ACROSS THE TABLE

BUSINESS CONSULTING

BUSINESS JOB 19 · EPISODE 19

Security Copilot vs Charlotte AI vs Purple AI

The card where the honest answer for most small businesses is: not this, not yet

Knowledge Article 19

AI Stack Series · acrossthetable.biz

© 2026 Across the Table Business Consulting · acrossthetable.biz · All Rights Reserved

THE JOB THESE THREE DO

Every business worries about being hacked, and rightly so. Small businesses get attacked constantly, usually not because anyone targeted them but because automated attacks sweep everybody.

These three are AI security tools. They are also the one card in this series where the right advice for most readers is to close the tab and do something else.

That is not a cop-out. It is the most useful thing this article can tell you, and it comes straight from the assessment itself.

> **READ THIS FIRST**
> Not every AI application is for every small business. Do not buy advanced AI to compensate for missing basic security. All three tools on this card score two stars out of five for small-business fit — the lowest in the entire series. They are built for companies with security teams.

WHO EACH ONE IS

Security Copilot — the Microsoft one

All three assume something a small business almost never has: people whose job is security, and a platform already in place for the AI to sit on top of.

Charlotte AI — the operations one

They do not protect you. They help a security team work faster. With no security team, there is nothing for them to speed up.

Purple AI — the investigation one

If you are a larger business with a security function, these are worth evaluating properly — and that evaluation is a different article from this one.

HOW THEY COMPARE

	Security Copilot	Charlotte AI	Purple AI
Best for	Microsoft security environment	Security operations	Threat investigation
Ease	Advanced	Advanced	Advanced
Small-business fit	★★☆☆☆	★★☆☆☆	★★☆☆☆
Advanced fit	★★★★★	★★★★★	★★★★★

© 2026 Across the Table Business Consulting · acrossthetable.biz · All Rights Reserved

	Security Copilot	Charlotte AI	Purple AI
Its main job	Security assistance	SOC and security operations	Investigate threats
Choose this if	Microsoft security is central	You have mature security operations	Threat investigation is a priority
Price	Enterprise pricing.	Enterprise pricing.	Enterprise pricing.

Two stars, two stars, two stars for small-business fit. No other card in this series looks like this. The table is telling you something.

> **WHERE TO START**
> Not every AI application is for every small business. Don’t buy advanced AI to compensate for missing basic security.

HOW A BUSINESS ACTUALLY USES EACH ONE

What a small business should do instead

Turn on two-factor authentication everywhere, especially email and banking. Use a password manager. Keep software updated. Back up your data somewhere the attacker cannot reach. Train your staff to spot a fake invoice email. None of that is exciting and all of it does more than any tool on this card.

When these become relevant

When you have someone whose actual job includes security, and a platform generating more alerts than they can work through. That is the problem these solve.

The trap to avoid

Buying advanced security AI while two-factor authentication is still switched off is like fitting an alarm to a house with the door propped open. The attacker does not need to defeat anything clever.

WHAT IT COSTS

All three are enterprise-priced and quoted rather than listed.

The basics that would help you more cost almost nothing. Two-factor authentication is free. A password manager is a few dollars a month. Backups are cheap. Staff training is your time.

© 2026 Across the Table Business Consulting · acrossthetable.biz · All Rights Reserved

WHERE THIS SITS IN YOUR STACK

Not every AI application is for every small business. A five-person landscaping company probably doesn't need an enterprise AI security platform. They do need cybersecurity — but their appropriate stack looks very different: a password manager, multi-factor identity, endpoint protection, cloud backup and monitoring first. AI security comes when complexity justifies it.

The pieces around it:

- Password manager — stop shared and reused passwords
- MFA / identity — the single biggest risk reducer
- Endpoint protection — the laptops and phones
- Cloud backup — tested restores, not just backups
- Security monitoring — someone watching

THE CEO DECISION

- Is two-factor authentication on for every account that matters? If not, that is this week's job and nothing on this card is.
- Do you have backups you have actually tested restoring from? Untested backups fail exactly when needed.
- Does anyone here have security as part of their job? If no, these tools have nothing to assist.
- Would your staff spot a convincing fake invoice email? That is how most small businesses actually lose money.

APPLY IT TO YOUR BUSINESS

Go through your important accounts — email, bank, payroll, website, customer system — and check whether two-factor authentication is switched on for each.

Every one that is not is a bigger risk than anything on this card addresses. Fix those this week. It costs nothing and it is genuinely the highest-value security work available to you.

YOUR QUICK REVIEW

- ☐ Is two-factor authentication on for email, banking and payroll?
- ☐ Do I use a password manager?
- ☐ When did I last test restoring a backup?
- ☐ Would my staff recognise a fake invoice email?
- ☐ Does anyone here have security as part of their job?

© 2026 Across the Table Business Consulting · acrossthetable.biz · All Rights Reserved

☐ Am I considering buying AI to paper over a basic gap?

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
Security Copilot	microsoft.com	Organisations already running Microsoft security tooling, with staff to use it.
Charlotte AI	crowdstrike.com	Companies with a security operations function and CrowdStrike already in place.
Purple AI	sentinelone.com	Mature security teams investigating incidents at volume.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which of the twenty jobs to start with.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

CONTINUE LEARNING

This is Business Job 19 of twenty. Episode 20 is Let AI Do the Work — ChatGPT Agent, Copilot Studio and Agentforce, which closes the series.

Explore The Scaling Edge and the Across the Table Business Learning library for the rest of the series.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

LinkedIn: https://www.linkedin.com/in/connie-jacobo-ramirez

Questions: info@acrossthetable.biz · 480-582-4716

© 2026 Across the Table Business Consulting · acrossthetable.biz · All Rights Reserved

LEGAL NOTICE AND COPYRIGHT

Copyright © 2026 Across the Table Business Consulting. All Rights Reserved.

Across the Table Business Consulting is a trade name of Bold and Beautiful Beauties, Phoenix, Arizona.

Trademarks

The CEO Shift™, JuntosHR™, the Across the Table brand name, and the methodologies described in this document are trademarks of Across the Table Business Consulting and may not be used without written permission. All other product and company names are the trademarks of their respective owners and are referred to here for identification only. No endorsement, affiliation or sponsorship is implied.

Permitted use

This article is provided to the reader for their own business education and for use inside their own company.

Prohibited use

No part of this document may be copied, resold, taught as the work of another, uploaded publicly, stripped of attribution, or used to build a derivative product. Coaching or group use requires a written licence obtained from info@acrossthetable.biz.

Enforcement

Across the Table Business Consulting reserves all rights available to it, including issuing takedown notices under the Digital Millennium Copyright Act and bringing civil proceedings under 17 U.S.C. § 501. Statutory damages of up to $150,000 per infringement may be sought for wilful infringement.

Disclaimer

This article is provided for educational purposes only. It is not legal, tax, accounting or financial advice, and no specific business outcome is guaranteed or implied. Prices, features and plan names for any software mentioned change without notice; confirm current pricing with the provider before committing. Always consult a qualified professional before making a financial decision for your business.

ACROSS THE TABLE BUSINESS CONSULTING

101 N First Ave, Suite 2325-1495, Phoenix, AZ 85003

info@acrossthetable.biz · 480-582-4716 · acrossthetable.biz