



# AI Usage & PEO for Insurance

## Members answer two questions from fellow dealers

Compiled by: Elizabeth Marvel, Office Technology Magazine

Following are two questions submitted by dealer members as part of BTA's Dealers Helping Dealers resource and many of the answers received. These answers and others can be found in the members-only section of the BTA website. Visit [www.bta.org/DealersHelpingDealers](http://www.bta.org/DealersHelpingDealers). You will need your username and password to access this member resource.



### How are you using artificial intelligence (AI) in your dealership? Do you have an AI policy in place?

"We have AI integrated into several daily aspects of fulfillment. We have selected and provided AI [software] to the employee it would benefit the most."

*Shaun Easter, service operations manager  
Seminole Office Solutions, Longwood, Florida*

"Only in CEO Juice."  
*Jeffrey Taylor, president  
Kingsport Imaging Systems Inc., Kingsport, Tennessee*

"We are looking into Formed AI for A/P processing. We use ChatGPT for various things, such as social media posts, marketing, emails and letter writing."

*Lynn Pickford, president  
Precision Copy Products Inc., Clairton, Pennsylvania*

"We use Microsoft's embedded AI. Some use ChatGPT. We have a policy in our handbook regarding safety and confidentiality."

*Christina Morgan, president  
TDS IT, Lowell, Arkansas*

"All employees use Grok. All employees are going through AI training with Google. Numerous employees have earned certifications with AI automation providers."

*Jeffrey Foley, COO  
Apollo Office Systems, Alvin, Texas*

"We use AI for administrative purposes (e.g., writing policies and procedures) and marketing. We use it in sales for writing and research. Yes, we have a policy."

*Stephen Valenta, president  
Offix, Gainesville, Virginia*

"We just started using AI. We don't have a policy yet."

*Chip Miceli, CEO  
Pulse Technology, Schaumburg, Illinois*

### Are any BTA members using a professional employer organization (PEO) for their dealership's health insurance? I'd like to get their feedback on the experience.

"Yes, ADP TotalSource. Group benefits are included and onboarding is seamless. Costs are consistent with the open market."

*Edith DeCourcy, CFO  
Seminole Office Solutions Inc., Longwood, Florida*

"We have been using Insperity as our PEO for the last three years. We were right at the point then when we exceeded 50 employees and the person who mostly handled HR internally started to get overwhelmed. Working with a PEO allowed us to offer Fortune 1000 benefits we could not have offered on our own. It has been a great retention and recruiting tool."

*Thomas Fimian, CEO  
Levifi, Charleston, South Carolina*

"We have used Insperity, TriNet and now Questco. We historically had better health rates using them, but now I think we are large enough where we don't need a PEO for lower health rates. They are still useful for HR help. I can direct employees to call the PEO instead of me having to spend time contacting our vendors on their behalf."

*Christina Morgan, president  
TDS IT, Lowell, Arkansas*

"I recommend Questco PEO. We have used a PEO for 11 years and Questco for the last five years."

*Jeffrey Foley, COO  
Apollo Office Systems, Alvin, Texas*

"No, we have a broker."  
*Kim Valenta, vice president  
Offix, Gainesville, Virginia* ■

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