



# The Vangård Framework

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## The AI Readiness Spectrum

A framework for business owners navigating AI.  
Where you are. What comes next. What's actually required.

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## van-guard

/■van■gärd/

*noun*

The leading part of an advancing force. The first into uncertain territory. Those who move ahead to clear the path before the main body commits.

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# 01

## A Letter from the CEO

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If you're reading this, someone on my team handed you this document because they believe VXIT can help your business. Before we get into frameworks and levels and technology, I want to be straight with you.

### **AI is the Wild West right now.**

There is no established playbook. There is no single vendor who has it all figured out. The landscape is moving so fast that what's cutting-edge today will be standard practice in 18 months, and half the tools people are buying right now won't exist in three years. That's the honest truth, and anyone telling you otherwise is selling you something (including me).

But here's what I also know: this is real. This is not a fad. AI is going to fundamentally change how small and mid-sized businesses operate, and the companies that build the right foundation now will have an enormous advantage over those that wait. The key word there is **foundation**.

AI is not going to replace your people all at once, nor should it. **It's not going to run your business while you sit on a beach.** What it can do, right now, today:

- Make your existing team faster, more accurate, and more focused on the work that actually matters
- Eliminate the repetitive tasks your best people waste hours on
- Surface information that used to take days to compile
- Turn your operational data into something you can actually use to make better decisions

### **But none of that works if the fundamentals aren't in place.**

If your data is scattered across disconnected systems, AI can't help you. If nobody's documented how work actually flows through your organization, AI can't optimize what it can't see. If your technology stack is a collection of tools held together with manual workarounds and spreadsheets, you're not ready for AI. **You're ready for us to help you get ready.**

That's what this document is about. A framework for understanding where you are, what's required to move forward, and where the real value sits. We built it because we were tired of watching businesses waste money on AI tools they weren't ready to use, or worse, **sitting frozen because they didn't know where to start.**

We're exploring this frontier together, and we're not just talking about it. We use AI inside our own business every day. We eat our own dog food. The frameworks in this document are the same ones we apply to our own operations before we bring them to yours. VXIT doesn't have all the answers, but we have a process, we have the technical foundation, and we're doing this work in our own business and in businesses like yours.

I'd rather have an honest conversation about where you actually are than sell you something you're not ready for.

### **Let's figure this out together.**

#### **Paul Vedder**

Chief Experience Officer, VXIT

# 02

## Why This Framework Exists

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Every week, a business owner asks us the same question: *"Should we be doing something with AI?"*

The answer is almost always yes. But the follow-up question matters more: **are you ready?**

Most AI initiatives in small and mid-sized businesses fail. Not because the technology is bad, but because the business skipped the foundational work. They bought a tool before understanding their data. They automated a process nobody had documented. They invested in AI before their basic IT infrastructure could support it.

This framework exists to prevent that. It gives you a clear, honest picture of where your business sits on the spectrum of AI readiness, and it maps out what's required at each stage to move forward with confidence rather than hope.

It's not a sales pitch. It's a diagnostic. Where you land on this spectrum determines what your next move should be, and some of those moves have nothing to do with AI at all.

# 03

## The Three Fundamentals

Before any AI implementation can succeed, three questions must be answered. These are not optional. They are the foundation that everything else is built on. **If you skip these, every AI investment is a guess.**

### 1. Where Does Your Data Live?

Every AI capability depends on data. If you don't know where your data sits, how it's structured, who owns it, and how it flows between systems, you cannot make informed decisions about AI.

This includes CRM records, financial data, client communications, operational documents, HR records, project files, and the spreadsheets your team maintains outside of any system. Data that's scattered, locked in email threads, or trapped on one person's hard drive is invisible to AI. Consolidation and organization come first.

### 2. What Are Your User Workflows?

How does work actually get done? Not how your org chart says it should work, but how it really works. Where do people build workarounds? Where do they re-key data between systems? Where do they rely on tribal knowledge instead of documented processes?

These friction points are where AI creates the most value. But you have to see them first. If your workflows aren't documented, AI has nothing to optimize.

### 3. What Systems Are Currently In Use?

A complete inventory of every tool, platform, and application your team touches. Not just the ones IT provisioned, but the ones people signed up for on their own. How do these systems connect, or fail to connect? Where is data duplicated?

This map is the foundation for identifying where AI can augment, automate, or replace existing tooling. Without it, you're guessing at solutions.

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**If the data is organized and accessible, the systems are well-understood, and the workflows are documented, you are ready to begin. Everything in this framework builds from that foundation.**

# 04

## The AI Readiness Spectrum

The spectrum below maps the journey from complete unawareness to full self-sufficiency. Most small and mid-sized businesses fall somewhere between Level 1 and Level 3. That's where the biggest gains are, and it's where the risk of inaction is highest.

Find where you are. Read what's required at your level. Then decide if you're comfortable staying there.



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## LEVEL 0: UNAWARE

*"AI is for big companies. Not us."*

Your team hasn't discussed AI in any meaningful way. It feels distant, overhyped, or irrelevant to your size and industry. No one has explored tools, and there's no internal conversation happening about what AI could do for your business.

This is more common than you'd think. Many businesses with 15 to 150 employees assume AI is something reserved for Fortune 500 companies with dedicated data science teams. That assumption was accurate five years ago. It is not accurate today. The tools have matured, the costs have dropped, and the use cases for small and mid-sized businesses are now well-established.

The danger at this level is not that you're doing something wrong. It's that you're not aware of what's possible, and that lack of awareness creates a blind spot your competitors don't share.

### SIGNS YOU ARE HERE

- No one on your team uses AI tools in any capacity
- AI feels like a buzzword that doesn't apply to your business
- You assume your industry or company size makes AI irrelevant
- You haven't had a single internal conversation about AI strategy

### THE RISK OF STAYING HERE

Your competitors are already experimenting. The gap compounds quietly. By the time you notice the operational advantage they've built, it will take years to close. AI adoption follows the same curve as cloud adoption did a decade ago: the early movers didn't just save money, they built capabilities that late adopters could never fully replicate.

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## LEVEL 1: CURIOUS BUT PARALYZED

*"We know it matters. We just don't know where to start."*

You've read the headlines. You've attended a webinar or two. You know AI is changing how businesses operate. But the landscape is overwhelming: hundreds of tools, conflicting advice from every vendor and consultant, and no clear first step. The fear of making a bad investment keeps you frozen.

This is the most common level we see in the SMB market. Business owners are smart enough to know AI matters, but honest enough to admit they don't know what to do about it. The problem is that the AI industry is not making this easy. Every vendor claims their tool will transform your business. Every conference has a keynote about the AI revolution. None of them tell you what to do on Monday morning.

The path forward is not to pick a tool. It's to build understanding. You need to know what you're working with before you can know what to do with it.

### SIGNS YOU ARE HERE

- You've consumed AI content but taken no concrete action
- You've considered hiring someone to 'figure out AI' but can't define the role
- You worry about falling behind but can't articulate what 'ahead' looks like
- Conversations about AI in your leadership team end with 'we should look into that'

### THE RISK OF STAYING HERE

Paralysis is a decision. Every month without a foundation is a month your data stays disorganized and your workflows stay invisible. The longer you wait, the more organizational debt accumulates, and the more expensive the eventual foundation work becomes.

### HOW VXIT HELPS AT THIS LEVEL

VXIT starts here with an AI Readiness Conversation. No jargon, no hard sell. We sit down with you and your leadership team, walk through the landscape in plain language, and help you understand what getting started actually looks like for a business your size. The goal is clarity, not a purchase order.

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## LEVEL 2: AD HOC EXPERIMENTATION

*"Some of our people use ChatGPT. We think."*

AI has entered your building, but not through the front door. Individual employees are using ChatGPT, Copilot, Gemini, or other AI tools on their own initiative. There's no policy, no coordination, and no visibility into what company data is being shared with these tools.

This is where most SMBs land today. Someone on your team figured out that ChatGPT could draft emails faster, or that Copilot could summarize a meeting. Word spread informally. Now you have pockets of AI usage scattered across the organization with no governance, no consistency, and no understanding of the security implications.

The experimentation itself is not the problem. Curiosity is a good thing. The problem is that it's happening without guardrails. Your employees may be pasting client data, financial records, proprietary processes, or strategic plans into tools that store and train on that data. You have a data exposure risk that you can't see because nobody is tracking it.

### SIGNS YOU ARE HERE

- Employees paste client data, internal docs, or financials into public AI tools
- No AI acceptable use policy exists
- Different departments use different AI tools with zero coordination
- You couldn't answer 'what AI tools are active across our company' with confidence
- Nobody has evaluated the data privacy implications of the tools in use

### THE RISK OF STAYING HERE

This is the shadow AI problem. It mirrors the shadow IT risk from a decade ago, but the data exposure surface is significantly larger. Client data, proprietary processes, and sensitive information may already be leaking into third-party models without your knowledge. One data incident here can create legal, regulatory, and reputational consequences that dwarf the cost of putting governance in place.

### HOW VXIT HELPS AT THIS LEVEL

VXIT delivers an AI Shadow Audit and builds your AI Acceptable Use Policy. We identify every AI tool in use across your organization, assess the data exposure for each one, and put a governance framework in place that protects your business while allowing your team to use AI responsibly. This is risk mitigation that pays for itself the first time it prevents a data incident.

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## LEVEL 3: FOUNDATION BUILT

*"We know what we're working with."*

This is the critical inflection point. The three fundamentals have been answered: you know where your data lives, how your workflows operate, and what systems are in use across the organization. You haven't implemented AI yet, but you have the foundation that makes implementation possible and productive.

Level 3 is where most AI success stories actually begin. Not with a tool purchase, but with a clear-eyed understanding of the business. When you can point to a specific workflow and say "this process takes 14 manual steps, costs us 20 hours a week, and is prone to errors at step 6," you have something AI can actually work with. That specificity is what separates businesses that get real value from AI from those that buy tools and wonder why nothing changed.

Reaching this level also means your IT infrastructure is stable, your data is organized and accessible, and your team has the governance framework to adopt new tools responsibly. These aren't glamorous accomplishments, but they are what makes everything above this level possible.

### SIGNS YOU ARE HERE

- Your data landscape is mapped and your systems are inventoried
- Key workflows are documented with friction points identified
- You have an AI governance policy in place and enforced
- Your IT infrastructure is stable, secure, and well-managed
- You can articulate specific operational problems AI might solve

### THE RISK OF STAYING HERE

The risk here is losing momentum. The foundation is built, but it erodes without action. Workflows change, systems evolve, people leave and take tribal knowledge with them. The assessment you built becomes stale. Move to targeted implementation while the picture is fresh and the organization's energy is high.

### HOW VXIT HELPS AT THIS LEVEL

VXIT delivers the Workflow and AI Readiness Assessment that produces this foundation. We map your data landscape, document your workflows across departments, inventory every system in use, score each AI opportunity by impact and feasibility, and deliver a prioritized roadmap for what to do first. This is the engagement that turns ambiguity into a plan.

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## LEVEL 4: TARGETED IMPLEMENTATION

*"We're solving real problems with AI now."*

With the foundation in place, you're implementing AI against specific, validated use cases. These aren't experiments. They're targeted deployments against documented workflow problems with measurable outcomes and governance in place.

This is where the return on your foundational work starts to materialize. Because you mapped your workflows at Level 3, you know exactly which processes to target. Because you inventoried your systems, you know what integrations are required. Because you built governance, your team knows the rules of engagement.

### WHAT THIS LOOKS LIKE IN PRACTICE

Use Case	Before AI	After AI
Invoice processing	Manual data entry, 12 hrs/week	AI extraction, 2 hrs/week review
Proposal drafting	4-6 hours per proposal	AI first draft in 20 min, 1 hr refine
Meeting follow-up	Manual notes, items lost	Auto-summary, action items tracked
Internal knowledge	"Ask the person who knows"	AI search across company docs
Client communications	Written from scratch each time	AI-assisted drafts, consistent tone

### THE RISK OF STAYING HERE

Scope creep without governance, or measuring activity (tools deployed) instead of outcomes (problems solved). The temptation at this level is to roll out AI everywhere at once. Stay disciplined about tying every implementation back to a documented workflow problem with a measurable result.

### HOW VXIT HELPS AT THIS LEVEL

VXIT manages the full implementation lifecycle: tool selection, integration with your existing stack, data pipeline configuration, user training, and ongoing optimization. We own the technical complexity so you can focus on business outcomes. Every implementation ties back to your roadmap and is measured against the workflow problem it was built to solve.

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## LEVEL 5: INTEGRATED AND SCALING

*"AI is how we operate now."*

AI is no longer a project or initiative. It's embedded in how your business runs. Multiple departments are using AI-augmented workflows. You're seeing compound returns as AI systems learn from your proprietary data and processes improve continuously.

At this level, something important has shifted: AI is no longer a tool you use. It's a capability you have. Your team thinks in terms of "how could AI improve this?" as a default question when evaluating any process. New hires are trained on AI-augmented workflows as part of onboarding, not as an afterthought.

The businesses that reach Level 5 have a structural advantage that compounds over time. Their proprietary data becomes a competitive moat: the AI systems trained on their specific operations, client history, and institutional knowledge produce outputs that no generic tool can replicate. This is the point where AI stops being an efficiency play and starts being a strategic asset.

### SIGNS YOU ARE HERE

- AI tools are standard operating procedure across multiple departments
- Clear ROI metrics exist and you can articulate the business value to anyone
- New hires are trained on AI-augmented workflows during onboarding
- You're identifying new use cases proactively, not reactively
- Your proprietary data is a competitive advantage that deepens over time

### THE RISK OF STAYING HERE

Complacency. The AI landscape moves fast. What's cutting-edge today is commodity in 18 months. Continuous evaluation and evolution is required to maintain the advantage you've built. The businesses that stall at Level 5 are the ones that stop treating AI as evolving and start treating it as finished.

### HOW VXIT HELPS AT THIS LEVEL

VXIT provides ongoing AI strategy, infrastructure management, and quarterly roadmap reviews. We monitor the evolving AI landscape, evaluate emerging tools against your operations, and ensure your technical foundation scales with your growing AI capability. We keep you ahead of the curve while managing the complexity behind the scenes.

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## LEVEL 6: SELF-SUSTAINING

*"We've got this. We need the infrastructure managed."*

You have internal capability to evaluate, select, and implement AI solutions. You may have a dedicated data or AI function in-house. You understand your data estate, your workflows, and your systems deeply. You need a technology partner for infrastructure, security, and scale, not for AI strategy.

This level exists in this framework because honesty matters. Not every business needs a guide for AI. Some businesses have the internal talent, the resources, and the organizational maturity to handle it themselves. If that's you, we're not going to pretend otherwise.

What you still need is a technology partner who keeps the underlying infrastructure rock-solid. AI systems are only as reliable as the networks, endpoints, security, and cloud environments they run on. That's our world, and it's what we do best.

### SIGNS YOU ARE HERE

- Internal team owns AI evaluation, selection, and implementation
- A dedicated data, analytics, or AI role exists in-house
- AI strategy is self-directed and aligned to business objectives
- You evaluate new AI tools and capabilities independently
- Your technology needs are infrastructure, security, and compliance

### THE RISK OF STAYING HERE

Standard technology risk applies. The infrastructure, security, and compliance foundation still needs to be managed, maintained, and evolved. AI systems increase the demands on your underlying infrastructure; more data, more compute, more integration points, more attack surface. The foundation doesn't maintain itself.

### HOW VXIT HELPS AT THIS LEVEL

VXIT provides world-class managed IT services. Strategy. Security. Support. We keep the foundation rock-solid so your internal team can focus on innovation. Our job is to make sure the infrastructure never becomes the bottleneck for your AI ambitions.

# 05

## The Education Problem

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**There's a cost to AI that nobody talks about, and it's not the software licenses.**

**It's education.**

Every person in your organization who interacts with AI needs to understand what it can do, what it cannot do, where the boundaries are, and how to use it effectively within the context of their specific role and workflow.

This isn't a one-time training session. The tools evolve constantly. New capabilities emerge monthly. What was impossible six months ago is now available. What was best practice last quarter may already be outdated.

The education cost is real and ongoing. It includes the time your team spends learning new tools. It includes the productivity dip during adoption. It includes the mistakes that happen when people use AI without understanding its limitations. It includes the cost of someone on your team staying current with a landscape that changes weekly.

Most businesses underestimate this by an order of magnitude. They budget for the software and forget about the humans who have to use it.

This is one of the primary reasons AI initiatives stall at Level 2 or Level 4. The tools are in place, but the people aren't equipped to use them well. The result is underutilization, frustration, and eventually the conclusion that 'AI doesn't really work for us.'

AI works fine. The education and change management didn't happen.

Any honest framework for AI in an SMB has to account for this. The cost of education isn't a side note. It's a line item, and it's recurring.

# 06

## How VXIT Meets You Where You Are

VXIT is a managed IT services provider. Strategy, Security, and Support have been our foundation since day one. AI doesn't replace that foundation. It builds on top of it.

Our approach is simple: we meet you at whatever level you're at on the spectrum and help you advance. We don't sell you Level 5 solutions when you're at Level 1. We don't skip the fundamentals. We don't pretend the hard parts are easy.

YOUR LEVEL	ENGAGEMENT	WHAT WE DO
Levels 0 & 1	<b>Start the Conversation</b>	Honest, jargon-free conversation about where AI fits for your business. We assess your current state and map what getting started looks like. No cost, no commitment.
Level 2	<b>Governance &amp; Shadow AI Audit</b>	Identify every AI tool in use, assess data exposure, and build a governance framework that protects your business while your team uses AI responsibly.
Level 3	<b>Workflow &amp; AI Readiness Assessment</b>	Map your data landscape, document workflows, inventory systems, and produce a prioritized AI opportunity roadmap. The foundation everything else builds from.
Levels 4 & 5	<b>Implementation &amp; Managed AI Services</b>	Targeted AI implementation against documented workflow opportunities. Tool selection, integration, data pipelines, training, and ongoing optimization.
Level 6	<b>Managed IT Services</b>	World-class infrastructure management. Strategy. Security. Support. Your internal team handles AI; we keep the foundation rock-solid.

**Every engagement starts with understanding where you are. Not where you want to be. Not where someone told you that you should be. Where you actually are, today.**

That's how we build trust. And that's how you build a real AI capability that lasts.

## Appendix A

# The Infrastructure Foundation

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Not every business that picks up this document is ready for AI. Some need to solve a more fundamental problem first: their infrastructure, data, and systems aren't sound.

If your network goes down twice a month, AI isn't your priority. If your backups haven't been tested in a year, AI isn't your priority. **The infrastructure has to come first.** Every level of the AI Readiness Spectrum assumes the underlying technology environment is stable, secure, and well-managed. Without that, nothing above Level 0 is sustainable.

Area	What Sound Looks Like
Network and Connectivity	Reliable uptime. Proper segmentation. Redundancy where it matters.
Endpoint Management	Every device inventoried, patched, monitored, and secured.
Security Posture	Firewall, threat detection, email security, MFA, tested incident response.
Backup and Disaster Recovery	Automated backups with tested recovery. Defined RPO and RTO.
Identity and Access	Centralized identity. Role-based access. Offboarding that revokes access.
Cloud and Applications	Properly configured cloud services. License and lifecycle management.
Compliance	Alignment with regulatory frameworks. Documentation that proves it.

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**This is VXIT's core business. It's what we've done since day one, and it's what we do better than anyone in our market.**

If you read through this framework and realized your business needs to shore up the fundamentals before thinking about AI, that's not a failure. That's clarity. Clarity about where you actually are is worth more than a premature AI investment built on an unstable foundation.

Whether you need managed IT services, AI readiness work, or both, the conversation starts in the same place: an honest look at where you are today.

# Ready to figure out where you stand?



Whether you're at Level 0 or Level 5, the next step is the same:  
an honest conversation about where you are today.

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Let's figure this out together.



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