MSI METRO SALES INC

CASE STUDY: **AI WORKFLOW AUTOMATION**

First AI Meeting to Nine Working Projects in About Two Months

A title company's owner could already see where AI would take load off the team. **What was missing was a safe way to do it.**

The Challenge

Title work runs on handoffs. An order moves from entry to search and exam to processing and closing, and at each step someone rekeys data from a PDF or from one system into another.

A title company also handles wire instructions and buyers' Social Security numbers every day. One careless paste into the wrong tool turns a time savings into a disclosure problem. The goal was to move fast with someone watching the guardrails.

In IBM's research, **65%** of shadow AI incidents compromised customers' personal data, compared with 53% across all breaches.[1]

The Solution

MSI recommended a business-tier AI platform the company owned, with the owner leading the build and MSI owning the governance. A monthly working cadence replaced a one-time project: each meeting ends with homework, and the next starts from what was built.

MSI reviewed the Claude Team settings, mapped the first automation candidates, and set up single sign-on and the Microsoft 365 connector. When the connector failed, MSI confirmed the tenant was right, traced the fault to the vendor's side, and escalated it.

Data rules came before rollout: no wire instructions in AI tools, PII redacted before processing, and six months of human review on every automation after go-live.

Engagement Snapshot

CLIENT	Title & Closing Company
INDUSTRY	Title & Real Estate Closing
RELATIONSHIP	Monthly AI Strategy Program
DELIVERED IN	About 2 Months

By the Numbers

9 working Claude projects within about two months of the first AI meeting.

65% of shadow AI incidents compromised customers' personal data, vs. 53% across all breaches.[1]

The Results

About two months in, the company had nine working Claude projects, a closing-software data extractor, a closing-package parser, and a 15-page workflow map that is now the automation backlog.

> "If your team's best automation ideas still live in one person's head, MSI's monthly AI program gets them written down and running under rules you can defend."

[1] IBM, Cost of a Data Breach Report 2025, research conducted by Ponemon Institute; IBM press release, July 30, 2025.