success partners.
Clarity. Connection. Capacity.

AI, BUSINESS & PEOPLE

Five conversations that bring clarity to a changing world.

A WORKSHOP INVITATION FOR CHAMBERS AND UNITED WAY OFFICES

A welcome from Angel Rivera Jr.

I'm Angel, Partner for Relationships at Success Partners. My partners, Trey Malicoat and Isaac Asher, and I would welcome a conversation about serving your business community through our AI, Business & People workshop series.

We begin with what people value about their businesses and what they would like to make possible. Trey and Isaac invite participants into practical conversations built around their questions, familiar examples, and shared discovery. No technical experience is needed.

This packet introduces the workshops, what attendees will learn, and how your office can host and promote an event. I'd love to hear what the businesses you serve are asking and explore which conversation would be most useful.

Angel Rivera Jr. | Partner / Relationships

Contact our team: SuccessPartners.ai/#contact

Built for your business community

These workshops serve owners, managers, and teams in businesses with fewer than 150 employees. Participants may be curious, skeptical, experienced, or simply unsure what to ask. Each session connects AI with familiar work and the people who make a business succeed.

Chambers can offer relevant member education and peer discussion. United Way offices can convene business partners around employee experience, customer relationships, and the decisions facing local employers.

THE WORKSHOPS

01 AI & Your Business: What Actually Matters?

Understand the possibilities. Consider your people. Decide what fits.

What could AI actually do for a business like yours? Through familiar examples involving customer questions, repetitive tasks, and scattered information, Trey and Isaac help participants distinguish useful possibilities from impressive promises. The conversation connects technology choices to the time, resources, and relationships that matter in a small business.

Participants will learn to:

- Distinguish AI assistance, automation, and improvements that simply require a clearer process.
- Evaluate a potential use by considering effort, information needs, reliability, and human review.
- Consider how a change could affect employees and customers.
- Decide whether an idea deserves investigation, a small test, or more time.

The benefit for attendees

A clearer basis for deciding where to spend attention and money, with practical questions to use before purchasing another tool.

60 minutes

02 AI Possibilities: Do You Think We Could?

Less repeated effort. More room for people.

What would you like your business to make easier or do better? Participants bring their curiosity into a live exploration of everyday possibilities. Trey and Isaac work through audience questions and selected demonstrations, showing how an ordinary observation can become a useful idea without requiring technical language.

Participants will learn to:

- Recognize opportunities in repeated questions, missed follow-ups, information searches, and routine administration.
- Describe what they want to make possible in everyday language.
- Understand what information, steps, and human involvement an approach would require.
- Distinguish a promising demonstration from something ready to use in their business.

The benefit for attendees

Greater confidence asking for help, discussing possibilities with technology providers, and recognizing where saved effort could create more time for customers and employees.

90 minutes recommended; 60-minute adaptation available

03 AI & Trust: What Can You Rely On?

Better questions. Sound judgment. Earned trust.

An AI answer can sound certain and still be wrong. A vendor's demonstration can look convincing while leaving important questions unanswered. This workshop helps participants develop practical habits for evaluating results, protecting information, and deciding when human review matters.

Participants will learn to:

- Spot missing context, unsupported claims, and answers that need verification.
- Match the level of review to the consequences of an error.
- Ask useful questions about information access, costs, support, and moving their data elsewhere.
- Establish who checks AI-assisted work before it is used or shared.

The benefit for attendees

More informed purchasing decisions and a repeatable approach to using AI while protecting customer relationships and business credibility.

60 minutes

04 AI & People: What Happens to Us?

Changing work. Human value. Stronger relationships.

When work changes, questions about technology quickly become questions about identity, confidence, and belonging. Trey and Isaac explore how owners and employees can discuss AI honestly, contribute their knowledge, and help shape changes that support the business and its people.

Participants will learn to:

- Recognize the different concerns behind enthusiasm, hesitation, and skepticism.
- Discuss possible changes without dismissing concerns or making premature promises.
- Involve employees in identifying what should improve and what should be preserved.
- Identify where human judgment, care, and attention are especially valuable to customers.

The benefit for attendees

A practical way to begin more constructive team conversations, use employees' experience, and protect the relationships that distinguish the business.

60 minutes

05 The Cost of Standing Still

AI, People & the Courage to Change

Preserve what matters. Find the courage to move.

How do you know when caution is serving your business and when it is postponing a necessary decision? Drawing on Trey's signature story and Isaac's operational perspective, this conversation explores how familiar habits, identity, and the need for control influence business choices.

Participants will learn to:

- Recognize how uncertainty and attachment to familiar roles can affect judgment.
- Distinguish thoughtful caution from indefinite avoidance.
- Consider the consequences of both making a change and leaving things as they are.
- Identify the evidence, support, and manageable next step needed to move forward.

The benefit for attendees

A clearer way to approach a consequential decision without feeling pressured to adopt technology simply because it is available. Participants leave with a framework for deciding what to preserve, investigate, test, or change.

60 minutes

How the room becomes part of the conversation

Start with strengths. We use appreciative inquiry to explore what works well, what people value, and what they would like to make possible.

Explore together. Trey connects the question to business purpose and human experience. Isaac explains the operational and technical possibilities. Audience questions, scenarios, and selected demonstrations shape the discussion.

Leave with clarity. Participants receive practical decision questions and a concise resource they can use with their business or team.

Choose one conversation or the full series

Every workshop stands alone. Most run 60 minutes; AI Possibilities works best as a 90-minute session. No AI account, technical background, homework, or prepared business problem is required.

Meet your Success Partners

Trey Malicoat, M.S.

Partner / Strategy

Trey holds a master's degree in Clinical Psychology and brings more than 27 years of experience in mental health, healthcare leadership, education, and consulting. He has built businesses, led a multimillion-dollar healthcare company, and served as a national vice president in an international home care organization. Through TreyMalicoat.com, he connects the human experience of change with practical leadership decisions.

Isaac Asher

Partner / Technology

Isaac brings 31 years of collections experience spanning account acquisition through closure, alongside expertise in information management, AI, automation, and connected business processes. Through Clear Sky Technologies and extensive SuiteDash work, he helps organizations understand how their people, information, and systems fit together.

Angel Rivera Jr.

Partner / Relationships

Angel brings 28 years of experience in product and service sales, with a focus on relationship development. He leads with curiosity, listens closely, and helps people feel known, seen, heard, and valued. As Partner / Relationships at Success Partners, he connects organizations with the conversations and support most useful to their business community.

A clear plan for your event

Book one session, selected topics, or all five. Delivery is available in person or online, with hybrid arrangements agreed in advance. A planning conversation confirms your audience, priorities, participation format, accessibility needs, and technical setup.

Your written proposal confirms the presenters, session length, planning, promotional description, participant resource, fees, travel, customization, and booking terms.

Promotion your office can make its own

The following pages include a sample promotional flyer for each of the five workshops. Your chamber or United Way office can add its name, event details, admission information, and registration link. Matching designs are available for all five workshops.

It begins with a curious conversation

Tell us about your audience, preferred dates, location or online format, expected attendance, and budget. We will help you select the session and prepare a proposal.

Contact our team: SuccessPartners.ai/#contact

SuccessPartners.ai | TreyMalicoat.com

[CHAMBER NAME] PRESENTS

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AI & YOUR BUSINESS

What Actually Matters?

Understand the possibilities.
Consider your people. Decide what fits.

What does AI actually mean for your business?

Join a practical, 60-minute conversation about AI, everyday work, and the people who make your business succeed.

LEAVE WITH A CLEARER VIEW

- Where AI could help your business.
- Where human judgment and relationships matter.
- What to ask before investing time or money.

Your questions help shape the conversation.
Real examples. Audience discussion. No AI experience needed.

Trey Malicoat, M.S.
Business strategy & people

Isaac Asher
Operations & technology

[DATE] | [TIME]

[VENUE / ONLINE LINK]
[MEMBER / GUEST ADMISSION]

RESERVE YOUR PLACE

[CHAMBER REGISTRATION LINK]

For small-business owners, managers, and teams.

[CHAMBER NAME] PRESENTS

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AI POSSIBILITIES

Do You Think We Could?

Less repeated effort.
More room for people.

What would you like to make possible?

Join a lively, 90-minute conversation exploring how AI could give your team more time for the work that matters.

LEAVE WITH A CLEARER VIEW

- See practical possibilities in everyday work.
- Explore ideas through real examples and demonstrations.
- Learn what to ask before turning an idea into a solution.

Your questions help shape the conversation.
Real examples. Audience discussion. No AI experience needed.

Trey Malicoat, M.S.
Business strategy
& people

Isaac Asher
Operations &
technology

[DATE] | [TIME]

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AI & TRUST

What Can You Rely On?

Better questions.
Sound judgment. Earned trust.

A convincing answer is not always a reliable one.

Join a practical, 60-minute conversation about AI, sound business decisions, and the relationships you have earned.

LEAVE WITH A CLEARER VIEW

- Know what to check before relying on an AI answer.
- Ask better questions about tools and vendor promises.
- Keep human review and responsibility clear.

Your questions help shape the conversation.
Real examples. Audience discussion. No AI experience needed.

Trey Malicoat, M.S.
Business strategy
& people

Isaac Asher
Operations &
technology

[DATE] | [TIME] | **[VENUE / ONLINE LINK]**
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AI & PEOPLE

What Happens to Us?

Changing work. Human value. Stronger relationships.

When work changes, people need a conversation.

Join a thoughtful, 60-minute conversation about AI, changing roles, and the human strengths that make your business work.

LEAVE WITH A CLEARER VIEW

- Discuss AI openly with your employees.
- Involve your team in shaping useful changes.
- Preserve the human attention your customers value.

Your questions help shape the conversation.
Real examples. Audience discussion. No AI experience needed.

Trey Malicoat, M.S.
Business strategy & people

Isaac Asher
Operations & technology

[DATE] | [TIME]

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THE COST OF STANDING STILL

AI, People & the Courage to Change

Preserve what matters.
Find the courage to move.

What is worth keeping? What deserves another look?

Join a story-led, 60-minute conversation about AI, business decisions, and the human experience of change.

LEAVE WITH A CLEARER VIEW

- Recognize how uncertainty shapes your decisions.
- Consider the cost of both action and inaction.
- Choose a thoughtful, manageable next step.

Your questions help shape the conversation.
Real examples. Audience discussion. No AI experience needed.

Trey Malicoat, M.S.
Business strategy & people

Isaac Asher
Operations & technology

[DATE] | [TIME]

[VENUE / ONLINE LINK]
[MEMBER / GUEST ADMISSION]

RESERVE YOUR PLACE

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