SAFEPOINT IT WEBINAR · JULY 23

SafePoint IT

Managed IT & Cybersecurity for healthcare and mission-critical businesses

20+	97%	3x
Years in Business	Customer Satisfaction	Inc 5000 Honoree

WHAT WE DO

- Cybersecurity & Compliance
- Cloud & Infrastructure
- Helpdesk & Onsite Support
- Virtual CIO & Strategy
- AI Integration & Automation
- Data Backup & Disaster Recovery

100% Local Chicagoland Team

90-Day Satisfaction Guarantee

SAFEPOINT IT WEBINAR · JULY 23

Inside the Build: Real AI Workflows We Run Every Day

Last time we talked about what agentic AI could do. This time we show you what it does — the actual systems running inside SafePoint, and how they're built.

PRESENTED BY

Alek Pirkhalo · CEO & Technology Strategist

Kaden Evenson · Service Manager

Jared Bahr · Enterprise Engineer

WHAT WE WILL COVER

01 The Three Claudes
Chat, Cowork, and Code — which mode fits which job.

02 Memory That Sticks
Teach it once — your tone, formats, and procedures just happen.

03 Live Builds: Connectors at Work
MCP connectors, the Follow-Up Engine, and QuickBooks — real workflows, real screenshots.

04 Guardrails + Q&A
Approval points, least access, and the SafePoint path forward.

CURRENT LANDSCAPE

HEADLINES & HYPE

What's New in AI This Month

Every major lab shipped agentic tools this month — AI that does the work, not just answers questions.

OPENAI · GPT-5.6 & PRESENCE

GPT-5.6 + ChatGPT Work: OpenAI's smartest models for professional work, in a workspace that pulls context from your tools and delivers finished docs, sheets, and slides.

Presence (July 22): an enterprise platform for customer-service and internal agents — policies, approved actions, guardrails, and human escalation. OpenAI's own phone support now resolves 75% of issues without a human.

GOOGLE · GEMINI 3.6 FLASH

A model per job (July 21): Flash for faster, cheaper agentic work; Flash-Lite for high-volume processing; Flash Cyber for finding and fixing vulnerabilities — restricted to governments and trusted partners.

The takeaway: the future isn't one giant model — businesses will route each job to the model optimized for complexity, speed, cost, or security.

MICROSOFT · COPILOT AGENTS

Email & meetings: July updates let Microsoft 365 Copilot agents triage email, send with supervision, manage folders and inbox rules, schedule meetings, and run time-finding polls.

Why it matters: agentic AI is landing inside the tools your team already lives in — the same pattern we'll show you today.

THE THREE CLAUDES

PICK THE RIGHT ONE

Meet the Three Claudes

Not every AI workflow belongs in the same place. Three modes: Chat helps you think, Cowork helps you work, Code helps you build repeatable systems.

RUNS IN · BROWSER & APP

Claude Chat

Where most people start. Ask a question, paste in some context, get help — rewriting an email, summarizing a document, cleaning up notes. Quick help, quick thinking, one-off work.

RUNS IN · COWORK DESKTOP

Claude Cowork

AI inside the way your business actually operates — your email, documents, CRM, notes, and projects. Less like a search box, more like an assistant that connects the dots across your tools.

RUNS IN · PROJECTS & TERMINAL

Claude Code

Not just for developers. A structured environment with files, instructions, and project context — the memory powerhouse that turns repeated work into repeatable systems.

A CLOSER LOOK

Claude Cowork

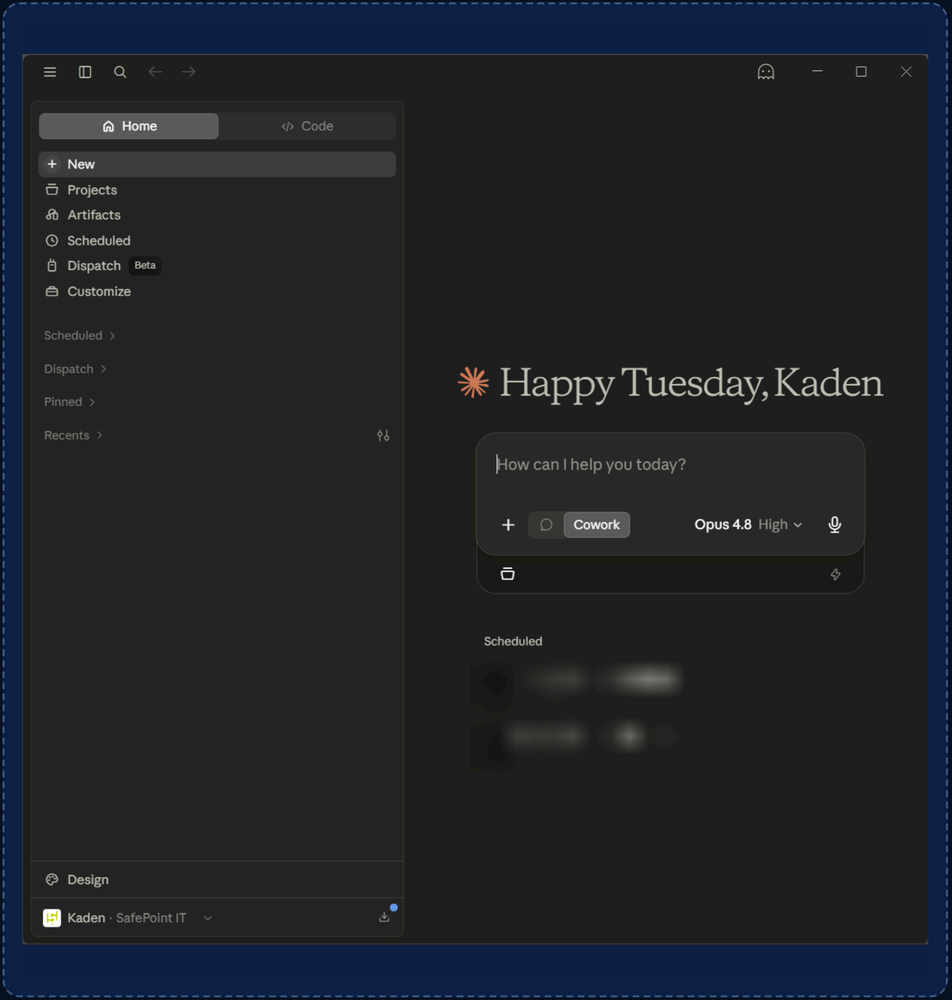
Where AI starts becoming useful inside the way your business actually operates — working alongside your emails, documents, CRM, notes, and projects.

Less search box, more assistant: prep for a meeting, catch up on recent communication, summarize what changed, draft the next step.

The real value: not just that it can write — it connects the dots across the tools and information you already use.

Supervised once, then autonomous: the first run, it checks its work with you and asks permission — then it runs automatically going forward.

→ **Cowork helps you work inside your business context.**



A CLOSER LOOK

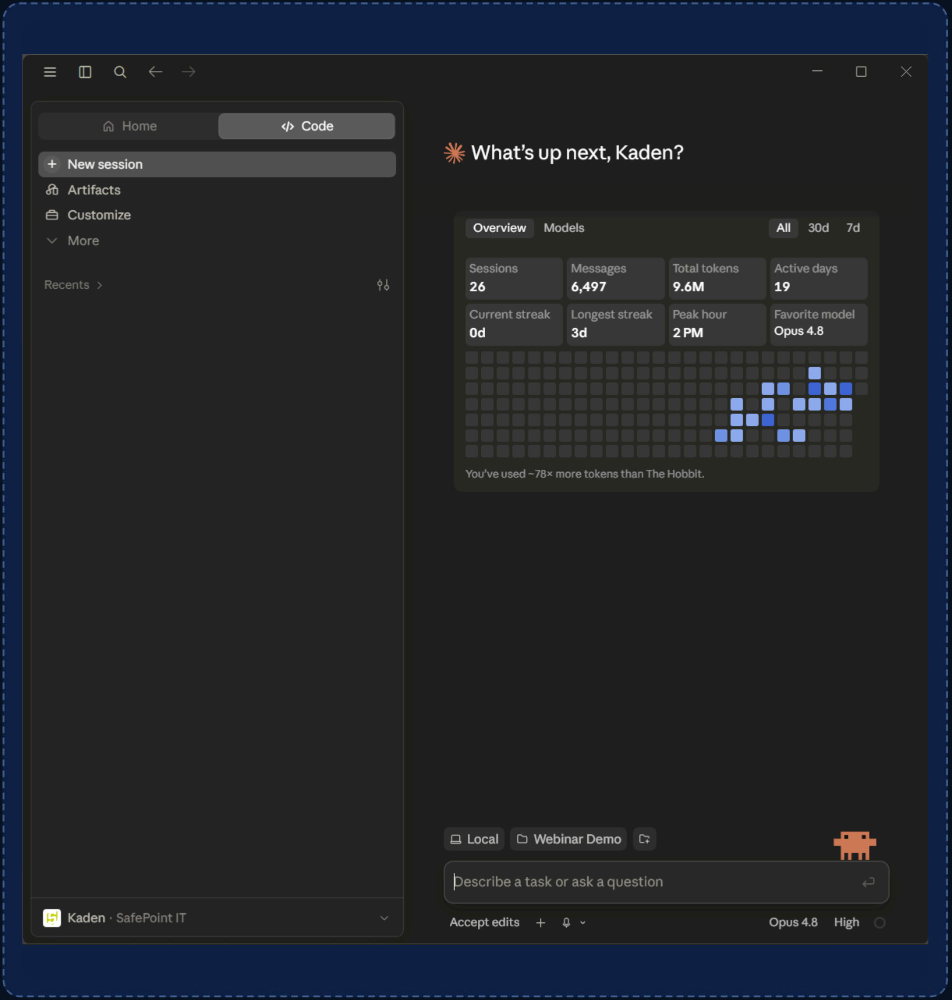
Claude Code

The name makes it sound developer-only. It's not. Code is where Claude works in a structured environment — files, instructions, repeatable workflows, and project context. The memory powerhouse.

Built for building systems: not answering one question, but creating repeatable processes — sales follow-ups, collections, reporting, client training material.

Teach it once: the structure, the standards, the tone, and the expected output live in the project — so you never explain them from scratch again.

→ **Think in Chat. Work in Cowork. Build in Code.**



MEMORY SAY IT ONCE, APPLIED ALWAYS

Teaching Claude Your Defaults

When we say memory, we don't mean random personal facts. We mean useful working preferences — your tone, your formats, your procedures — so AI stops starting from zero every time.

WITHOUT MEMORY

“Create a reminder on this calendar, at this time, in this format...” — explained again every single time.

WITH MEMORY

“Set a reminder like usual.” — and it already knows what usual means.

For a business it goes further — company tone, brand language, approval process, and standard procedures — so output is consistent and the team stops reinventing the wheel.

The goal is not to make AI magical. The goal is to make it stop starting from zero.

MEMORY IN ACTION

Memory in Action

Useful working preferences, taught once — then they just happen. What that looks like day to day:

Reminders, 'as usual'

Taught once: 15-minute hold, shown as Free, alert at zero. Now "put it on my calendar, as usual" just works.

Emails that sound like you

Follow-ups match your structure and tone — close enough to review and send, not a generic AI email.

Your company's standards

Company tone, brand language, approval process, and SOPs — applied consistently across the whole team.

Action items, your way

Summaries and task lists come back in your format — separated by owner, scheduled the way you expect.

MCP CONNECTORS

HOW CLAUDE REACHES YOUR TOOLS

What's an MCP Connector?

MCP is the open standard that lets Claude securely connect to the tools you already use — your CRM, your books, your email. A connector is the bridge for one tool, and it defines exactly what Claude can see and do there.

STOCK CONNECTOR

Pre-built, ready today

Off-the-shelf connectors for popular tools — turn them on and go. They cover the common ground: reading records, searching, summarizing, and standard actions the vendor chose to expose. Great for getting started; generic by design.

CUSTOM CONNECTOR

Built for your workflows

Built around how your business actually works: the specific actions your process needs (create the bill, stage the draft, update the right fields), your naming, your approval points — and nothing you don't want exposed. This is where the workflows you're seeing today come from.

→ **Stock gets you started. Custom gets you your process, end to end.**

LIVE BUILD · SALES & TASKS

The Follow-Up Engine: HubSpot/Salesforce + Microsoft 365

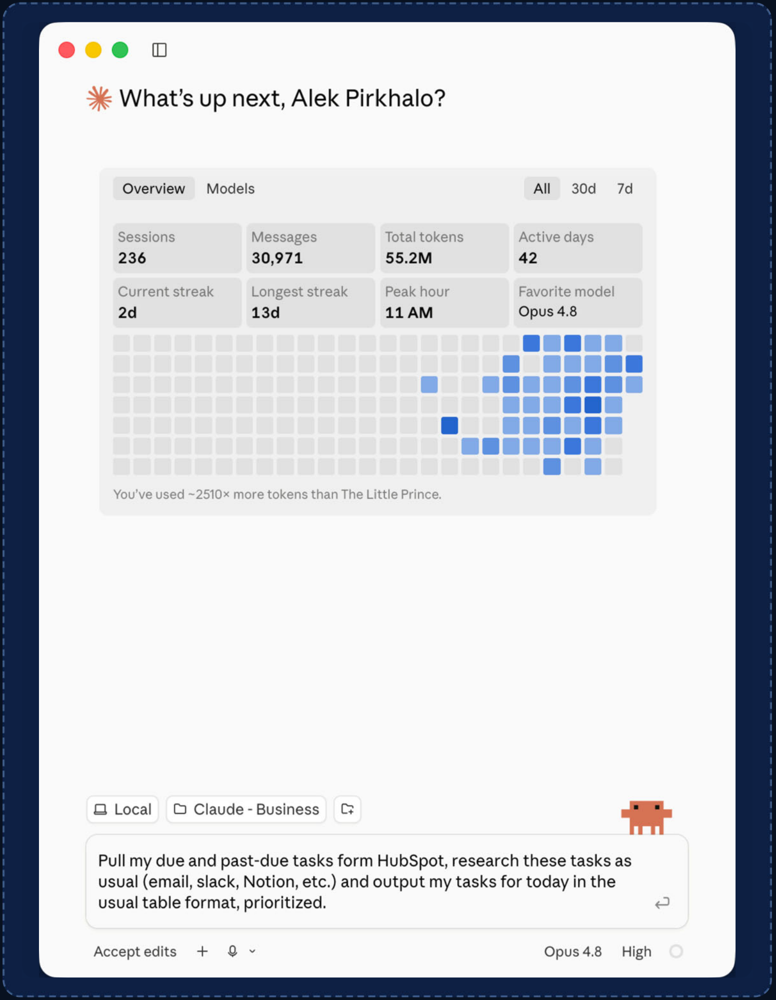
Tasks pile up all day — email this prospect, call that one, ping a teammate. Two meetings later you've lost the thread.

Triage: it reads HubSpot tasks due today and overdue, cross-references your email to see what already moved, and hands back the next three in priority order — with a one-line reason each.

Never-forget execution: one ask puts it on your calendar ‘as usual’ — and the event isn't empty. The call script, voicemail, and SMS are inside it.

Drafting: the follow-up email is already written, in context, sitting in drafts and scheduled to send.

→ **HubSpot is the record; the email is the truth — it reads both.**



LIVE BUILD · SALES & TASKS

THE REAL THING

The Follow-Up Engine, Step by Step

1 · Generated tasks table

Claude reads HubSpot and the email thread, then builds a prioritized table of every follow-up owed — who, what, and how urgent.

claude — ~/Claude — Business/Sales

>

The Meridian Financial call just wrapped. Run the follow-up engine: build my task list, update HubSpot, and draft the recap email.

● Pulled the call transcript and the Meridian Financial deal record. Here's your post-call action list, scored against the Buyer's Journey stage.

Read transcript · hubspot crm_get_deal · hubspot calls_get

Post-Call Tasks — Meridian Financial Partners

Task	Owner	Due	Priority	Stage / Why
Call Sarah to lock in the infrastructure assessment date (see script)	Alek	Tue Jul 15	HIGH	Consideration → she asked to move fast after the phishing scare
Schedule 30-min technical call with Dima re: Server 2016 EOL + MFA gaps	Alek	Wed Jul 16	HIGH	Consideration — prospect is technical, bring CTO in
Send recap email with the two-office scope + next steps	Alek	Mon Jul 14	HIGH	Consideration — keep momentum same-day
Prep FINRA/SEC compliance one-pager (records retention, MFA, MDR)	Dima	Fri Jul 18	MEDIUM	Consideration — trust-builder, not a pitch
Draft Preferred vs Ultimate comparison for 48 users, 2 sites	Alek	Mon Jul 21	MEDIUM	Consideration — hold until after assessment
Add Meridian to 30-day nurture (financial-sector security content)	Kostya	Wed Jul 16	LOW	Consideration — parallel channel, no inbox pressure

6 tasks generated. 3 written to HubSpot as reminders (owner: Alek), 1 assigned to Dima, 1 to Kostya.
Next: I'll push these to the Meridian deal and draft the recap email — both ready for your review before anything sends.

LIVE BUILD · SALES & TASKS

THE REAL THING

The Follow-Up Engine, Step by Step

2 · Call script, ready to dial

For calls, it drafts a script from the full history of the relationship — last conversation, open items, and what to ask for next.

claude — ~/Claude — Business/Sales

>

Write me a script for the call I need to make to Sarah tomorrow.

● Here's your script for the follow-up call. Goal is to lock the assessment date and set up the technical call with Dima — no re-pitching, she's already sold on the problem.

Call Script — Sarah Chen, Meridian Financial Partners

Objective: confirm infrastructure assessment date · offer live technical call with Dima (CTO) | Stage: Consideration | Tone: calm, no pressure

OPEN

"Hi Sarah, it's Alek from SafePoint. Thanks again for the time yesterday. I don't want to add to your plate, so I'll keep this quick, I just want to get the assessment on the calendar while it's fresh."

ANCHOR TO THEIR WORDS

"You mentioned the click on that invoice email last month is what really lit the fire. That's exactly the kind of gap the `infrastructure assessment` is built to surface, before it becomes the next incident."

THE ASK

"I'd like to get our engineers on-site for a couple hours across both offices. Does the week of the 21st work, or is the following week cleaner for your team?"

BRING IN DIMA

"You had some sharp questions on the Server 2016 side. I'm just the sales guy, so let me see if our CTO Dima has 30 minutes this week to go deep with you on the technical piece, that way you're talking to the person who'd actually own it."

IF SHE HESITATES

"Can you just send pricing first?"	→ "I could, but I'd be guessing. The assessment is what lets me quote something honest instead of a number I'd have to walk back. It's free and there's no obligation."
"We're still under contract with our current MSP."	→ "Totally fine, the assessment doesn't change anything with them. Worst case you get a free second opinion on where you stand."

CLOSE

Confirm the date → "Perfect, I'll send a calendar invite and a short prep note today. And I'll get you and Dima connected separately. Talk soon, Sarah."

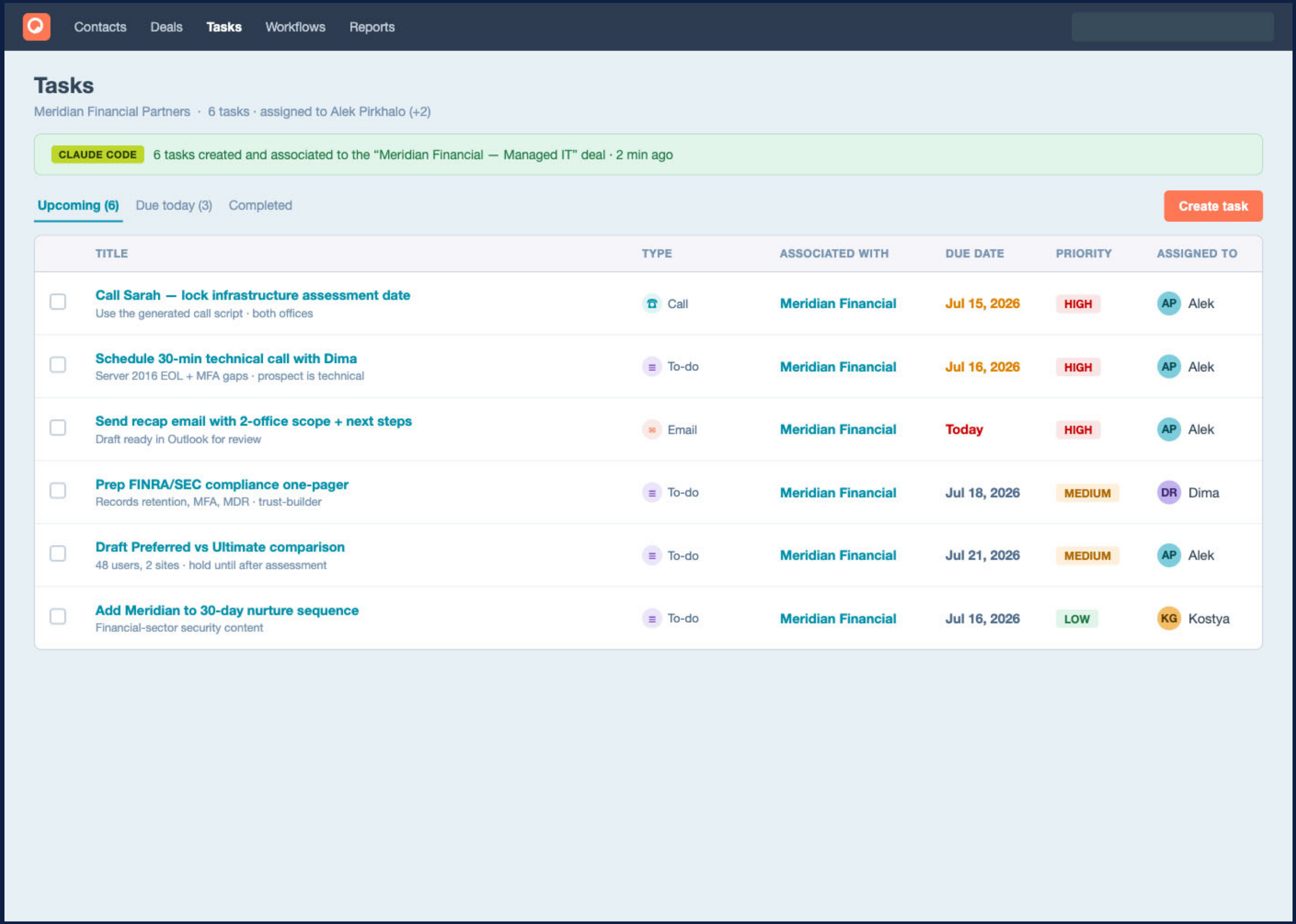
LIVE BUILD · SALES & TASKS

THE REAL THING

The Follow-Up Engine, Step by Step

3 · Tasks updated in HubSpot

Every follow-up lands back in HubSpot as a task — assigned, dated, and tied to the right contact, so nothing lives only in a chat window.



TITLE	TYPE	ASSOCIATED WITH	DUE DATE	PRIORITY	ASSIGNED TO
Call Sarah — lock infrastructure assessment date Use the generated call script · both offices	Call	Meridian Financial	Jul 15, 2026	HIGH	AP Alek
Schedule 30-min technical call with Dima Server 2016 EOL + MFA gaps · prospect is technical	To-do	Meridian Financial	Jul 16, 2026	HIGH	AP Alek
Send recap email with 2-office scope + next steps Draft ready in Outlook for review	Email	Meridian Financial	Today	HIGH	AP Alek
Prep FINRA/SEC compliance one-pager Records retention, MFA, MDR · trust-builder	To-do	Meridian Financial	Jul 18, 2026	MEDIUM	DR Dima
Draft Preferred vs Ultimate comparison 48 users, 2 sites · hold until after assessment	To-do	Meridian Financial	Jul 21, 2026	MEDIUM	AP Alek
Add Meridian to 30-day nurture sequence Financial-sector security content	To-do	Meridian Financial	Jul 16, 2026	LOW	KG Kostya

LIVE BUILD · SALES & TASKS

THE REAL THING

The Follow-Up Engine, Step by Step

4 · Follow-up email, drafted

After the call, a follow-up email is drafted with the specifics discussed — a person owns tone and the final send.

Send | Attach | Signature

DRAFT · created by Claude Code — review before sending

To: Sarah Chen <schen@meridianfp.com>

Cc: Dmitry Rudman <dmitryr@safepointit.com>

Subject: **Great talking today, next steps for Meridian**

Hi Sarah,

Thanks for the time today. It was clear how much you and the team have been carrying on the IT side, especially after last month's phishing email. You shouldn't have to be the one catching those.

A few things I took away from our conversation:

- The on-prem server behind both offices is on **Server 2016**, which loses support soon, that's the priority to get ahead of.
- MFA isn't consistently enforced yet, and there's real **SEC/FINRA** pressure on records retention and access control.
- Ticket response from your current provider has been slow when it matters most.

Here's what I'd suggest as next steps, no obligation on any of it:

- **Infrastructure assessment.** A couple hours on-site across both offices so we can give you an honest picture instead of a guess. I'll call tomorrow to find a date that works.
- **30 minutes with Dmitry, our CTO** (cc'd). You had sharp questions on the server side, and he's the right person to go deep with you.

I'll follow up with a call tomorrow. In the meantime, if anything urgent comes up, my cell is **(224) 300-0002**.

Alek Pirkhalo
CEO & Co-Founder
SafePoint IT · alekp@safepointit.com

> **Why this draft:** Consideration stage — recaps her own words, no pitch or pricing, one clear next step she controls. Cc'd Dima per the technical-prospect rule. Uses "infrastructure assessment," not "network assessment." Nothing sends until you click Send.

LIVE BUILD · FINANCE

QUICKBOOKS CONNECTOR

QuickBooks, Connected to Claude

With a QuickBooks connector, Claude works with your real numbers, real dates, and real accounts — and stages the work for your review instead of just talking about it.

ACCOUNTS PAYABLE

Create bills in QB

Forward a vendor invoice and Claude extracts the details, matches the vendor and accounts, and creates the bill in QuickBooks — staged for a person to verify before anything posts.

MONTH-END CLOSE

End-of-month journal entry

The recurring close — accruals, allocations, adjustments — prepped the same way every month, with the supporting math shown, ready for review and posting.

ACCOUNTS RECEIVABLE

Collections

Cross-references open invoices with your email — what was promised, when, and every contact attempt — then drafts the notice with real numbers. Nothing sends without approval.

→ **Claude preps the books; a person approves before anything is posted, paid, or sent.**

GUARDRAILS & CONTROLS

Keeping Agents in Their Lane

The best AI workflows aren't uncontrolled automation — they're assisted workflows with clear approval points. AI drafts, organizes, and prepares; people control what gets sent, posted, and approved.

Least privilege & scoping

Prevention at the root: read-only by default, sandboxed, with narrow write or delete access only where genuinely needed. Most irreversible mistakes simply can't happen — everything else is a backstop.

Human confirmation on high-stakes actions

A change a person reviewed and approved is by definition not unwanted — but only with a clear preview of what the action will do. "Are you sure?" without a diff gets clicked through reflexively.

Reversibility

The recovery layer when prevention and confirmation both fail: backups, pre-change snapshots, soft deletes, and rollback. This is what saves you the day an approval slips through.

Containment & observability

A kill switch halts a runaway loop before it compounds; audit logging makes every action traceable — enabling rollback and forensics. Rate limits and spending caps round it out.

BUILT IN CLAUDE

This whole deck was built in Claude, too.

Everything we just described, we used to make this session. We handed Claude our brand colors, fonts, and logo, pointed it at our existing training material, and had it draft, lay out, and refine these slides. The screenshots in this session are the real tools doing real work.

Q&A

Let's build your first custom connector.

Everything you saw today runs on connectors between Claude and the tools you already own. Work with us to build custom MCP connectors for your business — QuickBooks, HubSpot, Salesforce, Microsoft Office, and beyond — shaped around your workflows and your approval points.

QuickBooks | HubSpot | Salesforce | Microsoft Office | Your stack

→ **Reach out to us at sales@safepointit.com for more information.**

→ **You're on the list: everyone here today will be invited to our next event.**