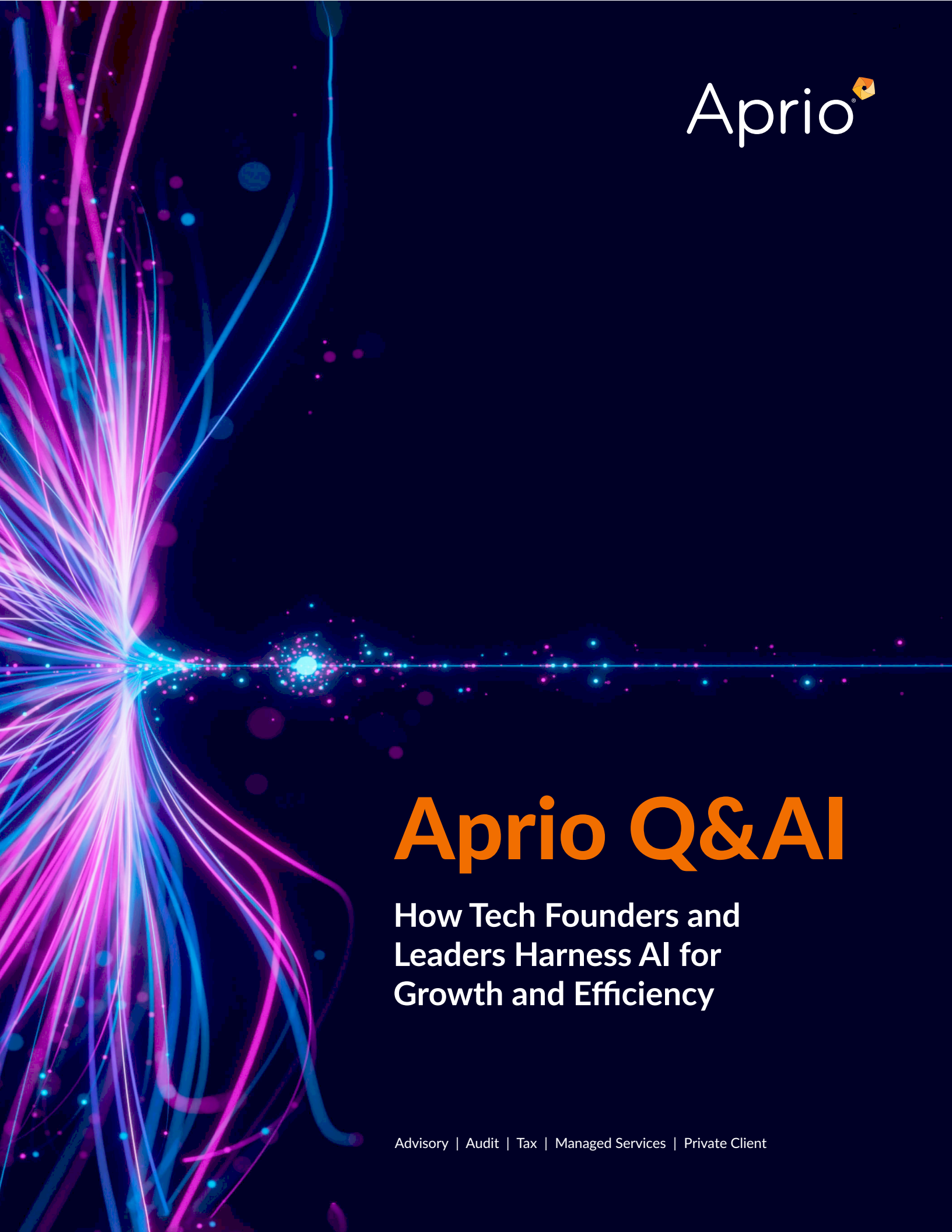




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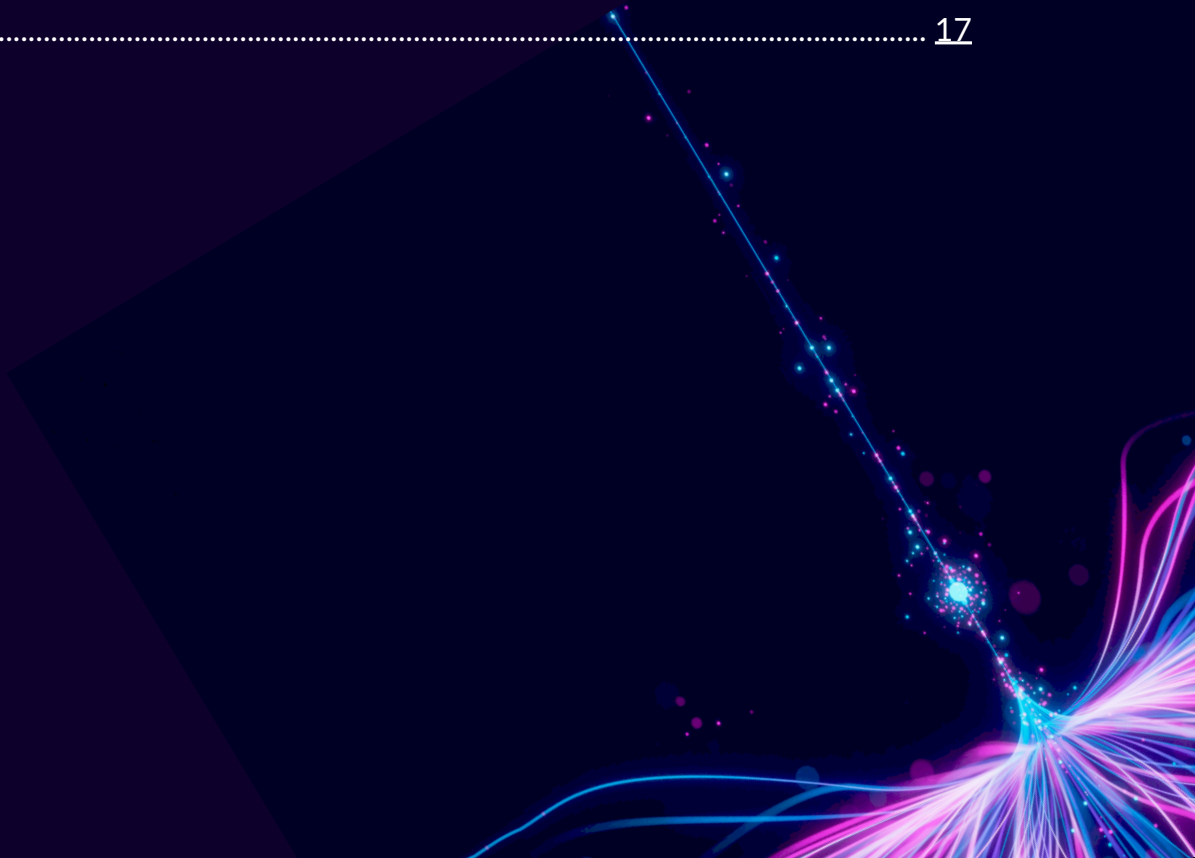
Aprio Q&A

How Tech Founders and
Leaders Harness AI for
Growth and Efficiency

Advisory | Audit | Tax | Managed Services | Private Client

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Executive Summary

1

AI integration will be key to strategic growth in 2025 and beyond.

Successful AI integration will give tech companies a competitive edge and set new benchmarks for excellence. Companies must disrupt traditional workflows to unlock the full potential of AI, making it a fundamental component of strategic growth. This shift demands new workforce competencies and a commitment to innovation.

2

Agentic AI systems open a whole world of possibilities, but clear goal setting must take precedence.

Unlike traditional AI models, agentic AI can handle complex sequences and continuously learn from feedback to achieve desired outcomes. These systems excel in performing specialized tasks, leading to improved efficiency, but they require contextual information to function effectively. Feedback loops help agentic AI stay on the right course.

3

Clean and organized data is a prerequisite for successful AI adoption.

Clean data sets are essential for extracting actionable insights and achieving success with AI. Companies must review, evaluate, and amend their data management strategies. Chaotic data management will only get in the way of AI-driven innovation. Tech leaders should act now to identify fragmented data systems in their organizations.



Pioneering the Future of AI Innovation

Similar to how the steam engine revolutionized industry, artificial intelligence (AI) is rapidly reshaping the digital ecosystem. Tech companies, like factories scrambling to keep up, are racing to integrate AI into their operations and products. They recognize that AI isn't just another tool—it's a transformative force rewriting the rules of efficiency, innovation, and the very nature of work itself.

How can tech entrepreneurs and leaders get ahead of the transformation? Learning from one another is a good start. Read real perspectives from Tech leaders and founders on how they're harnessing AI to drive growth, generate operational efficiencies, and create a competitive advantage.



Q&A: Aprio Answers

Q: What impact will AI have in 2025 and beyond?

A: Tech companies aiming to remain competitive understand that they must disrupt traditional workflows to unlock the full potential of AI. According to a LinkedIn report, 88% of C-suite executives globally prioritize rapid AI adoption as a critical agenda item. Furthermore, 80% of these executives anticipate a cultural overhaul driven by AI, expecting it to foster a more creative work environment. In 2025, the integration of AI into businesses will no longer be optional but a fundamental component of strategic growth. This shift in the technological landscape demands new workforce competencies, forcing executives to evaluate and adjust their talent acquisition and development strategies.

Organizations that successfully embed AI into their applications and operations will have a substantial competitive edge, having embraced not just a new set of tools, but a transformative approach to solving complex business challenges. Consequently, those at the forefront of AI integration will set new benchmarks for excellence within their industries. Preparing for this future requires a commitment to innovation, transformation, and a forward-thinking mindset that recognizes AI as a pivotal force for long-term growth and success.

Q: How are agentic AI and internal optimization unique?

A: Agentic AI and internal optimization represent a giant leap forward for the tech industry, opening vast possibilities as we embrace this new era of autonomously functioning systems. Unlike traditional AI models that require constant human intervention, agentic AI systems operate independently, reaching goals by aligning with user objectives and thoroughly understanding the context of the problems at hand.

While they leverage creative capabilities akin to generative AI models like ChatGPT, they are fundamentally different in that they focus on decision-making rather than content generation. Moreover, these systems can handle complex sequences, autonomously sourcing necessary data or triggering workflows to complete assignments effectively. By continuously learning from feedback and refining its decision-making processes, agentic AI becomes more adept at achieving desired outcomes.

For instance, an AI agent could continuously monitor competitor activities, market trends, and customer sentiment to identify strategic opportunities. If it detects any customer frustration with a competitor's product, it could draft targeted marketing campaigns and suggest product enhancements. Another application could be in internal process optimization, where agentic AI identifies inefficiencies, recommends improvements, and even implements changes across departments. Additionally, in customer success management, an AI agent could proactively monitor engagement metrics and trigger personalized retention strategies, such as scheduling training sessions or sending targeted content when usage drops.

Clear goal setting is, therefore, paramount. These systems require contextual information about why goals are important to the company and how they drive revenue. Continuous feedback loops are essential to refine and adapt models based on performance insights, ensuring they remain aligned with business objectives. Clear goals keep agentic AI systems stay on track.

Q: Why is clean, organized data the key to successful AI adoption?

A: More often than not, organizations find themselves entangled in unstructured data webs, handicapped by inadequacies in data management infrastructure and the lack of skilled personnel to guide them through the labyrinth of AI integration. As businesses prepare to make strides in AI, beginning with a focus on organized data management will ensure that the leap into AI is not just a technological advancement but also a strategic pivot towards sustained competitive growth. Data management strategies must evolve to meet the demands of AI-driven innovation.

Clean and well-organized data sets need to be the foundation upon which advanced AI functionalities are built. Without this foundation, the transition to AI can lead to fragmented data systems that hinder rather than help efforts to extract actionable insights. Many large organizations face challenges due to disparate data sources across departments, all using varying systems and databases, which underscores the need for comprehensive data integration strategies. Smaller enterprises, including startups, frequently encounter financial barriers, as the costs of advanced data management solutions can be prohibitive.

Despite these challenges, achieving data readiness is non-negotiable. For many, the preparation of data for AI often reveals discrepancies across systems that demand immediate attention. Historically, good data governance has entailed correcting errors and standardizing formats, but AI requires additional considerations like bias detection and skew prevention. Traditional data management protocols, often rigid and slow, fall short in this new context where data cleaning must be highly specific to the intended AI use case.

Q: What is the role of AI in driving innovation and competitive advantage?

A: By creating a culture that encourages teams to engage with AI systems, share their insights, and appreciate both their achievements and setbacks, organizations lay the groundwork for significant technological progress. This environment can unlock AI's potential to automate monotonous tasks, thereby freeing human resources to concentrate on strategic, value-driven work.

Agentic AI models excel in carrying out specialized tasks with precision, offering improved specialization compared to traditional, generalized automation systems. As AI stands at the cusp of revolutionizing data management, the extent of its success heavily depends on whether or not it is seamlessly integrated into existing organizational frameworks. Businesses that champion AI-driven automation, predictive analytics, and proactive infrastructure management will not only optimize costs but also secure a competitive advantage through quicker, more informed decision-making processes.

Data readiness remains the cornerstone of effective AI application. By implementing strategic AI initiatives, companies can realize the transformative power of their data in driving innovation and maintaining a competitive edge. High-quality data is vital for accurately training AI algorithms, which in turn yield precise and actionable insights, pivotal for sustaining business traction in a competitive marketplace.

Aprio Q&AI Sessions

We sat down with four tech leaders to discuss how they are grappling with the challenges and opportunities of AI:

1

How is AI impacting your industry and business?

2

How are you integrating AI into your customer applications and business operations?

3

What specific challenges have you faced in implementing AI, particularly regarding data management?

4

What tangible benefits or ROI have you seen from your AI initiatives?

5

Based on your experience, what advice would you give to other companies looking to adopt AI?





Vero AI: Harnessing GenAI to solve complex business challenges at scale

When Vero AI launched in 2023, it was positioned to help businesses navigate the increasing complexity of compliance with regulations including SOX, HITRUST, SOC 2, and various ISO standards. Its platform analyzes qualitative and quantitative data to provide organizations with actionable insights to streamline compliance with evolving legislation. “In a world where 80% of information is unstructured, traditional methods of analysis only scratch the surface,” said Eric Sydel, PhD, cofounder and CEO of Vero AI.

A conversation with:



Q: How is AI impacting your industry and business?

A: AI is revolutionizing the global tech landscape in complex and often unpredictable ways. AI capability itself offers the promise of augmenting and improving human performance in nearly every domain, but the hype around AI vastly outpaces the current reality of what it can do. Still, when it is applied rigorously and diligently, AI can offer tremendous value for businesses. For instance, Vero AI was founded shortly after generative AI became widely available. We built a GenAI-native analytics platform that can process unstructured data—such as compliance documents—against specific frameworks like ISO 27001 and HITRUST. The advancements we are creating were not possible before GenAI.

“Our tech helps auditors feel less overwhelmed and helps organizations efficiently comply with the increasing variety of complex frameworks.”

—Eric Sydel, PhD

Q: How are you integrating AI into your customer applications and business operations?

A: Since our entire platform was founded on AI, it is at the core of everything we do. The way we use AI is somewhat unique though. Essentially, we view AI as a statistical analysis capability. It helps us process data in ways that were previously not possible. Only 20% of the world’s information is numeric and easily analyzed—the remaining 80% is dark data. This includes unstructured text, imagery, etcetera. AI helps us break information down into meaningful components and relate it to other outcomes or characteristics. To this end, we take compliance documents and process them against specific frameworks, helping auditors save vast amounts of time.

Q: What specific challenges have you faced in implementing AI, particularly regarding data management?

A: Data security is a primary focus in our work. We have built our platform to securely store client data. To ensure that any third parties we are using are not retaining our client data and training on it, we use a Retrieval Augmented Generation (RAG) model. Uploaded information is housed securely on our platform and not available for training use by the LLM provider.

Q: What tangible benefits or ROI have you seen from your AI initiatives?

A: Our partners are telling us that our approach saves up to 60% of an auditor's time, while simultaneously helping them be more objective and accurate. This means that for a single audit, our clients save thousands of dollars. We expect this number to increase over time as we process more data.

Q: Based on your experience, what advice would you give to other companies looking to adopt AI?

A: Generative AI can do amazing things, but the most common use cases today are focused on generative tasks for individuals such as writing essays, answering questions, and creating images. GenAI can do so much more. When you view GenAI as statistical software, GenAI can help us understand and parse information at scale and in a way that was not possible just two years ago.

"I encourage companies to consider advanced, enterprise-grade applications of AI, but at the same time, do not rely on marketing hype to guide your AI implementation decisions. Instead, take a hard look at the technology and try it out. See if it produces results for you. There is so much tech hype these days that buyers must beware of, but figuring out how you can capitalize on the uniquely disruptive potential of AI can reap grand rewards."

—Eric Sydell, PhD

About Vero AI

Vero AI's platform is a first-of-its-kind analytical engine built to help enterprises process and understand both numeric data and unstructured information such as text in a fully automated, scaled, easy manner. Through its scientifically derived, AI-assisted platform and objective framework, the VIOLET Impact Model, Vero AI ingests information of all types and creates meaningful, interpretable, reliable scores that allow users to know immediately whether their existing AI tools, algorithms, or any set of information is functioning across a range of customizable criteria. Vero AI's engine is a cognitive architecture that expands basic GenAI functionality to solve specific business problems in an enterprise-grade environment. To learn more visit <https://www.vero-ai.com/>.



Codoxo: Tapping into the power of AI to create a better future for healthcare

A conversation with:



The U.S. healthcare system loses billions of dollars each year due to fraud, waste, abuse, and inaccurate claims payments. Desiring to change this dynamic, Musheer Ahmed, Codoxo Founder and CEO, created a cost containment platform and company to help bring about a better future for healthcare. “We apply AI to every aspect of the healthcare payment integrity process in order to facilitate correct claim submission and enable early intervention against fraud, waste, and abuse,” said Toby Shum, Vice President of Finance at Codoxo.

Q: How is AI impacting your industry and business?

A: Codoxo was built on AI. We started when AI wasn’t widely recognized, and our founder, Musheer Ahmed, a researcher at Georgia Institute of Technology, was instrumental in integrating AI and generative AI into our operations.

Codoxo was the first startup to use AI to identify novel fraud, waste, and abuse schemes, mitigating potential losses for health plans. We leverage AI to target education to providers so claims are submitted correctly from the start, reducing processing cost and time, and more importantly, minimizing claim denials.

Generative AI helps fraud auditors review complex claim submissions and medical documentations more efficiently and thoroughly. It also assists in the correct application of complex payment rules so that claims are paid accurately.

Q: How are you integrating AI into your customer applications and business operations?

A: We integrate AI models to enable continuous improvement in detecting fraud schemes. Fraud schemes in healthcare are like computer viruses. You can write rules to keep track of historical viruses, but it does a

poor job of identifying new threats. Our AI reviews all payments and claims submissions, identifying patterns to assess whether claims are legitimate or potentially problematic before they result in big losses.

We use GenAI and large language models (LLMs) to handle extensive, word-heavy, and highly technical healthcare claims submissions. For example, a claim filed for a short hospital stay can be hundreds of pages long and will take a professional several days to review. LLMs shorten that review time dramatically.

Another area where we use GenAI is to understand how payments should be made, considering the various payment methodologies and rules applied by health plans. Many of these rules may appear similar, but the details are very different. LLMs help us understand policies and exceptions at a deeper level to facilitate efficient claims processing and to avoid delays or contentious payment reversals.

Q: What specific challenges have you faced in implementing AI, particularly regarding data management?

A: Our company has always prioritized data integrity. As we continue to use AI when we work with our customers, we recognize the need for better data.

Historically, data with gaps might have been acceptable because humans could slowly parse through or ignore these gaps. However, to achieve exponential efficiency with AI, we work closely with our clients to make sure their data is complete and accurate.

We also spend a lot of time validating our software so that it guides us to the right outcomes. During the implementation phase, we work together with our clients to ensure everything is set up correctly. Whenever our clients identify potential issues, we work with them to understand the problem in depth and make adjustments. We strive for our recommendations to be accurate and reflect our clients' intent.

Q: What tangible benefits or ROI have you seen from your AI initiatives?

A: Clients who switched to our service from existing vendors have experienced a 25% improvement in performance, even in the early stages of implementation. We have also analyzed workforce productivity and found that our AI initiatives provide 20 to 30 times the efficiency. Previously, most claims were paid out without ever getting reviewed due to high costs and turnaround time constraints. With AI, we can review all claims instead of only the high-cost claims. Policy loading is another area where we have seen major gains. With generative AI, we help translate complex insurance claim policies and provider agreements into actionable rules

95% faster with 50% greater accuracy.

Q: Based on your experience, what advice would you give to other companies looking to adopt AI?

A: Start with a clearly defined problem that you want AI to solve. Identify areas where AI can move processes upstream, preventing issues rather than detecting them after the fact.

I also encourage building cross-functional teams that combine domain expertise with technical knowledge. Understanding how AI applies to specific problems, such as billing codes or payment rules, requires a lot of domain expertise. We deal with humans, patients, and their providers, so it's important for AI to augment human expertise, rather than attempt to supersede it.

Last but not least, prioritize transparency and explainability in your AI system, especially in highly regulated industries like healthcare. We recognize the importance and impact of our work—and we take this responsibility seriously.

“We deal with humans, patients, and their providers, so it’s important for AI to augment human expertise, rather than attempt to supersede it.”

—Toby Shum

About Codoxo

With a mission to make healthcare more affordable and effective for everyone, Codoxo is the premier provider of generative AI and artificial intelligence-driven solutions and services that help healthcare payers proactively detect and eliminate payment issues earlier in the claim lifecycle. The Codoxo Unified Cost Containment Platform helps payers drive savings across payment integrity, provider education, special investigation unit (SIU), network management, and clinical teams. Our software-as-a-service applications are built on our proven Forensic AI Engine, which uses patented AI-based technology to identify payment issues far faster and earlier than traditional techniques. Codoxo is a Fierce Healthcare Innovation Award winner and has been recognized by the Inc. 5000 list for growth. Our solutions are HIPAA-compliant and operate in a HITRUST-certified environment. For additional information, visit <https://www.codoxo.com/>.



Polimorphic: Empowering local governments to deliver best-in-class service with AI

Polimorphic is on a mission to supercharge government processes with digital workflows and AI-powered tools. “AI is making waves across municipal governments,” said Nick Paulson, Chief of Staff at Polimorphic. The government technology company has already achieved great success across [New Jersey](#) and [Florida](#)—and this is just the beginning.

Q: How is AI impacting your industry and business?

A: Only 8% of government employees are [under 30](#), while the median age for both federal and municipal workers is categorically higher than the rest of the workforce. It’s no secret to public servants that it’s more important than ever to be able to work efficiently and find ways to innovate. We’ve seen AI as the solution in mind for this. People are interested in using AI tools to supplement their work—and potentially replace some of it—as they explore opportunities to be more agile and efficient in serving their constituents. We consider our tools workforce multipliers. They do not eliminate jobs. Instead, they allow local government teams with already very full plates to take out the mundane tasks and focus on the more impactful parts of their roles.

Q: How are you integrating AI into your customer applications and business operations?

A: AI is central to what we offer local governments. Polimorphic began as a simple tool to help public servants manage their contact database and automate forms and constituent submissions. Our AI product suite has expanded our offerings to cover the entire “front desk” so that no constituent question or request goes unanswered. We’ve created a first-of-its-kind customer service phone agent that’s completely powered by AI

A conversation with:



Nick Paulson
Chief of Staff
Polimorphic

and is able to handle almost any constituent question—and even act as a telephone triage nurse, connecting a citizen to the right specialist when they need or ask to speak to a human.

Q: What specific challenges have you faced in implementing AI, particularly regarding data management?

A: Since our systems rely on information provided by cities and counties, the help our products are able to provide is solely dependent on the quality of data that we receive, which has become a tool for our customers to find information that’s outdated or otherwise irrelevant. At times, there’s work involved in cleaning that up, but ultimately that’s in everyone’s best interest.

“Some of our customers have reported returning from weekends with only 3 or 4 voicemails from constituents needing action, where previously that number was over the hundreds. As a result, they are able to dedicate more of their time to the projects that deliver more value.”

—Nick Paulson

Q: What tangible benefits or ROI have you seen from your AI initiatives?

A: Our customers have seen a dramatic improvement their ability and efficiency in interacting with their constituents.

Internally, we've seen that AI tooling has greatly improved the speed at which our developers are able to produce code and the accuracy with which they are able to write. That's helped us push out features faster while keeping a lean team.

Q: Based on your experience, what advice would you give to other companies looking to adopt AI?

A: Think about the tools that are available to you as ways to make your company more efficient. We think about this quote by Joanna Maciejewska a lot: "I want AI to do my laundry and dishes so that I can do art and writing, not for AI to do my art and writing so that I can do my laundry and dishes." Think about the aspects of your company that you would consider as your "laundry and dishes." What are routine tasks that require too much of your team's valuable time? Those are the areas where you can supplement your work with AI.

"AI sounds and feels like a much bigger and scarier thing than it actually is"

—Nick Paulson

About Polimorphic

Polimorphic is on a mission to create technology that lets governments of all sizes deliver for the people. Polimorphic's CRM & Workflows, AI Search & Chat, and VoiceAI solutions empower service-first governments to provide residents with the highest quality communication and engagement. Serving hundreds of public sector departments across the country, Polimorphic is built for the unique needs of government, including cities, counties, and state agencies. Learn more or request a demo at polimorphic.com.



Document Crunch: Leveraging AI to address construction's biggest pain points

A conversation with:



Sabrina Miskelly
Creative Director
Document Crunch

By systematically identifying risks, helping teams better understand obligations, and ensuring best practices for contract and document compliance, AI-driven solutions like Document Crunch are shifting construction from a reactive industry to a more proactive field. “We combine powerful AI models trained specifically for construction with deep industry knowledge, helping increase project success and creating a less risky, more profitable industry,” said Sabrina Miskelly, Director at Document Crunch.

Q: How is AI impacting your industry and business?

A: In the construction industry, contract and project document compliance is a major pain point. Notoriously complex and lengthy, construction contracts often span hundreds or thousands of pages and critical details are buried in legal terminology. Before AI, construction teams had no choice but to spend days reviewing contracts and documents, collaborating with team members, and negotiating with stakeholders manually. The process was inefficient and prone to human error. When it was time for project kick-off, transferring that contract and document knowledge from the back-office to the field posed another significant challenge. Once the work began, the ability for teams on site to understand contractual obligations and find accurate information quickly was nearly impossible. The evolution of AI, and specifically new AI-powered solutions like Document Crunch, have changed all that.

Q: How are you integrating AI into your customer applications and business operations?

A: Document Crunch fully utilizes the power of AI, but here are some of our key AI-driven features:

- **Key Provision Match:** CrunchAI™ identifies where

contract provisions are contextually discussed throughout documents, even when standard terminology isn't used.

- **Generative AI Checklists:** Our Checklists standardize contract review, making it easy to collaborate and manage risk review in one central location. They automatically identify potential risks and generate contract summaries, eliminating manual workload.
- **Chat:** Chat is an AI-powered contract partner, ready to help clarify, rewrite, and answer any questions, leading to more effective work.
- **Automated Playbook Creation:** CrunchAI™ also interprets a crunched contract and instantly creates a Playbook from it, making legal jargon understandable for all team members so they can make better decisions on projects to stay compliant.
- **Notice Generation:** Giving proper notice is one of the most important ways to help protect construction profits. Our Notice Builder feature, powered by CrunchAI™, drafts contractually-compliant notices for changes, delays, and other critical communications, ensuring teams follow proper procedures.

“Protecting your data should be a top priority. Ensure that your AI provider is transparent about how they use and secure your data. Look for compliance with standards like SOC 2 Type II and safeguards against unauthorized training. Insist on transparency and continuous improvement. Good AI shows its sources and gets better with use. It can explain its recommendations and learn from your team’s feedback.”
—Sabrina Miskelly

Q: What specific challenges have you faced in implementing AI, particularly regarding data management?

A: Building any AI platform, especially one tailored for the construction industry, presents several unique challenges. One of the core hurdles we face is creating a product that people can trust. It is not an easy task. At Document Crunch, we prioritize building a reliable product and giving them the resources and tools to “trust but verify” the information they get.

Another is the need for industry-specific training data. Construction contracts differ significantly from general legal documents, requiring a specialized language model that understands construction terminology and complex provisions. Like many AI tools, ensuring data security and privacy is also a challenge. Construction contracts contain sensitive information, requiring robust security

protocols and SOC 2 Type II compliance—all of which we’ve achieved at Document Crunch.

The variability in contract structures adds another layer of complexity. Construction contracts vary tremendously across project types, regions, and delivery methods, requiring the AI to be highly trained. Finally, integrating our solution with existing workflows is essential to avoid creating tech fatigue in an already complex technological environment. Document Crunch seamlessly integrates with Procore, and we have other integrations on the horizon.

Q: What tangible benefits or ROI have you seen from your AI initiatives?

A: Our AI initiatives have yielded several measurable benefits for our customers. One is the substantial time savings, with our customers reporting that their contract review times have reduced by 50-90%. This efficiency also translates into cost reductions, as our clients rely less on external legal counsel.

Risk mitigation is another key benefit. Our AI helps catch critical contract issues that might have been missed previously, reducing exposure to disputes and claims. Our customers have also reported improved field operations. Having instant contract access reduces the time project managers spend shuffling through contracts for information by 80%.

Last but not least, our AI has democratized knowledge within organizations. More people are now referencing project contracts independently, which helps ensure projects stay compliant. With the average construction dispute valued at \$43 million according to industry data, preventing even one major dispute can deliver significant ROI.



Q: Based on your experience, what advice would you give to other companies looking to adopt AI?

A: First and foremost, choose vertical-specific AI solutions. Look for tools that are purpose-built for your industry. In our case, we focus on construction, so we need AI that understands the terminology, documents, and real-world nuances of our business, rather than any generic AI.

Select vendors with deep construction knowledge and proven AI credentials. The best solutions are built by people who know the jobsite and the tech. It's also important to make sure the AI fits your workflow. The AI should integrate seamlessly with your tools and processes, functioning like an eager assistant.

About Document Crunch

Document Crunch is the document compliance platform for construction. Leveraging proprietary AI and machine learning, it simplifies construction documents, quickly identifying critical risks and providing guidance so teams can make great decisions throughout the entire project lifecycle. The company is on a mission to empower everyone in the construction industry to understand what's in their contracts. To learn more, visit documentcrunch.com or schedule a demo, [here](#).

WHAT'S NEXT



As AI continues to reshape the tech industry, companies must stay ahead of the curve. [Aprio is dedicated to helping tech companies](#) navigate the complexities of AI, from data organization to implementation and optimization. True transformation through AI requires a commitment to data integrity, governance, and strategic foresight. To fully embed AI into applications, operations, and processes, leadership must lead from the front and actively manage this change to drive business growth and innovation. By aligning work with company goals and building confidence among teams working with AI, leaders can help manage natural reluctance and realize new value for their business.

Schedule a consultation with Aprio today to learn how we can support your AI journey.





About Aprio

Aprio is the brand name under which Aprio, LLP, and Aprio Advisory Group, LLC, deliver professional services. Since 1952, clients throughout the U.S. and across more than 50 countries have trusted Aprio for guidance on how to achieve what's next. As a premier business advisory and accounting firm, Aprio Advisory Group, LLC, delivers advisory, tax, managed and private client services to build value, drive growth, manage risk and protect wealth, and Aprio, LLP, provides audit and attest services. With proven experience and genuine care, Aprio serves individuals, entrepreneurs, and businesses, from promising startups to market leaders alike.

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