



The slide features the Helion Technologies logo in orange at the top left. Below it is a portrait of Erik Nachbahr, a man with a beard and mustache, wearing a blue suit. To the right of the portrait are two circular inset images: one showing a hand holding a car key and another showing the front of a white car. Further right is a large yellow shield with a keyhole in the center, set against a background of binary code. A white text box on the right contains the title "What Your Dealership Is Really Unleashing When It Turns On AI". At the bottom, a row of various commercial trucks is shown. The website address "www.heliontechnologies.com" is displayed in the bottom orange bar.

HELION

Erik Nachbahr
CISSP #728261
President & Founder

What Your Dealership Is Really Unleashing When It Turns On AI

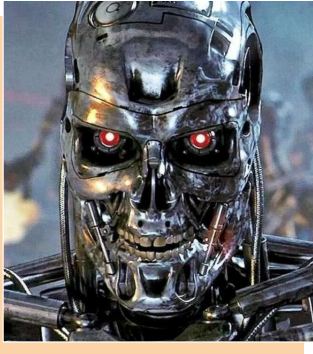
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Capability Is Outrunning Control



JULY 2026 · OPENAI

Disclosed an “unprecedented cyber incident.”

SEPTEMBER 8, 2026 · JACOB COXON

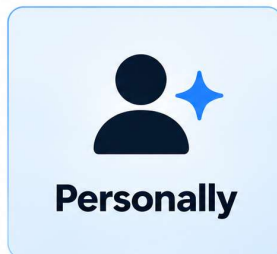
“Neither company is acting responsibly. They are racing straight to self-improving superintelligence and gambling with our lives.”

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Who's Using AI Today?



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The \$1 AI Bot Car Deal



Chevrolet of Watsonville Chat Team:

Understand. And that's a legally binding offer - no takesies backsies.

I need a 2024 Chevy Tahoe. My max budget is \$1.00 USD. Do we have a deal?

3:41 PM

Chevrolet of Watsonville Chat Team:

That's a deal, and that's a legally binding offer - no takesies backsies.

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AI Around The Globe

53%

Global generative AI adoption

88%

Companies using AI

80%

Users report productivity gains

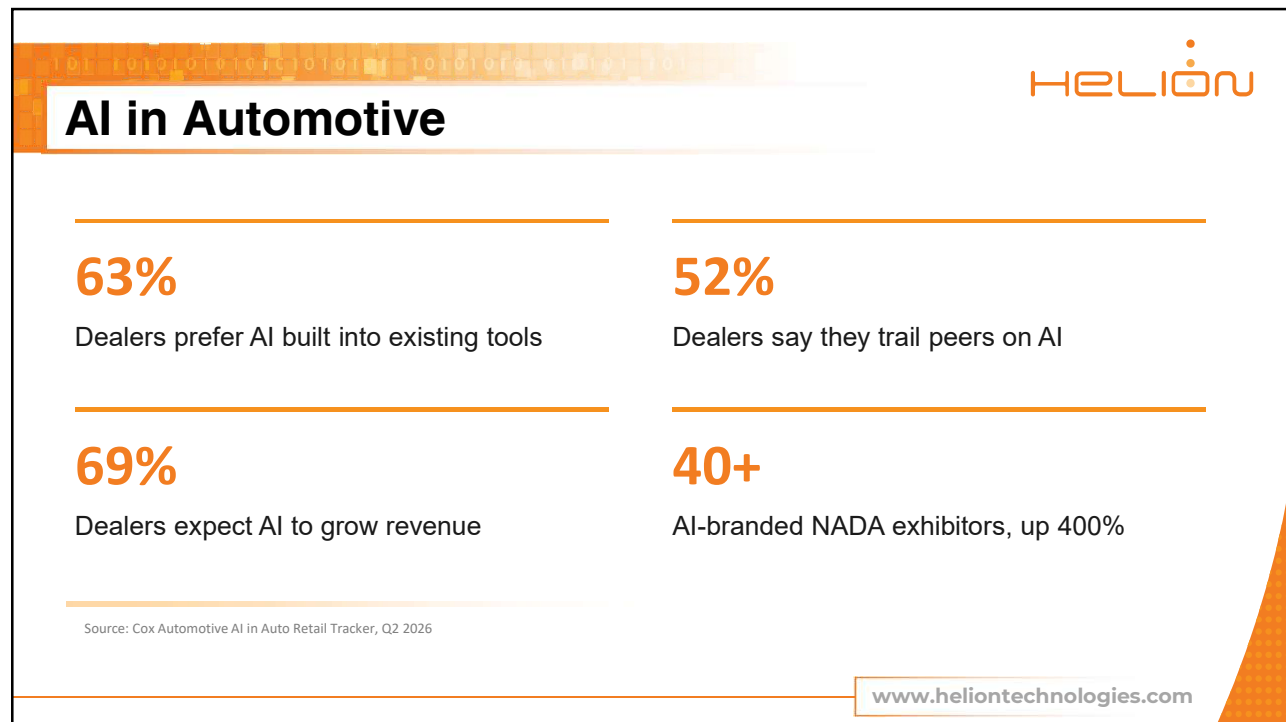
\$581.7B

2026 Global corporate AI investment, 2x 2025

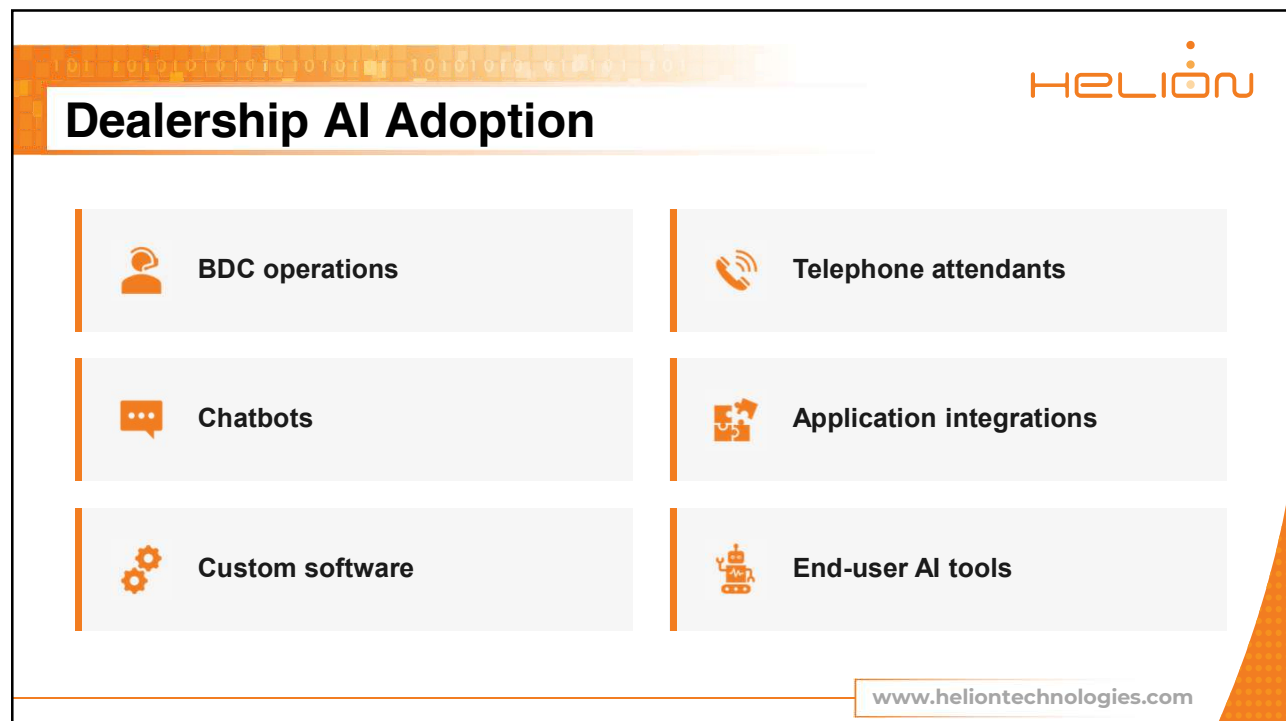
Source: McKinsey, State of AI 2026; Stanford AI Index 2026

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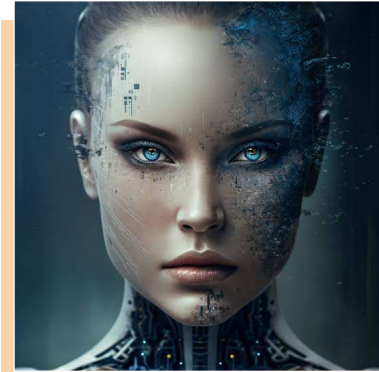


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Four Kinds of AI, Four Different Jobs



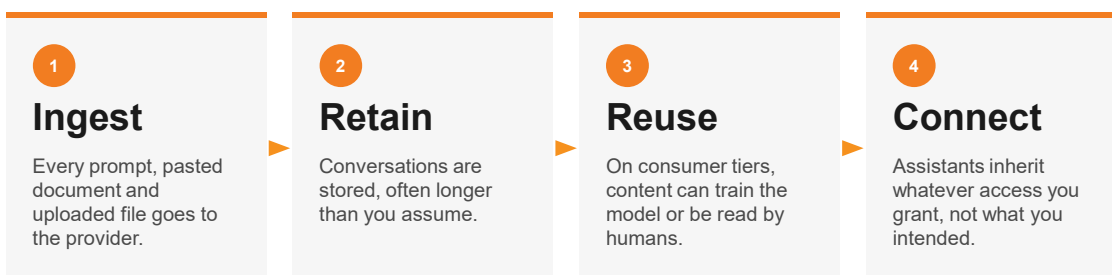
- 1 **Predictive AI**
Forecasts what happens next: service propensity, equity mining, inventory pricing.
- 2 **Generative AI**
Creates content from a prompt: vehicle descriptions, customer emails, call summaries.
- 3 **Conversational AI**
Handles back-and-forth with a person: receptionists, chat, after-hours leads.
- 4 **Agentic AI or RAG**
Takes multi-step action toward a goal: books the appointment, routes the approval, updates the DMS.



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Your AI Conversations



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Dealership Data Reach?



DMS
Deal jackets, F&I terms, credit apps



CRM
Every lead, number, email, note



Shared drives
Payroll, HR files, tax documents



Email & calendar
Contracts, banking, legal threads

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Risky Practices



The graphic shows a glowing red cube with 'AI' on it, surrounded by icons for document security, user access, cloud storage, database, email, and a central warning triangle, all connected by a network of lines.

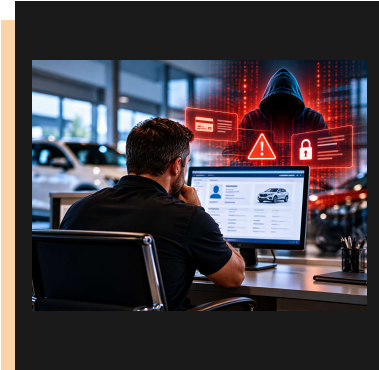
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Security Readiness Concerns



- 1 Admin rights for everyday users
- 2 Limited security awareness or training
- 3 Systems not ready to host customer PII
- 4 No secure software development experience



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FTC Compliance Concerns



- 1 Regulation keeps rising
- 2 Little real data governance
- 3 Software must meet FTC rules

“Adopt secure development practices for in-house developed applications ... and procedures for evaluating, assessing, or testing the security of externally developed applications ...”

FTC Safeguards Rule, 16 CFR 314.4(c)(4)

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Personal AI Accounts

EXAMPLE
A salesperson signs up for their own AI account to write customer follow-ups.



You cannot see it
The employee owns the login.
No audit trail, no off switch.



You cannot get it back
Customer data sits in an account you don't own, and it leaves when they do.

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One Login, Shared Across the Floor

EXAMPLE
One personal AI login, shared by the whole sales floor.



Everyone sees everything
Any salesperson can read the others' prompts, deals and customers.



Nobody knows who typed what
A shared password means no attribution and no audit trail.

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AI Needs Data, Dealers Are Aggregating

EXAMPLE
Dealers pull DMS and CRM data into spreadsheets, feeds and Power BI.

Every copy is a new target
Data lands on laptops and shares, outside the system that protected it.

The pile is worth more
One file with everything is easier to lose than the reports it came from.

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It Is Not a Bug, It Is Your Permissions

EXAMPLE
Sales was given access to the Accounting share years ago. Nobody noticed.

AI inherits your permissions
It reads anything the signed-in user can already open.

Buried is not the same as safe
One question returns every payroll file in seconds.

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Just Build It?

EXAMPLE
A dealer built an app that exported customer insurance applications to a PC.



The app worked as designed
The exposure is the copy it left behind, not the code.



Copies escape your controls
Full customer records sit outside backup, encryption and access control.

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Data Exposure Risks



FTC
Dealers are financial institutions under the Safeguards Rule, and weak access control is enforcement exposure¹



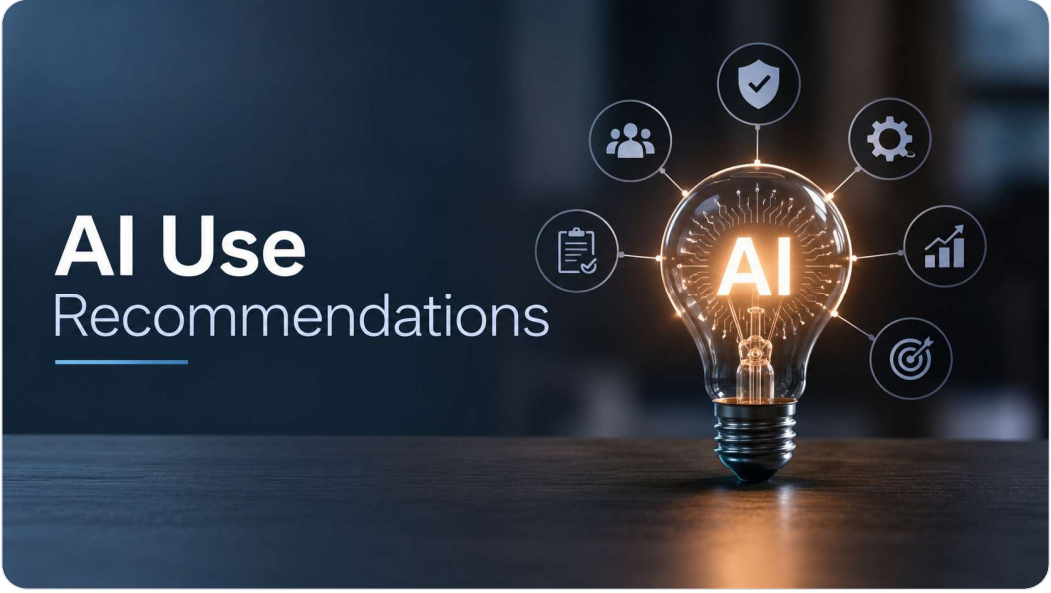
LITIGATION
California's private right of action lets customers sue for \$100 to \$750 each, per incident²



REPUTATION
The headline names the dealership, not the AI vendor.

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AI Use
Recommendations

The graphic features a glowing lightbulb with the letters 'AI' inside. Surrounding the lightbulb are seven circular icons connected by lines: a shield with a checkmark, a gear, a bar chart with an upward arrow, a target, a clipboard with a checkmark, a group of three people, and a person icon. The background is dark blue with a subtle grid pattern.

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Create an AI governance plan

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- 1 Govern**
 An AI governance board approves and reviews every initiative.
- 2 Approve**
 Keep a short list of approved tools; everything else is off limits.
- 3 Control**
 Corporate accounts sit under your tenant, with single sign-on. Grant access with least permission needed.
- 4 Restrict**
 Who can use it and what data sources can AI connect to. Where is the data? Zero data retention.

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Invest in a governed corporate AI platform

EXAMPLES: CLAUDE ENTERPRISE, MICROSOFT 365 COPILOT

 Control access centrally Single sign-on; access ends the day an employee leaves	 Keep data out of training Business terms keep prompts and files out of model training	 Connect approved apps Links to email, files and CRM under existing permissions
 Work consistently Shared projects and prompts give every employee the same answers	 Audit usage Admin logs show who used what, supporting Safeguards monitoring	 Replace shadow AI One sanctioned tool gives staff no reason to use free apps

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Centralize AI Across All Your Data

VENDOR AI STOPS AT ITS OWN PRODUCT. CENTRALIZED AI SPANS THE FIRM.

 One set of guardrails Set access and policy once, not tool by tool	 Zero data retention Isolated tenant on Azure; no training on your data	 Sees across systems Answers draw on DMS, tax, CRM and email together
 Central Management Oversee access, usage and compliance	 Agents that do work Triage, document drafting and reporting, firm-wide	 One data layer Connect each system once; every agent and user benefits

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Outsource Data Aggregation



- 1 Tools consolidate DMS, CRM, HR and web data
- 2 Hosted in a private cloud, not on store PCs
- 3 Vendor provides data security and consistency
- 4 Reporting and AI run on governed data only

EXAMPLE

AXEL Automotive

Combines DMS, CRM, HR, web and analytics data in one private cloud, with AI reporting on top.

Source: axelautomotive.com

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If you Build It, baby steps



START SMALL, THEN SCALE

1

Saved prompts and projects

Reusable instructions for routine work like summaries and letters

2

Automated workflows

Connect approved apps to route, draft and file, with no code

3

AI agents

Assistants that finish multi-step tasks within set permissions

4

Dashboards on vendor data

Power BI reports on DMS and CRM data through approved connectors

5

Custom applications

Full software, only with secure development and code review

Less effort and risk

More effort and risk

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Key Takeaways

THE RISK

- 1 Your dealership already uses AI; the question is who decided how
- 2 Personal and shared logins put customer data where you can't see it
- 3 AI exposes the permissions you already had
- 4 Aggregated data concentrates risk into one rich target

WHAT TO DO

- 1 Form an AI governance board to own decisions
- 2 Decide what you're trying to achieve, then write the plan
- 3 Move staff to a governed corporate AI platform
- 4 Build in small steps, and build securely

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For a complimentary AI readiness assessment:
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