



Where Organizations Collaborate to Connect, Share, Learn and Grow!

Things YOU Missed

Week of February 17 - 21, 2025

Cyber Resilience Peer Group

- No Organization is too small to be targeted by Cyber Threats, only too small to make the news
- Define and Build Your Security Posture -What components are needed to run your business? -What tools do you really need? -What is your REALISTIC risk appetite?
- Things to Start Doing Today -Activate MFA/2FA for all accounts (business and personal) -Backup ALL your data - keep a disconnected USB drive with your most critical data
- Be Decisive - Understand Where Incident Response Plans Struggle to be Effective

KEY: When you get in trouble don't try to fix it for yourself, Get Professional Help!

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Financial Perspectives Peer Group

- The proposed Capital Gains inclusion rate increase has been postponed until 2026
- Take advantage of available tax credits
- Expense records should be retained for at least six years
- Capital Losses can be carried forward indefinitely.

KEY: Keeping meticulous financial records can help avoid unnecessary audits, maximize deductions, and ensure compliance with tax regulations.

Marketing Peer Group

- Prioritizing leads based on their engagement and potential value improves efficiency
- Recognize the importance of early engagement and relationship-building
- Lead scoring uses eliminates guesswork by using data to determine the lead quality
- Prioritize high-intent actions and do not get distracted by vanity metrics.

KEY: Focusing on high-intent actions—such as demo requests, pricing page visits, and direct inquiries—ensures time and resources are invested in leads with real buying potential, rather than being distracted by vanity metrics.

Legal Perspectives Peer Group

- Due diligence is crucial—assessing training data, methodology, and potential biases ensures responsible AI use
- Contracts should include clauses on data security, deletion, and return of information after termination.
- Liability for infringement should be clearly defined in agreements with AI service providers.
- Service level agreements, warranties, indemnities, and liabilities must be carefully structured.

KEY: AI contracts must not only define ownership and liability but also proactively address ethical concerns such as data security, transparency, and bias mitigation—ensuring responsible AI deployment.

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