

AI In Your Practice



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Blue

Ghost

Eevee



Rome



Tokyo

AI accelerates the process

AI does not replace the process



Generative AI

Models that generate

Text

Images

Audio

Code



ChatGPT

Four waves of AI

Chat

Content

Multimodal

Agentic

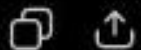
Chat

A request and a response

A conversation you can refine

Turn this update into three concise executive bullets: Customer onboarding is taking 12 days, the target is 7, and the biggest delay is waiting for complete intake forms.

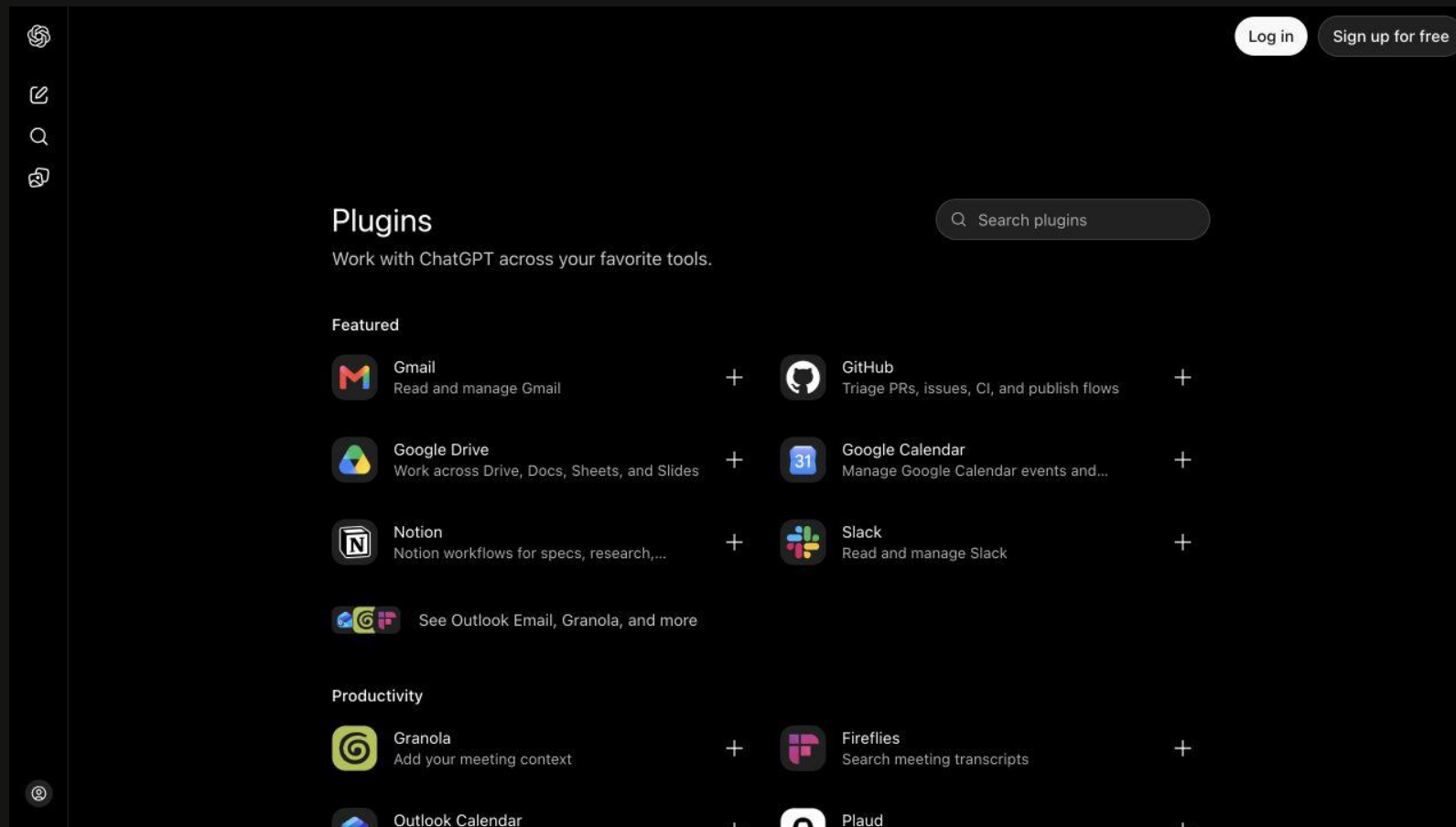
- **Onboarding is averaging 12 days**, 5 days above the 7-day target.
- **The primary bottleneck is incomplete intake forms**, which delays the start of processing.
- **Priority:** Improve intake-form completeness to close the 5-day cycle-time gap.



Content

Files and search

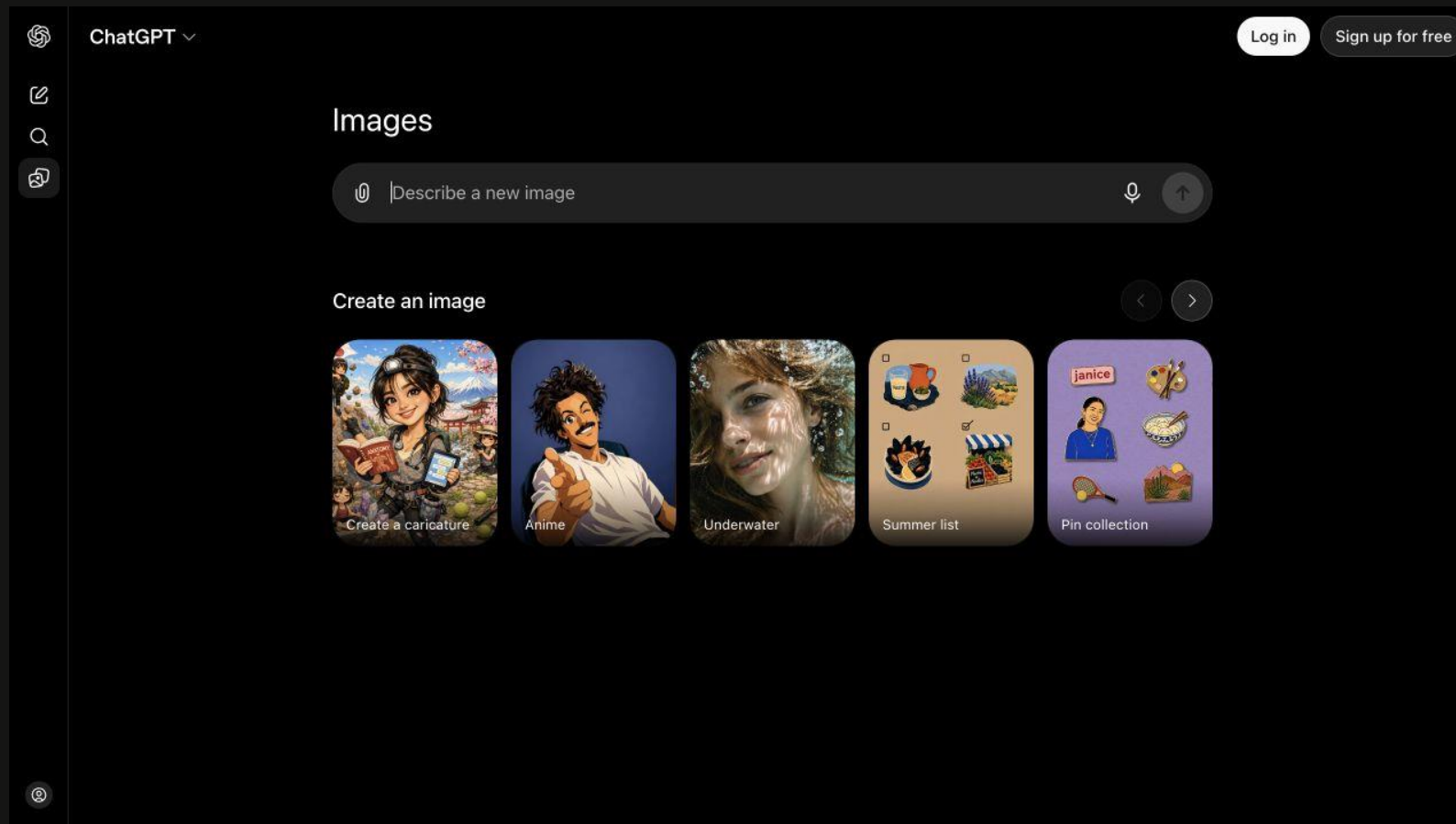
Files and connected tools



Multimodal

Images, voice, and video

More than text



Agentic

Tools and actions

Work toward a goal

I have 20 minutes before my Solara Health review. Update my existing deck with one executive-ready slide using the data room and  Slack context.



Solara Health pptx

< 1 / 8 >

100%

1

Blossom Systems

Solara Health Strategic Account Plan

Prepared by Blossom Systems
Q3 2026

2

Executive Summary

Strong Adoption Creates a Clear Path to Signal

Solara has the usage foundation and exec sponsorship; the remaining work is scope, governance, and timing.

Why now	Proposed pilot	Decisions needed
93.4% activation, 1,120 June workflows, and 67% Revenue Operations activation.	60 days, Revenue Operations pilot one state region; three forecast workflows.	Confirm governance evidence, data boundary, success metrics, and commercial path.

21 July 8 customer authority pilot design and governance work so pricing can lock by August 13 and the teams can target an August 28 agreement.

3

Account Overview

Solara is primed for Signal—if governance clears

Account picture **Decision context**

21.4M ARR as of 7/27 health acute and chronic flow adoption against 10-year potential. 2026 Revenue Operations and 67% Revenue Operations activation a critical path. 1,120 June workflows and 67% Revenue Operations activation evidence.

The decision target

Change to test the evidence adoption against 20% revenue acute and 20% revenue chronic flow 20% revenue can reach.

Account Planning View

\$1.2M Incremental ARR opportunity requires un

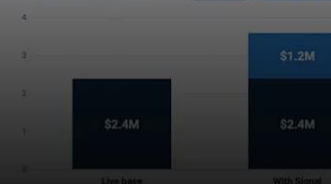
Usage and sponsorship validate the upside; evidence and timing determine whether it co

Account ARR outlook

LIVE ARR

BEST CASE

5M ARR



Key context

\$2.4M live ARR + Health
Elena Marquez + Marc
back a narrow Signal p

Risks / blockers

CSO Priya Shah requires
model, audit, and data
boundary evidence.

Prepare for customer meetings



Computer use

<https://x.com/ChatGPT/status/2092366556584153249>

Turn spreadsheet into planning tool



Morgan Stanley

Assistant

Debrief

Morgan Stanley Debrief

With client consent

Capture meeting notes

After the meeting

Summarize and identify actions

Advisor review

Edit and send the follow-up

Record

Save a note to Salesforce

100,000

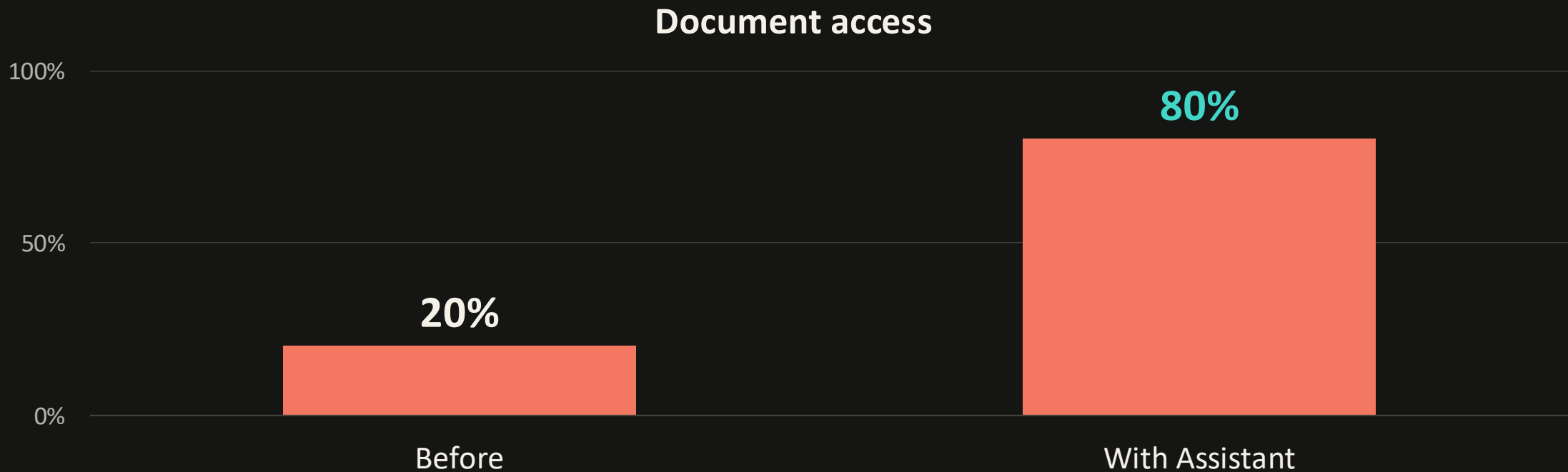
internal documents



Over 98%

of advisor teams use the Assistant

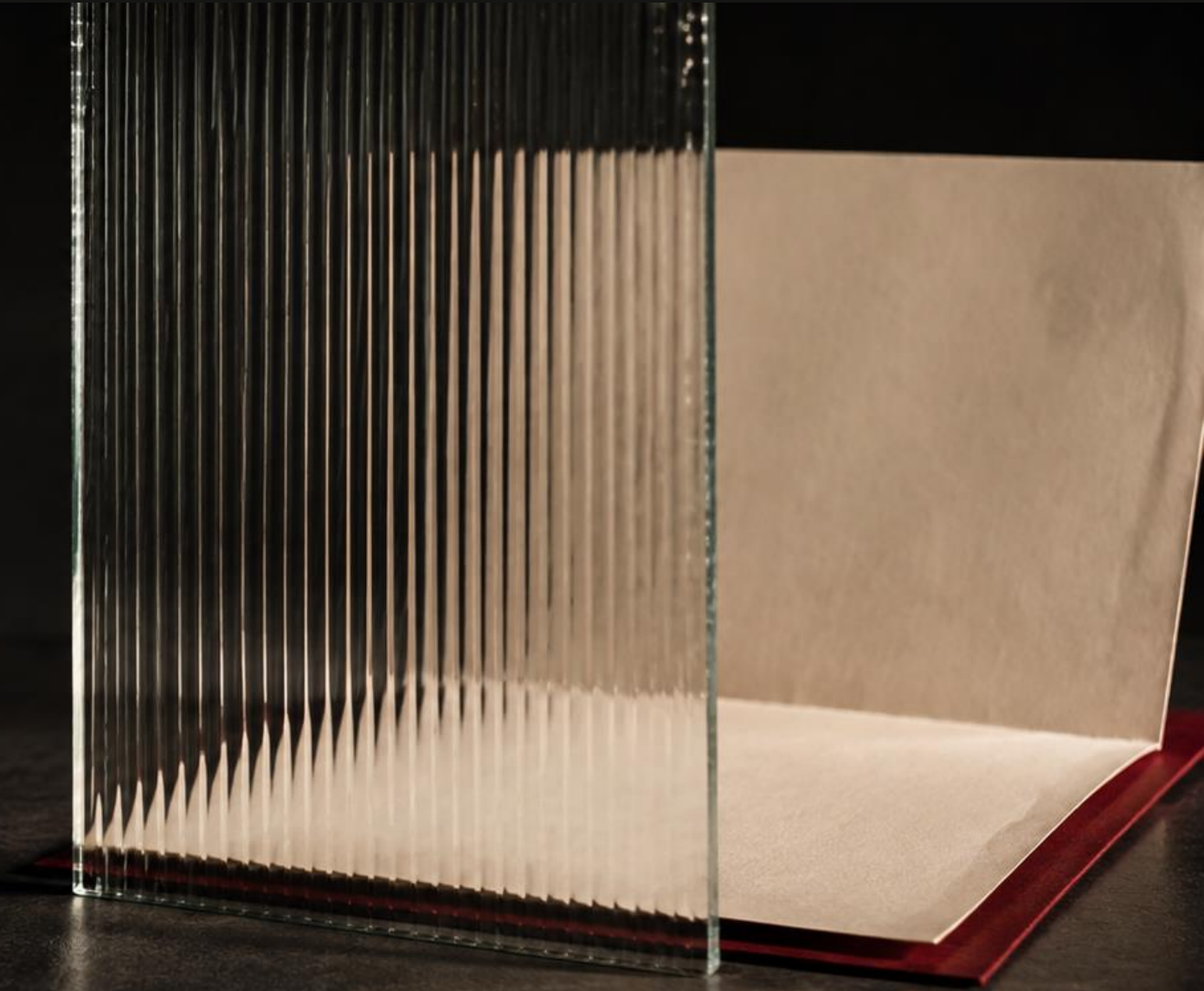
AI @ Morgan Stanley Assistant



More time for the conversation



Data protection



Where does the data go?

Training

Do prompts and files improve the model?

Retention

How long does the provider keep them?

Location

Where does it store and process data?

Where does the data go?

Access

Who can see prompts, files, and outputs?

Other tools

Which connected services receive data?

Control

Can the firm audit use and delete data?

Personal and work accounts

Personal account

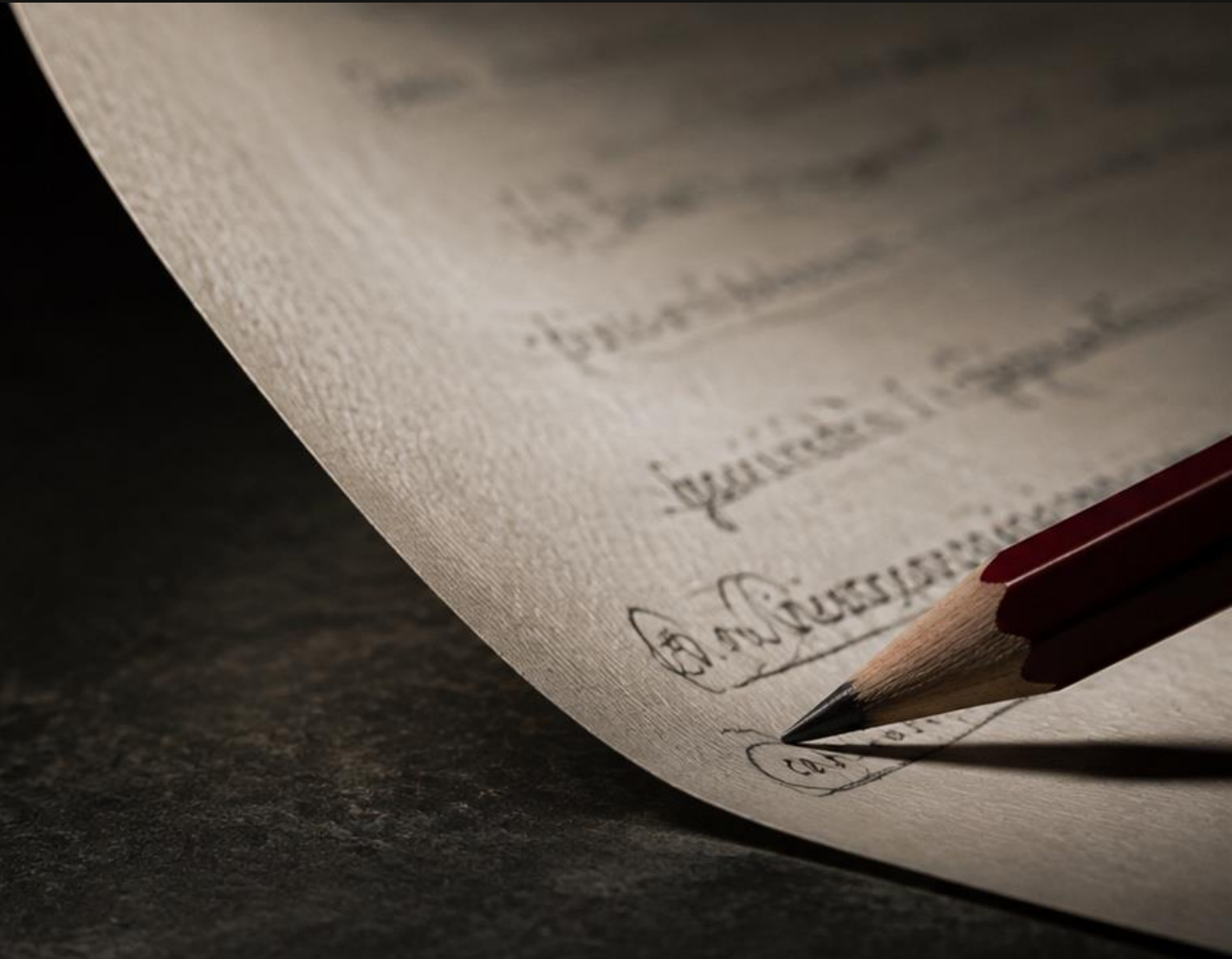
Training and history settings

Approved work account

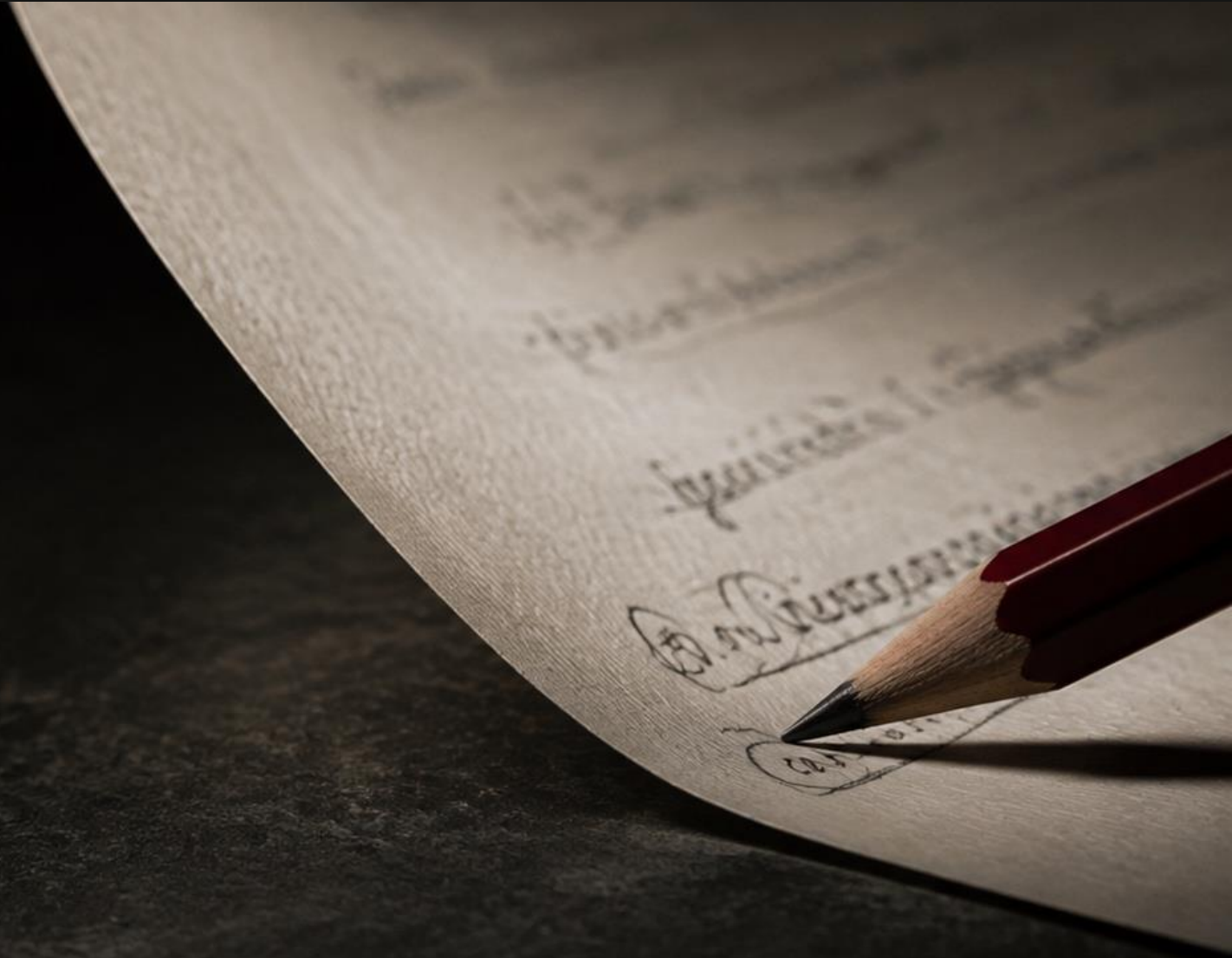
Firm controls and permitted uses

Client information needs an approved workflow.

Prompting



“Summarize
these notes.”



A useful prompt

Persona

Who should it act as?

Context

What does it need to know?

Task

What should it do?

Constraint

What should it avoid?

Format

How should it return the answer?

A useful prompt

Persona

Meeting assistant

Context

These notes only

Task

Actions and questions for the next meeting

Constraint

Leave missing facts open

Format

Under 150 words

What is missing?

“What would you need
to know first?”

Ask me three questions and wait.

What changed?

What became more useful?

What still needs checking?

Where would this help in your work?

Questions?

Download the slides: jfprojects.dev

Email: jackbfrancis@gmail.com, jack.francis@aihuntsville.org

If you're interested in the AI Use Policy developed by AI Huntsville, please [email](#) me!

Questions for your firm

Training	Does the provider use customer data to train?
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Retention	What are the retention and deletion terms?
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Location	Where does it store and process data?
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Access	Who can see prompts, files, and outputs?
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Questions for your firm

Connections

Which services receive data?

Audit

Can the firm audit use and enforce controls?

Review

What human review does the work require?

Approval

Which tools and uses has the firm approved?

Sources

[Morgan Stanley Debrief](#)

[Morgan Stanley customer case](#)

[CFP Board AI Ethics Guide](#)

[CFP Board beginner's guide](#)

[FINRA Regulatory Notice 24-09](#)

[ChatGPT access and plans](#)

[ChatGPT data controls](#)

[Temporary Chat](#)