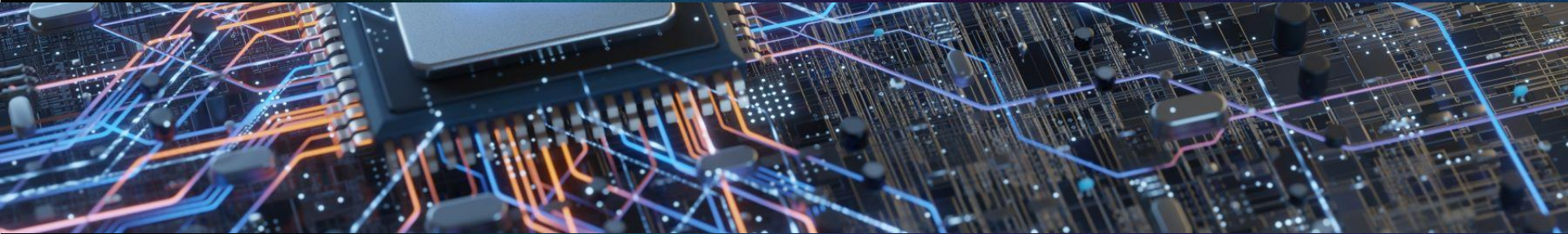


AI in Construction Finance

What's Working & What's Next



March 21, 2025
Live Webinar

Adam Eagle
CEO & Founder, Beam

Samantha Hallburn
Owner, Simplified Accounting Management

WHAT WE'LL COVER TODAY



NAVIGATING AI
HYPE



TOOLS FOR SALES
& ESTIMATING



TOOLS FOR
FINANCE



OTHER TOOLS &
USE CASES

SAMANTHA HALLBURN

Samantha Hallburn, founder of Simplified Accounting Management and PBS Accounting and Tax Solutions, brings over 20 years of diverse financial expertise and entrepreneurial leadership. She is passionate about helping business owners understand the stories their numbers are telling them, creating streamlined operations and financial clarity through in-person and virtual training and consulting.



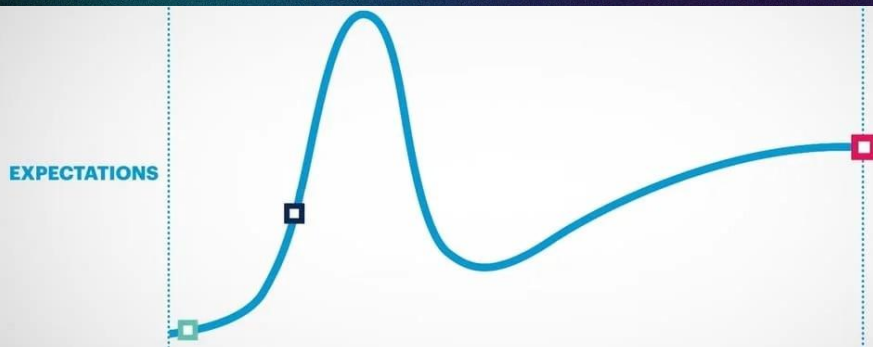


BEAM

ADAM EAGLE

- Studied computer science and machine learning at MIT
- Built AI software for healthcare companies
- Built financial & payments software at Stripe
- Founder and CEO of Beam

NAVIGATING AI HYPE



25%

of Small Businesses are
currently using AI in some way

| Message ChatGPT

55%

of small businesses report that
AI tools are prohibitively
expensive

&

their business' data isn't high
enough quality to use
effectively



“

How do I assess what's real and
what's just hype?

“

How much should I be paying for
AI tools?

“

How do I work with tools that are only 80% accurate?

AI TOOLS FOR SALES & ESTIMATING



AI Chatbots

Business owners report AI chatbots helped them achieve their business goals.

4%

NOT SATISFIED

74%

SATISFIED

22%

NEUTRAL

AI Site-Chat

Test, train and edit settings for the

AI Site-Chat is active on your site

Test Chat **Train Chat** Q

Train the AI Site-Chat

Add knowledge and restriction

- ☐ Name
- ☐ Income
- ☐ Physical store
- ☐ Eco friendly

Applinks Bot

TODAY 10:01 AM

Applinks Bot

Hey Whitewale! Are you ready to start driving good conversations on your site? What's stopping you from getting started?

I have a few questions about Applinks - can we jump on a call?

✓ 10:06 AM

AI Content Generation for Blogs, Social Media, and more

- Can use inexpensive tools like ChatGPT, Claude, or Gemini
- Available in many marketing platforms like Hubspot and Canva
- Can also generate images
- Many can assess SEO and optimize for marketing

AI writer

Generate comprehensive people-first content in minutes

AI images

Auto-generate irresistible, high CTR images for your blog



New AI takeoff software is speeding up the process of going from plans/drawings to material quantities & work estimates.

Let's watch a [short demo](#)

Bid AI, Togonal AI, and several other startups

Many of these products are new, untested, and can be expensive.

Make sure you aren't locking yourself in to long contracts or paying a similar price for a takeoff. AI-powered tools should be cost effective compared to using a human!



AI TOOLS FOR FINANCIAL MANAGEMENT



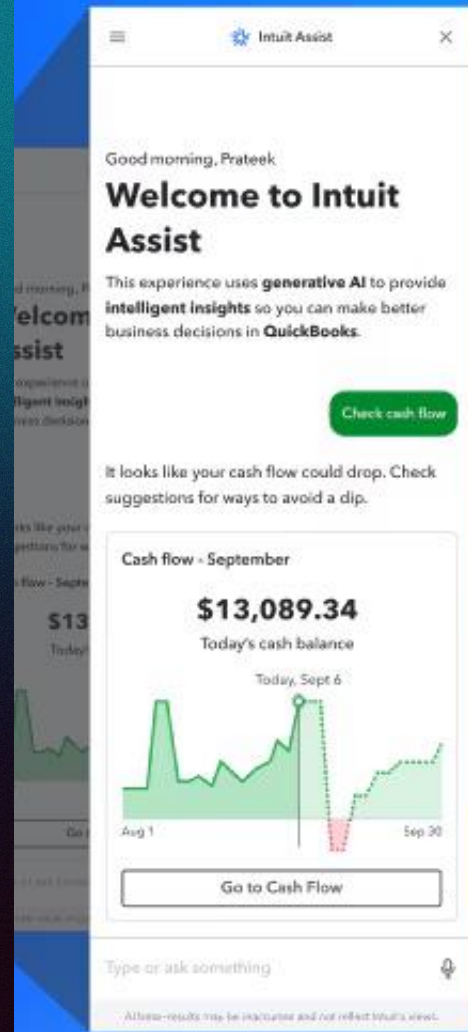
Intuit Assist is an AI assistant for QuickBooks. It can automate requests like, “generate a report” or “duplicate this estimate”.

But you need good data in the first place to get the full value.

Intuit Assist

Don't put the cart before the horse and pay \$1,000s for AI reporting/management software before you have good data quality.

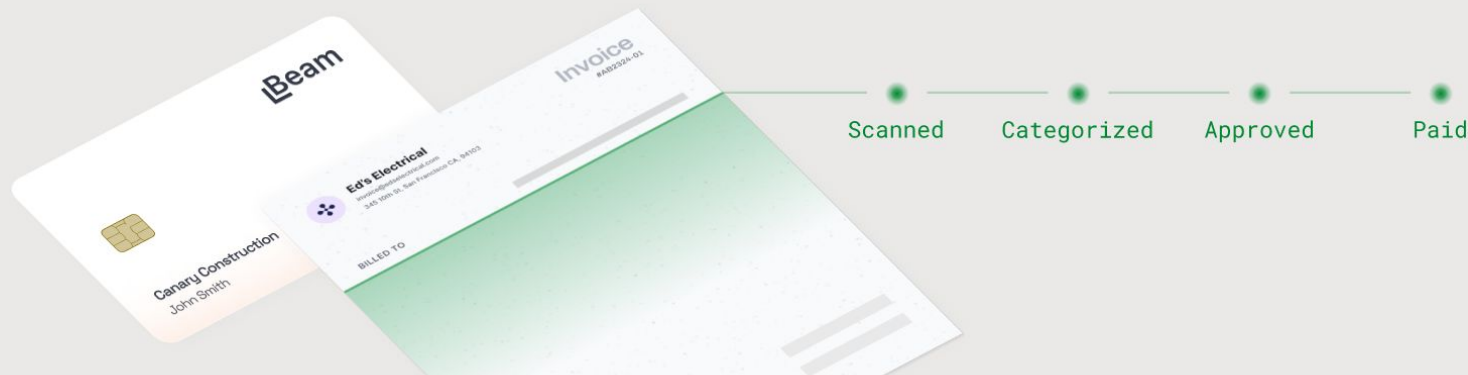
Focus on finding people or software to improve your data quality, like cleaning up your books.



50%

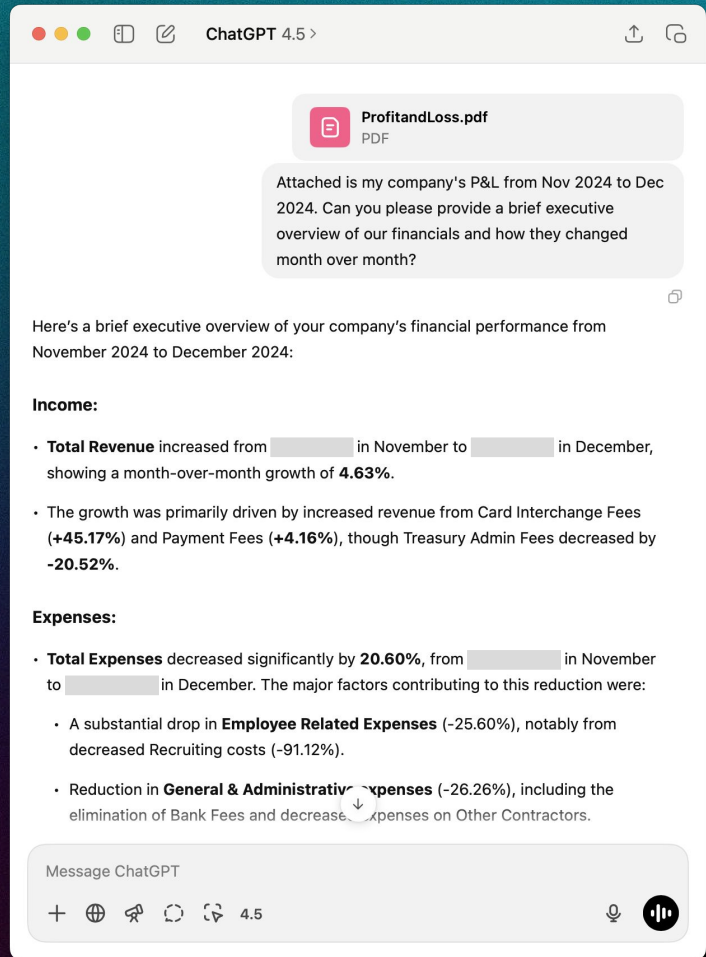
Or more of invoices, bills, and expenses can be scanned by OCR and AI technology to streamline data entry and reconciliation.

QuickBooks Online and Beam offer this functionality!



ChatGPT and similar products can accept PDFs of your QuickBooks reports and provide executive summaries or find interesting trends.

Even CSV exports of lists of transactions with descriptions can be analyzed!

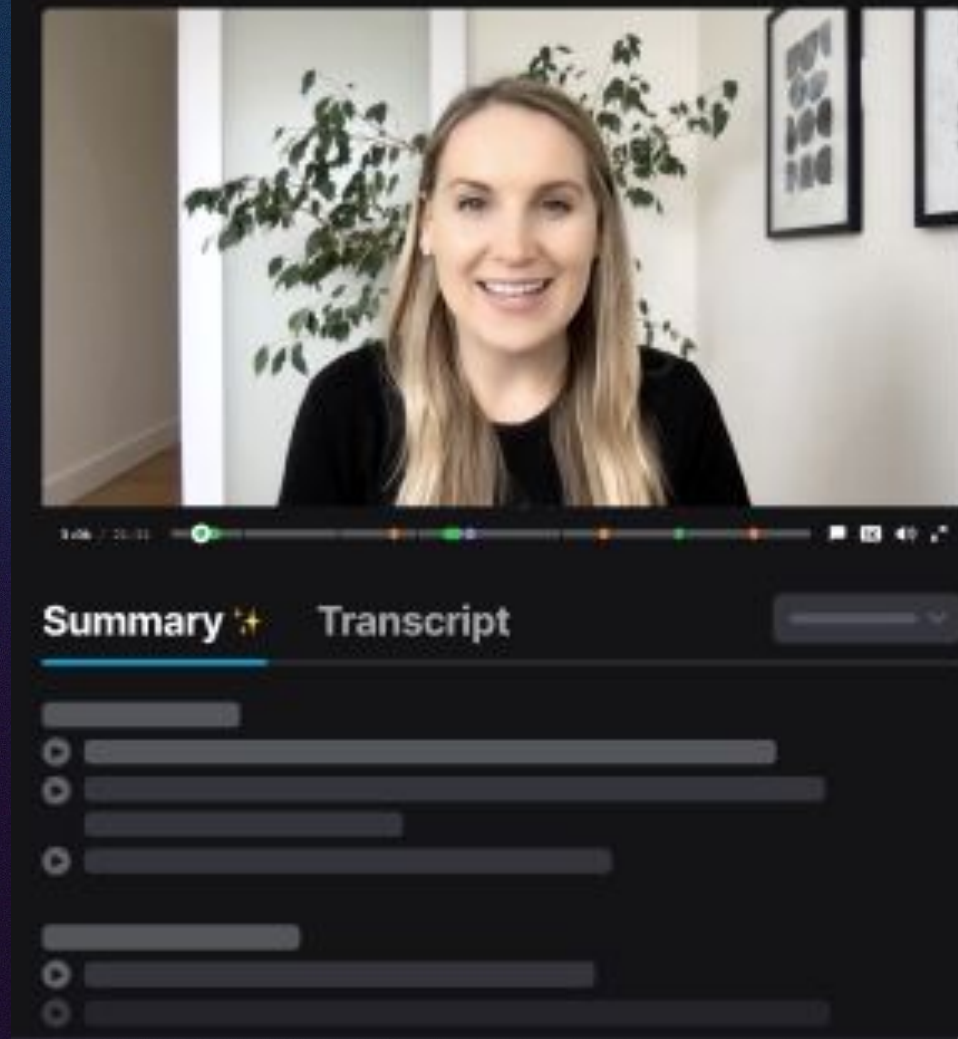


OTHER TOOLS & USE CASES



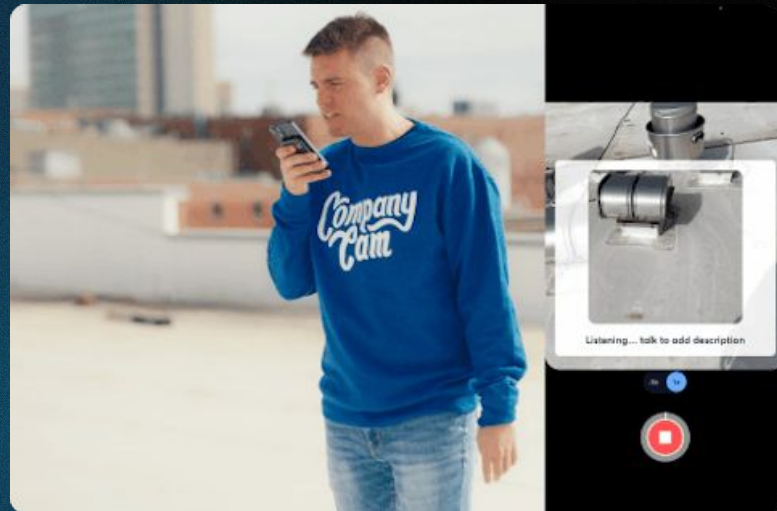
AI Transcription for Meetings

- Record & transcribe client & team meetings
- Automatically generates summaries, action items, & more
- Dozens of low cost options available



AI-generated walkthroughs, daily logs, and more

Software like [CompanyCam](#) and [Ressio](#) help transcribe audio, collect frames from videos, summarize notes, and collate photos for reports.



Water damage in Southeast corner of the roof

- Take the water damage in the Southeast corner



Site Inspection

- Cover seams when tarping down
- Address water damage
- Consider vents on the roof
- Avoid covering the exit hatch

