



# DX Tech Solutions

## Presents

### An AI-Enabled Business Scaling Webinar Series

For owners of professional service firms including:  
Insurance agencies, accounting, bookkeeping, and  
financial services with \$200K-\$5M annual  
revenue.





## Who Are We!

DX Tech Solutions is a collaboration of business-technology consultants and educators convening in a strategic partnership structured to deliver technology education, guidance and management to support professional service company owners and executives motivated to learn how to successfully adopt, implement and use digital transformation technologies successfully to operate, grow, sustain and add value to their businesses.

**ICP Focus: Professional Services**



A smiling woman with dark curly hair, wearing a blue blazer over a white top, stands in front of a blurred office background. The image is overlaid with a semi-transparent dark brown rectangle containing white and orange text.

# Introducing Our: **AI-Enabled Business Scaling Webinar Series**

## Technology Adoption Starts with Education

We offer a series of webinars designed to inform audiences about **AI** technology trends, use cases, management methodologies and processes. The goal of these series of webinars is to empower small business owners and entrepreneurs to learn how to successfully adopt and implement AI to grow your business. Attendees are also invited to enroll in our DX Virtual Campus community where you will gain access to a host of discounted training resources and consulting services.



## **AI-Enabled Business Scaling**


### **INDUSTRY EXPERTISE + TECHNOLOGY LEADERSHIP**

Unlike generic AI consultants DX Tech Solutions has expertise across the tech stack and understands our client's unique industry challenges including operational and compliance requirements. Our recommendations are backed by Gartner's research and insights along with professional hands-on business technology implementation expertise of our team.



**We are focused on each client's unique business objectives.**



A man in a dark suit and white shirt stands in profile, facing right, holding a small white card. He is addressing a group of people seated in a room with large bookshelves filled with books. The lighting is warm and focused on the speaker. The audience consists of several people, mostly women, dressed in business attire, listening attentively.

# Welcome to: AI-Enabled Business Scaling: "The Smart Path from Solopreneur to Business Owner"

Our webinar series is designed to help professional service practitioners transform from a job you own into a business that works without you. Our proven methodology combines **AI** automation techniques with hands-on implementation strategies to help entities like insurance agencies, accounting and bookkeeping firms scale efficiently, profitably, and sustainably.

**Encouraging Leaders to Learn **Before** they Invest**



# **The AI-Enabled Business Scaling Webinar Mission**

## **Addressees Key Pain Points:**

- Business Development/Marketing
- Insurance: Policy management, renewals, claims processing, carrier compliance
- Accounting: Tax workflows, client onboarding, financial reporting, seasonal capacity
- Workforce skillsets needed to ensure real results match recommendations
- Revenue Growth vs. Profit Growth





# AI-Enabled Business Scaling Webinar Series

## "The Smart Path from Solopreneur to Business Owner"

Dr. Christopher Harrison, Ed.D, the co-founder of Summit Learning Institute® LLC and Maurice L. Butler, MBA, the Founder and CEO of DX Tech Solutions will host and moderate each webinar session.



Dr. Chris Harrison, Ed.D



Maurice L. Butler, MBA, MDiv



**Series Objective:** Align **AI** technology adoption and implementation strategies with practical use case models, business goals and objectives of attendees.



# AI-Enabled Business Scaling Webinar

## "The Smart Path from Solopreneur to Business Owner"

- Total Sessions: 8 webinars
- Duration: 2-weekly sessions (30 days). 60 minutes per session (45 min presentation + 15 min Q&A). Format: Live streamed presentation with interactive polls, chat, Q&A, and downloadable resources.
- Target Audience: professional service owners including Insurance, accounting and bookkeeping firm principals generating \$200K-\$2M annually. Webinar Goal: Guide attendees from a solopreneur mindset to scalable business ownership with AI-enhanced operations.
- Registration Benefits:
  - Complete access to each session recordings
  - Downloadable assessment tools and checklists
  - Industry-specific implementation templates
  - 30-minute complimentary consultation for serious prospects.
  - Exclusive invitation to attend bonus **AI-Enabled Business Scaling Training Program**





# AI-Enabled Business Scaling Webinar Sessions:

## "The Smart Path from Solopreneur to Business Owner"

- Session 1: "Breaking Through the Growth Ceiling"
  - The Solo Professional's Scaling Dilemma
- Session 2: "The Technology Foundation"
  - AI Tools and Systems That Multiply Your Capacity
- Session 3: "Building Your AI-Enhanced Team"
  - Personnel, Skills, and Organizational Structure for Growth
- Session 4: "The Investment Framework"
  - ROI, Budgeting, and Financial Planning for AI Transformation
- Session 5: "Implementation Roadmap"
  - From Planning to Execution - Your 12-Month Transformation Timeline
- Session 6 & 7: "Insurance Agency/Accounting Firm Deep Dive"
  - Industry-Specific AI Applications and Case Studies
  - Transforming Tax Preparation and Advisory Services
- Session 8: "Measuring Success and Continuous Improvement"
  - KPIs, Analytics, and Long-Term Growth Strategies





# AI-Enabled Business Scaling: “The Smart Path from Solopreneur to Business Owner”

This comprehensive webinar series positions our AI-Enabled Business Scaling consulting service as the definitive educational and implementation resource for professional service firms ready to transform their operations and achieve sustainable growth through AI technology integration.

**Let Us Help Take Your Business to the Next Level...**





# AI-Enabled Business Scaling Bonus Training Program

The **AI-Enabled Business Scaling Bonus** training program is a comprehensive, deep dive, project-based master class designed to immerse leaders and workforce professionals into everything AI. This master-class program is led by Maurice L. Butler, MBA, MDiv and Dr. Chris Harrison, ED. co-founder of Summit Learning Institute®, LLC, along with other expert business-technology practitioners. The primary focus of this program is to guide professionals at all levels through pilot-projects using AI technology tools and resources to develop and implement a strategic growth plan for the respective organization.

This program is only available to participants of the AI-Enabled Business Scaling webinar series. As part of our business-technology webinar and event series you are invited to register for this training at a 20% discounted fee.





# Thank you for Registering for our AI-Enabled Business Scaling Webinar:

“The Smart Path from Solopreneur to Business Owner”

REGISTER TODAY





WEBINAR  
SERIES



**AI-Enabled Business Scaling:** “The Smart Path from Solopreneur to Business Owner”



\$ 495.00



WEBINAR



**BONUS TRAINING**

**AI-Enabled Business Scaling:** “The Smart Path from Solopreneur to Business Owner”



\$ 2,795.00