

A background image showing three men in a modern office setting. They are sitting around a white table, looking at laptops and smiling. The man in the center is bald and wearing a dark suit, while the other two have dark hair and are wearing casual shirts. The image is overlaid with a dark blue gradient.

AI IMPLEMENTATION CASE STUDY

FINDING REAL-WORLD RESULTS IN AI IMPLEMENTATION

AI is everywhere, but knowing how to adopt it securely and strategically is the real challenge. At Charles IT, we operationalized AI internally first — testing, governing, and scaling it to drive measurable business outcomes without compromising security or compliance.

CHALLENGES

- Tool Selection
- Security & Compliance
- Team Adoption

GOALS

- Increase reporting efficiency

RESULTS

The implementation of CoPilot and ChatGPT and Charles IT led to:

- 6,000 hours save annually

Through a combination of AI and automation activities, approximately 6,000 hours were saved in recurring reporting activities across multiple departments.

- Real-Time Client Reporting

Account Managers now have the ability to live-query data, making reporting turnaround times nearly instantaneous.

- 1,000 hours forecasted in additional savings

Charles IT is now targeting an additional 1,000 hours saved from AI and automation efforts implemented in Q1 2026.

CONCLUSION

By taking a thoughtful, security-first approach to AI implementation, Charles IT has saved over 6,000 hours annually — proving that when the right technology meets the right vision, the results speak for themselves. Their journey reflects a broader truth: success doesn't come from chasing the latest tools, but from starting with purpose, solving real problems, and building toward something bigger. This isn't the end of the story. It's just the beginning.

How Charles IT Evaluated, Secured, and Implemented AI Internally

EXECUTIVE SUMMARY

Artificial intelligence is everywhere: headlines, boardroom conversations, vendor pitches, and competitive strategy sessions.

But for most business leaders, the challenge isn't understanding that AI matters, it's knowing what to do next. Which tools are real? Which are secure? Which are worth the investment? And how do you adopt AI without exposing your organization to risk?

At Charles IT, we believed the best way to guide our clients through those questions was to answer them ourselves, first.

Rather than theorize about AI adoption, we operationalized it internally; building, testing, governing, and scaling AI tools inside our own environment.

Under the direction of our Head of Professional Services Dereck Jacques, the initiative focused on one core objective:

» **Adopt AI in a way that drives real business outcomes without compromising security, compliance, or operational maturity.**

This case study outlines how we approached that journey and what we learned along the way.

THE CATALYST: WHY WE INVESTED IN AI INTERNALLY

Our investment in AI didn't start as a response to market pressure. It started as an operational efficiency initiative, and we were early in exploring what the technology could realistically do.

As Dereck Jacques, Head of Professional Services, described it, his initial vision was ambitious.

Like many organizations evaluating AI for the first time, there was excitement around its potential to transform how work got done, especially when it came to data visibility and reporting.

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One of the earliest use cases centered on dashboarding and analytics.

At the time, much of our operational reporting lived inside platforms like BrightGauge, where creating a custom report required backend configuration, manual validation, and specialized knowledge.

Only a small group of people could program dashboards to surface the data leaders and account managers needed, and that process took time.

If an account manager needed a performance metric or profitability view, the workflow looked something like this:

1. They would first try to locate the data themselves.
2. If they couldn't, the request escalated.
3. A technical resource would build or modify a dashboard.
4. The data would be validated.
5. Then the findings would be delivered back to the account manager.

What seemed like a simple question often consumed hours of multiple people's time.

Dereck saw AI as a way to compress that entire workflow.

The long-term vision was straightforward but powerful:

» **Instead of building dashboards manually, leaders could simply ask questions and get answers instantly.**

Questions like:

- "What was the average profitability of all projects we ran last year?"
- "How are core ticket metrics trending quarter over quarter?"
- "Where are we seeing service bottlenecks?"

Rather than programming reports, teams could query their data conversationally.

The time savings weren't just individual; they compounded.

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Every avoided dashboard build saved hours across multiple roles while accelerating access to insights.

But efficiency wasn't the only driver. There was also a client experience component.

Faster access to operational data meant account managers could respond to client questions in real time, not after a reporting delay.

Instead of saying, "Let me get back to you," the goal was to provide answers on the spot, or at least on the same day.

That shift, from reactive reporting to on-demand intelligence, became one of the foundational motivations behind our AI initiative.

What began as a reporting efficiency exploration ultimately evolved into a broader AI strategy. All in all, the starting point was clear:

» Use AI to remove operational friction, unlock data faster, and enable teams to make better decisions without adding complexity.

THE STARTING POINT: WHERE DO YOU EVEN BEGIN?

One of the biggest barriers to AI adoption today isn't budget or technology access, it's paralysis.

There are thousands of AI tools on the market, each claiming to transform productivity, automate operations, or redefine how businesses work.

According to Dereck, the first step wasn't selecting tools, it was defining the outcomes we wanted to experience.

Instead of asking:

"Which AI platform should we try?"

We asked:

"What do we want AI to do for us?"



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We began by identifying operational inefficiencies, repetitive workflows, and areas where either automation or AI could create a measurable impact.

Starting with what you want to use the technology for, not the technology itself, gives the initiative focus and direction.

BUILDING AN EVALUATION FRAMEWORK

Once the priority use cases were defined, the next challenge was narrowing down the tool landscape. This required Dereck to evaluate tools in a way that balanced innovation with risk management.

While he did not create the structured evaluation model below, we've included it for teams to use and apply to their own AI implementation journeys should you find the model useful.

Key evaluation pillars included:

USE CASE ALIGNMENT	SECURITY & DATA HANDLING	COMPLIANCE READINESS	VENDOR TRANSPARENCY	SCALABILITY
Could the tool meaningfully solve the defined business problem? In essence, can it do what we want it to do for us?	How is data stored, processed, & protected? Even with paid tools, you must confirm your data will not be used for training.	What future concerns, if any, do we have about the tool's ability to operate within our regulatory environment(s)?	Are security practices, training models, and data usage clear?	Can the tool support long-term operational use? Can it scale across our organization? How can we scale it?

This framework will help quickly assess AI tools and determine which are a better fit for your defined use case.

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As Dereck noted, not all AI tools are built for regulated or security-mature organizations even if they appear powerful on the surface.

TESTING AI IN CONTEXT: START WHERE THE WORK ALREADY LIVES

Rather than rolling AI tools into production all at once, Charles IT began testing tools in the context of real work and existing systems.

When evaluating Microsoft Copilot versus ChatGPT, the team focused on:

- **Native integration with existing platforms**, particularly Microsoft 365
- **Speed and accessibility of answers** within daily workflows
- **Security implications of how data is accessed and retained**

As Dereck explained, while ChatGPT was powerful, Copilot's ability to work directly inside tools like Outlook and Teams made it far more practical for everyday use, enabling faster results without the friction of external workflows.

Early testing was led by a small group, including Dereck and Foster Charles, Charles IT Founder & CEO, who actively poked, tested, and applied AI to known pain points, especially repetitive and data-heavy tasks.

As viable use cases emerged, access expanded organically:

- Licenses were shared with employees who wanted to experiment
- Teams crowdsourced ideas for real-world applications
- Successful use cases spread naturally across departments

This approach allowed innovation to happen inside familiar systems, grounded in real operational needs without over-engineering the evaluation process or forcing artificial test environments.

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GOVERNANCE AS A FOUNDATION FOR RESPONSIBLE AI

During the initial evaluation of Microsoft Copilot and ChatGPT, security considerations acted as an early filter, particularly around how proprietary and personal data could be accessed, retained, or exposed.

That experience reinforced a broader principle: AI enablement is most effective when supported by governance, not afterthoughts.

While early testing focused on real-world use inside existing platforms, Charles IT created formalized guardrails before usage expanded beyond the smaller, controlled test groups. These guidelines included:

- Defining acceptable and inappropriate AI use
- Clarifying what data should never be entered into AI tools
- Establishing ownership and access expectations
- Ensuring alignment with existing compliance and security obligations

The goal was not to slow innovation, but to ensure it scales responsibly, in a way that reflects the same risk awareness applied to cybersecurity, compliance, and data protection more broadly.

As AI adoption matures, Charles IT recommends pairing experimentation with clear governance guidance, especially for organizations operating in regulated or security-sensitive environments.

MEASURING SUCCESS: OUTCOMES OVER INSTALLATION

From the beginning, success was defined less by deployment and more by whether AI reduced friction in real workflows.

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Rather than tracking adoption metrics, Dereck focused on practical indicators such as:

- Time saved on repetitive tasks
- Speed of producing answers and insights
- Reduction in manual reporting and validation work
- Improved responsiveness to internal teams and clients

Simply making a tool available wasn't considered success.

Value was only realized when AI changed how work was actually done.

Separately, tools themselves were evaluated based on how well they fit real use cases, including reliability, security posture, and alignment with existing systems. Tools that introduced friction or failed to deliver meaningful benefit were deprioritized in favor of those that integrated cleanly into daily work.

TOOL VS. TEAM: WHERE VALUE IS REALLY CREATED

One clear takeaway from the experience was that AI outcomes were shaped as much by **how people applied the tools** as by the tools themselves.

Early progress came from hands-on experimentation: testing, refining, and applying AI to known pain points. As more employees gained access, new use cases emerged organically, often in unexpected ways.

Some of the most impactful applications didn't come from the original plan, but from individuals discovering how AI could simplify their own repetitive work.

The lesson was clear: even powerful tools require context, experimentation, and thoughtful application to deliver real value.

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LESSONS LEARNED

Like any emerging technology initiative, the journey surfaced important lessons:

1. Not every AI tool delivered practical value, even if it appeared powerful
2. Native integration mattered more than standalone capability
3. Security considerations influenced tool selection early
4. Real value emerged through experimentation, not rigid planning

These insights helped ground future decisions in reality and strengthened Charles IT's ability to guide clients in real time with real data.

OPERATIONAL & CULTURAL IMPACT

As AI tools have matured internally, including ChatGPT's integration into CoPilot, we saw meaningful operational improvements.

These included:

- Faster documentation and reporting
- More efficient cross-system analysis
- Accelerated project workflows
- Improved service enablement

Importantly, AI didn't replace team members; it allowed them to focus their time on higher-value work.

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TRANSLATING INTERNAL EXPERIENCE TO CLIENT VALUE

By experimenting with AI internally, Charles IT gained practical insight into how different tools behave in real environments, including where they excel and where they fall short.

That experience now informs client guidance around:

- Selecting tools aligned to specific business outcomes
- Understanding security and data-handling tradeoffs
- Setting realistic expectations for adoption and impact
- Identifying use cases that deliver value quickly

Clients benefit from advice grounded in hands-on experience, not theory.

EXECUTIVE GUIDANCE: WHERE LEADERS SHOULD START

Leaders evaluating AI initiatives should:

1. Start with the problem they want to solve
2. Prioritize tools that fit existing systems and security models
3. Experiment in real workflows before expanding usage
4. Expect learning and iteration before clear ROI emerges

You don't need every AI tool. You need the ones that solve real problems, in environments you already trust.

CLOSING STATEMENT

AI is transforming how businesses operate, but adoption without intention creates risk.

By evaluating and testing AI internally, Charles IT built the experience necessary to guide clients and partners through their own AI journeys with clarity and realism. Not from theory, but from practice.