



The Practical Guide to AI for B2B Manufacturers - Part 3 of 3

*Building an AI Roadmap for B2B Manufacturing
Growth in 2026*

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Embrace Digital.
Stay Human.



AGENDA



1. Who is WSI
2. Quick Recap of Sessions 1 & 2
3. AI Road Map
 - Using Real Life Example
4. AI Case Studies
5. Next Steps

Who is WSI?



- Specialize in Digital Marketing & AI Strategy and Implementation
- WSI founded in 1995 – HQ in Toronto. 30 years in business
- We work with domestic and international clients around the world
- 30 years experience in helping businesses succeed online
- We turn complex digital data into actionable marketing insights
- Invested heavily in AI to help companies get better ROI from their marketing spend
- Experts in our field – leveraging global knowledge to deliver local results





We're Proud of Our Accomplishments

We don't mean to brag, but we believe awards should be celebrated – and respected. We are incredibly proud of all the awards the WSI network has won, and we believe our collective trophy case is tangible proof that we'd make a fantastic marketing partner for any business.



“ This recognition is a testament to the talent of our network, the strength of our partnerships, and the strategic mindset that drives everything we deliver.”

— Valerie Brown-Dufour,
President of WSI

2025 WEB MARKETING ASSOCIATION AGENCY OF THE YEAR AWARD WINNER! THIRD TIME IN SIX YEARS PLUS 200+ WMA AWARDS AND COUNTING!!!!

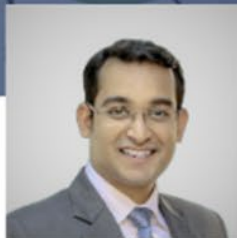
Our Team



Robert Mitchell

Director of Strategy and AI

Robert brings over two decades of experience in business expansion and development, offering a unique perspective on leveraging AI to enhance business processes and drive transformative solutions.



Kundan Mohapatra

Director of Strategy and AI

With a background spanning digital marketing, analytics leadership, and strategic consulting, Kundan guides clients through the evolving AI landscape, transforming technologies into potent business assets.



Seamus Smyth

Director of Strategy and AI

Seamus blends profound AI technologies and strategic business insights to guide clients through their AI transformation, turning complex advancements into practical value-driven strategies.



Lisa Kilrea

Principal, AI Strategy & Digital Marketing

Lisa is an AI and Digital Marketing consultant with 25+ years of experience working with Fortune 50 companies such as Pepsico and BP North America as well as start ups and SMBs.

Recap of Session 1

- We went back in time to 1990's 2 years BG (before Google). Influencers were predicting the internet would never take off and newspapers would always be the way people consumed news. Yellow pages were how people found information
- Then Chat GPT was born 11/30/2022...3 ½ months later Chat GPT-4 was born and last month Chat GPT-5 came to be.
- Recap of the adoption rate of new on line platforms and time it took to reach 1 million subscribers (Netflix- 3.5 YEARS , AirBnB- 2.5 YEARS, Facebook 10 MONTHS, Chat GPT FIVE DAYS!)
- Massive capabilities improvement in Chat GPT in 3.5 months...bar exam lowest 10% with initial version, top 10% with Chat GPT-4.
- Chat GPT 4 has IQ of 155. Einstein is 160. Predicted it will be 1600 within the next year or 10X Einstein.
- History of AI: Started in 1950's. Each decade had it's notable AI progress..just was not mainstream until 2022. It's moved from theory in 1950's to everyday impact today

Spectrum of AI Use for Manufacturers

1. Existing AI in Platforms	2. Semi-Custom AI Solutions	3. AI-Enhanced Analytics	4. Custom AI Automation	5. AI Agents / Co-Pilots
- Live Chat - Spam Filters - CRM/ERM suggestions - Auto-complete	- Invoice automation - Data entry bots - Inventory alerts - Doc scanning	- Predictive dashboards - Anomaly detection - Sales forecasts - Smart reports	- Predictive accounting - HR Analytics - Demand forecasting - Scheduling	- Cross-system AI assistants - Sales co-pilot - Ops co-pilot - Finance co-pilot

AI Road Map

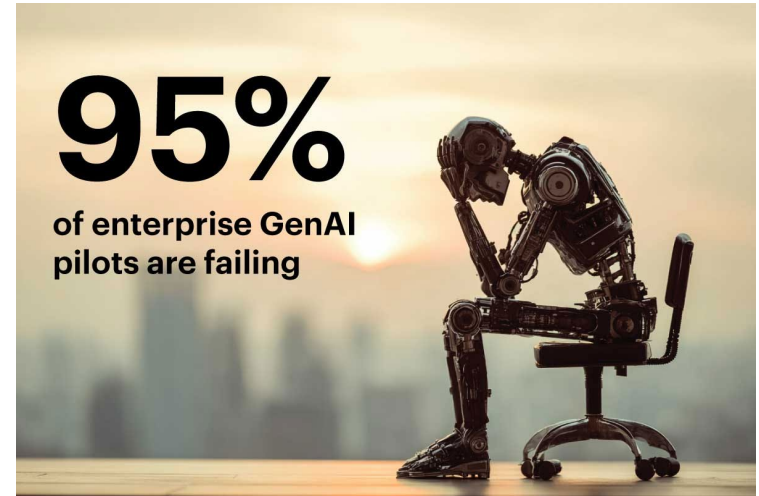
The Learning Gap: Why Most AI Pilots Fail

MIT study: 95% of generative AI pilots fail to deliver measurable business impact

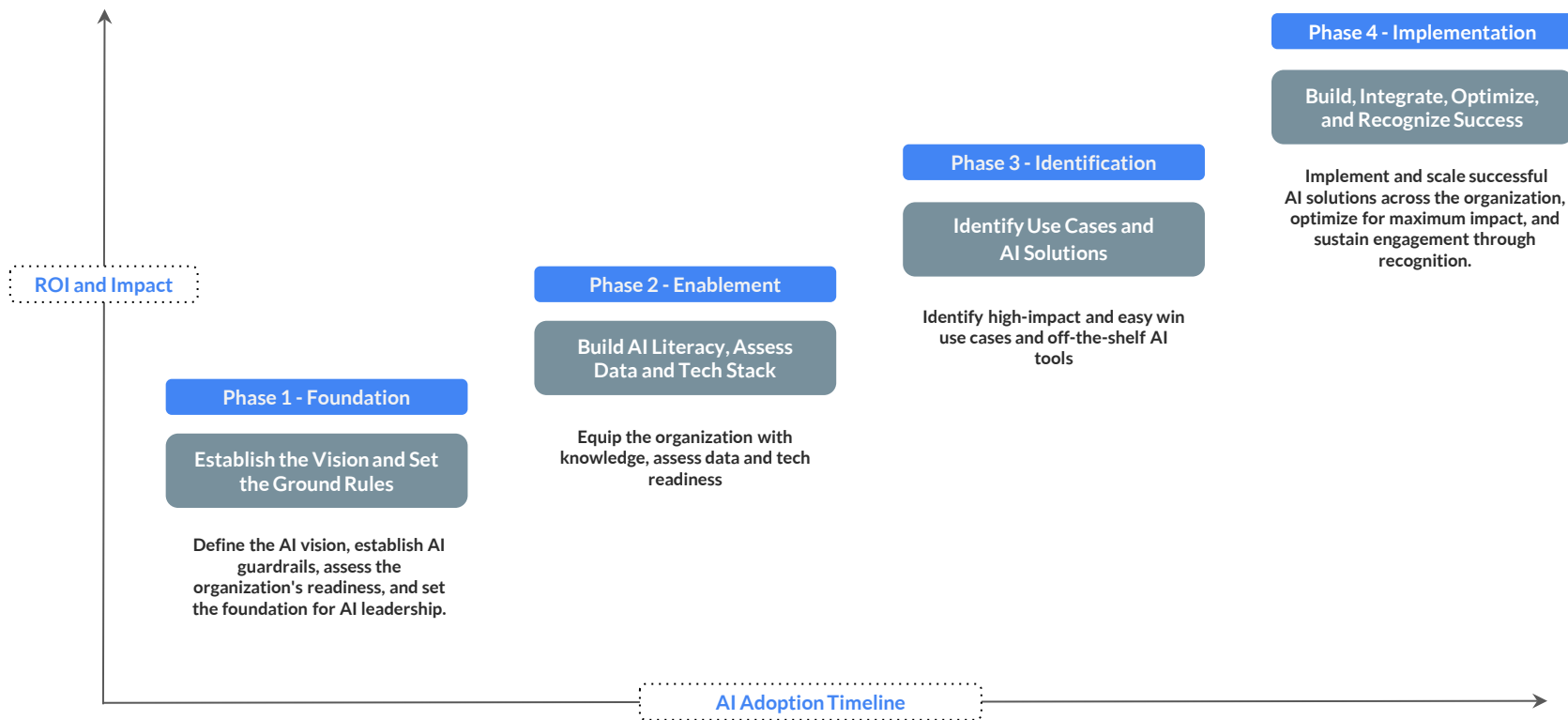
- Key reason: not the tech, but the **learning gap**

Why they fail:

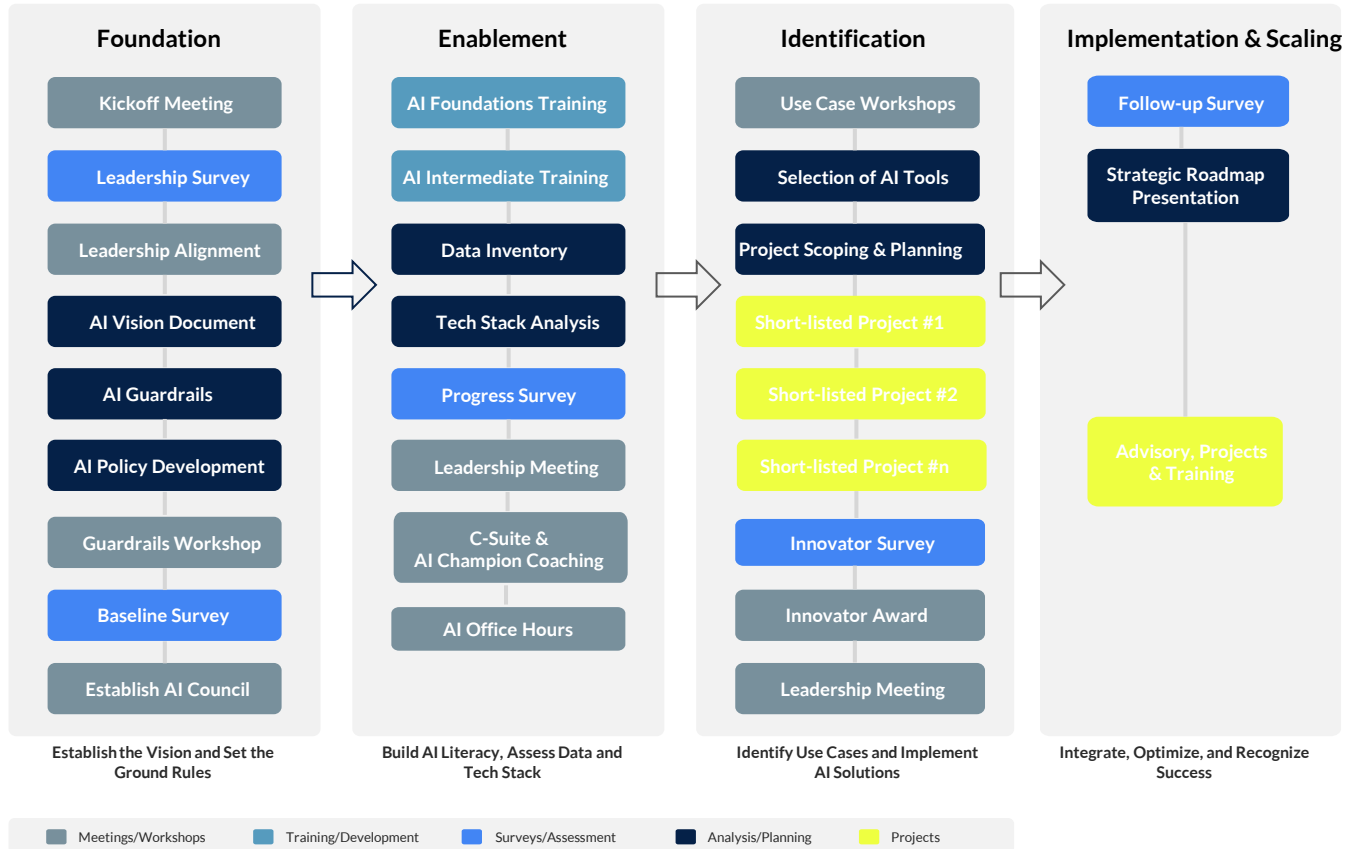
- Pilots treated as “science projects” with no strategy or path to scale
- Workflows remain brittle and don’t adapt
- No feedback loops, employees don’t have adequate knowledge or training



AI Adoption Roadmap



AI Adoption Roadmap



AI Adoption: Deliverables

Phase 1	Phase 2	Phase 3	Phase 4
AI Vision	AI Foundations Training	AI Use Case Identification	AI Roadmap Presentation
AI Guardrails and Best Practices	AI Intermediate Training	AI and Automation Project Scoping	Project Prioritization and Implementation (ongoing)
AI Policy (Internal and External)	Data Inventory and Tech Stack Analysis	AI Productivity Lift Survey and Report	
AI Council Formation and Charter	Office Hours for Employees	Custom GPTs	
AI Productivity Baseline Survey and Report	C-Suite & AI Champion Coaching		

Real Life Example



A leading multinational company in the automotive, marine and motorcycle industry, with a long history of innovation and a diverse global customer base.”



01

Current State and AI Readiness



Current State

- **Leadership Engagement:** Leadership is aligned on AI's potential but lacks formal governance, policies, or structured ownership. No dedicated internal AI team; IT is outsourced and not AI-focused.
- **Organizational Structure:** Cross-functional engagement exists across operations, sales, finance, and marketing. Key decisions often centralized in back-office. Operations and sales demonstrate the strongest drive and familiarity with AI tools.
- **Infrastructure & Systems:** ERP (Taitona) in use with partial automation; core financial reports, budget control, and credit processes still handled manually. CRM undergoing deployment; limited integration across systems. No current AI integration in core platforms.
- **Operational Challenges:** Credit approval process is overly manual, slow, and relationship-driven, impacting sales conversion. Inventory distribution planning lacks predictive logic; key decisions are reactive and time-consuming.



Overall AI Readiness

Leadership Engagement: Leadership supports AI and recognizes it as a strategic priority, but there is no formal governance, ownership, or internal team driving AI initiatives.

Cross-functional alignment exists across operations, sales, finance, and marketing. Sales and operations are the most AI-aware and actively exploring use cases.

Core platforms like ERP (Taitona) are in place with partial automation, but credit processing, pricing updates, and inventory planning are still highly manual.

Individuals use AI tools such as ChatGPT for tasks like drafting communications and design support, but there's no enterprise-level enablement or data governance, leading to gaps in control and scalability.

AI Readiness: Medium.

Foundational systems and clear executive interest are in place, but the company lacks centralized ownership, structured enablement, and integrated data strategy to scale AI effectively.



Rotate the arrow image to point to the right readiness level

02

Goals, Challenges and Priorities



Strategic Goal and Key Challenges

Strategic Goal

Drive operational efficiency and elevate customer experience through targeted AI integration: Automate key processes, improve inventory predictability, and enable data-driven decision-making across sales, finance, and post-sales services.

Challenges

- Manual credit approval processes causing sales delays and inconsistent customer experiences.
- Fragmented technology ecosystem limiting visibility, automation, and data-driven decision-making.
- Low internal standardization across operations, leading to inefficiencies and duplicated efforts.
- Limited AI governance creating risks in data usage, security, and knowledge retention.
- Underutilization of existing ERP capabilities restricting financial agility and timely reporting.

Priority Areas Identified

Credit Pre-Approval:

Automate credit validation process based on customer ID and historical data.

Enable near-instant pre-assessment (<20 min) integrating APIs and RPA to reduce dropout and speed conversion.

Operations Planning:

Apply AI to forecast ideal stock distribution ("cuadro básico") by location and model.

Optimize stock allocation, transport, and ruteo to reduce cost and prevent missed sales.

Post-Sales and Service:

Implement predictive maintenance reminders and smart scheduling via WhatsApp.

Enable automated triage, NPS measurement, and targeted accessory/up-sell offers to increase retention.

Data Management and CRM Activation:

Clean, centralize, and deduplicate sales and marketing data from Clientify, ERP, and social media channels.

Automate lead routing and activate chatbot with FAQs, pricing, and appointment scheduling.



03

Our Approach and Solution



AI Foundations Workshop – Level 1



Description

A foundational workshop designed to upskill employees with essential AI knowledge and practical skills, enabling them to effectively utilize AI technologies in their daily roles.



Target Audience

Employees at all levels seeking to enhance their AI knowledge and skills for improved productivity and innovation in their roles.



Logistics

- 2 hours total
- Available online or on-site
- A maximum of 15 participants per group



Methodology

- Interactive lectures
- Hands-on workshops
- Group projects
- Practical applications



What Participants Gain

Foundational Understanding: Basic knowledge of AI concepts and large language models.

Practical Skills: Hands-on experience with AI tools, prompting techniques.

Collaborative Learning: Team projects to foster innovation and practical application.

Continued Learning Resources: Tools and techniques for ongoing AI education.



Content

Introduction to AI Terms and Large Language Models (5 min)

Deep Dive into ChatGPT Interface and Tools (10 min)

Navigation and features

GPT's

Prompting Framework – A.C.E. (10 min)

Classwork

LLM Faceoff (10min)

Team Project: Ideation Workshop (30 min)

Brainstorming with GPT-4 to conceptualize a startup

Creating a go-to-market product strategy

Developing a brand name and logo with AI assistance

Using GPT-4 for marketing content and strategy development

Introduction to ADA (10 min)

Exploring Text-to-Image Generators (20 min)

Side-by-Side comparison of top models

Homework

Tools: Perplexity, ChatGPT

Q&A and Wrap-Up (10 min)

AI Intermediate Workshop – Level 2



Description

An advanced workshop designed to build upon foundational AI skills, providing employees with deeper insights and practical applications to further enhance their AI capabilities.



Target Audience

Employees who have completed Level 1 training and are seeking to deepen their AI knowledge and skills for advanced applications in their roles.



Logistics

- 2 hours total
- Available online or on-site
- A maximum of 15 participants per group



Methodology

- Interactive lectures
- Hands-on workshops
- Group projects
- Practical applications



What Participants Gain

Advanced Understanding: Deeper knowledge of AI concepts and applications.

Practical Skills: Enhanced hands-on experience with AI tools, content creation, and custom GPT building.

Collaborative Learning: Opportunities for advanced team projects and peer learning.

Continuous Improvement: Feedback and insights to foster ongoing AI skill development.



Content

Recap from last workshop (10min)

ADA FDD Activity (20min)

GPT's Theory and Use: (10min)

Store Search Feature

Why Custom GPTs vs. ChatGPT

GPT Builder Activity (40min)

Room 1: SEO Optimized Content Creator GPT. Input: topic, medium (blog, IG, FB, etc..)

Room 2: New Employee GPT Quiz. Input: upload training manual

Room 3: FranDev GPT Quiz. Input: upload FDD

Room 4: (advanced): Create New Customer Personas. Input: framework, MVV, existing customers

Activity Sharing (20min)

Q&A (20 min)

Survey

DIFFERENCES BETWEEN LEVEL 1 & LEVEL 2

Level 1: Foundations

- Build literacy & confidence
- Learn AI basics
- Practice prompting
- Hands-on with tools
- Overcome intimidation

Level 2: Intermediate

- Move to application & creation
- Build custom GPTs
- Explore real business use cases
- Develop practical solutions
- Immediate on-the-job impact

Deep Dive Scoping Sessions

What You'll Gain

- **Clarity on Your Needs** – We map your exact workflows, data sources and decision points so nothing is overlooked
- **Tailored AI Concepts** – You walk away with 2–3 prioritized use-case sketches that align to your highest-impact opportunities
- **ROI Aligned Budgeting** – Receive preliminary cost estimates tied to projected ROI and scoped to your key priorities, ensuring budgets are right-sized and you can plan with confidence before development begins.
- **Alignment on Scope** – Clear next-step recommendations ensure your team and ours start on the same page

Key Deliverables

- A 90-minute interactive workshop with your core stakeholders
- A process map and data-stack review that highlights integration points
- A Scoping Brief summarizing use-case concepts, estimated effort ranges and high-level timelines

Expected Outcomes

Faster Credit Approvals & Higher Conversion

- Automate credit checks using ID and historical data for sub-20 min pre-approvals
- Reduce application dropouts and accelerate decision timelines

Optimized Inventory & Distribution Costs

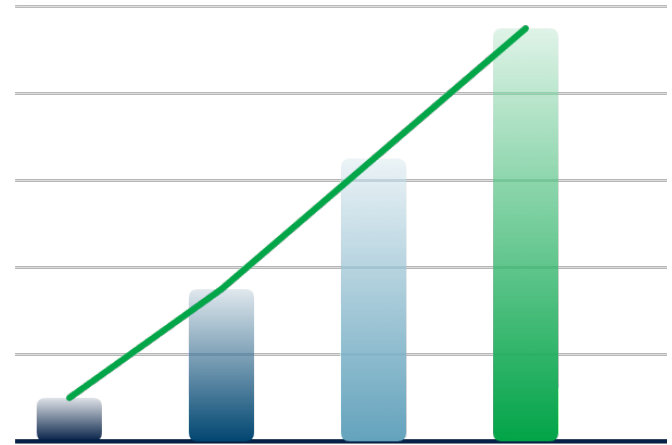
- Use AI to forecast demand and plan stock by model and location
- Improve route efficiency and minimize transport and inventory holding costs

Improved Post-Sales Retention & Revenue

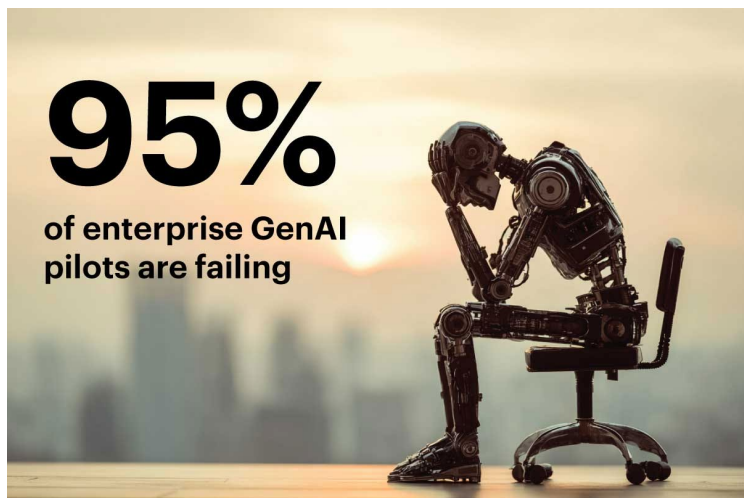
- Send predictive service reminders and smart scheduling via WhatsApp
- Drive accessory upsells and monitor satisfaction with automated NPS

Higher Data Accuracy & Lead Conversion

- Centralize and clean data across CRM, ERP, and social channels
- Enable automatic lead assignment and chatbot-based qualification



AI Readiness Assessment vs. Full RoadMap?



Which makes the
most sense for your
company?

Where to start with AI?



Strategy First!

Identify Opportunities

Start Small

Measure & Celebrate

Scale Progressively

AI Readiness Assessment

start here →

Don't fall into 'random acts' of AI - like random acts of marketing, they rarely produce lasting value.

Assess where the biggest opportunities exist and prioritize based on cost vs. benefit.

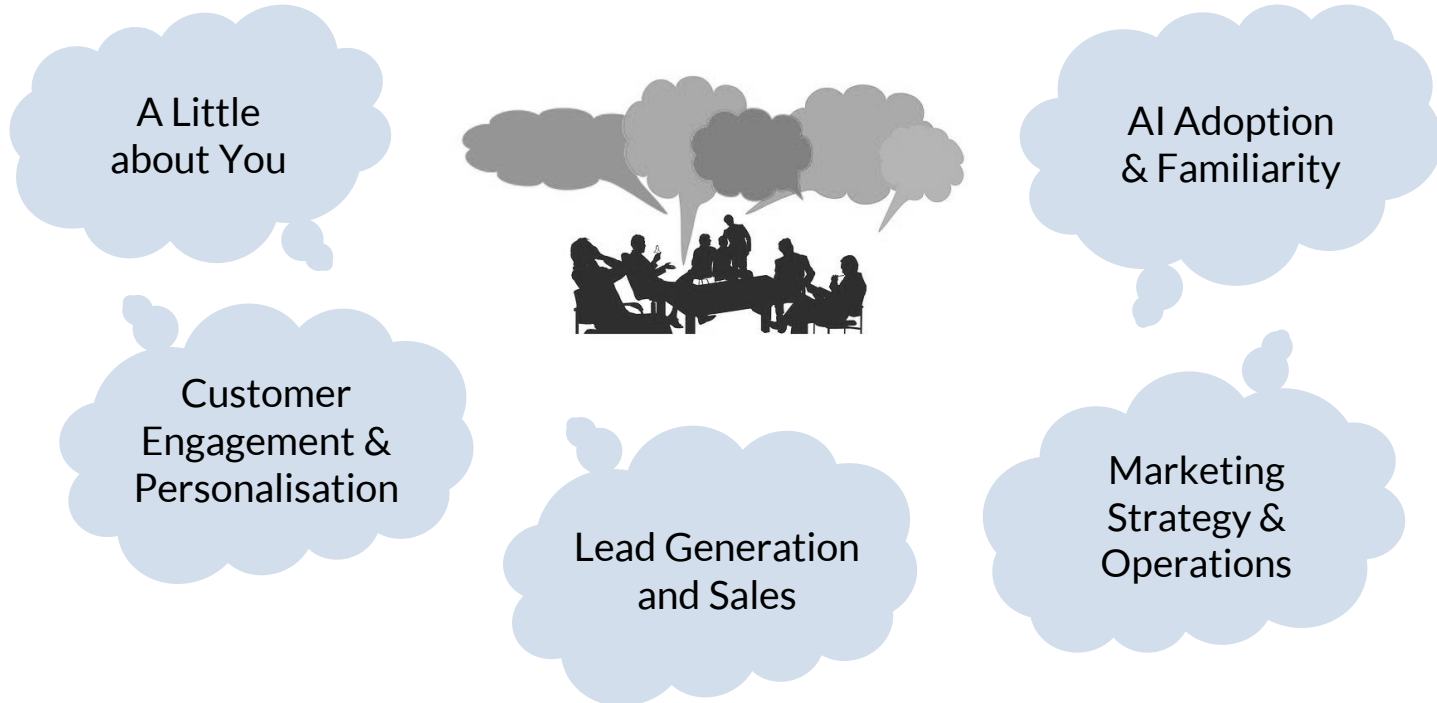
Begin with quick wins that can demonstrate efficiency gains and ROI.

Track results, showcase wins, and build momentum across the organization.

Move down the list of opportunities in a structured, step-by-step way.

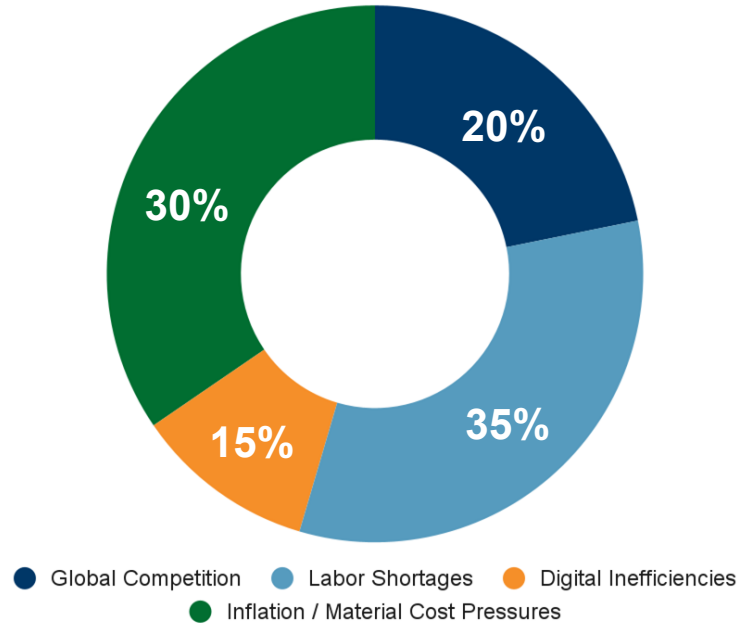
45-60 minutes of discovery in one business area, across 5 topic categories. Output: tailored recommendations, ROI calculations, and a clear roadmap.

WSI AI Assessment for Marketing and Sales Function



Why AI is Relevant Right Now

- AI is driving 5–10x ROI for SMB manufacturers
- Affordable, scalable, and doesn't require a big tech team
- Helps tackle labor shortages, inflation, and global competition



How AI helps Manufacturers Offset Rising Costs

Automate repetitive quoting & admin tasks

Free up staff time and reduce labor costs.

Predict customer churn & service needs

Retain more revenue and lower the cost of lost accounts.

Optimize inventory & material planning

Cut carrying costs and minimize waste.

Streamline recruitment & training

Reduce hiring costs and speed up productivity.

Identify efficiency gains to offset tariffs

Find hidden cost savings that protect margins.

Two choices:

1. AI Road Map
2. AI Readiness Assessment

The fact is there are opportunities out there that can be leveraged AND money is potentially being left on the table.

The speed of change with AI is mind boggling and now, more than ever the efficiencies and cost savings available through AI implementation is something that can not be ignored or even delayed

Food & Beverage Manufacturer (AI Quality Control)

From Manual Inspections to Automated Accuracy – Ensuring Consistent Product Quality

1 Challenge

- Quality inspections relied on human operators visually checking packaging and labeling.
- Inconsistent detection of defects (e.g., mislabels, damaged packaging).
- High cost of customer complaints and product recalls.
- Slow inspection process slowed down production lines.

2 Solution

Deployed AI computer vision system with high-resolution cameras on production line.

- Real-time detection of mislabels, damaged goods, or packaging errors.
- Automatic rejection of faulty items without slowing throughput.
- Integrated analytics to identify recurring defects and root causes.

“

The AI quality control system has transformed how we manage production.

Not only are we reducing waste, but our customers notice the improvement in consistency.

*– Operations Director,
Food & Beverage Manufacturer*

3 Key Results

95% defect
detection rate

50% fewer
recalls/complaints

Faster
throughput

Improved
brand reputation



Electronics Manufacturer (AI Energy Optimization)

Cutting Energy Costs – Smarter, Greener Manufacturing with AI

1 Challenge

- Rising energy costs significantly impacted margins.
- Equipment often ran at peak power demand unnecessarily.
- Lack of visibility into energy usage by machine or production line.
- Sustainability goals required measurable reduction in energy consumption.

2 Solution

Implemented AI-driven energy monitoring and optimization software.

- Real-time adjustments of machine usage based on demand forecasts.
- Shifted non-critical operations to off-peak hours.
- Integrated dashboards for management to track usage, costs, and CO₂ reductions.

3 Key Results

18% lower
energy costs

25% fewer
peak surcharges

Progress
on sustainability goals

Positive
ROI < 9 months

“

AI energy optimization is saving us thousands each month while supporting our green initiatives.

We're now able to report measurable sustainability improvements to our customers.

*– Plant Manager,
Electronics Manufacturer*



Automotive Parts Supplier (AI Supply Chain Risk Management)

From Disruptions to Resilience – Building Smarter Supply Chains

1 Challenge

- Global supply chain disruptions caused part shortages and costly production delays.
- Reliance on single suppliers created vulnerability to geopolitical and logistics risks.
- Lack of predictive visibility into upstream bottlenecks.
- Reactive approach resulted in missed deliveries to OEM customers.

2 Solution

Deployed AI platform to analyze supplier performance, shipping data, and global risk signals.

- System flagged at-risk suppliers and recommended alternate sources proactively.
- Integrated with procurement system for automated re-ordering from secondary suppliers.
- Dashboards for leadership showing supply risk scores and scenario forecasts.

3 Key Results

40% fewer
supply stoppages

15% lower
buffer costs

Improved
OEM delivery

Stronger
supplier resilience

“

The AI supply chain tool has given us a competitive edge.

Instead of reacting to shortages, we're proactively mitigating risks and ensuring consistent delivery to our customers.

*– Supply Chain Manager,
Automotive Parts Supplier*

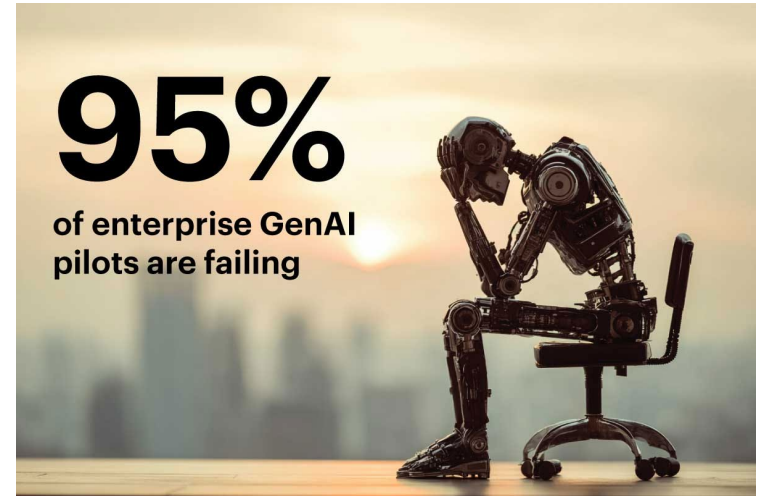
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Why they fail:

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- Workflows remain brittle and don’t adapt
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AI Readiness Assessment

45-60 minutes • Practical insights • Clear ROI roadmap

FREE

Strategic Next Steps

Your best first step:

- ✓ FREE AI Readiness Assessment. FIRST 10 TO DM ME IN CHAT
- ✓ 35-page report with recommendations
- ✓ Start proving ROI in 30-60 days

What
questions
do you
have?

