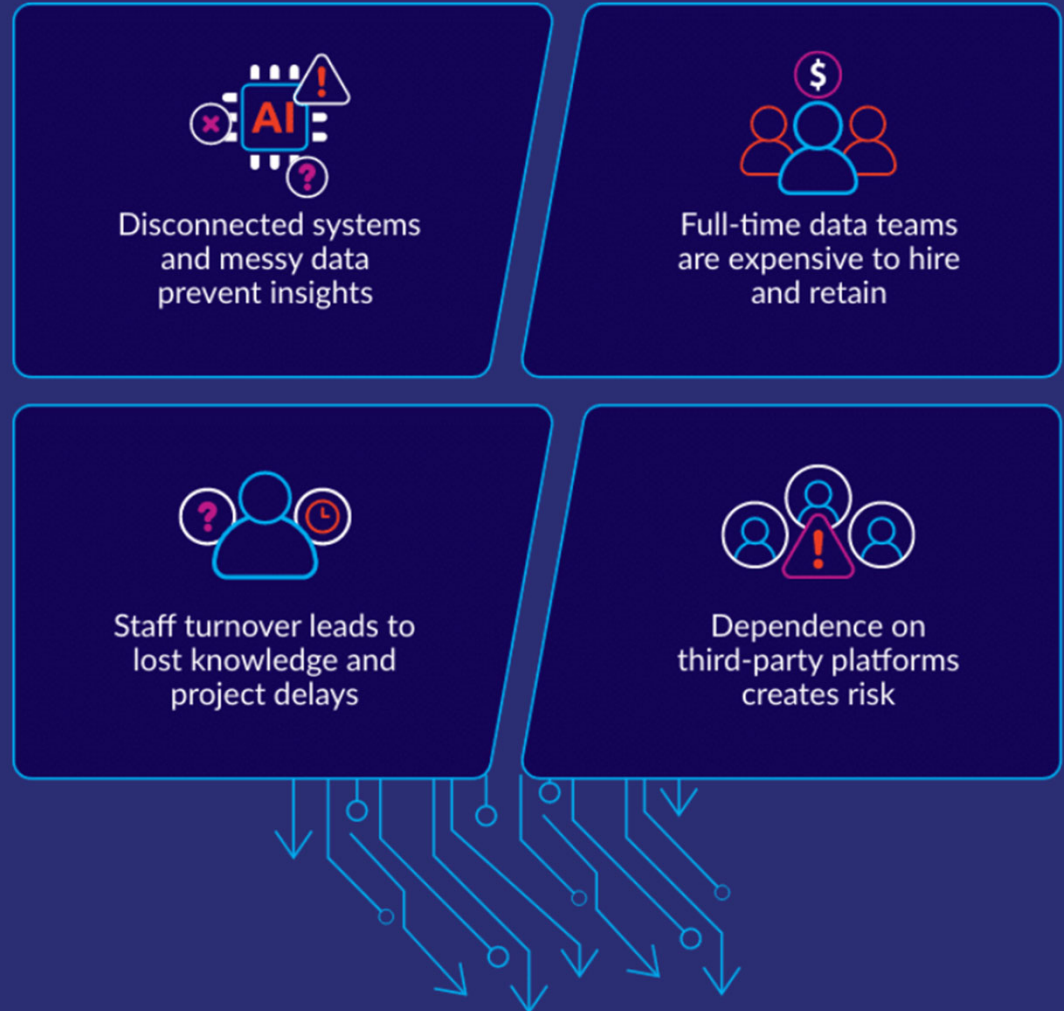
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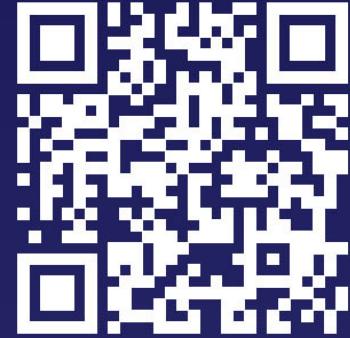
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