

BrightLine Solutions | AI Briefing for Industry Leaders

Welcome to the July 2025 monthly issue of **BrightLine Solutions' AI Briefing for Industry Leaders**, exclusively tailored to our clients and designed based on their organizational priorities.

We aim to deliver a meaningful, smart, and concise rundown of the latest AI advancements and how they can drive efficiency, innovation, and growth within your organization. We skip hype and focus on **practical applications** that emerged within the last month, so you can quickly grasp what's relevant to your team and why.

If something piques your curiosity, [BrightLine Solutions](#) is here to explore it with you. If you want to suggest we explore a specific topic for our next issue, please email us your suggestion to: info@brightlinesolutions.ca

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AI-Powered Financial Automation

CFOs across industries are embracing AI to eliminate tedious manual work in finance. For example, generative AI tools now draft journal entries and reconcile accounts payable in minutes. One retail CFO cut a 20-hour monthly AP process down to **2 hours** using a custom AI workflow[1].

Within your organization, many routine tasks (invoice entry, coding, reconciliations) remain partly manual. AI “co-pilots” can handle these repetitive processes end-to-end, reducing errors and freeing your finance team for higher-value analysis. In fact, **79%** of CFOs plan to boost AI budgets in 2025, and **94%** say generative AI will benefit at least one finance activity within a year[3].

From faster closings to automated expense coding: it’s an ideal time to pilot no-code automation for tasks like daily bank reconciliations or credit card coding, which could save **hours per day** and virtually eliminate backlogs.

- **Data Analysis Co-Pilots for FP&A:** New AI tools act like on-demand analysts, instantly summarizing complex financial data and answering ad-hoc questions in plain English. Using ChatGPT or Google’s latest AI (Gemini) with your spreadsheets, you can ask “*What changed in expenses this quarter?*” and get a quick, accurate breakdown. **ChatGPT Team**, OpenAI’s business edition, even lets you connect secure internal data sources so the AI’s answers are grounded in your actual reports. This means faster variance analysis, real-time forecasting help, and decision support at your fingertips. If your finance team is analytically minded and eager not to be “left behind”, leveraging an AI co-pilot for budgeting or forecasting could accelerate insight generation and scenario planning. Early adopters report that “*AI hasn’t replaced anything, but it makes our existing processes and people better*”[8], for instance by speeding up analysis and highlighting assumptions in forecasts. In short, generative AI can crunch your numbers and surface key insights in seconds, acting as a junior financial analyst who works 24/7.
- **Anomaly Detection & Fraud Prevention:** AI is getting remarkably good at catching the “unknown unknowns” in financial data: the odd patterns or outliers that humans might miss. Machine learning models can monitor transactions, POS data, and accounting entries to flag suspicious activity in real time. **71%** of financial institutions are already using AI/ML to detect fraud, up from 66% the year prior[9], because these tools spot anomalies far faster than manual reviews. This directly aligns with your interest in using AI to flag unusual store voids, refunds or vendor billing irregularities. We envision an AI assistant watching over store and payment data and sending an alert **only when something truly looks off**, like a surge in refund overrides at one store, or an invoice that doesn’t match any contract. Early detection could save significant losses by enabling a quick investigation of fraud or errors[11]. In practice, AI-based anomaly detection would act as a continuous audit assistant, combing through thousands of transactions nightly and highlighting only the exceptions that need attention. This means your team spends less time poring over data and more time on strategic risk management.

HR, People & Culture

- **Talent Acquisition, Onboarding & Training Augmented by AI:** Hiring and onboarding are being transformed by generative AI in ways that feel very *human*. Imagine AI screening incoming résumés against job criteria, drafting polite rejection or interview invitation emails, and even scheduling interviews automatically. Such tools already exist, and **81%** of HR leaders have implemented or are actively exploring generative AI in recruiting workflows[12]. This means your recruitment team could deploy an AI assistant to handle initial candidate Q&A and scheduling, freeing up HR managers to focus on interviews and relationship-building[14]. Onboarding is another high-impact area: AI can generate personalized welcome packets and guide new hires through paperwork, benefits enrollment and training materials **24/7**, ensuring no question goes unanswered[15]. Instead of overwhelming new employees with dense manuals, an AI chatbot could walk a new store manager through setting up payroll step by step or instantly answer “How do I enroll in the RRSP plan?” at 10 PM. This not only saves HR time but also makes the new-hire experience smoother and more engaging. As one expert notes, it’s about delivering “*the right content at the right time*” so employees feel supported from day one[16]. If you are considering an organizational engagement hub, a generative AI could be its engine, by providing a friendly, knowledgeable assistant for thousands of frontline employees. The technology is here: organizations are already deploying HR chatbots that tap into company policy and FAQ data to give personalized answers and guidance[17]. The result is a more scalable HR team that can focus on strategic people initiatives while AI handles routine inquiries and tasks.
- **HR Data Insights & Employee Engagement:** HR has a goldmine of data from payroll to performance reviews. AI can uncover trends or issues that might otherwise stay hidden. Generative AI and new analytics tools can summarize attrition patterns, identify factors driving turnover, or even predict which departments might struggle with staffing next quarter by analyzing text feedback and HRIS data. In one of our client’s discovery sessions, we identified a need to streamline “*manual HRIS reporting and identify trends*”. AI can deliver on this by digesting unstructured inputs (e.g. open-ended survey comments, exit interview notes) and extracting common themes or sentiment. This means quicker answers to questions like “What workplace issues most affected employee morale this year?”, without a weeks-long analysis project. Additionally, *AI-driven sentiment analysis* of pulse surveys or Glassdoor reviews could give your leadership a real-time read on employee satisfaction across your organization’s branches or stores[19][20]. On the employee communications side, generative AI can help draft policy updates or company-wide memos in a consistent, warm tone, then translate them into French or Spanish instantly if needed. HR teams are also experimenting with AI avatars and video tools for training: for example, creating a lifelike virtual trainer who can run a new hire through safety training modules interactively. All these advancements boil down to **time saved and better reach**. In fact, McKinsey research suggests generative AI could free up *60-70% of HR staff’s time* currently spent on administrative work[21]. That reclaimed time can be invested in high-touch initiatives like leadership

development or culture-building. The bottom line: AI is poised to give HR a “strategic upgrade,” automating the drudgery and empowering HR (and people managers) with faster insights to support our people better[22].

Legal

- **“AI Paralegal” for Contracts and Compliance:** Legal teams worldwide are enlisting AI as a junior analyst to handle the heavy lifting of document review. Generative AI can rapidly summarize lengthy contracts, flag risky clauses, and compare terms against predefined policies or checklists. Allen & Overy, a global law firm, found that **25%** of its lawyers use an AI assistant *daily* and **80%** use it at least monthly[23], often for first-draft document work. At one of our client’s Legal department, a similar opportunity emerged: using AI for *first-pass risk flagging on contracts, insurance policy checks, and creating lease abstracts* for Operations. In practice, an AI tool (securely trained on your templates and playbooks) could review a 30-page lease in seconds and highlight unusual provisions or deviations from standard terms. It might say, “Clause 4.2: Indemnity language differs from our standard: this is a potential risk” saving lawyers and paralegals from having to comb line-by-line. It can also extract key dates and obligations, ensuring nothing slips through the cracks. Because these language models excel at recognizing patterns in text, they serve as a tireless pair of eyes. If you’d love your AI to act like a “*diligent paralegal*”, catching issues and improving efficiency, that’s exactly what these tools are becoming. Importantly, modern legal AI platforms (like Harvey, used by Allen & Overy) prioritize data privacy and allow lawyers to **validate every output** to avoid errors[26]. The idea isn’t to trust AI blindly, but to let it do the grunt work: initial contract review, drafting boilerplate, compiling due diligence findings, all under attorney supervision. The payoff can be huge: faster turnaround on reviews, fewer tedious hours, and reduced risk of oversight. Given that some of our client’s Legal departments are already cautiously piloting ChatGPT for drafting letters, expanding to a dedicated legal AI assistant (with enterprise-grade security) could dramatically increase team bandwidth.
- **Streamlined Research & Document Management:** Another pain point we heard is the time spent organizing legal documents and answering repetitive questions. AI can help here too. Imagine a secure chatbot that has ingested, or has real-time access to your organization’s internal legal knowledge such as policies, past case files, standard operating procedures, and can instantly answer queries like “*What’s the process to enforce a guarantor’s obligation under our lease?*” This is becoming reality: companies are deploying generative AI chatbots that **access the entire knowledge base of the legal function** to provide quick answers[28]. This kind of tool would let any authorized staff get immediate answers to common legal questions (with caveats, of course), instead of emailing Legal and waiting. It acts as an always-available legal reference librarian. Additionally, AI-powered email filing and deadline reminders can ensure nothing falls through the cracks. For example, an AI system could read incoming emails for cues like “attached signed contract” and automatically save the attachment to the correct

matter folder or nudge the team if a renewal deadline is 30 days away. These are relatively low-risk uses of AI that *remove administrative burden*. No more hunting through inboxes for that one document. Let AI find and file it for you. We also see potential in **AI translation and summarization** tools: if your Operations team sends an incident report in French, AI could produce an English summary for Legal in seconds (and vice-versa), which is especially useful for bilingual environments. The key for Legal is **secure deployment**, and both OpenAI and Google have enterprise offerings (ChatGPT Team, NotebookLM via Google's Gemini) that ensure your data stays private[30]. With proper guardrails, AI can significantly lighten Legal's load on research, document management, and routine drafting, allowing your legal counsel to focus on high-impact advisory work.

Procurement

- **Smarter Procurement with AI Document Analysis:** Sourcing and asset development often involve sifting through mountains of specs, proposals, and contracts. AI can accelerate this by digesting those documents and extracting exactly what you need to know. In a recent BrightLine Solutions pilot, we introduced “**TradeBridge AI**”, a custom GPT that ingested a project's equipment design specs and a vendor's quote, then instantly flagged **discrepancies** (e.g. missing features, spec non-compliance). The result was a quick red-flag report highlighting where the vendor's offer didn't meet requirements, something that would have taken hours of manual comparison.

This kind of AI document review can be extended to RFP responses, contracts, or regulatory filings, delivering a “best-of-the-best” analysis in seconds and ensuring nothing is overlooked. Procurement leaders globally are bullish on these capabilities: **64%** of procurement execs anticipate generative AI will fundamentally change how their teams operate within 5 years[32]. Leading procurement platforms like Coupa and SAP Ariba are already embedding AI to auto-classify spend or draft RFPs[33].

By embracing AI's document crunching power, your organization can streamline vendor selection (through faster RFP scoring), catch costly errors in contracts before they're signed, and negotiate with insights drawn from data (e.g. “This vendor's pricing is 5% above our historical average for similar items – ask for a reduction”). In short, AI becomes your vigilant procurement analyst, ensuring you get the best value and no surprises.

- **Spend Analytics & Inventory Forecasting:** Organizations with hundreds of stores and a complex supply chain generate a trove of data on purchasing patterns, lead times, and inventory levels. AI can turn this data into actionable intelligence for cost savings. Advanced algorithms can analyze *years of spend data* to identify patterns, such as which product categories have the most volatile prices or which suppliers consistently deliver late.

For example, generative AI could quickly surface that *“Store fixtures spend has risen 8% year-over-year due to inefficient bulk ordering: consider a consolidated contract”* or answer a question like *“What are our top 10 maintenance cost drivers in the last 5 years?”* by scanning maintenance logs and invoices.

These insights help with **strategic sourcing**: targeting areas for bulk discounts or alternative suppliers. Another application is **predictive inventory management**: AI models (the “predictive” kind, often powered by machine learning) can forecast demand for equipment or supplies better by finding subtle trends. If we feed in historical usage, store expansion plans, and seasonality factors, the AI might predict *“Order 15% more HVAC filters next quarter due to an expected hot summer”* or flag that a particular region will stock out of point-of-sale paper rolls in 3 weeks. This avoids overstock and stockouts.

Generative AI can even help with **vendor discovery**. Given a description of a need (e.g. a new shelving system to fit into a specific area of a standard store design), it could comb through databases and public info to suggest potential suppliers and even draft an outreach email.

The big picture: AI helps procurement move from reactive to proactive. Instead of just processing POs, the function becomes a strategic advisor using data-driven foresight. Notably, **49%** of procurement teams piloted Gen AI in 2024 (up from 23% in 2023) and saw up to *10-25% improvements* in productivity and user experience from early efforts[34][33]. By tapping into these tools, Procurement teams can similarly expect smoother operations, better supplier terms, and fewer last-minute scrambles.

IT

- **AI Service Desk and Knowledge Management:** IT support teams could get a significant upgrade by deploying AI assistants as tier-1 support agents. Modern *AI help desk chatbots* can resolve common tickets by drawing from internal knowledge bases, policies, and how-to guides, through a conversational interface that’s available 24/7. This isn’t the clunky FAQ bot of yesterday; with generative AI, it feels like a tech-savvy colleague on the other end of the chat.

For instance, an employee could message the AI, *“My email won’t sync on my phone, what do I do?”*, and the bot can respond with step-by-step instructions pulled from IT documentation (and even offer to walk them through the phone settings).

ServiceNow reports that generative AI can potentially **deflect 60% of routine IT support tickets** by handling them automatically. This is the modern version of a –almost infinite– knowledge base or library for tech support. Implementing this means your IT team spends far less time on password

resets, device setup queries, or VPN troubles. AI can resolve those instantly or gather key details for a human tech when escalation is needed.

Beyond chatbots, AI can also assist IT staff directly: tools like GitHub Copilot or OpenAI Codex can help write and debug scripts, and ChatGPT can quickly synthesize troubleshooting steps from forums.

By introducing an AI service desk assistant, IT can boost user satisfaction (faster answers, no waiting for the next business day) and allow the support team to focus on more complex, rewarding work. And thanks to **ChatGPT Team** and similar platforms, this can be done securely – with SSO, admin controls, and data kept private[35][36]. It's like giving every employee an instant support concierge and giving every support tech an AI sidekick to lighten the load.

- **Predictive IT Operations & Automation:** AI's benefits for IT go beyond support. "**AI Ops**" is a growing trend where AI is applied to IT operations – monitoring systems, anticipating issues, and optimizing resources automatically. This could mean using machine learning to analyze system logs and alert the team to anomalies (a spike in database errors, unusual network traffic) *before* they become major incidents.

For organizations with hundreds of stores and numerous backend systems, an AI ops tool could identify patterns that indicate an impending outage or capacity bottleneck, allowing preemptive fixes. Think of it as predictive maintenance, but for servers and networks.

AI can also group and analyze ticket data to spot trends (e.g. "20 stores all reported POS scanner issues after the last software update"). That insight can trigger a swift resolution (maybe rollback that update) and even prevent future occurrences by improving testing. AI can also help with **IT asset management**: e.g., forecasting when to replace equipment by learning from historical failure rates and usage patterns.

On the automation side, generative AI can write simple integration code or scripts to connect systems together without heavy development. For example, if IT wants to automate how store incident reports flow into a ticketing system, an AI tool might help generate the script or API calls needed. Additionally, AI-driven *security* tools can be a force multiplier: they can scan for vulnerabilities or suspicious activities in real-time and either fix them or alert your team. All told, IT stands to gain both **efficiency and insight**. It's no surprise that in surveys, IT departments lead in AI adoption among functions (McKinsey found 36% of IT teams were using AI, higher than any other business unit)[37]. By harnessing these AI capabilities, IT teams can ensure smoother operations, faster incident resolution, and a more proactive IT posture that keeps ahead of business needs. The end goal: an IT organization that is not just a service provider but a predictive, automated backbone to support the growth of your organization.

Marketing

- **Generative Content Creation and Campaigns:** Marketing is arguably *ground zero* for generative AI adoption, and for good reason: AI is a creative accelerator. Tools like OpenAI's GPT-4, Google's **Duet AI**, or Canva's Magic Write are now drafting copy, designing ad variants, and even generating social media visuals in seconds. A recent industry survey found **88%** of marketers already rely on AI in their day-to-day work, with 93% using it to generate content faster[39]. This translates to immediate wins for drafting weekly flyers, social posts, promotional emails and even radio scripts that can be sped up dramatically with AI.

Instead of starting from a blank page, creative teams input a few key points (offer details, target audience, desired tone) and let the AI produce a solid first draft of the copy or a set of creative taglines.

For example, *"GPT, give me five Instagram captions highlighting our back-to-school sale (tone: upbeat, community-focused)"* – and you get tailored options instantly.

These drafts still require the expert human touch to perfect them, but even if they're 80% there, think of the hours saved.

Marketers at companies large and small report that AI is boosting their creative output and efficiency by generating dozens of ad copy variations to A/B test, storyboarding a video, or localizing content to French without paying a translator.

Importantly, AI can also ensure **brand consistency** by being trained on your organization's past campaigns and style guides, so the output respects your voice (no off-brand surprises).

A single marketer augmented with AI can do the work of 2–3 in terms of content volume, while freeing up time to focus on *strategy and creativity*. And since generative AI is evolving (OpenAI, Google, Adobe and others release new features almost monthly), we'll keep seeing new creative superpowers – from generating short videos, to producing custom jingle music, to interactive AI-driven ads.

The key is to embrace these tools early to maintain a competitive edge in engaging customers.

- **Data-Driven Insights & Personalization:** Beyond content, AI empowers Marketing with deeper insights and more personalized customer outreach. If a team spends **32 hours/month** manually pulling data for marketing performance reports, AI can cut that to near-zero by integrating a generative AI assistant with dashboards and sales data. The team could simply ask, *"Summarize last week's campaign performance – what worked and what didn't?"* and get a narrative analysis instantly.

Google's **NotebookLM** (now available via the Gemini AI upgrade) is an example of a tool that, when fed with your data, can produce human-readable reports and even answer follow-up questions[42][43]. Instead of spending days collating spreadsheets, Marketing can focus on interpreting insights and acting on them.

AI is also revolutionizing **pricing strategy and promotion optimization**. A current client is leveraging 5+ years of sales data to model optimal pricing changes at their store. AI can crunch historical data to suggest, for example, which SKUs could tolerate a slight price increase without hurting demand, or conversely where a discount could drive significant volume uplift.

Essentially, it helps simulate “*what if*” scenarios in seconds – a task that used to require data science support. Then there's personalization: AI can analyze customer segments and behaviors to tailor marketing efforts at scale. For instance, an AI might find that customers in urban stores respond better to social media ads, while rural customers engage more with email – and recommend shifting budget accordingly, or even dynamically adjust creative messaging by segment.

Generative AI can also assist in creating localized store-by-store marketing playbooks: picture a system that reads a store's sales figures, compares to regional trends, and suggests “*Store 112 is under-indexing in beverages; consider a targeted promotion on iced drinks this month.*”

This level of targeted insight can dramatically improve same-store sales by addressing specific needs.

The bottom line is that AI turns Marketing into a *precision-guided* operation – where gut feel is augmented with data, and broad campaigns are augmented with personalization.

Given that **90%** of marketers using AI say it helps them make decisions faster[46], marketing teams stand to benefit from quicker turnarounds on analytics and more nimble campaign adjustments mid-flight.

In a fast-moving retail landscape, those capabilities are game changers for staying ahead of customer needs.

Operations

- **Automating Reports & Communications:** Operations involve a lot of routine documentation, incident reports, audit summaries, shift memos, you name it. Generative AI can take on much of this “paperwork” burden by drafting clear, standardized documents in a flash. Loss Prevention teams spend significant time writing up incident reports and safety memos; AI-generated communications can **save time on routine writing**. With AI, a manager could provide a few key details (incident type, date, people involved, outcome) and get a well-structured draft report or notice letter ready for review. The

tone and format remain consistent across the board, and it ensures nothing is forgotten in the report (since the AI can follow a template).

Store ops managers could use AI to draft weekly “store performance recap” emails. The AI can pull in data (sales, foot traffic, any incidents) and produce a concise update that managers then tweak and send. This not only saves managers time but also improves communication clarity.

Generative AI can also help translate communications or create bilingual copies instantly, which is handy for bilingual regions.

Additionally, consider policy or training materials: an AI tool can quickly generate a first draft of a new **SOP** (Standard Operating Procedure) if you tell it the gist, or create a friendly “cheat sheet” version of a detailed safety policy for quick reference.

In essence, AI becomes a writing assistant ensuring documentation is thorough, timely, and consistent, while your team focuses on actual operational oversight.

A cautious approach (maybe start with non-sensitive memos) can demonstrate how much time is freed up. The future of Ops admin work could very well be “*write once, use AI everywhere*”.

- **AI-Powered Loss Prevention & Safety Monitoring:** On the Loss Prevention front, AI offers a new set of eyes and ears to catch irregularities. Traditional LP relies on audits and human vigilance, but AI can watch *all stores at once*, flagging anything that looks out of the ordinary. For example, AI systems can analyze **transaction patterns** to detect signs of fraud or theft: unusual spikes in refunds or voided sales, patterns of after-hours transactions, or cash register discrepancies that hint at “sweethearting”.

In fact, AI-driven loss prevention tools are already in use at major retailers. They scan POS data and *operational anomalies* to alert LP teams of potential theft or error[49]. AI can monitor things like voids, discounts, and safety incidents across hundreds of stores. If one store’s evening shift is logging 5× more “item not found” overrides than others, AI would raise a hand: this could indicate a training issue or a deliberate loophole being exploited.

Similarly, if a particular region shows an unusual pattern of slip-and-fall accident reports, the system will flag it so Ops can investigate potential facility issues or fraud.

Another aspect is **camera analytics**: modern AI can also watch CCTV footage for shoplifting or safety hazards (like blocked fire exits). Some retailers use AI cameras that can tell if someone is sneaking items into a bag or if a shelf is empty, and alert staff in real time.

Back to data: AI anomaly detection isn't limited to fraud. It can also catch *process failures*, like if a store's daily safe count hasn't been logged by a certain time or if an employee ID is used in two cities on the same day (possible timecard fraud).

By overlapping Ops and Finance data, AI gives a fuller picture of operations health. A big advantage here is **proactivity**: instead of discovering losses weeks or months later, AI finds patterns as they emerge, so the team can intervene quickly.

Privacy and proper use of these tools is key: any AI for LP must use secure, internal data and respect employee privacy (focusing on transactional anomalies, not individual profiling without cause).

The synergy between Finance and LP on fraud detection is a prime example of cross-department value: an anomaly spotted in sales data can prevent a financial loss and a compliance issue in one go.

Overall, AI can significantly augment an organization's Loss Prevention by acting as a tireless analyst, crunching through operational data to protect the company's assets and people. It's like upgrading your security camera DVR to an AI that not only records, but *understands* and alerts – ensuring a safer, more compliant operation all around.

Online Communities

For membership organizations with active online communities, generative AI offers a growing toolbox to strengthen engagement, improve responsiveness, and reduce the workload on already stretched community managers. But it's also a space where skepticism is healthy and warranted.

Many community leaders are approaching AI cautiously and rightly so. At BrightLine Solutions, we believe the role of AI in community work isn't to replace human connection but to enable deeper, more meaningful interactions by removing digital friction.

Here are a few low-risk, high-value applications we've seen succeed:

- **Smart Moderation Assistance:** AI tools can flag potentially harmful or off-topic posts (without auto-removing them), helping moderators focus their time where human judgment is essential.
- **Automated Event Recaps and Summaries:** For webinars or discussion threads, AI can generate accessible recaps, freeing up time and ensuring members who missed the live event still benefit.

- **Personalized Onboarding Paths:** New members joining a community can receive tailored welcome content based on their interests, learning goals, or affiliation guided by AI but curated by humans.
- **Knowledge Surfacing, Not Replacement:** AI can help surface older, relevant discussions or resources to answer recurring member questions, increasing value without creating new content.

We know that online communities thrive on trust, nuance, and belonging. When thoughtfully deployed, AI can act as a background helper supporting the humans who make communities great.

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