Build Your AI Strategy Roadmap

Develop your AI strategy to maximize return and mitigate risks with your AI investments.

INFO~TECH RESEARCH GROUP | **EXPONENTIAL** IT

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Analyst Perspective

Transforming the organization with AI.

Today, every organization is being challenged to determine their strategy on the use of AI-based solutions. Never in our history has a technology become so accessible and, at that same time, so disruptive. This is a unique time in our history. The benefits of AI are transformative and readily accessible to all organizations – but the introduction of transformative capabilities also introduces new risks that need to be planned for.

A successful business-driven AI strategy requires:

- Alignment to the organizational strategy.

- AI goals and strategic AI principles to guide investments.

- Candidate business capabilities that can be augmented or automated with AI to drive business value.

- A roadmap to deliver and support new AI-based solutions.

Bill Wong
Research Fellow
Info-Tech Research Group

Executive Summary

Your Challenge

AI is disrupting all industries and providing opportunities for organization-wide advantages.

Organizations need to understand this disruptive technology and the trends to properly develop a strategy for leveraging this technology successfully.

C-suite technology leaders need to:

- Identify AI use cases that align with your organization's capabilities and goals.

- Organizations need to adopt a data-driven culture.

All organizations, regardless of size, should be planning how to respond to this new and innovative technology.

Common Obstacles

Business stakeholders need to cut through the hype surrounding AI to optimize investments for leveraging this technology to drive business outcomes. They need to:

- Understand the market landscape and the benefits and risks associated with AI.

- Understand the gaps the organization needs to address to fully leverage AI.

Without a proper strategy and foundational AI guiding principles, the risks to deploying this technology could negatively impact business outcomes.

Solution

Info-Tech's human-centric, value-based approach is a guide for deploying AI applications, including:

- Aligning AI initiatives to the organization's business drivers.

- Adopting strategic AI guiding principles.

- Evolving an AI maturity model.

- Prioritizing candidate generative AI-based use cases.

- Developing AI policies.

This blueprint will provide a list of activities and deliverables required for the successful deployment

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Info-Tech Insight

Create awareness among the CEO and C-suite executives about the potential benefits and risks of transforming the business with AI.

Your challenge

This research is designed to help organizations that are looking to:

- Develop a business-driven AI strategy to maximize the benefits and minimize the risks associated with AI-based solutions.

- Understand the potential opportunities to improve business outcomes and best practices to govern the risks with developing or deploying AI applications.

- Assess the organization's capabilities to provide AI governance, a data platform optimized for analytics, access to AI skills and processes, and the supporting technology infrastructure.

- Have clear metrics in place to measure the progress and success of AI initiatives.

- Build the roadmap to implement candidate use cases.
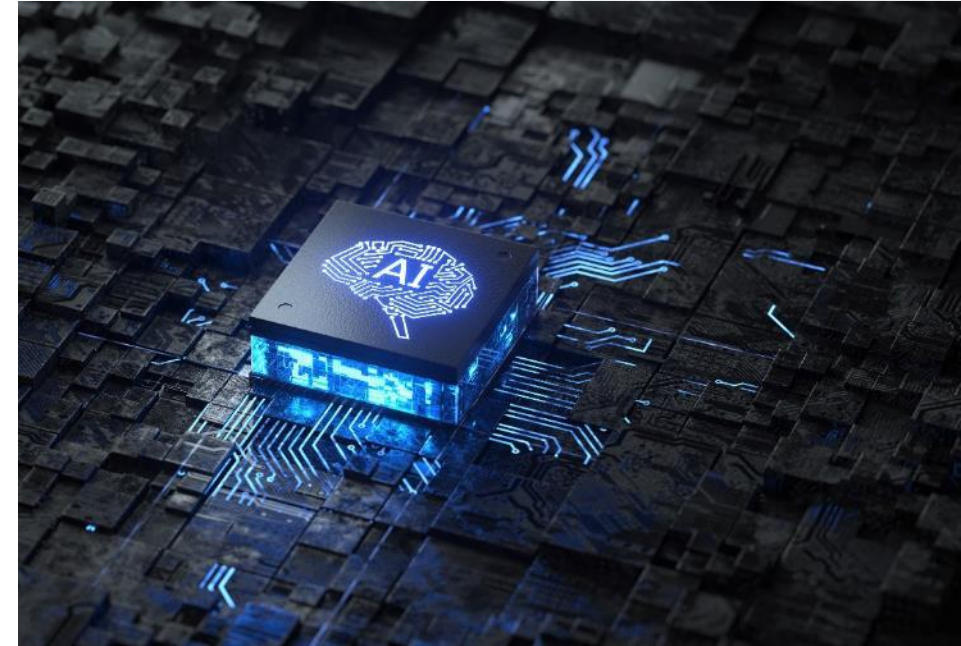
Common obstacles

These barriers are challenging for many organizations:

- Getting all the right business stakeholders together to develop the organization's AI strategy, vision, and objectives.

- Establishing strategic AI principles to guide AI investments and deployments.

- Advancing the AI maturity of the organization to meet requirements of data and AI governance as well as human-based requirements such as fairness, transparency, and accountability.

- Assessing AI opportunities and developing policies for use.
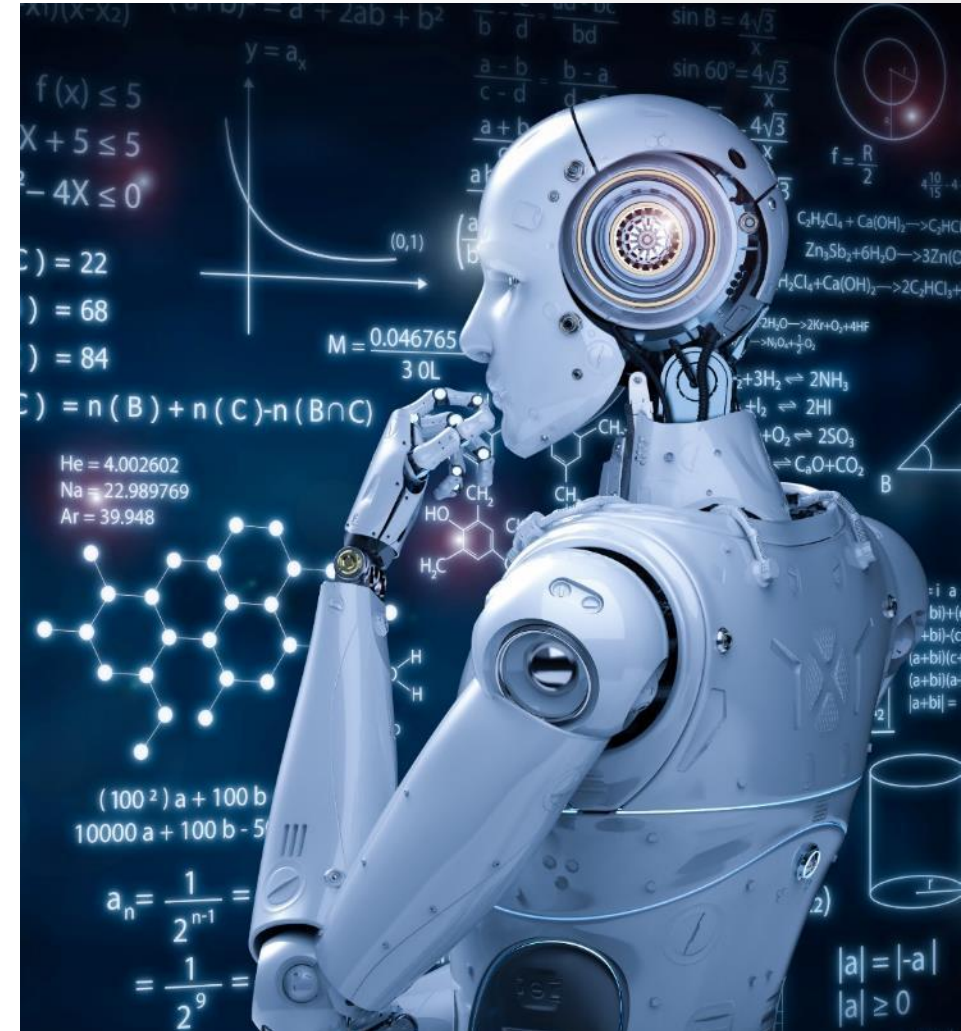
TAKE THE LEAD IN YOUR AI TRANSFORMATION

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#iTRG

AI is an existential transformation – transform or be left behind.

Unprecedented levels of investment

$200B Invested globally by 2025 in implementing new AI technologies and reshaping business models.

Unprecedented speed of change

5 days The time it took OpenAI to achieve one million customers for ChatGPT. Facebook took 10 months.

Unprecedented depth of impact

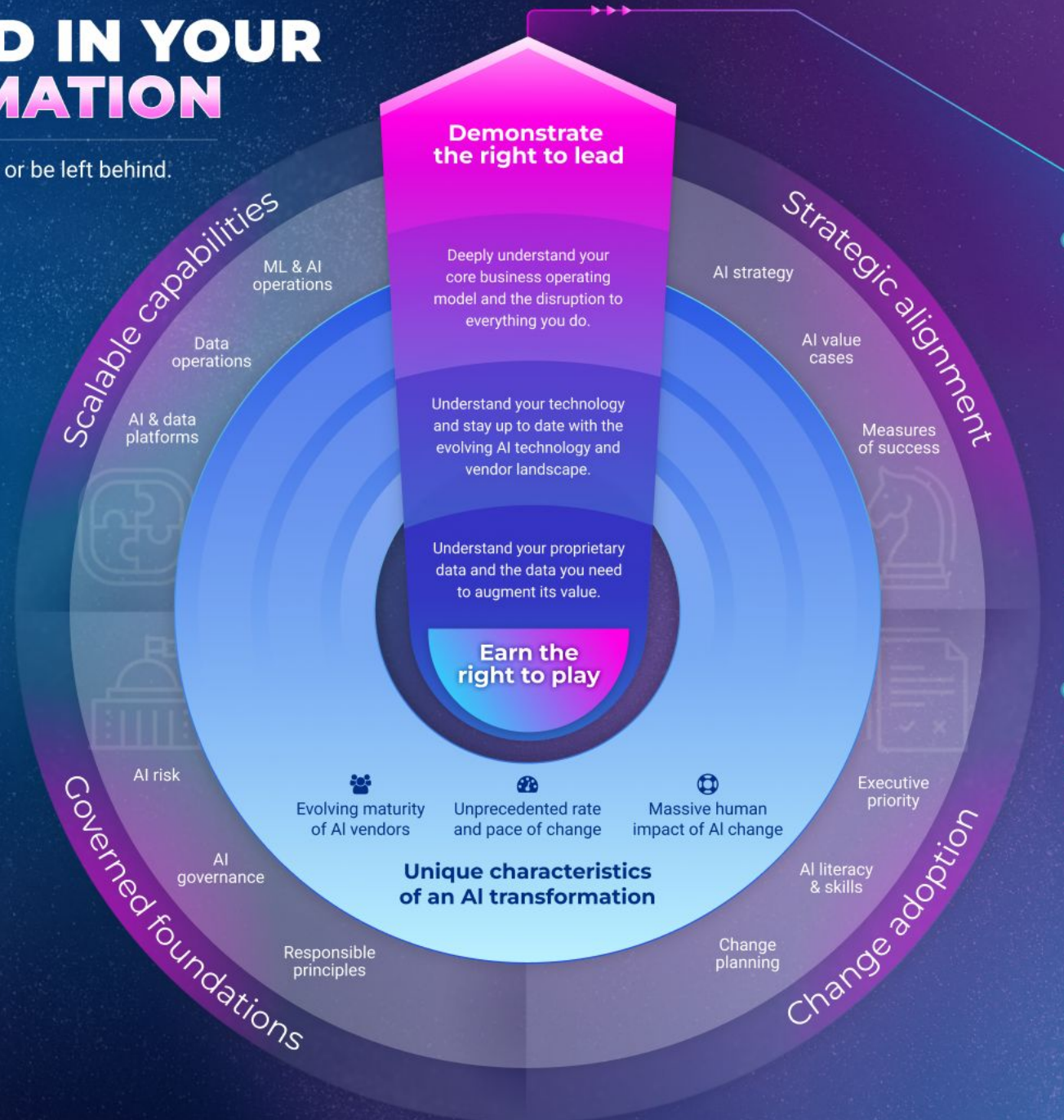**70%** The number of people McKinsey has estimated AI could displace from their jobs by 2030.

Which one do you want to be?

Disruptor → **Disrupted**

Unlimited opportunities for accelerating growth   or   Digital Darwinism: The future is bleak for those left behind

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Demonstrate the right to lead

Deeply understand your core business operating model and the disruption to everything you do.

Understand your technology and stay up to date with the evolving AI technology and vendor landscape.

Understand your proprietary data and the data you need to augment its value.

Earn the right to play

Scalable capabilities
- ML & AI operations
- Data operations
- AI & data platforms

Strategic alignment
- AI strategy
- AI value cases
- Measures of success

Governed foundations
- AI risk
- AI governance
- Responsible principles

Change adoption
- Executive priority
- AI literacy & skills
- Change planning

Unique characteristics of an AI transformation
- Evolving maturity of AI vendors
- Unprecedented rate and pace of change
- Massive human impact of AI change

Move from AI-enhanced productivity to AI-driven product and service development

While most organizations view an AI transformation as a productivity play, true success will come to those who manage to transform their offerings by providing hyper-personalized products and services to their customers. Transformative AI is about products and services, not productivity.

Personalization of products and services

Whoever leads with AI, wins.

| PRIORITY

Product and service strategy
- ✔ True personalization
- ✔ Hyper-loyalty and hyper-adoption
- ✔ Empathic products and services

| BYPRODUCTS

Productivity strategy
- ✔ Self-evolving design
- ✔ Autonomous & optimal
- ✔ Proactive self-healing

Optimized operations

Create a Value-Driven AI Strategy Aligned With Your Business & Organization

Build your AI strategy roadmap to guide investments and deployment.

Navigating Through the Era of AI
Identify the impact, requirements, and gaps that need to be addressed to transform your organization through AI successfully.

Our approach sets the foundation for building and integrating strategic AI principles and policies to identify AI use cases that perfectly align to organizational strategy.

An AI strategy cannot be derived unless the organization is clear on its own goals and objectives. An effective AI strategy must align to the organization's overarching strategy.
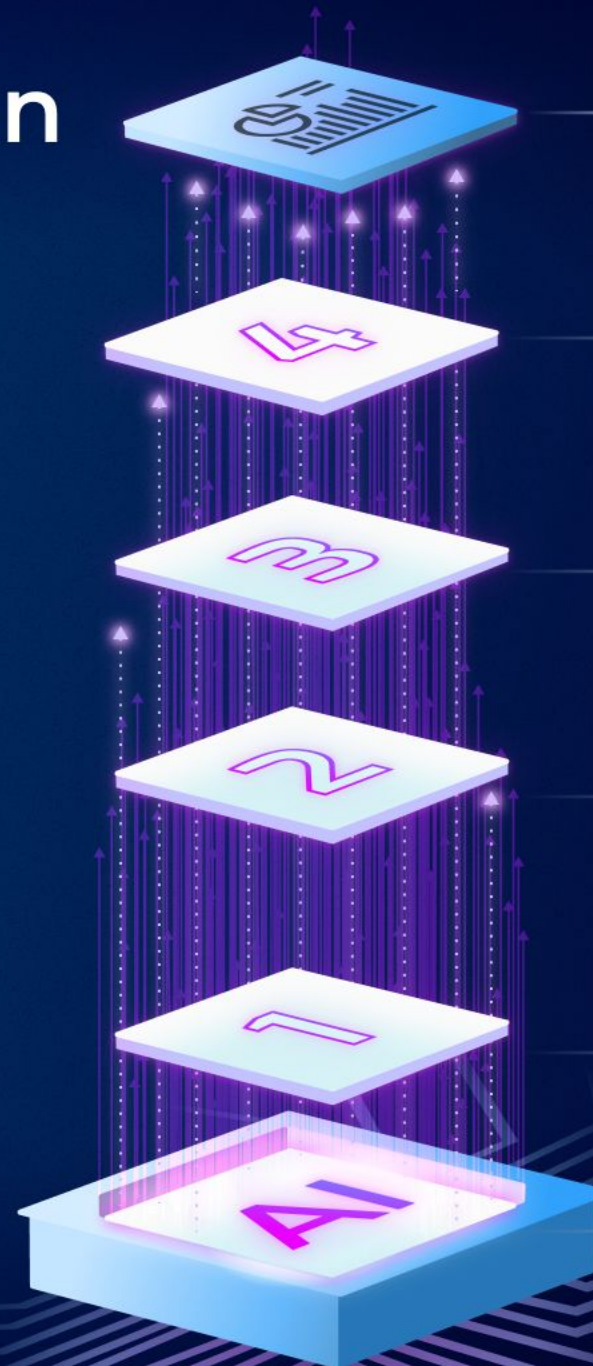
Outcomes
- Reduce cost
- Enhance revenue
- Drive innovation
- Mitigate risk
- Improve processes
- Empower the workforce

4. Develop & Finalize the AI Roadmap
- Finalize your AI strategy presentation.
- Determine next steps and communication approach.

3. Prioritize AI Use Cases & Evaluate Business Value
- Prioritize business-aligned AI initiatives based on value and feasibility.
- Calculate estimated outcomes for each initiative.

2. Assess AI Maturity & Identify AI Use Cases
- Understand AI maturity dimensions and evaluate the current state of capabilities.
- Leverage the AI use case selection tool and library to identify candidate use cases.

1. Understand & Establish the Scope of AI
- Elicit business-aligned AI goals and guiding principles.
- Develop a vision for the AI-enabled organization.

Foundational AI principles

Align your AI strategy with AI governance

An effective AI strategy must intersect with an organization's governance and compliance requirements

Scope

- This blueprint provides guidance for aligning your AI strategy with your organizational strategy.

- This approach sets the foundations for building and applying foundational AI principles and AI policies aligned to corporate governance and key regulatory obligations (e.g. privacy). Both steps are foundational components of how you should develop, manage, and govern your AI program but are not a substitute for implementing broader AI governance.

Guidance on how to implement AI governance can be found in the blueprint linked below.
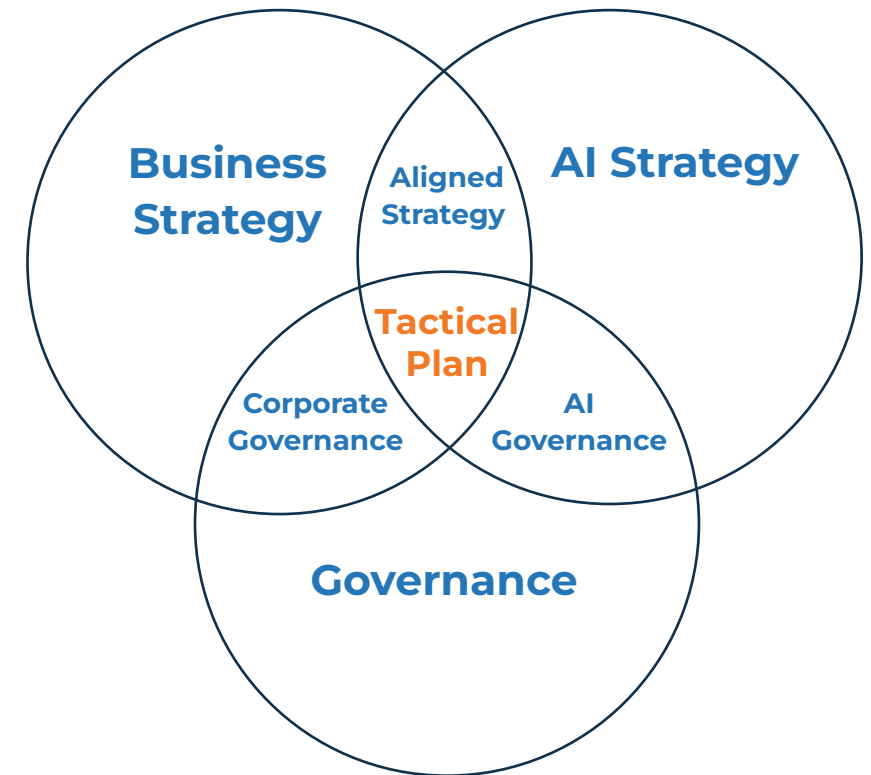
↓ Download our *Govern the Use of AI Responsibly With a Fit-for-Purpose Structure* blueprint

Business Strategy

AI Strategy

Aligned Strategy

Tactical Plan

Corporate Governance

AI Governance

Governance

Measure the value of this blueprint

Leverage this blueprint's approach to ensure your AI initiatives align with and support your key business drivers

This blueprint will guide you to drive and improve business outcomes. Key business drivers will often focus on:

- Improving customer experience
- Increasing revenue
- Reducing costs
- Improving time to market
- Reducing risk

Business value drivers for private sector

AI Key Initiative Plan

Initiatives collectively support the organization's goals for adopting AI-based solutions

Improve Customer Experience — Enhance Customer Experience
Focus on differentiating or improving the client experience.

Increase Market Share — Support Growth Initiatives
Focus on growth through expansion of product, services, or market.

Improve Operational Excellence — Improve Operational Excellence
Focus on improving efficiency, effectiveness, or cost optimization.

Drive Innovation — Drive Technology Innovation
Focus on improving product/service development or time to market.

Mitigate Risk — Reduce Risk
Focus on reducing risks with the development, deployment, and execution of AI applications.

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In Phase 1 of this blueprint, we will help you identify the key AI strategy initiatives that align to your organization's goals. Value to the organization is often measured by the estimated impact on revenue, costs, time to market, or risk mitigation.

In Phase 4, we will help you develop a plan and a roadmap for addressing any gaps and introducing the relevant AI capabilities that drive value to the organization based on defined business metrics.

Example business outcome objectives and metrics for a private organization.

Once you implement your 12-month roadmap, start tracking the metrics below over the next fiscal year (Year 1) to assess the effectiveness of measures:

Business Outcome Objective	Key Success Metric
Improving Customer Experience	Increased customer engagement and market share
Increasing Market Share	Increased revenue from identified key areas
Improving Operational Excellence	Decreased costs for identified business units
Improving Time to Market	Time savings and accelerated revenue adoption
Reducing Risk	Cost savings or revenue gains from identified business units

Build Your AI Strategy Roadmap

	Prework	Session 1	Session 2	Session 3	Session 4	Post-Workshop
	Understand Business Strategy & AI Adoption	**Establish Scope of AI Strategy**	**Identify AI Use Cases & Assess AI Maturity**	**Detail & Prioritize AI Use Cases**	**Develop AI Roadmap**	**Next Steps and Wrap-Up (Offsite)**
Activities	CXO to: • Review documented business strategy, current strategic business initiatives, and business capability map. • Schedule and designate participants.	• Provide a foundational understanding of AI, including industry-specific opportunities and risks. • Understand your business goals and value drivers. • Elicit business-aligned AI goals. • Develop a vision for the AI-enabled organization. • Develop strategic guiding principles for your strategy.	• Leverage our AI use case repository and identify AI use cases that resonate with your strategic business goals and capabilities. • Understand AI maturity dimensions and evaluate current state of AI capabilities. • Identify your strategic AI investment path.	• Build one-pagers that provide estimated cost, business value, dependencies, and complexity for each AI use case. • Align AI use cases to your business initiatives, capabilities, and AI goals. • Prioritize AI use cases based on feasibility and value.	• Develop your AI initiative roadmap. • Determine next steps and communication approach. • Finalize your AI strategy presentation. • Present AI roadmap to the executive leadership team.	• Generate workshop deliverables. • Set up review time for workshop report and to discuss next steps. • Use Info-Tech's AI Marketplace to begin the vendor selection process. • Establish AI governance with _Govern the Use of AI Responsibly With a Fit-for-Purpose Structure_.
Outcomes	• Activity outputs to be shared with workshop facilitator at Info-Tech	• AI vision statement • Business-aligned AI goals • Strategic AI principles	• Candidate AI business use case list • Identified challenges and risks for use cases • AI current-state maturity assessment results	• Detailed one-pagers for AI use cases • An alignment chart of AI goals, business capabilities, and AI use cases	• AI roadmap (Gantt chart format) • AI strategy one-pager • Preliminary AI strategy presentation	• Completed workshop deliverables • Provide exercise tools leveraged in workshop with content entered in workshop (optional)

Info-Tech offers various levels of support to best suit your needs

DIY Toolkit

"Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful."

Guided Implementation

"Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track."

Workshop

"We need to hit the ground running and get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place."

Executive & Technical Counseling

"Our team and processes are maturing; however, to expedite the journey we'll need a seasoned practitioner to coach and validate approaches, deliverables, and opportunities."
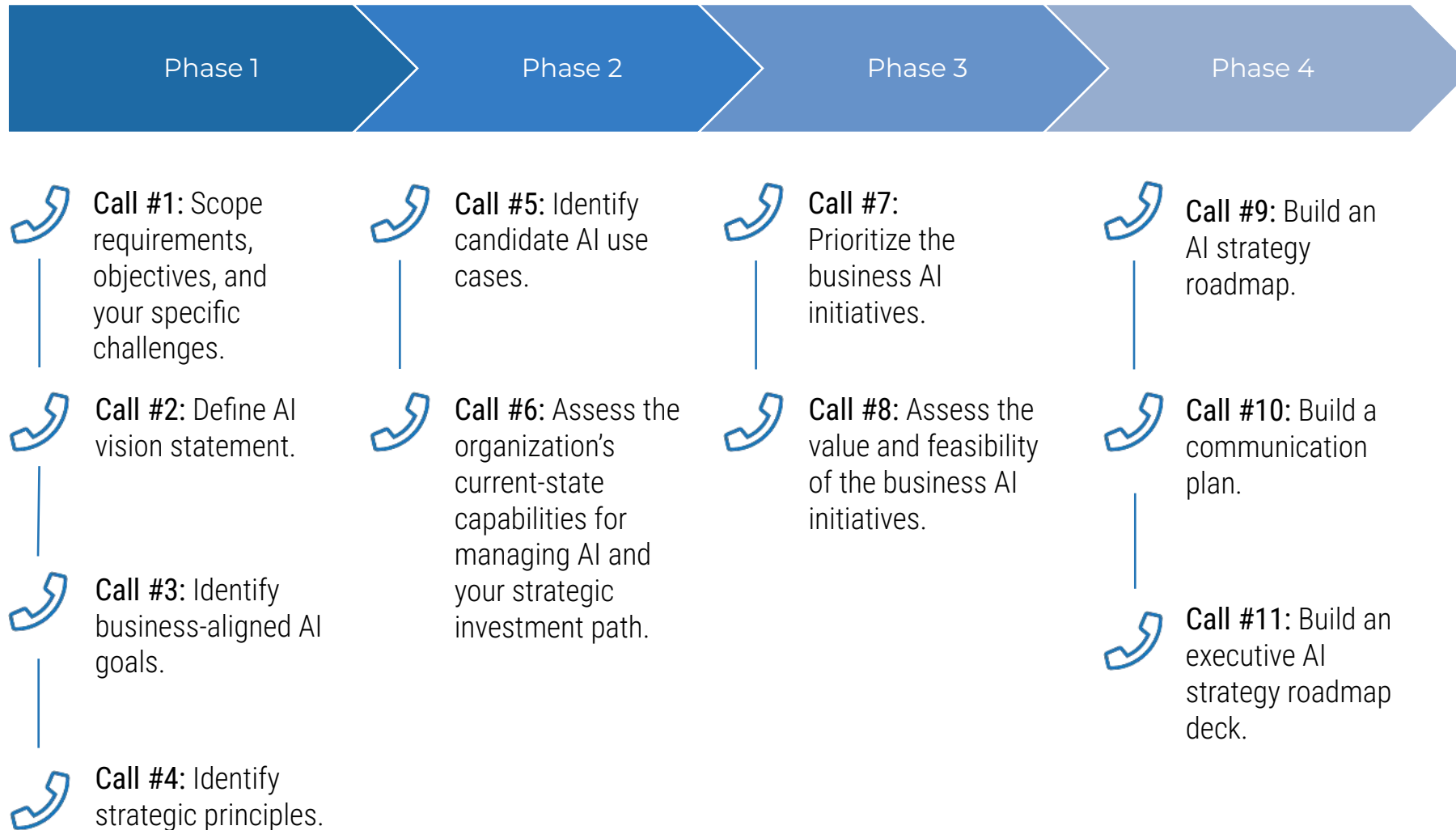
Consulting

"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."

Diagnostics and consistent frameworks are used throughout all four options.

Guided Implementation

What does a typical GI on this topic look like?

Phase 1	Phase 2	Phase 3	Phase 4

Call #1: Scope requirements, objectives, and your specific challenges.

Call #2: Define AI vision statement.

Call #3: Identify business-aligned AI goals.

Call #4: Identify strategic principles.

Call #5: Identify candidate AI use cases.

Call #6: Assess the organization's current-state capabilities for managing AI and your strategic investment path.

Call #7: Prioritize the business AI initiatives.

Call #8: Assess the value and feasibility of the business AI initiatives.

Call #9: Build an AI strategy roadmap.

Call #10: Build a communication plan.

Call #11: Build an executive AI strategy roadmap deck.

A Guided Implementation (GI) is a series of calls with an Info-Tech analyst to help implement our best practices in your organization.

A typical GI is 10 to 12 calls over the course of 2 to 3 months.

Insight summary

Overarching Insight

An AI strategy cannot be derived unless the organization is clear on its forward-looking goals and objectives. An effective AI strategy must align to the organization's strategy.

AI Strategy

A business-driven AI strategy is one that is aligned with the firm's organizational strategy. Key components of the AI strategy include:

- AI vision and mission statements
- Business value drivers
- Strategic AI principles
- Foundational AI principles

Buy vs. Build

Most organizations will be exposed to AI via incumbent software or purchasing off-the-shelf tools. Seek to buy first before deciding if you have no other option but to build.

- Assess current AI maturity.
- Identify AI strategic investment path.

Opportunity Prioritization

Assess candidate business capabilities targeted for generative AI to see if they align to the organization's business criteria, foundational AI guiding principles, and capabilities for delivering the project.

- Develop a prioritized list of candidate use cases.
- Detail use cases and estimate business value.

Tactical Insight

Business stakeholders need to cut through the hype surrounding AI, including apps like ChatGPT, to optimize investments for leveraging this technology to drive business outcomes.

Tactical Insight

Identify and prioritize use cases that deliver immediate operational benefits while also laying the groundwork for broader transformation.

Blueprint deliverables

Our *AI Maturity Assessment Tool, AI Initiatives Prioritization and Roadmap Planning Tool,* and *AI Strategy & Roadmap Presentation Template* enable you to shape your generative AI roadmap and communicate the value of the initiatives to your C-suite sponsors.

Each step of this blueprint is accompanied by supporting deliverables to help you accomplish your goals:
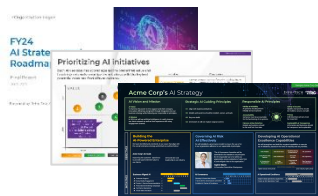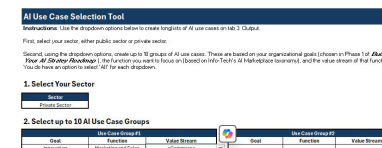
AI Strategy and Roadmap Presentation Template

Present your AI roadmap in a prepopulated document that summarizes the key findings of this blueprint and provides your C-suite with a view of the AI challenge and your plan to meet it.

AI Use Case Selection Tool

A comprehensive repository designed to help AI working groups discover use cases by sector-specific needs, organization function, and source of value.
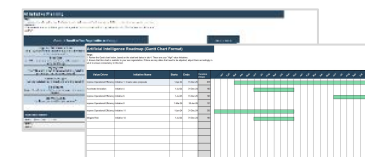
AI Maturity Assessment Tool

Use our best-of-breed AI Maturity Framework to analyze the current state of the gap between your current and target states.

AI Initiatives Prioritization and Roadmap Planning Tool

Assess and prioritize your initiatives to develop a roadmap aligned with your value stream.

Case Studies: Leveraging AI Strategy

9.4/10	$55,509	34
Overall Impact	Average $ Saved	Average Days Saved

City of Arlington

"We are incredibly grateful for the facilitator and the AI strategy process, which truly stood out as the most impactful part of the workshop. As a large city with over 27 lines of business, Info-Tech's AI Strategy Workshop brought our City departments together in a meaningful and transformative way, far exceeding expectations. The value it provided was unmatched by any other initiative we've tried in-house."

Impact	10/10
$ Saved	$137,000
Days Saved	90

County of San Luis Obispo

"Well organized material; knowledgeable, well effective presenter, quick turnaround and excellent follow-up on findings; practical application of workshop priorities."

Impact	10/10
$ Saved	$51,375
Days Saved	20

First Global Management Services, Inc.

"This was good reinforcement of the messages we've been hearing from other IT leaders, but it was delivered in a more programmatic way. It was a good discussion. This wasn't yet directed at time or cost savings, but we probably will have some cost savings just by not doing the wrong thing."

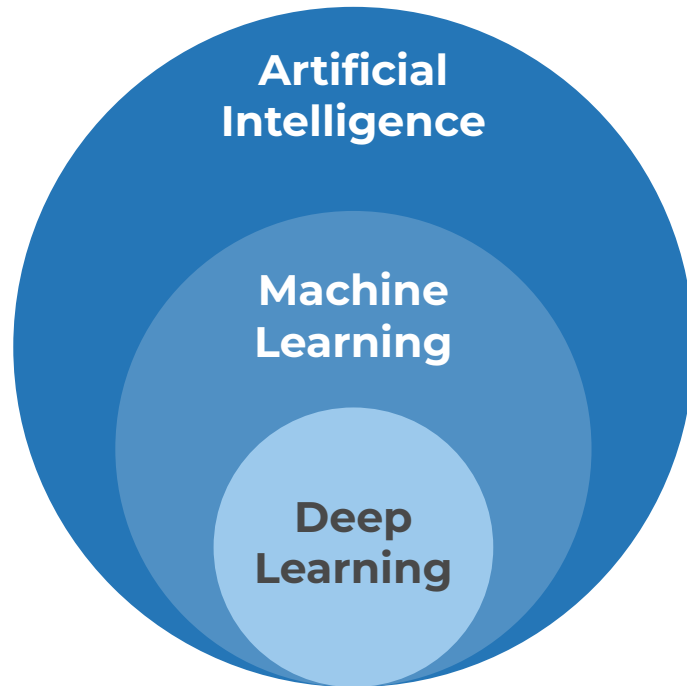| Impact	10/10
$ Saved	$13,700
Days Saved	

PowerNet Limited

"Julianna was fantastic to work with, The Info-Tech material was very easy to work through. No bad parts."

Impact	9/10
$ Saved	$34,250
Days Saved	32

Cut through the marketing hype to understand AI

Artificial Intelligence

Machine Learning

Deep Learning

Definitions

- Artificial intelligence (AI) is human intelligence mimicked by machine algorithms. Example: Playing chess or Go.

- Machine learning (ML) is a subset of AI algorithms to parse data, learn from data, and then make a determination or prediction. Examples: Spam detection, preventative maintenance.

- Deep learning (DL) is a subset of ML algorithms that leverage artificial neural networks to develop relationships among the data. Examples: Image classification, facial recognition, generative AI.

What Makes AI Perform

Algorithms
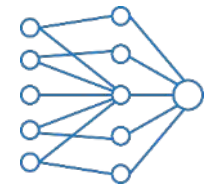
Accelerators

Big Data

What Makes AI Different

Traditional Programming

Data →
Program → Computer → Output

Machine Learning

Data →
Output → Computer → Program
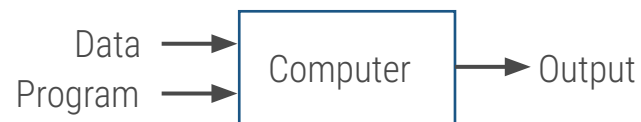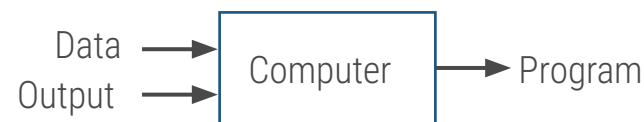
Organizations must address AI risks as part of their AI strategy

Hallucinations
Responses generated that are not based on observation

Copyright
Possible IP infringement

Bias
Trained on data from the internet

AI

Cybersecurity
New threats targeting the AI model

Privacy
Ensure privacy of data is preserved

Lack of Transparency
Training data may not be accurate, complete, or relevant
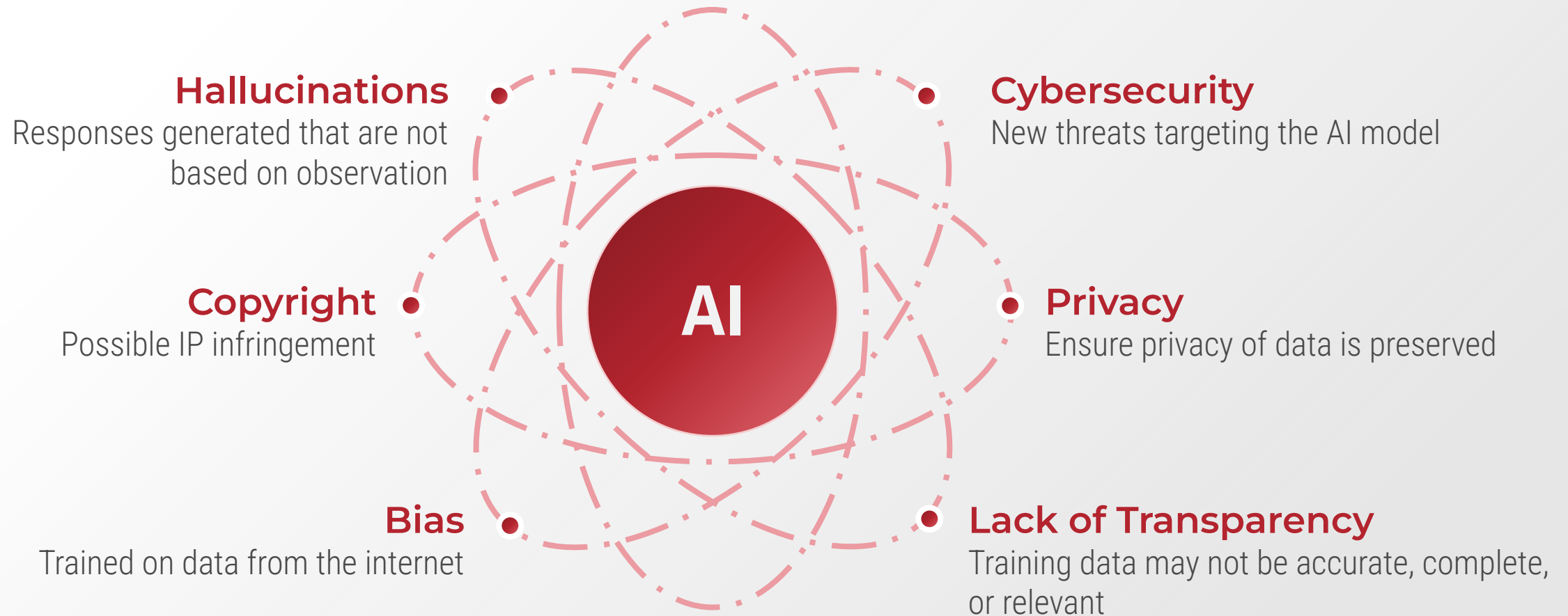
Generative AI gives humanlike responses to general queries, and its capabilities are growing exponentially

LiveBench LLM Benchmark as of 2025-05-30

Model	Average score
OpenAI GPT-5 High	78.59
OpenAI GPT-5 Medium	76.45
OpenAI GPT-5 Low	75.34
OpenAI o3 Pro High	74.72
OpenAI o3 High	74.61
Anthropic Claude 4.1 Opus Thinking	73.48
Anthropic Claude 4 Opus Thinking	72.93
OpenAI GPT-5 Mini High	72.2
xAI Grok 4	72.11
Anthropic Claude 4 Sonnet Thinking	72.08
OpenAI o3 Medium	71.98
OpenAI O4 Mini High	71.52
Google Gemini 2.5 Pro (Max Thinking)	70.95
Alibaba Qwen 3	70.76
OpenAI GPT 5 Mini	70.69
DeepSeek R1 (2025-05-28)	70.1

Average score is calculated based on performance of reasoning, coding, mathematics, data analysis, language comprehension, and instruction following.

Traditional AI
- Conventional neural networks
  - Process data sequentially
- Good for applications not requiring an understanding of context or relationships
- Optimized for a single use case

Generative AI
- Transformer-based neural networks
  - Can process data in parallel
- Able to create new humanlike responses
- Can be optimized for multiple use cases

Benefits/Use Cases of Generative AI
- Chatbots for customer service and support
- Writing emails, resumes, papers, presentations, etc.
- Creating photorealistic art
- Suggesting new drug compounds to test
- Designing physical products and buildings
- And more…

Companies are assessing the use of ChatGPT/LLM

A wide spectrum of usage policies are in place at different companies

Company policies as of August 2023:

Prohibit Use	Selective Use Cases	Do Not Use Company-Sensitive Data	All In

In 2023, Bain & Company announced a global services alliance with OpenAI.

- Internally:
  - "The alliance builds on Bain's adoption of OpenAI technologies for its 18,000-strong multidisciplinary team of knowledge workers. Over the past year, Bain has embedded OpenAI technologies into its internal knowledge management systems, research, and processes to improve efficiency."
- Externally:
  - "With the alliance, Bain will combine its deep digital implementation capabilities and strategic expertise with OpenAI's AI tools and platforms, including ChatGPT, to help its members around the world identify and implement the value of AI to maximize business potential. The Coca-Cola Company announced as the first company to engage with the alliance."

News Sites:

- "BuzzFeed to use AI to write its articles after firing 180 employees or 12% of the total staff" (Al Mayadeen, 2023).
- "CNET used AI to write articles. It was a journalistic disaster." (Washington Post, 2023).

Info-Tech's AI Marketplace

Unlock the potential of AI tailored to your needs and transform possibilities into reality with our dedicated support.

Info-Tech's AI Marketplace offers an extensive catalog of case studies and thought leader interviews that makes your AI vendor selection a breeze.

→ Visit the AI Marketplace

Session 1

Establish the Scope of Your AI Strategy

Session 1

1.1 Understand business goals and value drivers
1.2 Elicit business AI goals
1.3 Construct AI vision statement
1.4 Elicit AI strategic principles

Session 2

2.1 Identify candidate AI use cases
2.2 Assess current AI maturity
2.3 Identify strategic AI investment path

Session 3

3.1 Map candidate AI use cases
3.2 Build AI initiatives one-pagers
3.3 Prioritize candidate AI use cases

Session 4

4.1 Build your AI initiative roadmap
4.2 Build a communication plan for your roadmap

This session will walk you through the following activities:

- Assessing the scope and understanding of your AI strategy
- Eliciting business-aligned AI goals
- Constructing an AI vision statement
- Articulating AI strategic principles
- Understanding foundational AI principles

This session involves the following participants:

- Executive stakeholders
- CIO
- Other IT leadership

Build Your AI Strategy Roadmap

An AI strategy has four key components

A business-driven AI strategy is one that is aligned with the firm's organizational strategy. Key components of the AI strategy include:

AI Vision and Mission: The AI vision statement is usually forward-looking and aspirational, and reflects the organization's commitment to leveraging AI to deliver positive and responsible outcomes. The AI mission statement outlines what the organization will do to realize its AI vision by focusing on immediate objectives and actions required to enable the delivery of the AI vision.

Business Value Drivers: These drivers represent the key ways value is recognized by the organization and are used to ensure candidate AI initiatives are aligned to the organization's goals and objectives.

Strategic AI Principles: These guiding principles align the business strategy with the AI strategy and reflect the organization's overall approach to the use of AI.

Foundational AI Principles: These principles are designed to govern the development, deployment, and maintenance of AI applications to mitigate the possible risks from deploying AI-based applications.

AI Vision and Mission

Business Value Drivers

AI Strategy

Strategic AI Principles

Foundational AI Principles

Understand your organizational strategy

Key Stakeholders

- CEO
- CRO
- CTO/COO
- CTO/CPO
- CFO
- CIO

Context Insights

- Organizational Strategy
- Business Value Drivers
- Business Priorities
- AI Vision
- Strategic AI Principles
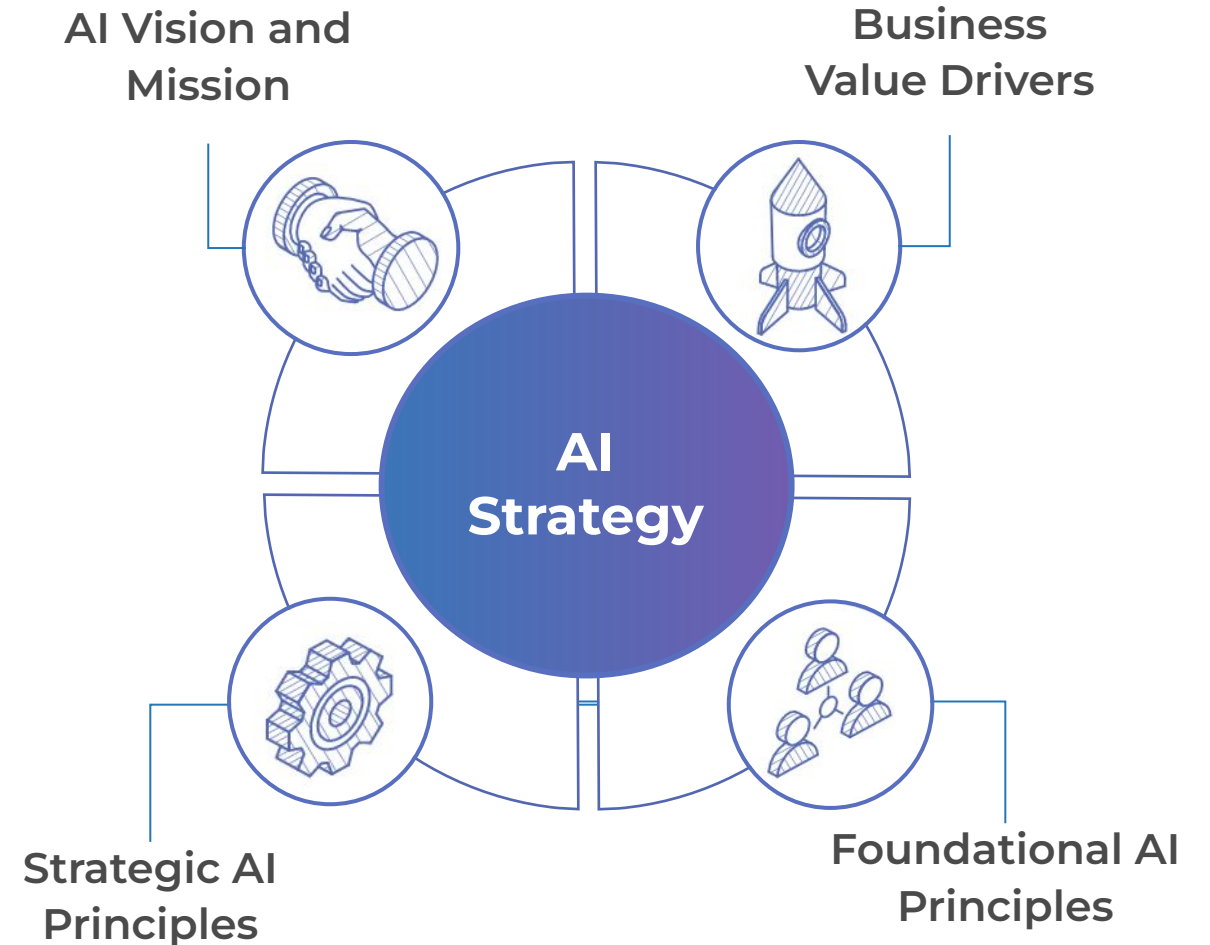
Input for Your AI Strategy
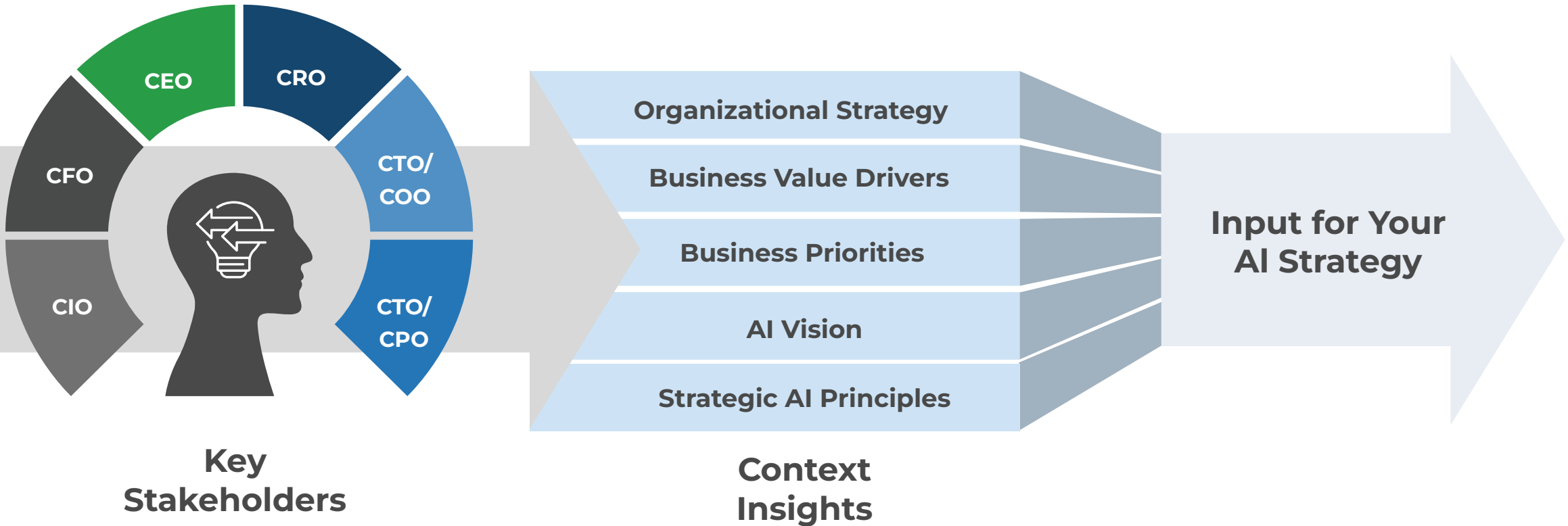
Align the AI strategy with the corporate strategy

Organizational Strategy | **Unified Strategy** | **AI Strategy**

- Convey the current state of the organization and the path it wants to take.
- Identify future goals and organizational aspirations.
- Communicate the initiatives that are critical for getting the organization from its current state to the future state.

- Establish business-driven AI vision and mission statements and strategic AI principles to guide the organization's AI investments.
- AI goals and objectives optimization can be and should be linked, with metrics, to the corporate strategy and ultimate organizational objectives.

- Establish foundational AI guiding principles to mitigate the risks of deploying AI-based solutions.
- Identify AI initiatives that will support the business and key AI objectives.
- Outline staffing and resourcing for AI initiatives.
- Communicate the organization's budget and spending on AI.

Info-Tech Insight

AI projects are more successful when the management team understands the strategic importance of alignment. Time needs to be spent up-front aligning organizational strategies with AI capabilities. Effective alignment between IT and other departments should happen daily. Alignment doesn't occur at the executive level alone, but at each level of the organization.

1.1 Understand your business goals and value drivers

1. Start with reviewing your organization's business and IT strategy. An AI strategy can be as strong as how it is derived from its parent organizational strategy.

2. Pull the essential documents that you will need for this blueprint:

   a) Business strategy

   b) Business initiatives

   c) Business capability map

   d) IT strategy

3. Review your organizational goals and brainstorm AI use cases that can help you achieve them.

↓   Download the *AI Strategy and Roadmap Presentation Template*

Input	Output
• Business strategy • Business initiatives • Business capability map	• Business goals

Materials	Participants
• Collaboration/brainstorming tool (whiteboard, flip chart, digital equivalent) • *AI Strategy and Roadmap Presentation Template*	• AI initiative lead • CIO • Other IT leadership

Business value drivers for private sector

AI Key Initiative Plan

Initiatives collectively support the organization's goals for adopting AI-based solutions

Improve Customer Experience

+

Increase Market Share

+

Improve Operational Excellence

+

Drive Innovation

+

Mitigate Risk

Enhance Customer Experience

Focus on differentiating or improving the client experience.

Support Growth Initiatives

Focus on growth through expansion of product, services, or market.

Improve Operational Excellence

Focus on improving efficiency, effectiveness, or cost optimization.

Drive Technology Innovation

Focus on improving product/service development or time to market.

Reduce Risk

Focus on reducing risks with the development, deployment, and execution of AI applications.

Business value drivers for **public sector**

AI Key Initiative Plan

Initiatives collectively support the organization's goals for adopting AI-based solutions

Improve Constituent Experience

+

Modernize Service

+

Improve Operational Excellence

+

Drive Innovation

+

Mitigate Risk

Improve Constituent Experience
Focus on differentiating or improving the citizen experience.

Target Service Modernization
Focus on growth through expansion of product, services, or market.

Improve Operational Excellence
Focus on improving efficiency, effectiveness, or cost optimization.

Drive Technology Innovation
Focus on improving product/service development or time to value.

Reduce Risk
Focus on reducing risks with the development, deployment, and execution of AI applications.

1.2 Elicit and rank business AI goals

1. Gather the AI strategy creation team and revisit your business strategy document and business goals.

2. Review the predefined business value drivers on the previous slides. Add new drivers or customize existing ones to make them align better with your business strategy.

3. Ask participants to rank the importance of the drivers to the business.

4. Now, analyze the responses and prioritize the business goals that IT needs to address or start addressing within the next 12 months.

5. Discuss findings with your AI strategy creation team and edit the business AI goals section of the *AI Strategy and Roadmap Presentation Template.* Use colored dots to highlight the primary and secondary business goals.

6. Include a notes section if there are any expected changes to primary and secondary goals in the future.
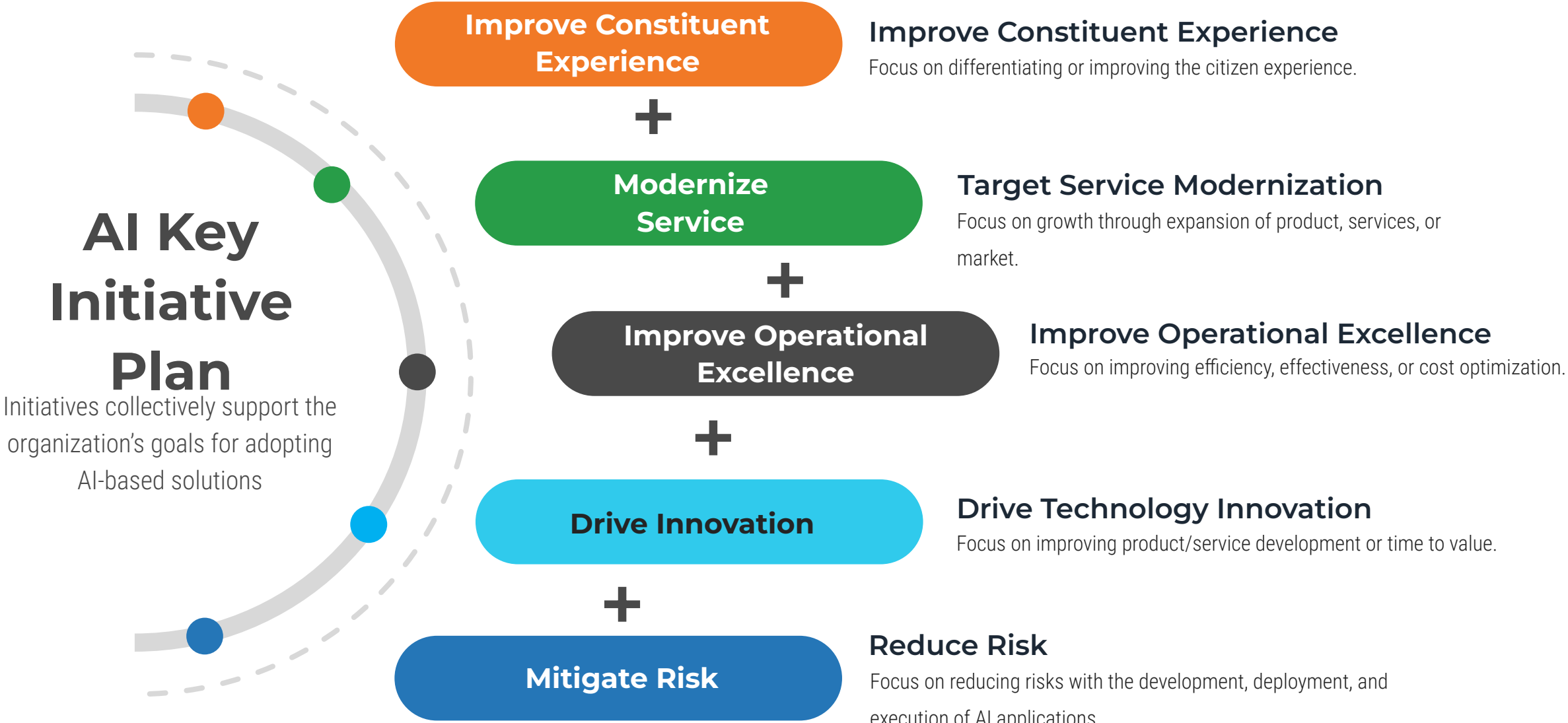
↓ Download the *AI Strategy and Roadmap Presentation Template*

Input	Output
• Business strategy • Business initiatives • Business capability map	• AI goals

Materials	Participants
• Collaboration/brainstorming tool (whiteboard, flip chart, digital equivalent) • *AI Strategy and Roadmap Presentation Template*	• AI initiative lead • CIO • Other IT leadership

Example: Business Goals for Year 1

Value Driver

Customer Experience

Focus on differentiating or improving the client experience.

Market Growth

Focus on growth through expansion of product, services, or market.

Operational Excellence

Focus on improving efficiency, effectiveness, or cost optimization.

Innovation

Focus on improving product/service development or time to market/value.

Risk Mitigation

Focus on reducing risks with the development, deployment, and execution of AI applications.

Use Case

Use chatbots to assist customer support with troubleshooting and technical support.

Use AI to analyze client requirements and recommend the best product or service offering.

Use AI to analyze and automate calls to improve customer service.

Automatically run and analyze site variant tests to optimize user experience and conversions.

Establish an AI center or excellence, identify and train team members, and define practices and responsibilities.

Legend   ● Primary   ● Secondary

1.3 Construct an AI vision statement

Input	Output	Materials	Participants
• Business vision statement	• AI vision statement	• Screen • Projector • Sticky notes • Markers • Whiteboard • Paper • Collaboration/brainstorming tool (whiteboard, flip chart, digital equivalent)	• Executive stakeholders • CIO • Other IT leadership

↓ Download the *AI Strategy and Roadmap Presentation Template*

1.3 Construct an AI vision statement

Objective: Define the ideal team culture (how they work together to achieve their purpose) with an AI vision statement.

Step 1:

- Gather the AI strategy creation team and revisit your business context inputs, specifically the corporate vision statement.
- Share one or more examples of vision statements.
- Provide participants with sticky notes and writing materials and ask them to work individually for this step.
- Ask participants to brainstorm using the following questions:
  - What is the desired future state the IT organization can achieve by leveraging AI?
  - How should we work to attain the desired state?
  - How do we want IT to be perceived in the desired state?
- Provide participants with guidelines to build descriptive, compelling, and achievable statements regarding their desired future state.
- Regroup as a team and review answers.

Step 2:

- Ask the team to post their notes on the wall.
- Have the team group notes that have a similar meaning or feeling behind them – these will create themes.
- When the group is done categorizing the statements into themes, ask if there's anything missing. Did they ensure alignment to the corporate and IT vision statements? Are there any elements missing when considering alignment to the corporate and IT vision statements?

Examples: AI vision statements

Vision: IBM is committed to shaping the future of AI with trust and transparency at its core.

Source: IBM, 2025

Vision: To democratize AI as a platform.

Source: Microsoft, 2023

Vision: To be a national leader in the study and implementation of AI technologies to solve specific, practical problems in healthcare.

Source: Stanford Medicine Healthcare AI Applied Research Team, 2024

Vision: By responsibly adopting AI, the Government of Canada can deliver world-class services to its clients, protect our people and interests, achieve a more innovative and efficient workplace, and accelerate scientific discovery for the benefit of all.

Source: Government of Canada, 2025

Vision: Our "AI for People and Planet" encapsulates our belief that the purpose of research and innovation in AI and related technologies is ultimately to benefit people and societies around the world, and to make a positive impact on the planet.

Source: UCL, 2019

1.4 Elicit AI strategic principles

1. Gather the AI strategy creation team and revisit your vision statement.

2. Ask the group to brainstorm answers individually, silently writing their ideas on separate sticky notes. Provide the brainstorming criteria from the previous slide to all team members. Allow the team to put items on separate notes that can later be shuffled and sorted as distinct thoughts.

3. After a set amount of time, ask the members of the group to stick their notes to the whiteboard and quickly present them. Categorize all ideas into four major buckets: breadth, depth, organizational coverage, and planning horizon. Ideally, you want one guiding principle to describe each of the four components.

4. If there are missing guiding principles in any category or anyone's items inspire others to write more, they can stick those up on the wall, too, after everyone has presented.

5. Discuss and finalize your AI guiding principles.

6. Document your guiding principles in Section 1 of the *AI Strategy and Discovery Template*.

Input	Output
• Four components for eliciting guiding principles • Mission and vision statements	• AI strategy guiding principles • AI strategy scope

Materials	Participants
• Sticky notes • Whiteboard/flip chart • Pens • Collaboration/brainstorming tool (whiteboard, flip chart, digital equivalent)	• Executive stakeholders • CIO • Other IT leadership

Example: Strategic principles for AI strategy

The following guiding principles define the values that drive the AI strategy in Year 1 and provide the criteria for a 12-month planning horizon.

01
Align With Business Initiatives

AI initiatives must deliver business value and align with the company's strategic objectives. We will prioritize AI use cases that enable or create business capabilities aligned with the organization's key initiatives.

02
Integrate With Existing Structures and Processes

AI use cases should not be viewed in isolation. AI initiatives and technology should be integrated into existing business processes and workflows to optimize and streamline them. AI governance should be incorporated into existing governance structures as well.

03
Buy Over Build

We will prioritize the sourcing of existing market solutions over the in-house building of ML models.

04
Gen AI Will Not Replace Original Content

Using generative AI for content production and output would compromise our research quality and integrity. Gen AI must not be used for any client-facing content production.

Examples: Strategic guiding principles

Google

- Bold innovation.
- Responsible development and deployment.
- Collaborative progress, together.

Source: Google, 2025

INTEL.gov

- Respect the law and act with integrity.
- Human-centered development and use.
- Informed by science and technology.

Source: Office of the Director of National Intelligence, 2020

THOMSON REUTERS

- Will strive to partner with individuals and organizations who share similar ethical approaches to our own regarding the use of data, content, and AI.
- Aims to use data and to design, develop, and deploy AI products and services that are reliable, consistent, and empower socially responsible decisions.

Source: Thomson Reuters, 2025

Government of Canada

- We focus on the needs of those we serve and the public servants who serve them in deciding where we adopt AI and how we integrate it into our work.
- We work together on AI adoption with Indigenous and Canadian partners, other Canadian and international jurisdictions, and our public service colleagues.
- We have the data, infrastructure, tools, culture, talent, skills and policy we need for responsible, safe, secure, and successful AI adoption.
- We inform clients and public servants when and how we use AI so that they trust that our use of AI respects privacy and is justified, responsible, fair, safe, and secure.

Source: Government of Canada, 2025

FDA U.S. FOOD & DRUG ADMINISTRATION   Health Canada Santé Canada   Medicines & Healthcare products Regulatory Agency
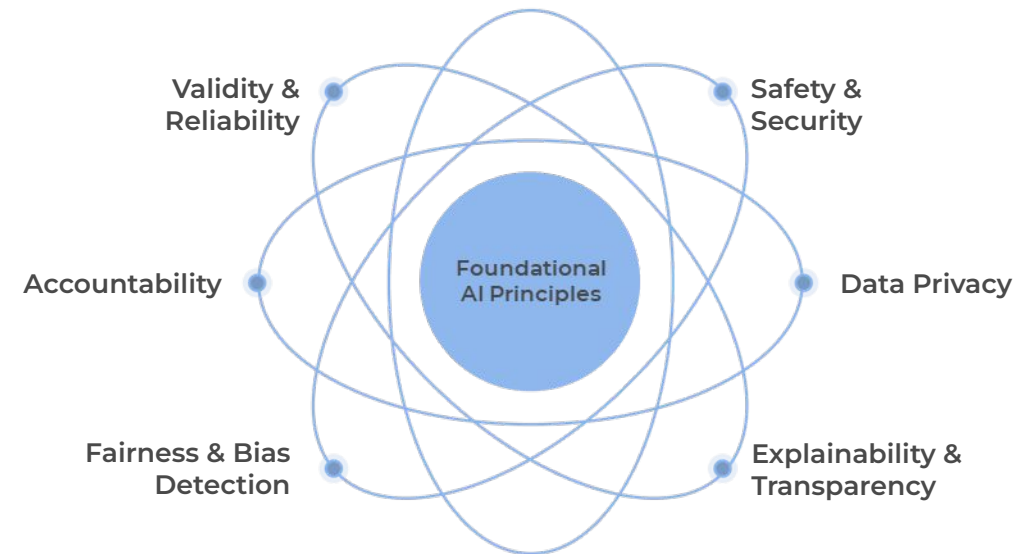
- Multi-disciplinary expertise is leveraged throughout the total product lifecycle.
- Focus is placed on the performance of the human-AI team.

Source: FDA, 2021

What is foundational AI?

A framework for designing, developing, and deploying an AI system that provides safeguards for potential risks of using AI-based technologies.

- **Foundational AI** is an approach to designing, developing, and implementing artificial intelligence technologies in a way that balances the need to innovate, automate, and improve processes, tasks, and experiences with the need to protect, promote, and optimize human-based principles.

- This involves aligning the AI solution to human-based principles. The AI decision-making process encompasses principles such as fairness, explainability, transparency, and accountability to address bias and the need for data privacy.

- *It is a good practice to socialize foundational AI guiding principles to internal and external stakeholders.* When developing AI principles, organizations should ensure their principles are informed by organizational and AI strategies and are used as foundational inputs when defining AI policies, governance, and foundational AI practices more generally.

Validity & Reliability

Safety & Security

Accountability

Foundational AI Principles

Data Privacy

Fairness & Bias Detection

Explainability & Transparency

↓ Download the *Develop Responsible AI Guiding Principles* blueprint

The need for foundational AI guiding principles

Without foundational AI guiding principles, the outcomes of AI use can be extremely negative for both the individuals and the companies delivering the AI application.

Data Privacy

Example: In 2018, Facebook experienced a breach of private data affecting more than 50 million user accounts during the presidential election.

Source: Politico, 2018

Fairness & Bias Detection

Example: It was reported that Amazon would sell its facial recognition technology, Rekognition, to police departments. Amazon later halted this practice.

Source: Amazon, 2020

Explainability & Transparency

Example: IBM announced a collaboration with NYPD for facial recognition and racial classification using surveillance video. IBM later withdrew its facial recognition products.

Source: PCMag, 2020

Security & Safety

Example: There was a petition to cancel Microsoft's contract with US Immigration and Customs Enforcement. Microsoft later responded that, to the best of its knowledge, its products and services were not being used by federal agencies to separate children from their families at the border.

Source: Microsoft, 2018

Foundational AI Principles

Data Privacy

Info-Tech Insight
Creating a comprehensive organization-wide data protection and privacy strategy continues to be a major challenge for privacy officers and privacy specialists.

Definition

- Organizations that develop, deploy, or use AI systems and any national laws that regulate such use shall strive to ensure that AI systems are compliant with privacy norms and regulations, taking into consideration the unique characteristics of AI systems and the evolution of privacy standards.

Challenges

- AI relies on the analysis of large quantities of data that is often personal, posing an ethical and operational challenge when considered alongside data privacy laws.

Initiatives

- Understand which governing privacy laws and frameworks apply to your organization.

- Create a map of all personal data as it flows through the organization's business processes.

- Prioritize privacy initiatives and build a privacy program timeline.

- Select your metrics and make them functional for your organization.

Foundational AI Principles

Safety & Security

Definition

- Safety and security are designed into the systems to ensure only authorized personnel receive access, the system is resilient to any attacks and data access is not compromised in any way, and there are no physical or mental risks to the users.

Challenges

- Consequences of using the application may be difficult to predict. Lower the risk by involving a multidisciplinary team that includes business stakeholders and IT teams.

Initiatives

- Adopt responsible design, development, and deployment best practices.
- Provide clear information to deployers on responsible use of the system.
- Assess potential risks of using the application.

Foundational AI Principles

Explainability & Transparency

Definition

- Explainability is important to ensure the AI system is fair and nondiscriminatory. The system needs to be designed in a manner that informs users and key stakeholders of how decisions were made.

- Transparency focuses on communicating how the prediction or recommendation was made in a humanlike manner.

Challenges

- Complex AI models may use algorithms and techniques that are difficult to understand. This can make it challenging to provide clear and simple explanations for how the system works.

- Some organizations may be hesitant to share the details of how the AI system works for fear of disclosing proprietary and competitive information or intellectual property. This can make it difficult to develop transparent and explainable AI systems.

Foundational AI Principles

Fairness & Bias Detection

Info-Tech Insight

If unfair biases can be avoided, AI systems could increase societal fairness. Equal opportunity in terms of access to education, goods, services, and technology should also be fostered. Moreover, the use of AI systems should never lead to people being deceived or unjustifiably impaired in their freedom of choice.

Definition

- Bias in an AI application refers to the systematic and unequal treatment of individuals based on features or traits that should not be considered in the decision-making process.

Challenges

- Establishing fairness can be challenging because it is subjective and depends on the people defining it. Regardless, most organizations and governments expect that unequal treatment toward any group of people is unacceptable.

Initiatives

- Assemble a diverse group to test the system.

- Identify possible sources of bias in the data and algorithms.

- Comply with laws regarding accessibility and inclusiveness.

Foundational AI Principles

Validity & Reliability

Definition

- Validity refers to how accurately or effectively the application produces results.

- AI system results that are inaccurate or inconsistent increase AI risks and reduce the trustworthiness of the application.

Challenges

- There is a lack of standardized evaluation metrics to measure the system's performance. This can make it challenging for the AI team to agree on what defines validity and reliability.

Initiatives

- Assess training data and collected data for quality and lack of bias to minimize possible errors.

- Continuously monitor, evaluate, and validate the AI system's performance.

Foundational AI Principles

Accountability

Definition

- The group or organization(s) responsible for the impact of the deployed AI system.

Challenges

- Several stakeholders from multiple lines of business may be involved in any AI system, making it challenging to identify the organization that would be responsible and accountable for the AI application.

Initiatives

- Assess the latest NIST Artificial Intelligence Risk Management Framework and its applicability to your organization's risk management framework.
- Assign risk management accountabilities and responsibilities to key stakeholders.

  ○ RACI diagrams are an effective way to describe how accountability and responsibility for roles, projects, and project tasks are distributed among stakeholders involved in IT risk management.

Use an AI Risk Management Framework to guide your foundational AI principles derivation

At the heart of the AI risk management framework is governance. The NIST AI Risk Management Framework offers the following guidelines regarding accountability:

- Roles and responsibilities and lines of communication related to mapping, measuring, and managing AI risks are documented and are clear to individuals and teams throughout the organization.

- The organization's personnel and partners receive AI risk management training to enable them to perform their duties and responsibilities in a manner consistent with related policies, procedures, and agreements.

- Executive leadership of the organization takes responsibility for decisions about risks associated with AI system development and deployment.

Map
Context is recognized and risks related to context are identified

Measure
Identified risks are assessed, analyzed, or tracked

Govern
A culture of risk management is cultivated and present

Manage
Risks are prioritized and acted upon based on a projected impact
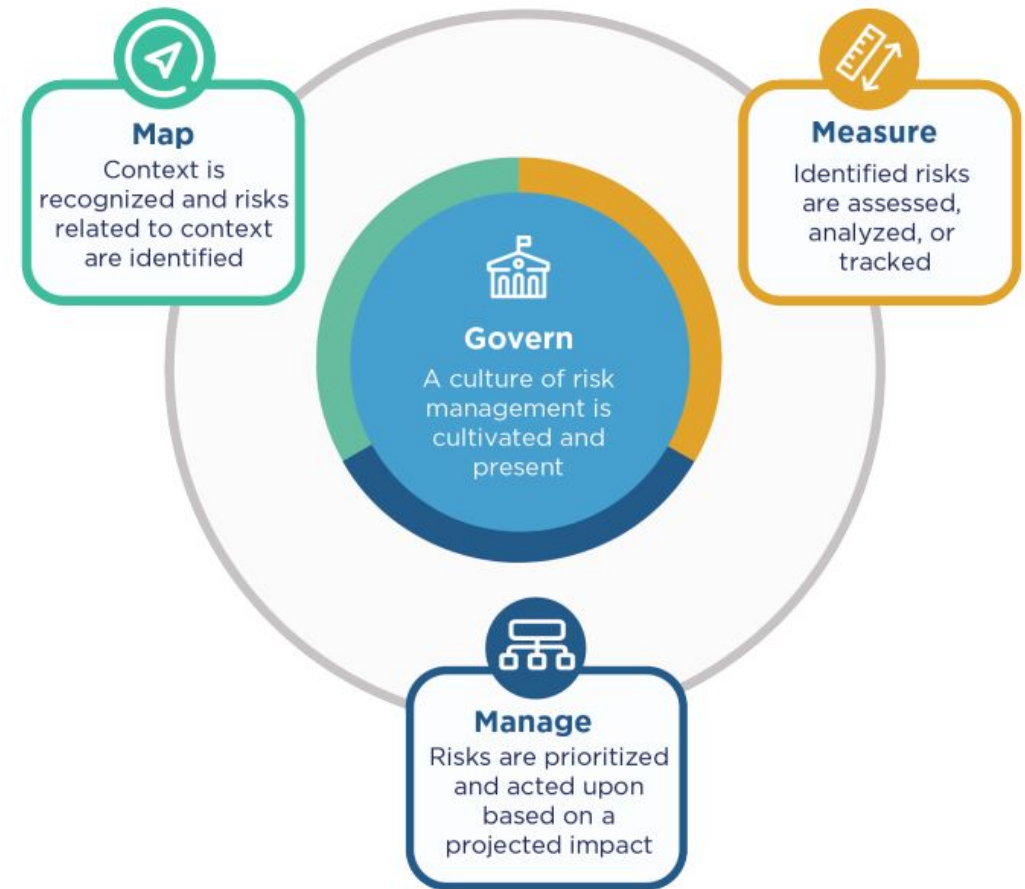
Image from Artificial Intelligence Risk Management Framework, NIST, 2023

Be sure to balance AI opportunities against the risks

Defining the long-term goals and objectives of a business

Business Strategy

Aligned Strategy

AI Strategy

Defining how and where AI can add value to the organization

Tactical Plan

Corporate Governance

AI Governance

Governance

Enforcing policies and frameworks to ensure responsible behavior
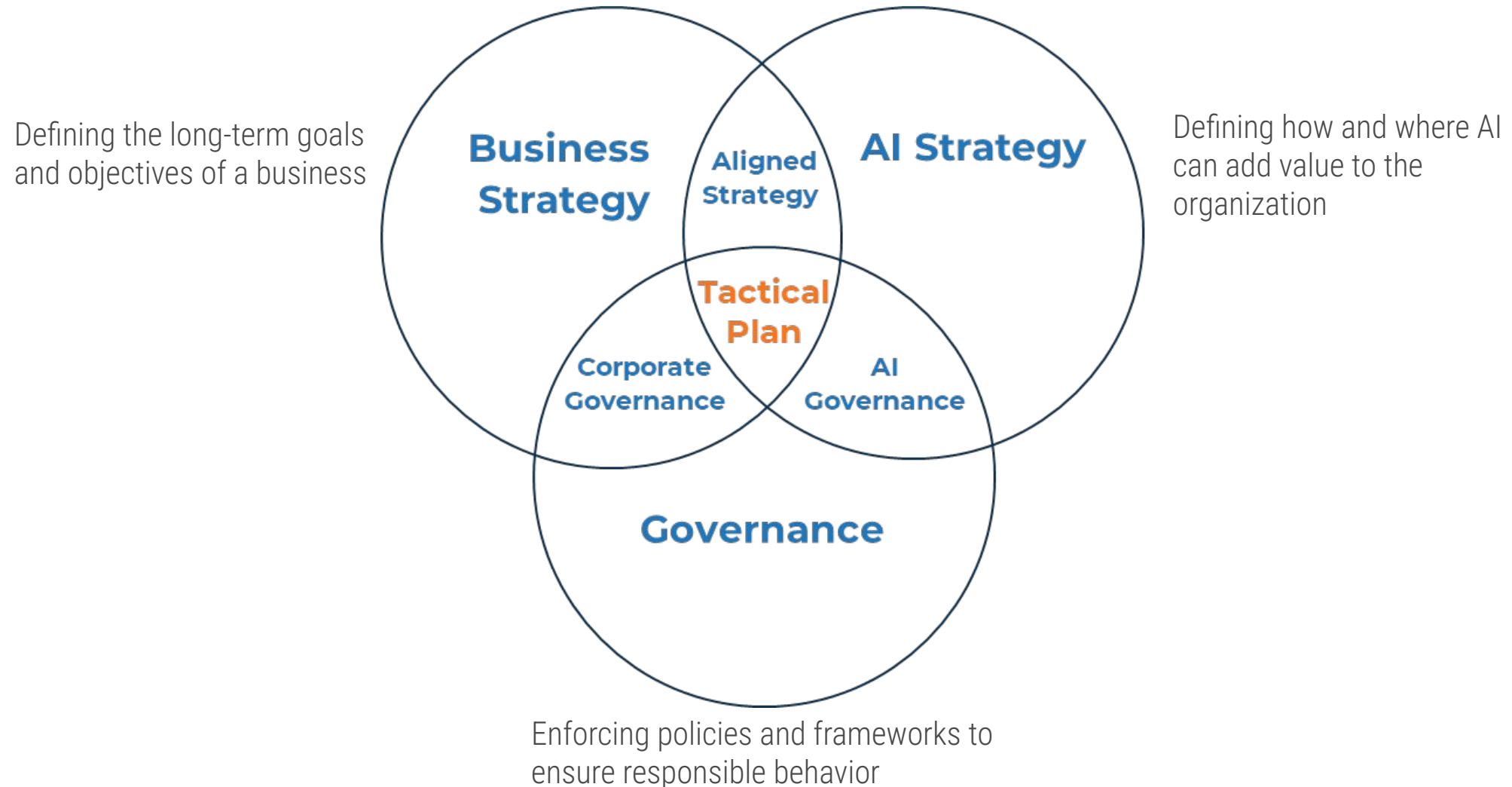
Session 2

Identify AI Use Cases & Assess Current AI Maturity

Session 1

1.1 Understand business goals and value drivers
1.2 Elicit business AI goals
1.3 Construct AI vision statement
1.4 Elicit AI strategic principles

Session 2

2.1 Identify candidate AI use cases
2.2 Assess current AI maturity
2.3 Identify strategic AI investment path

Session 3

3.1 Map candidate AI use cases
3.2 Build AI initiatives one-pagers
3.3 Prioritize candidate AI use cases

Session 4

4.1 Build your AI initiative roadmap
4.2 Build a communication plan for your roadmap

This session will walk you through the following activities:

- Identifying AI use cases in alignment with strategic business goals
- Understanding the dimensions of AI maturity
- Assessing current AI maturity
- Identifying strategic AI investment path

This session involves the following participants:

- AI initiative lead
- CIO
- Other IT leadership

Build Your AI Strategy Roadmap

2.1 Identify candidate AI use cases

1. Use the *AI Use Case Selection Tool* to create longlists of AI use cases.

2. On the Data Input tab, first select your sector: public or private.

3. Second, using the drop-down list options, create up to 10 groups of AI use cases. These are based on your organizational goals (chosen in Phase 1), the function you want to focus on (based on Info-Tech's AI Marketplace taxonomy), and the value stream of that function. You do have an option to select "All" for each drop-down.

4. Bring these use cases forward to assess their feasibility and value for later activities in this blueprint.

↓ Download the *AI Use Case Selection Tool*

Input

- Business goals
- Business initiatives
- Business capability map
- AI use cases

Output

- Business-aligned AI use cases list

Materials

- Collaboration/brainstorming tool (whiteboard, flip chart, digital equivalent)
- *AI Use Case Selection Tool*

Participants

- AI initiative lead
- CIO
- Other IT leadership

Info-Tech's industry-leading AI Maturity Model

A principle-based approach is required to advance AI maturity.

These maturity levels focus primarily on addressing the technical challenges of building a functional AI model.

Beyond the technical challenges of building the AI model are human-based principles that guide development in a responsible manner to address consumer and government demands.
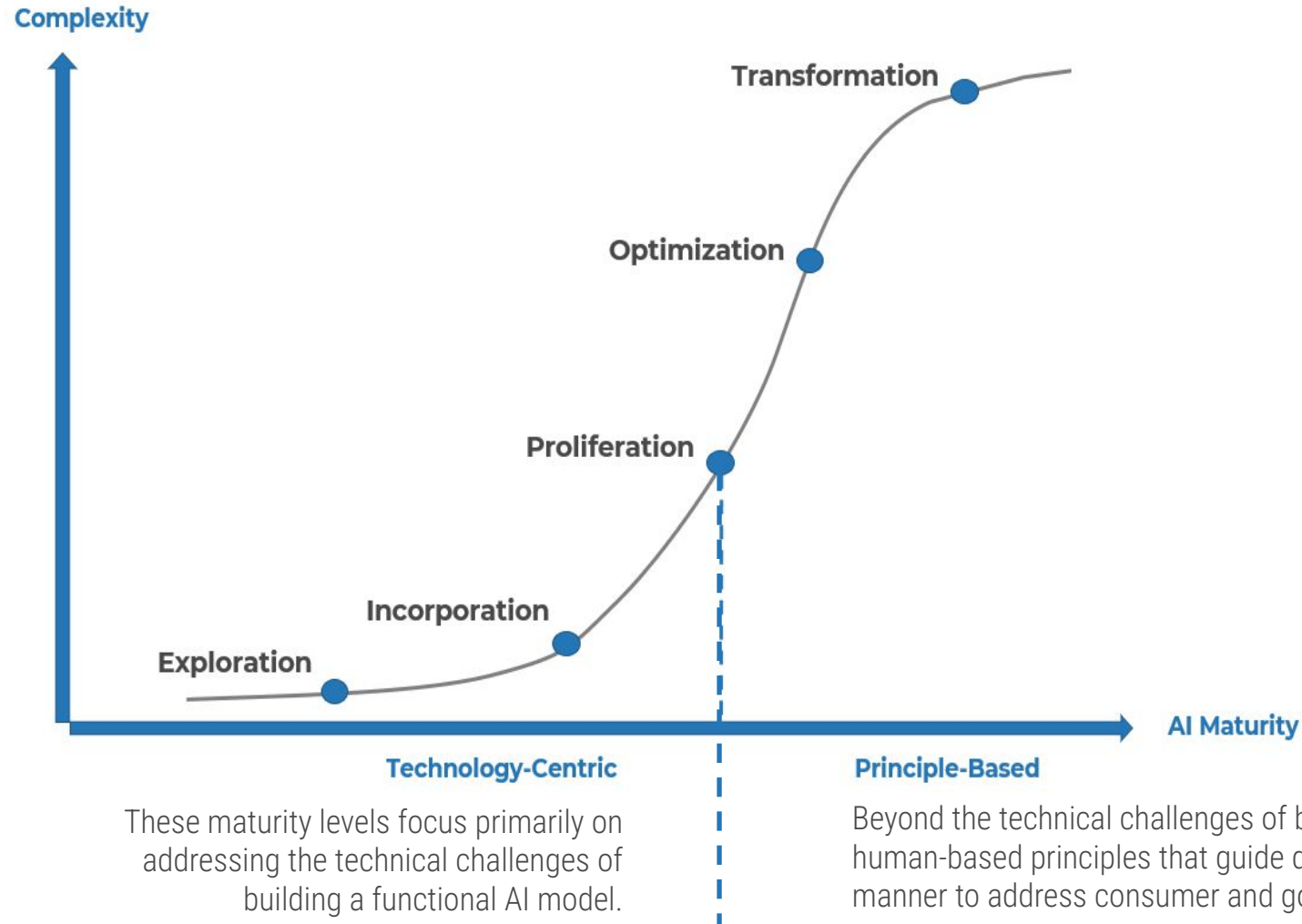
AI maturity dimensions

Assess your AI maturity to understand your organization's ability to deliver in a digital age
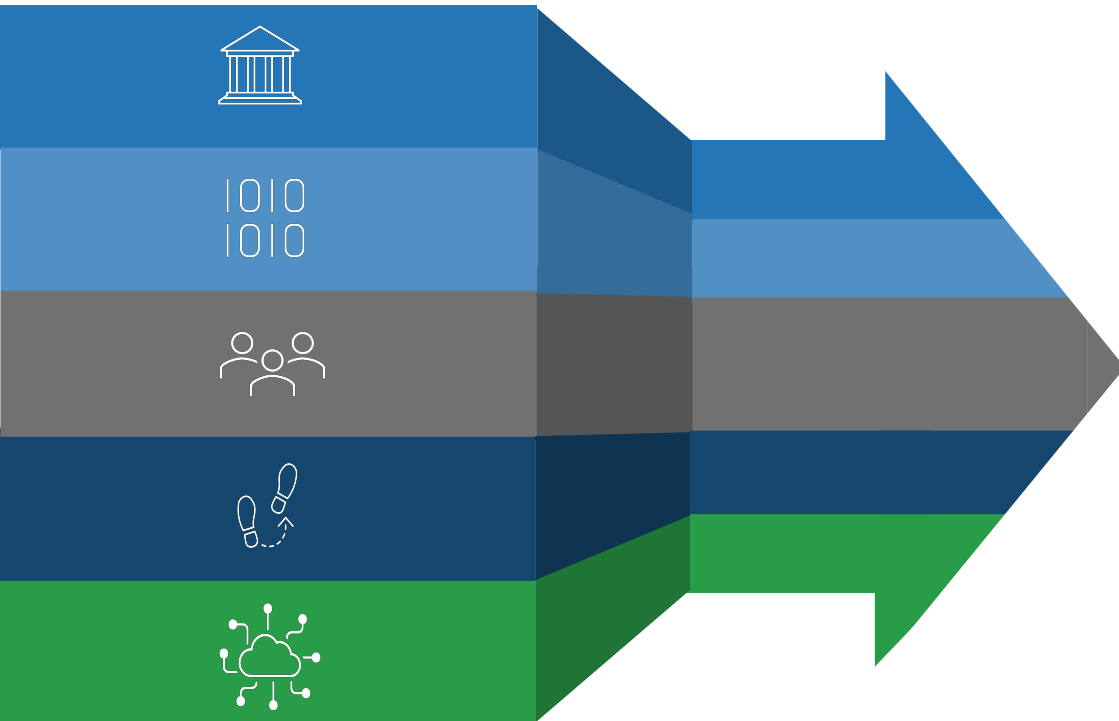
AI Governance

Does your organization have an enterprise-wide, long-term strategy with clear alignment on what is required to accomplish it?

Data Management

Does your organization embrace a data-centric culture that shares data across the enterprise and drives business insights by leveraging data?

People

Does your organization employ people skilled at delivering AI applications and building the necessary data infrastructure?

Process

Does your organization have the technology, processes, and resources to deliver on its AI expectations?

Technology

Does your organization have the required data and technology infrastructure to support AI-driven digital transformation?

AI Maturity Model dimensions and characteristics

	MATURITY LEVEL				
DIMENSION	**Exploration**	**Incorporation**	**Proliferation**	**Optimization**	**Transformation**
AI Governance	Awareness	AI model development	AI model deployment	Corporate governance	Driven by ethics and societal considerations
Data Management	Silo-based	Data enablement	Data standardization	Data is a shared asset	Data can be monetized
People	Few skills	Skills enabled to implement silo-based applications	Skills accessible to all organizations	Skills development for all organizations	AI-native culture
Process	No standards	Focused on specific business outcomes	Operational	Self-service	Driven by innovation
Technology (Infrastructure and AI Enablers)	No dedicated infrastructure or tools	Infrastructure and tools driven by proofs of concept (POCs)	Purpose-built infrastructure, custom or commercial-off-the-shelf (COTS) AI tools	Self-service model for AI environment	Self-service model for any IT environment

AI Maturity Dimensions

AI Governance

Requirements

- AI governance requires establishing policies and procedures for AI model development and deployment. Organizations begin with an awareness of the role of AI governance and evolve to a level where AI governance is integrated with organization-wide corporate governance.

Challenges

- Beyond the governance of AI technology, the organization needs to evolve the governance program to align to foundational AI guiding principles.

Initiatives

- Establish foundational AI guidelines to govern AI development.

- Introduce an AI review board to review all AI projects.

- Introduce automation and standardize AI development processes.

AI governance is central to foundational AI

Organization

Structure, roles, and responsibilities of the AI governance organization.

Monitoring

Monitoring compliance and risk of AI/ML systems/models in production.

Tools & Technologies

Tools and technologies to support AI governance framework implementation.

Model Governance

Ensuring accountability and traceability for AI/ML models.

Operating Model

How AI governance operates and works with other organizational structures to deliver value.

Risk & Compliance

Alignment with corporate risk management and compliance with regulations and assessment frameworks.

Policies/Procedures/ Standards

Policies and procedures to support implementation of AI governance.
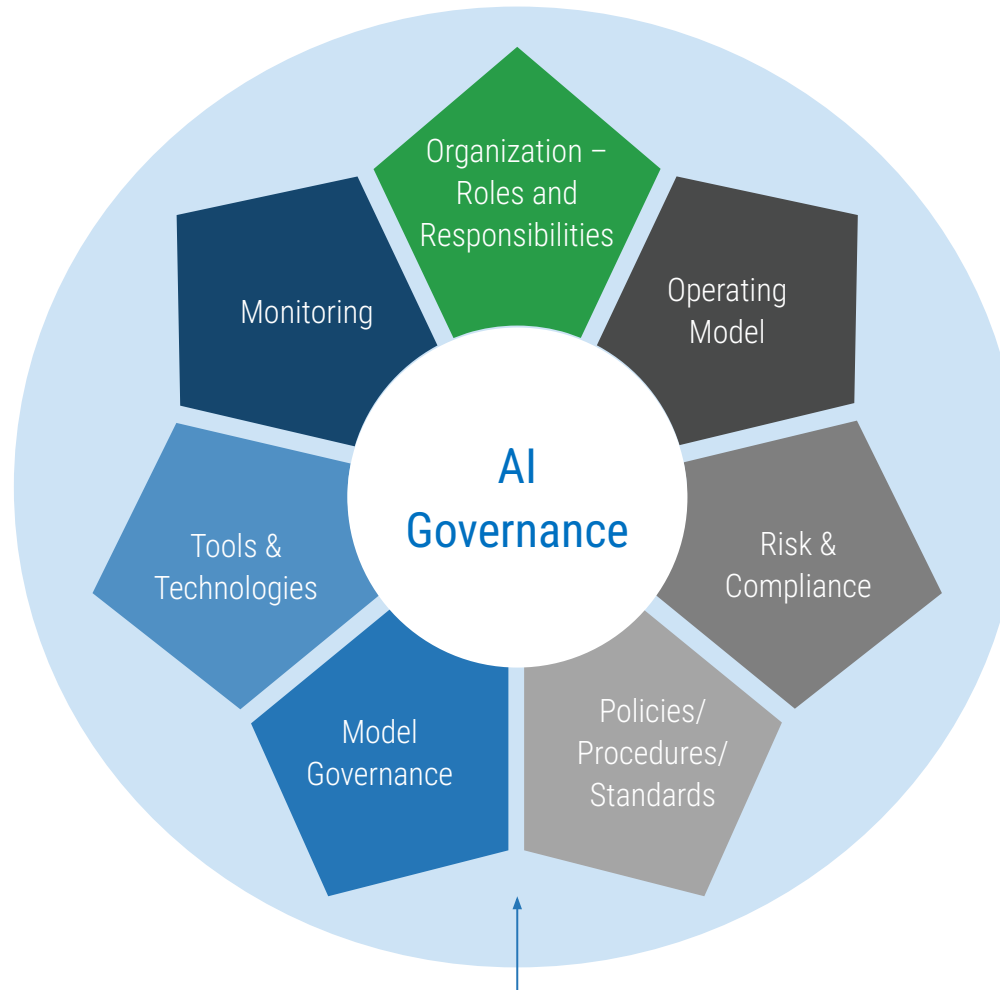
Foundational AI Principles are a part of how you manage and govern AI.

Next steps in AI governance

AI governance fits within enterprise governance.

Enterprise Governance

Authority for enterprise governance falls to the board and executive management.

- Provides strategic direction for the organization.
- Ensures objectives are met.
- Sets the risk standards or profile.
- Delegates resources responsibly.

AI Governance

AI subcommittees will govern the use of AI within the organization.

- Ensures AI initiatives align with IT and organizational goals.
- Ensures AI initiatives align with our foundational AI principles and ethical standards.
- Mitigates risks associated with the use of AI.
- Defines and ensures the adherence to policies and standards related to implementing AI within the organization.
- Final decision authority for resolving any AI-related issues.

Next steps in AI governance

Mandate and responsibilities of executive AI governance committee

MANDATE

The executive-level AI governance committee executes the strategic direction set by the board and acts as an ultimate approval and decision-making body.

- Set foundational AI principles and audit their implementation within the organization.
- Govern AI-related risks.
- Ensure realization of value from AI.
- Define and audit AI policies and standards.
- Guide development of and approve AI strategy.

RESPONSIBILITIES

- Define foundational AI principles and other AI policies and standards and audit their implementation.
- Review and approve AI strategy; ensure AI/ML goals and initiatives are aligned with strategic business objectives and initiatives.
- Ensure AI value and value drivers are understood.
- Ensure a risk management framework is in place and used to assess AI risk.
- Build a risk mitigation plan.
- Maintain awareness of AI implementation and its impact throughout the organization.
- Ensure necessary checks and precautions are in place at each stage of AI design and use.
- Set standards and processes to remove bias from data sets and ML models.
- Routinely review and assess compliance of proposed AI systems, vendors, or models with privacy and ethics regulations, external and internal guidelines, and policies.
- Establish and review metrics to evaluate the impact of AI initiatives.
- Stay informed and current on AI advancements and best practices.

Next steps in AI governance

Implementation of AI initiatives will be managed by an AI center of excellence.

Establish an AI center of excellence to implement the roadmap of business-aligned AI initiatives.

The AI center of excellence will act as a central body for promoting AI/ML best practices, providing AI/ML/data science teams across the organization with support, helping with knowledge sharing, and driving standardization across all teams working on AI initiatives.

RESPONSIBILITIES

- Build guardrails for the use of AI systems.
- Assist development teams in conducting initial risk and compliance assessment of data sets and models.
- Standardize AI architecture, tools, and technologies, including ML operations (MLOps) tools, across the organization.
- Define training opportunities, develop a training plan, and conduct training.
- Collaborate with the AI/data science teams and AI governance council to resolve any issues or concerns related to either data or model use.
- Collaborate with enterprise architecture (EA) to ensure alignment with EA practices.
- Develop prototypes or proofs of concept and share the results with the community.
- Align with IT on the priorities and tool adoptions.

Example:

Establish an AI center of excellence (CoE)

Establish an AI CoE, identify and train team members, and define practices and responsibilities.

AI GOAL CATEGORY

Risk Mitigation

INCREMENTAL COST

$10,000
LABOR

$0
SYSTEMS

$0
CONTRACTS

$10,000
TOTAL

INITIATIVE DESCRIPTION

- Establish multidisciplinary team of experts from various departments who will oversee the implementation of AI initiatives within the organization.
- Define roles and responsibilities of CoE members.
- Define processes, procedures, KPIs, and metrics for the CoE.
- Define reporting structure and communication plan.
- Provide training and education to CoE members.

PROJECT TIMELINE

	Year 1										
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — HIGH

Ensuring coordinated, successful implementation of AI initiatives across the organization.

OTHER EXPECTED BENEFITS

- Centralization of data
- Easier scalability of AI efforts

FEASIBILITY

Ability to execute	**High**
Risk mitigation	**Low**
Stakeholder support	**High**

COMPLEXITY/DEPENDENCIES

- Approval of Executive AI Governance Committee

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

Develop committee charter

Craft charters for effective AI governance at the executive level.

AI GOAL CATEGORY

Risk Mitigation

INCREMENTAL COST

$2,500
LABOR

$0
SYSTEMS

$0
CONTRACTS

$2,500
TOTAL

INITIATIVE DESCRIPTION

- Formalize roles on the committee and build the authority matrix for decision-making.
- Define operating model for board committee.
- Define collaboration models (including meeting cadence and agendas, stakeholder collaboration).
- Define risk governance process and risk mitigation plan.
- Define AI auditing process (auditing for risk, implementation of foundational AI principles, compliance with regulations, realization of value).

FEASIBILITY

Ability to execute	High
Risk mitigation	Low
Stakeholder support	High

PROJECT TIMELINE

	Year 1											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE   HIGH

Ensure ethical and responsible use of AI technologies in line with our foundational AI principles.

OTHER EXPECTED BENEFITS

Improved decision-making and operational efficiency.

COMPLEXITY/DEPENDENCIES

- Approval of Executive AI Governance Committee

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

AI Maturity Dimensions

Data Management

Requirements

- Organizations begin their data journey with a focus on pursuing quality data for the AI model. As organizations evolve, data management tools are leveraged to automate the capture, integration, processing, and deployment of data.

Challenges

- A key challenge is to acquire large volumes of quality data to properly train the model. In addition, maintaining data privacy, automating the data management lifecycle, and ensuring data is used in a responsible manner are ongoing challenges.

Initiatives

- Implement GDPR requirements.

- Establish responsible data collection and processing practices.

- Implement strong information security and data protection practices.

- Implement a data governance program throughout the organization.

Data governance enables AI

- **Integrity, quality,** and **security** of data are key outputs of data governance programs as well as necessities for effective AI.

- Data governance focuses on creating accountability at the internal and external stakeholder levels and establishing a set of data controls from technical, process, and policy perspectives.

- Without a data governance framework, it is increasingly difficult to harness the power of AI integration in an ethical and organization-specific way.

Data Governance in Action

Canada has recently established the Canadian Data Governance Standardization Collaborative, governed by the Standards Council of Canada. The purpose is multipronged:

- Examine the foundational elements of data governance (privacy, cybersecurity, ethics, etc.).

- Lay out standards for data quality and data collection best practices.

- Examine infrastructure of IT systems to support data access and sharing.

- Build data analytics to promote effective and ethical AI solutions.

Source: Global Government Forum, 2020

Operating Model

Policies & Procedures

Data Ownership & Stewardship

Data Leadership

DATA GOVERNANCE

Data Literacy & Culture

Data Privacy & Security

Enterprise Projects & Services
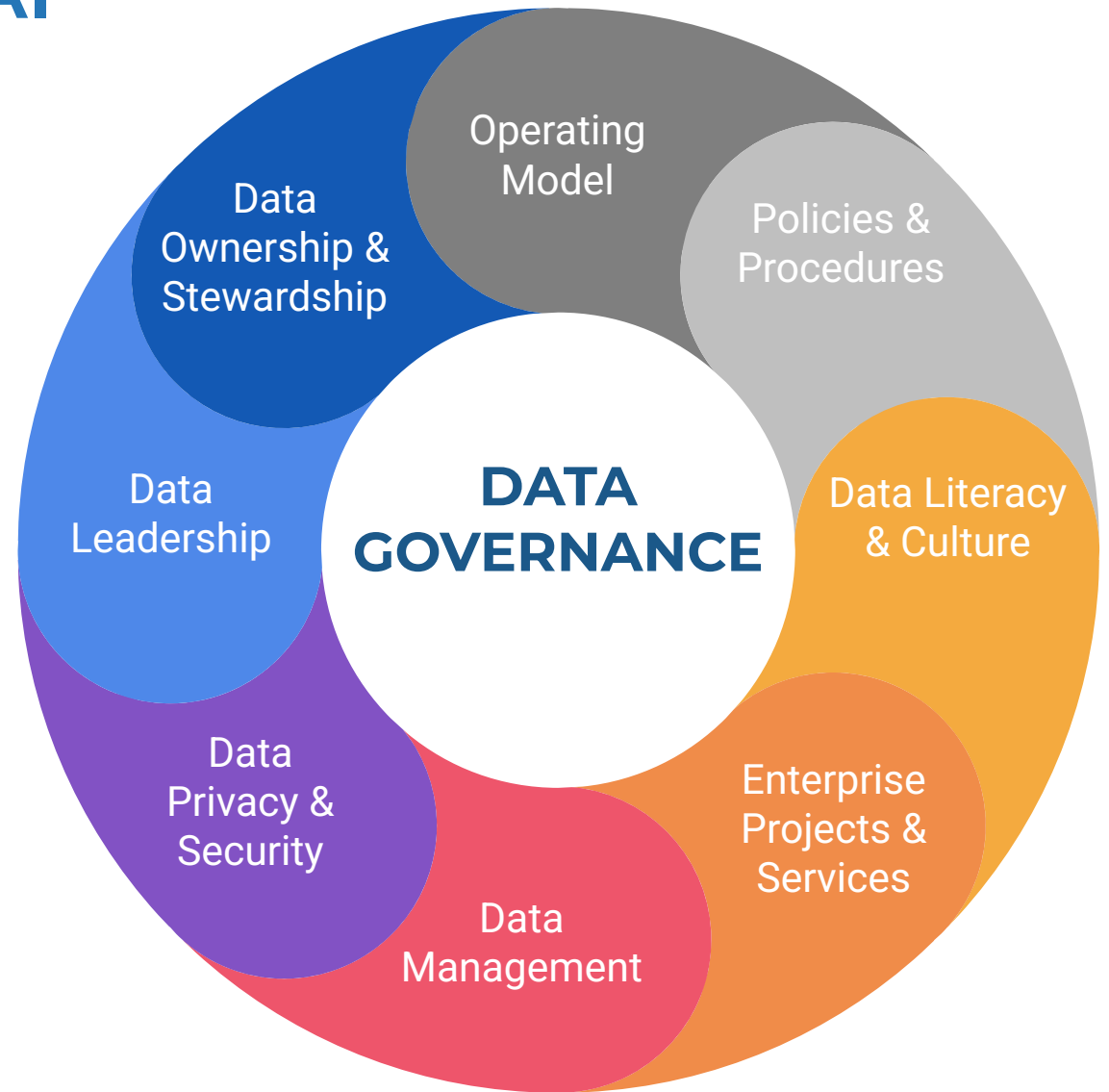
Data Management

Example:

Improve data operations capabilities

Develop internal data integration, management, cleansing, and preparation capabilities.

AI GOAL CATEGORY

Operational Excellence

INCREMENTAL COST

$250K
LABOR

$0
SYSTEMS

$25,000
CONTRACTS

$275K
TOTAL

INITIATIVE DESCRIPTION

- Hire two FTEs to support data integration, data management, and data cleansing/preparation activities.
- Move one FTE from application maintenance to the data operations team to analyze, approve, prepare, and deliver data for AI pilot use cases.
- Integrate key data sources (published content, client data) into the main analytical data store.
- Explore data testing and orchestration platform solutions.

PROJECT TIMELINE

Year 1											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — HIGH

- Reduce required time to deliver and scale new use cases.
- Improve quality of delivered AI products.

OTHER EXPECTED BENEFITS

Identify data operations best practices that can support other data & analytics teams.

FEASIBILITY

Ability to execute	Medium
Risk mitigation	Medium
Stakeholder support	High

COMPLEXITY/DEPENDENCIES

- Strategy and budget approval

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

AI Maturity Dimensions

People

Requirements

- Several data-centric skills and roles are required to successfully build, deploy, and maintain the AI model. The organization evolves from having few skills to everybody being able to leverage AI to enhance business outcomes.

Challenges

- AI skills can be challenging to find and acquire. Many organizations are investing in education to enhance their existing resources, leveraging no-code systems and software as a service (SaaS) applications to address the skills gap.

Initiatives

- Promote a data-centric culture throughout the organization.

- Leverage and educate technical-oriented business analysts and business-oriented data engineers to help address the demand for skilled resources.

- Develop an AI center of excellence accessible by all departments for education, guidance, and best practices for building, deploying, and maintaining the AI model.

Multidisciplinary skills are required for successful implementation of AI applications

Blending AI with technology and business domain understanding is key. Neither can be ignored.

Business Domain Expertise

- Business Analysts
- Industry Analysts

AI/Data Skills

- Data Scientists
- Data Engineers
- Data Analysts

IT Skills

- Database Administrators
- Systems Administrators
- Computer Specialists

Domain understanding

IT skills

AI skills
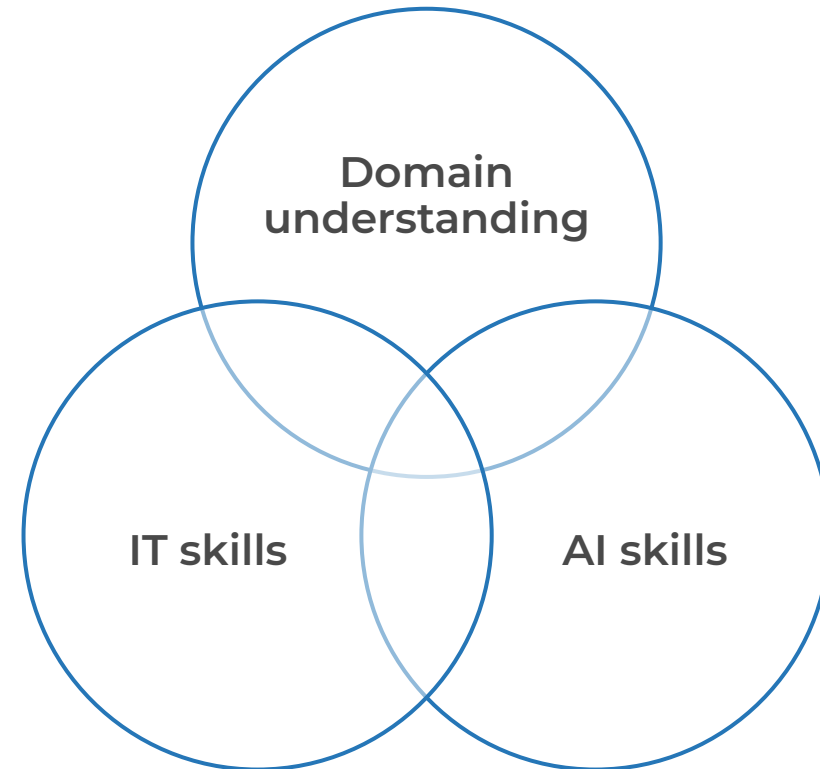
↓ Download the *VP AI Job Description Template*

Example:

Create an ML operations team

Hire a team of experts to select and manage LLMs for identified use cases.

AI GOAL CATEGORY

Operational Excellence

INCREMENTAL COST

$150k
LABOR

$0
SYSTEMS

$20,000
CONTRACTS

$170k
TOTAL

INITIATIVE DESCRIPTION

- Move two FTEs from the development team to a new MLOps team.
- Hire one FTE to lead the team.
- Internal and external training for this team to support the following activities:
  - Vendor and model selection
  - Model training and fine-tuning
  - Prompt engineering
  - Selecting a best-in-class LLM instance to train on chosen use cases

PROJECT TIMELINE

Year 1											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — HIGH

Deliver business-enabling AI projects in line with good practices.

OTHER EXPECTED BENEFITS

Develop an internal ML engineering capability that can be applied to other projects in the future.

FEASIBILITY

Ability to execute	
Risk mitigation	**Medium**
Stakeholder support	**High**

COMPLEXITY/DEPENDENCIES

- Strategy and budget approval

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

Train and brief committee members

Provide foundational AI training and brief committee members on current use of AI within the organization.

AI GOAL CATEGORY

Risk Mitigation

INCREMENTAL COST

$5,000
LABOR

$0
SYSTEMS

$5,000
CONTRACTS

$10,000
TOTAL

INITIATIVE DESCRIPTION

- Train committee members on our AI governance framework, foundational AI principles, policies, guidelines, relevant regulations, and ethical considerations.
- Invite external speakers or industry experts to share on AI trends and the regulatory landscape.
- Create an AI resource center.
- Review case studies and brief committee members on current use of AI within the organization, highlighting best practices and lessons learned.

FEASIBILITY

Ability to execute	High
Risk mitigation	Low
Stakeholder support	High

PROJECT TIMELINE

			Year 1								
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE   HIGH

Ensure ethical and responsible use of AI technologies in line with our foundational AI principles.

OTHER EXPECTED BENEFITS

Improved decision-making and operational efficiency.

COMPLEXITY/DEPENDENCIES

- Approval of Executive AI Governance Committee

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

Strengthen AI literacy and capabilities

Provide comprehensive AI training programs and continuous learning opportunities for all employees.

AI GOAL CATEGORY

Innovation & Modernization

INCREMENTAL COST

$250K
LABOR

$TBD
SYSTEMS

$TBD
CONTRACTS

$TBD
TOTAL

INITIATIVE DESCRIPTION

- Keep workforce engaged and skilled in the dynamic AI field.
- Offer unified skill gap assessment tools via centralized location.
- Offer aggregated, curated learning material to upskill workforce through online/recorded/live training resources (e.g. Digital Academy, SMA Technical Excellence Program).
- Establish a feedback loop to keep training material relevant.
- Provide workforce with design tools to develop tailored AI solutions for their missions.
- Develop AI work sharing and progress updates via tech consultations such as guilds for AI researchers or platform deep dives for developers.
- Provide engagement opportunities: hack-a-thons, lunch n' learns, lectures, webinars, book clubs, podcast clubs.
- Implement rotations to/from client/home org for hands-on training, knowledge transfer, and experience.
- Curated innovation time. Create time for training. Consider including innovation objectives as part of individual performance plans.

FEASIBILITY

Ability to execute	**Medium**
Risk mitigation	**Medium**
Stakeholder support	**High**

PROJECT TIMELINE

Year 1											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
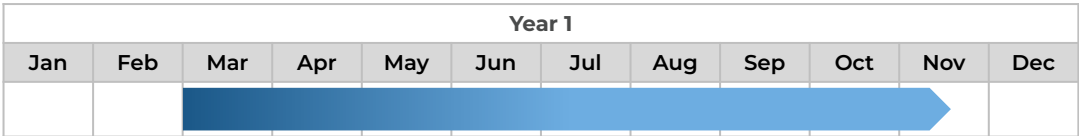
BUSINESS VALUE — HIGH

- Productivity gain due to skilled workforce who can more easily uses AI capabilities.
- Better-quality AI solutions.
- Mission delivery enhanced with right AI tools to achieve objectives more efficiently.

OTHER EXPECTED BENEFITS

- More effective knowledge sharing for individual innovation or solutions creation.
- Enhanced decision-making.
- Increased employee satisfaction, morale and retention/recruitment supporting the organization's brand.
- Time savings from increased tool usage.

COMPLEXITY / DEPENDENCIES

- Overcoming challenges of culture change.
- Creating training resources and keeping them updated.
- Approval of upskilling resources.
- Middle management buy-in.
- Staying up to date and reassessing continuously.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

AI Maturity Dimensions

Process

Requirements

- Automate processes involved with building, deploying, and maintaining the model to enable the organization to scale, enforce standards, improve time to market, and reduce costs. The organization evolves from performing tasks manually to an environment where all major processes are AI-enabled.

Challenges

- Many solutions are available to automate the development of the AI model. There are fewer tools to automate foundational AI processes, but this market is growing rapidly.

Initiatives

- Assess opportunities to accelerate AI development with the adoption of MLOps.

- Assess foundational AI toolkits to test alignment with guiding principles.

Example:

Simplified procurement process for data and AI infrastructure

AI GOAL CATEGORY

Operational Excellence

INCREMENTAL COST

$TBD
LABOR

$TBD
SYSTEMS

$TBD
CONTRACTS

$TBD
TOTAL

INITIATIVE DESCRIPTION

- Define existing procurement process.
- Identify process improvement areas.
- Formalize roles and responsibilities and build the authority matrix for decision-making and procurement governance.
- Define operating model for procurement process.
- Define collaboration models (including meeting cadence and agendas, stakeholder collaboration, etc.).
- Define risk profile and risk mitigation plan for AI vendor procurement process.
- Define AI auditing process to evaluate risk, implementation of foundational AI principles, compliance with regulations, and realization of value.

FEASIBILITY

Ability to execute	**High**
Risk mitigation	**Low**
Stakeholder support	**High**

PROJECT TIMELINE

	Year 1						Year 2					
Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept

BUSINESS VALUE   HIGH

- Ensure ethical and responsible use of AI technologies in line with our foundational AI principles.
- Accelerate time to value.
- Reduce acquisition cost of duplicate AI systems by 10%.

OTHER EXPECTED BENEFITS

- Improved decision-making and operational efficiency.

COMPLEXITY / DEPENDENCIES

- Approval of Executive AI Governance Committee.
- Ability to harvest unstructured data in disparate data repositories.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Evolving to a model-driven environment is pivotal to advancing your AI maturity

Current Environment

Model Development – Months
- Model rewriting
- Manual optimization and scaling
- Develop/test/release
- Application monoliths

Data Discovery & Prep – Weeks
- Navigating data silos
- Unactionable metadata
- Tracing lineage
- Cleansing and integration
- Privacy and compliance

Install Software and Hardware – Week/Months
- Workload contention
- Lack of tool flexibility
- Environment request and setup
- Repeatability of results
- Lack of data and model sharing
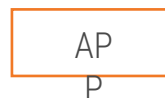
Model-Driven Development

Machine Learning as a Service (MLaaS) – Weeks
- Apply DevOps and continuous integration/delivery (CI/CD) principles
- Microservices/cloud-first applications
- Model portability and reuse
- Streaming/API integration

Data as a Service – Hours
- Self-service data catalog
- Searchable metadata
- Centralized access control
- Data collaboration
- Data virtualization

Platform as a Service – Minutes/Hours
- Self-service data science portal
- Integrated data sandbox
- Environment agility
- Multitenancy

Shared, Optimized Infrastructure

AP
P

AI Maturity Dimensions

Technology

Requirements

- A technology platform that is optimized for AI and advanced analytics is required. The organization evolves from ad hoc systems to an environment where the AI hardware and software can be deployed through a self-service model.

Challenges

- Software and hardware platforms to optimize AI performance are still relatively new to most organizations. Time spent on optimizing the technology platform can have a significant impact on the overall performance of the system.

Initiatives

- Assess the landscape of AI enablers that can drive business value for the organization.
- Assess opportunities to accelerate the deployment of the AI platform with the adoption of infrastructure as a service (IaaS) and platform as a service (PaaS).
- Assess opportunities to accelerate performance with the optimization of AI accelerators.

Infrastructure – AI accelerators

CPU	GPU	FPGA	ASIC

Flexibility ← → **Efficiency**

CPU	GPU	FPGA	ASIC
intel	NVIDIA	XILINX	Tesla, Chrome, aws
AMD	AMD	intel	Graphcore, Qualcomm
			intel, Microsoft
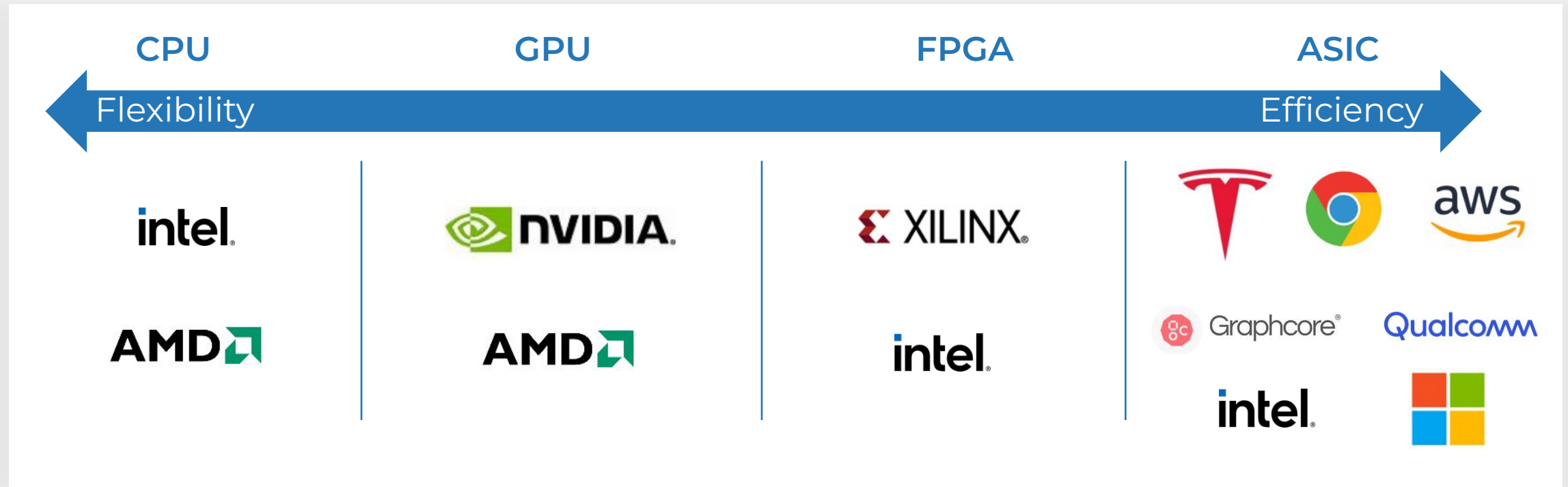
"By 2025, 70% of companies will invest in alternative computing technologies to drive business differentiation by compressing time to value of insights from complex data sets."

– IDC, 2021

Performing the AI Maturity Assessment

The Scale

Assess your AI maturity by reviewing the maturity scale on the right and selecting the level that closest resembles the organization's current AI environment. Maturity dimensions that contribute to overall AI maturity include AI governance, data management, and people, process, and technology capabilities.
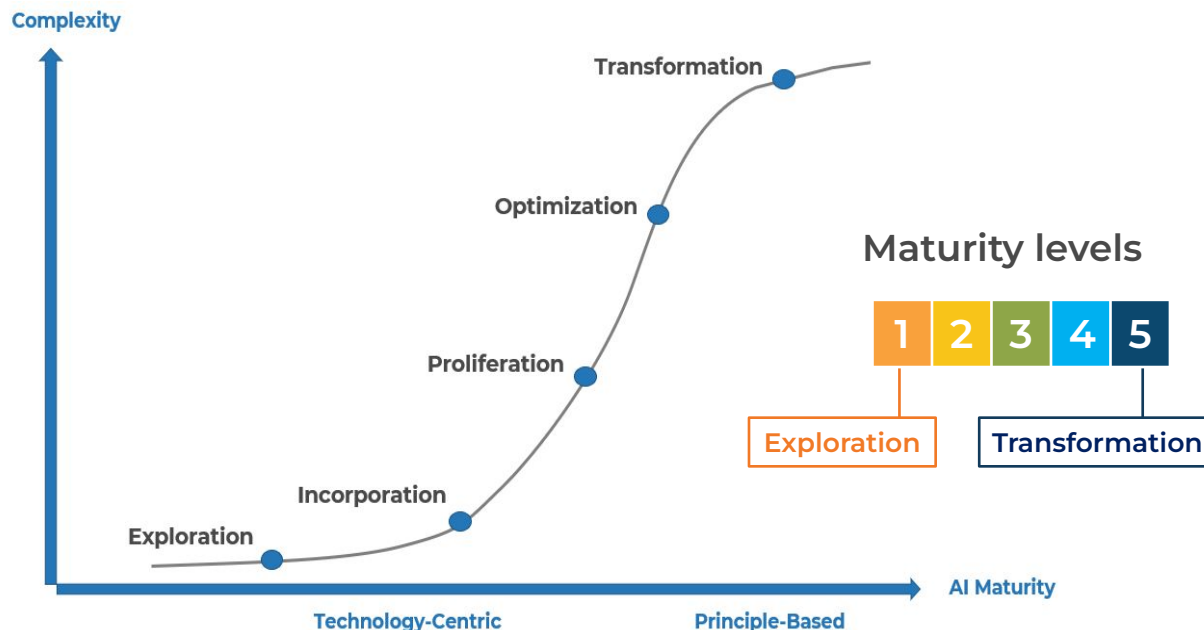
Exploration (1.0)

The organization has no experience building or using AI applications.

Incorporation (2.0)

The organization has developed or acquired some skills in using AI applications, or the organization is considering AI pilots.

Proliferation (3.0)

AI applications have been adopted and implemented in multiple departments. Some of the foundational AI guiding principles (e.g. data privacy) have been addressed.

Optimization (4.0)

The organization has automated the majority of its digital processes and leverages AI to optimize business operations. Controls are in place to monitor compliance with foundational AI guiding principles.

Transformation (5.0)

The organization has adopted an AI-first culture and approach for building or implementing new business capabilities. Foundational AI guiding principles are operationalized with AI processes that proactively address possible breaches or risks associated with AI applications.

2.2 Assess current AI maturity

It is important to understand the current capabilities of the organization to deliver and deploy AI-based applications. Consider that advancing AI capabilities will also involve organizational changes and integration with the organization's governance and risk management programs.

1. Assess the current state of the organization's AI capabilities with respect to AI governance, data, people, process, and technology infrastructure using Info-Tech's *AI Maturity Assessment Tool*.

2. Follow the instructions on Tab 2 and answer the questions to elicit your current AI maturity.

3. *(Optional)* If you want to assess the target state as well, answer the same questions again considering where you see your organization in the future.

4. Consider the following as you complete the assessment:
   a) What is the state of AI and data governance in the organization?
   b) Does the organization have the skills, processes, and technology environment to deliver AI-based applications?
   c) What team will be accountable for any and all business outcomes of using the AI applications?
   d) Has a risk assessment been performed?

5. Make sure you avoid the following common mistakes:
   a) Do not focus only on addressing the technical challenges of building the AI model.
   b) Do not ignore subject matter experts on either the business or the IT side. You will need to consider both.

↓ Download the *AI Maturity Assessment Tool*

Input

- Any documented AI policies, standards, and best practices
- Corporate and AI governance practices
- Any risk assessments

Output

- Current AI maturity assessment results

Materials

- Whiteboard/flip charts
- *AI Maturity Assessment Tool*

Participants

- AI initiative lead
- CIO
- Other IT leadership

Next steps in AI maturity

Analyze the gaps between current and target states.

Current State (Year 0) ●————————

GAP ANALYSIS

Target State (Year 1) ●

Level 2: Incorporation

- We have defined the role and scope for AI governance.

- We have initiated pilot projects to gain practical experience and insights into AI applications.

- We have not deployed any AI applications at scale.

- We're focused on learning from the outcomes of pilot projects.

AI Governance
We need to implement formal AI governance bodies, charters, memberships, decision authorities, and relationship with other governing bodies.

Data Management Operations
We need to strengthen existing capabilities around data integration, management, cleansing, and preparation for analysis.

Machine Learning Engineering & Operations
We need to build capabilities to select vendors and foundational models, train and fine-tune models, engineer prompts, and manage deployed models.

People & Skills
We need to augment our AI skills by either training our staff or acquiring the skills necessary for successful implementations.

Technology Infrastructure
We need to provide a platform to support and optimize performance for the AI application.

Level 3: Proliferation

- We will use tools to automate and validate compliance with policies, principles, and standards.

- We will support implementation of AI applications at scale.

- We will move beyond the experimental stage and operationalize AI systems in specific business functions.

- AI systems will be integrated with business processes and workflows.

Next steps in AI maturity

The target state is determined based on the organization's assessed need in each area to support business goals.

AI Governance (L1 - L5)

Data Management for AI (L1 - L5)

Tech & AI Infrastructure (L1 - L5)

People & AI Skills (L1 - L5)

AI Processes (L1 - L5)

Current Maturity   Target Maturity
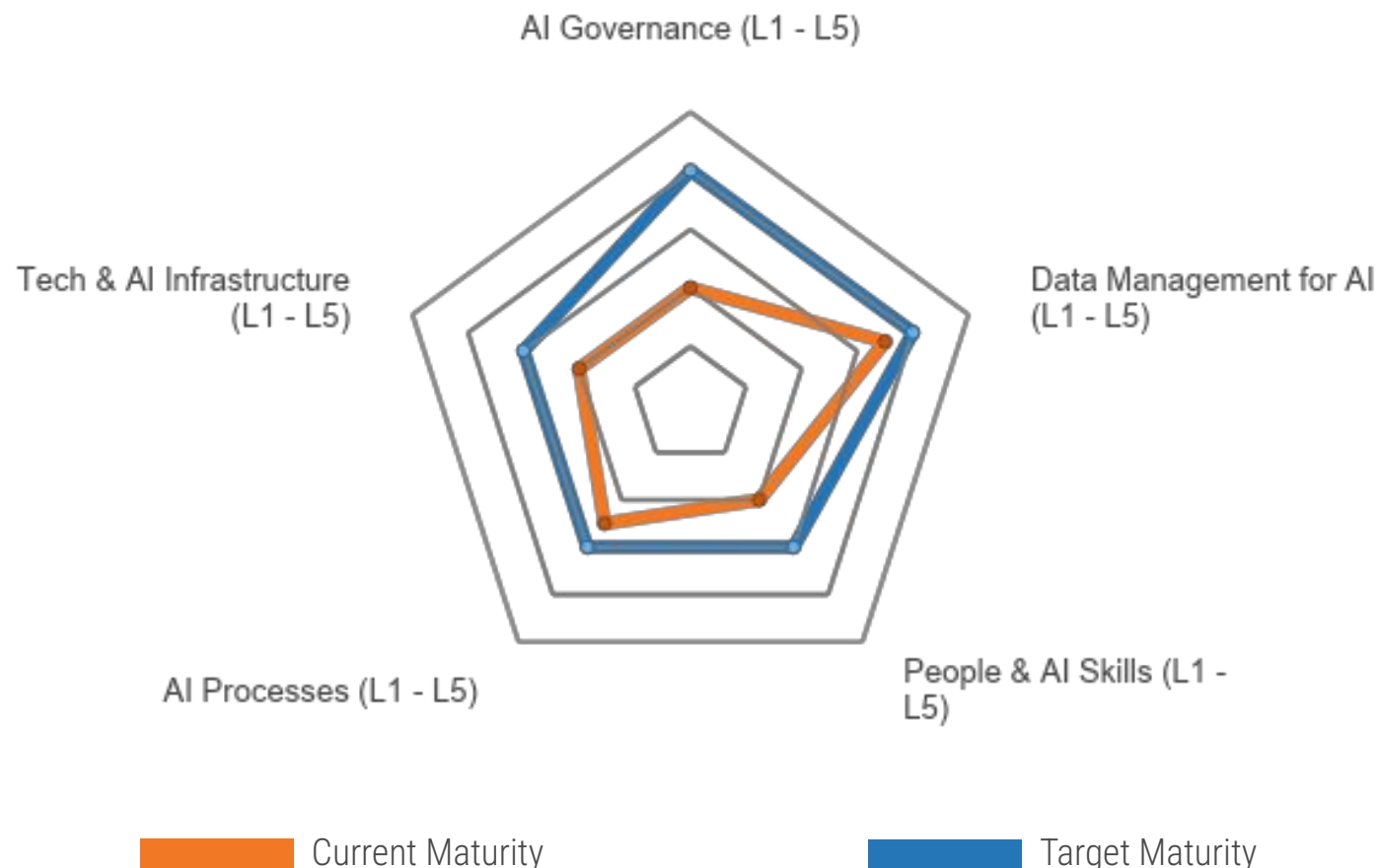
Decide on your AI strategic investment path

Evaluate strategic options

- Before developing an AI solution, consider whether you should **buy, build, or both.**

- Evaluating these strategic options helps ensure you are:
  - Aligning with your organization's business strategy, priorities, stakeholders' needs, and culture.
  - Making optimal use of your organization's limited financial resources and talent, managing risks, and maximizing the value of AI investments.
  - Building a systematic approach for your AI strategy to help guide your organization's decisions and direction.

- Your AI maturity assessment results will help you decide which investment path you should pursue. Lower maturity scores indicate that building your own solution might not be the most feasible option until you improve your scores.

Buy
Their Way

VS.

Build
Your Way
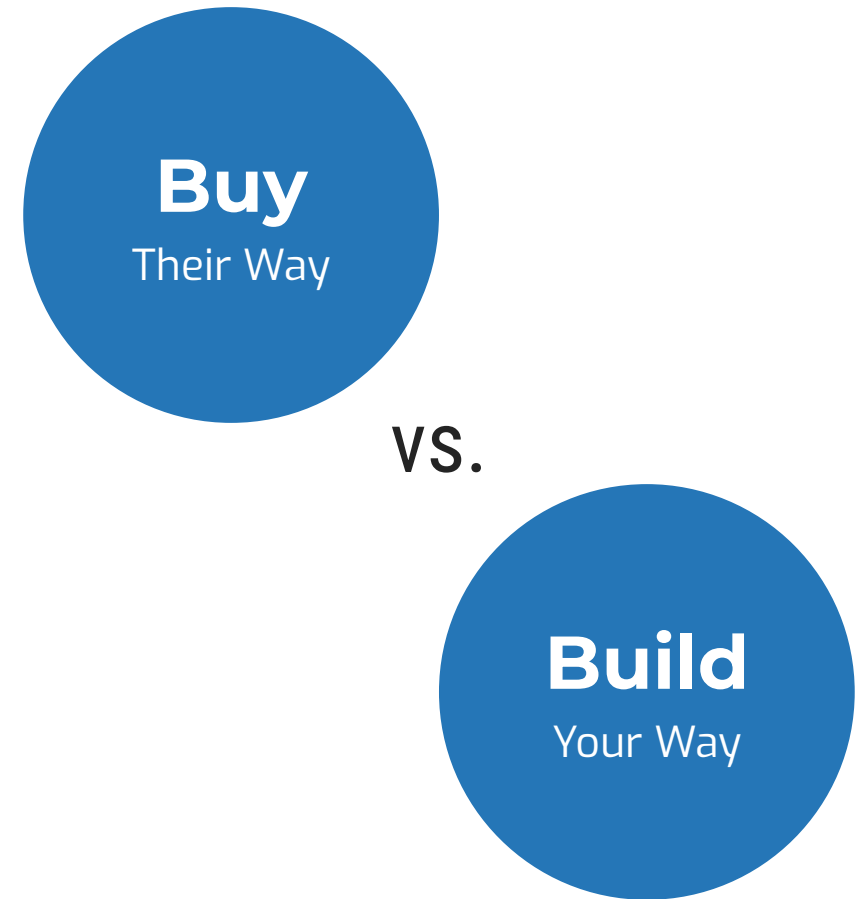
2.3 Identify your AI strategic investment path

1. Follow the decision path on the next slide to identify your best-fit strategic path for AI investment based on the results of Phase 1.

2. The results will help activity participants understand whether to build or buy for an AI project.

3. This flow chart should be periodically revisited as AI maturity and organizational goals change.

Input

- Results of Phase 1 (organization's goals, resource availability)

Output

- Understand the decision points for whether to build or buy for an AI project.

Materials

- Whiteboard/flip charts
- Decision-flow chart for build vs. buy

Participants

- Executive stakeholders
- CIO
- Other IT leadership

AI Investment Strategic Decision Tree

```
Start → Is the AI investment aligned with strategic & business objectives?
         ├─ No → Stop AI investment
         └─ Yes → Is the solution scalable?
                   ├─ No → Stop AI investment or consider alternate solution
                   └─ Yes → Is the AI investment budget constrained?
                             ├─ No → Consider open-source or buy options
                             └─ Yes → Is the time to value acceptable?
                                       ├─ No → Consider build option
                                       └─ Yes → (continues below)
```

```
Does the IT infrastructure support the AI investment without significant cost?
  ├─ No → Consider build option
  └─ Yes → Do we have in-house AI skills and talent to develop and deploy this AI investment?
            ├─ No → Consider open-source or buy options
            └─ Yes → Is the AI investment within our organization's risk profile?
                      ├─ No → Consider buy option
                      └─ Yes → Does the AI investment provide IP protection and control?
                                ├─ No → Consider build or open-source options
                                └─ Yes → Is there an acceptable existing strategy if the AI vendor relationship fails?
                                          ├─ No → Consider build or open-source options
                                          └─ Yes → Consider buy option
```

Session 3

Detail & Prioritize AI Use Cases

Session 1
1.1 Understand business goals and value drivers
1.2 Elicit business AI goals
1.3 Construct AI vision statement
1.4 Elicit AI strategic principles

Session 2
2.1 Identify candidate AI use cases
2.2 Assess current AI maturity
2.3 Identify strategic AI investment path

Session 3
3.1 Map candidate AI use cases
3.2 Build AI initiatives one-pagers
3.3 Prioritize candidate AI use cases

Session 4
4.1 Build your AI initiative roadmap
4.2 Build a communication plan for your roadmap

This session will walk you through the following activities:

- Identifying challenges and risks for use cases
- Building initiative one-pagers for selected AI use cases
- Prioritizing AI use cases

This session involves the following participants:

- AI initiative lead
- CIO
- Other IT leadership
- Business SMEs

Build Your AI Strategy Roadmap

3.1 Map your candidate AI use cases

1. Gather the AI strategy creation team and revisit your strategy context inputs, specifically your organization's business goals, business initiatives, and business capability map.

2. Brainstorm and discuss possible AI use cases your organization can leverage to bring value. You may use sticky notes or an online collaboration tool to keep track of your use case ideas.

3. In the *AI Strategy and Roadmap Presentation Template,* map these use cases based on whichever business goal they are associated with.

4. Next, detect possible challenges you may run into while implementing these use cases.

5. Once you've mapped your candidate AI use cases, input this key list into your business goals to AI use cases cascade visual for your AI strategy in the *AI Strategy and Roadmap Presentation Template*. This will help you to visualize the alignment between use cases and business goals.

↓ Download the *AI Strategy and Roadmap Presentation Template*

Input	Output
• Business goals • Business initiatives • Business capability map • AI use cases	• Business-aligned AI use cases list

Materials	Participants
• Collaboration/brainstorming tool (whiteboard, flip chart, digital equivalent) • *AI Strategy and Roadmap Presentation Template*	• AI initiative lead • CIO • Other IT leadership

Example: Candidate AI use cases

	Customer Experience	Revenue/Growth	Operational Excellence	Innovation	Risk Mitigation
Opportunities	1. Develop an AI-driven recommendation system to analyze and provide insights from client requests and engagements for our products/services to improve sales. 2. Use chatbots to assist customer support with troubleshooting and technical support. 3. Augment and accelerate the creation of marketing content: ad copy, product descriptions, scripts for video ads and product demos, etc.	1. Personalize customer engagements with a virtual sales assistant to improve close rates for target offerings/services. 2. Develop personalized marketing campaigns to improve or increase adoption of target offerings/services.	1. Use AI to analyze and automate calls to improve customer service. 2. Use code generators to improve productivity of programmers. 3. Improve chatbot accuracy and performance by accessing the company's data assets in a safe and secure manner. 4. Use technical virtual assistants/chatbots in call centers to provide easier access to technical support and troubleshooting documentation to improve customer support.	1. Perform sentiment analysis on social media data (social media posts, blog posts, emails) to improve market segmentation and marketing campaigns.	1. Use an AI assistant to analyze logs and reduce cybersecurity risk and data protection. 2. Complete performance analytics (adherence to policies).
Challenges	1. Data privacy and the use of client data 2. Clients' lack of tech savviness	1. Lack of clarity on digital strategy	1. Data management and governance 2. Heterogenous technology stack 3. AI skills deficiency	1. Limited R&D investment pool/funding 2. Cost containment	1. Data quality assurance 2. Distributed enterprise risk function

Example: Candidate AI use cases cascade

Business Goals	Achieved Through	Business Initiatives	Create or Improve	Business Capabilities	Supported or Improved by	AI Use Cases	
1. Improve Customer Experience		Improve customer support	Develop Approach	Develop Plan		Use technical virtual assistants or chatbots in call centers to provide easier access to technical support and troubleshooting documentation to improve customer support.	Perform sentiment analysis on social media data (social media posts, blog posts, emails) to improve market segmentation and marketing campaigns.
2. Grow the Business		Improve marketing campaigns	Develop Approach	Develop Plan		Develop an AI-driven recommendation system to analyze and provide insights from client requests and engagements for our products/services to improve sales.	Develop personalized marketing campaigns to improve or increase adoption for target offerings/services.
3. Improve Operational Excellence		Reduce operational costs	Assign Team Members	Produce Deliverables		Leverage virtual assistants to train and develop new call center agents.	Personalize customer engagements with a virtual sales assistant to improve close rates for target offerings/services.
		Improve knowledge management	Develop Approach	Develop Plan		Augment and accelerate the creation of marketing content: ad copies, product descriptions, scripts for video ads and product demos, etc.	Use AI to analyze call transcripts and summarize action items, decisions, and next steps.
4. Mitigate Risks		Improve sales effectiveness	Confirm or Revise Processes	Assess Staff Performance		Improve chatbot accuracy and performance by accessing the company's data assets in a safe and secure manner.	Use code generators to improve productivity of programmers.

3.2 Build AI initiatives one-pagers

Input	Output	Materials	Participants
• AI business goals • Prioritized list of AI initiatives • Feasibility scores	• AI initiatives one-pagers	• *AI Initiatives Prioritization* and *Roadmap Planning Tool* • *AI Strategy and Roadmap Presentation Template*	• AI initiative lead • CIO • Other IT leadership • Business SMEs

↓ Download the *AI Strategy and Roadmap Presentation Template*

3.2 Build AI initiatives one-pagers

Example:

Add the initiative name and its value statement.

Add the key initiative category it belongs to.

Provide an estimate of quantified value.

Although it will be difficult to get an accurate estimate for cost, a ballpark within +/- 100% of the actual will help to begin to budget and scope the roadmap. Feel free to categorize them with costs your organization uses.

Example:

1. Customer support

Use chatbots to assist customer support with troubleshooting and technical support.

AI GOAL CATEGORY

Customer Experience

QUANTIFIED VALUE

Est. 5% ROI, VP of Sales

INCREMENTAL COST

Labor	$10,000
Systems	$60,000
Contract	$50,000
Total	$120K

INITIATIVE DESCRIPTION

- Use technical virtual assistants or chatbots in call centers to provide easier access to technical support and troubleshooting documentation.
- Improve customer experience and customer satisfaction by enabling quick issue resolution.
- Ongoing resource support will be required to train and maintain chatbot.

PROJECT TIMELINE

Year 1

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — HIGH

Increase customer satisfaction and reduce training time for new customer support representatives.

OTHER EXPECTED BENEFITS

Chatbot can be leveraged for other use cases and departments if successful.

FEASIBILITY — HIGH

Ability to execute	Low
Risk mitigation	Medium
Stakeholder support	High

COMPLEXITY/DEPENDENCIES

- Data to inform chatbot must be thorough, cleansed, and up to date.
- Wait until Microsoft Copilot is released before initiating vendor selection.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

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Describe the initiative and its expected effect on your organization. Give enough detail while keeping your target audience in mind.

Outline the benefits achieved by completing this initiative. Think about the specific capabilities or strategic goals they will help support.

Brainstorm who would be the main stakeholders involved in the initiative.

Input the feasibility score you evaluated during the prioritization activity and highlight its final score.

Brainstorm complexities/dependencies for this initiative. These could be external or internal dependencies on other initiatives or resources.

Example:

1. Customer support

Use chatbots to assist customer support with troubleshooting and technical support.

AI GOAL CATEGORY

Customer Experience

QUANTIFIED VALUE

Est. 5% ROI, VP of Sales

INCREMENTAL COST

Labor	$10,000
Systems	$60,000
Contract	$50,000
Total	$120K

INITIATIVE DESCRIPTION

- Use technical virtual assistants or chatbots in call centers to provide easier access to technical support and troubleshooting documentation.
- Improve customer experience and customer satisfaction by enabling quick issue resolution.
- Ongoing resource support will be required to train and maintain chatbot.

FEASIBILITY — HIGH

Ability to execute	Low
Risk mitigation	Medium
Stakeholder support	High

PROJECT TIMELINE

						Year 1					
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — HIGH

Increase customer satisfaction and reduce training time for new customer support representatives.

OTHER EXPECTED BENEFITS

Chatbot can be leveraged for other use cases and departments if successful.

COMPLEXITY/DEPENDENCIES

- Data to inform chatbot must be thorough, cleansed, and up to date.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

2. Social media engagement

Use sentiment analysis on social media posts to identify opportunities to improve prospecting calls and customer support.

AI GOAL CATEGORY

Customer Experience

QUANTIFIED VALUE

Est. 5% ROI, VP of Marketing

INCREMENTAL COST

Labor	$10,000
Systems	$60,000
Contract	$50,000
Total	$120K

INITIATIVE DESCRIPTION

- Perform sentiment analysis on social media data (social media posts, blog posts, emails) to improve market segmentation and improve marketing campaigns.
- Define scoring criteria for leads and use an AI predictive lead scoring tool to identify the highest quality leads in the pipeline by assessing lead data against criteria.

FEASIBILITY — LOW

Ability to execute	Low
Risk mitigation	Medium
Stakeholder support	Low

PROJECT TIMELINE

	Year 1											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — MEDIUM+

Improved brand awareness and visibility and greater lead generation.

OTHER EXPECTED BENEFITS

Improved prospecting strategy based on insights and trends.

COMPLEXITY/DEPENDENCIES

- Approval of software selection and purchase
- Integration to CRM and call analysis software

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

3. Product/service recommendation

Use AI to analyze client requirements and recommend the best product or service offering.

AI GOAL CATEGORY

Business Growth

QUANTIFIED VALUE

Est. 10% ROI, VP Product Marketing

INCREMENTAL COST

Labor	$10,000
Systems	$0
Contract	$15,000
Total	$25,000

INITIATIVE DESCRIPTION

- Develop an AI-driven system to analyze and provide insights on client requests for our products/services.
- Build recommendation algorithms that suggest tailored resources based on the client's specific requirements.
- Ensure complex requests can still be routed to humans for handling or validation.

FEASIBILITY — MEDIUM

Ability to execute	Medium
Risk mitigation	Medium
Stakeholder support	Medium

PROJECT TIMELINE

Year 1											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — MEDIUM+

Improved customer experience through quick and accurate delivery of relevant information and assistance.

COMPLEXITY/DEPENDENCIES

- Integration with CRM
- Access to AI implementation expertise
- Collaboration and model training by product SMEs

OTHER EXPECTED BENEFITS

Reduced employee effort and time savings from no longer manually sifting through requests and research to appropriately match them.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

4. Personalized marketing campaigns

Analyze past customer engagements to customize and personalize marketing engagements.

AI GOAL CATEGORY

Business Growth

QUANTIFIED VALUE

∧ Increase webinar attendance by 8%. – VP Product Marketing

INCREMENTAL COST

Labor	$50,000
Systems	$0
Contract	$20,000
Total	**$70,000**

INITIATIVE DESCRIPTION

- Leverage AI-powered call analysis software to analyze prospect calls.
- Use software to transcribe and analyze prospect calls and provide actionable feedback and insights for sales reps.
- Dashboard will include visualizations of call performance metrics and trends.
- Individual coaching and training recommendations will result from the analysis.

FEASIBILITY — MEDIUM+

Ability to execute	**Medium**
Risk mitigation	**Medium**
Stakeholder support	**High**

PROJECT TIMELINE

	Year 1											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — MEDIUM

AI-powered insights will enable sales reps to tailor their approach and strategy to clients to improve prospect engagement.

OTHER EXPECTED BENEFITS

Improved skill sets of sales reps through tailored coaching and training.

COMPLEXITY/DEPENDENCIES

- None

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

5. Call center operations

Use AI to analyze and automate calls to improve customer service.

AI GOAL CATEGORY

Operational Excellence

QUANTIFIED VALUE

Est. 20% ROI, VP Customer Support

INCREMENTAL COST

Labor	$10,000
Systems	$60,000
Contract	$50,000
Total	**$120K**

INITIATIVE DESCRIPTION

- Leverage AI-powered call analysis software to analyze calls.
- Software will transcribe and analyze calls and provide actionable feedback and insights for call center reps.
- Dashboard will include visualizations of call performance metrics and trends.
- Individual coaching and training recommendations will result from the analysis.

FEASIBILITY — HIGH

Ability to execute	**Low**
Risk mitigation	**Medium**
Stakeholder support	**High**

PROJECT TIMELINE

Year 1											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — HIGH

AI-powered insights will enable call center reps to tailor their approach and strategy to clients to improve prospect engagement.

COMPLEXITY/DEPENDENCIES

- None.

OTHER EXPECTED BENEFITS

Improved skill sets of call center reps through tailored coaching and training.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Example:

6. Virtual sales assistant

Use chatbots to assist Sales with onboarding, product knowledge, and sales support.

AI GOAL CATEGORY

Operational Excellence

QUANTIFIED VALUE

∧ **Est. 12% ROI, VP Sales**

INCREMENTAL COST

Labor	$10,000
Systems	$60,000
Contract	$50,000
Total	**$120K**

INITIATIVE DESCRIPTION

- Select and implement a chatbot tool to use as an internal sales assistant to provide instant responses to queries and offer suggestions based on existing sales training material and data.

- Existing vendor partners will be considered; specific tools will not be selected until next year when new solutions are announced.

- Implementation will be dependent on having a large library of up-to-date training content.

- Ongoing resource support will be required to train and maintain chatbot.

FEASIBILITY — MEDIUM

Ability to execute	**Low**
Risk mitigation	**Medium**
Stakeholder support	**Medium**

PROJECT TIMELINE

						Year 1					
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

BUSINESS VALUE — MEDIUM+

Increase both prospect conversion rate and client engagement through improved sales knowledge and training.

COMPLEXITY/DEPENDENCIES

- Data to inform chatbot must be thorough, cleansed, and up to date.

OTHER EXPECTED BENEFITS

Chatbot can be leveraged for other use cases and departments if successful.

PROJECT TEAM

Business Sponsor: <Name>
IT Sponsor: <Name>
PM: <Name>

Leverage your industry's capability maps to identify candidate opportunities/initiatives

Business capability map defined

In business architecture, the primary view of an organization is known as a business capability map.

A business capability defines what a business does to enable value creation rather than how. Business capabilities:

- Represent stable business functions.
- Are unique and independent of each other.
- Typically will have a defined business outcome.

A business capability map provides details that help the business architecture practitioner direct attention to a specific area of the business for further assessment.
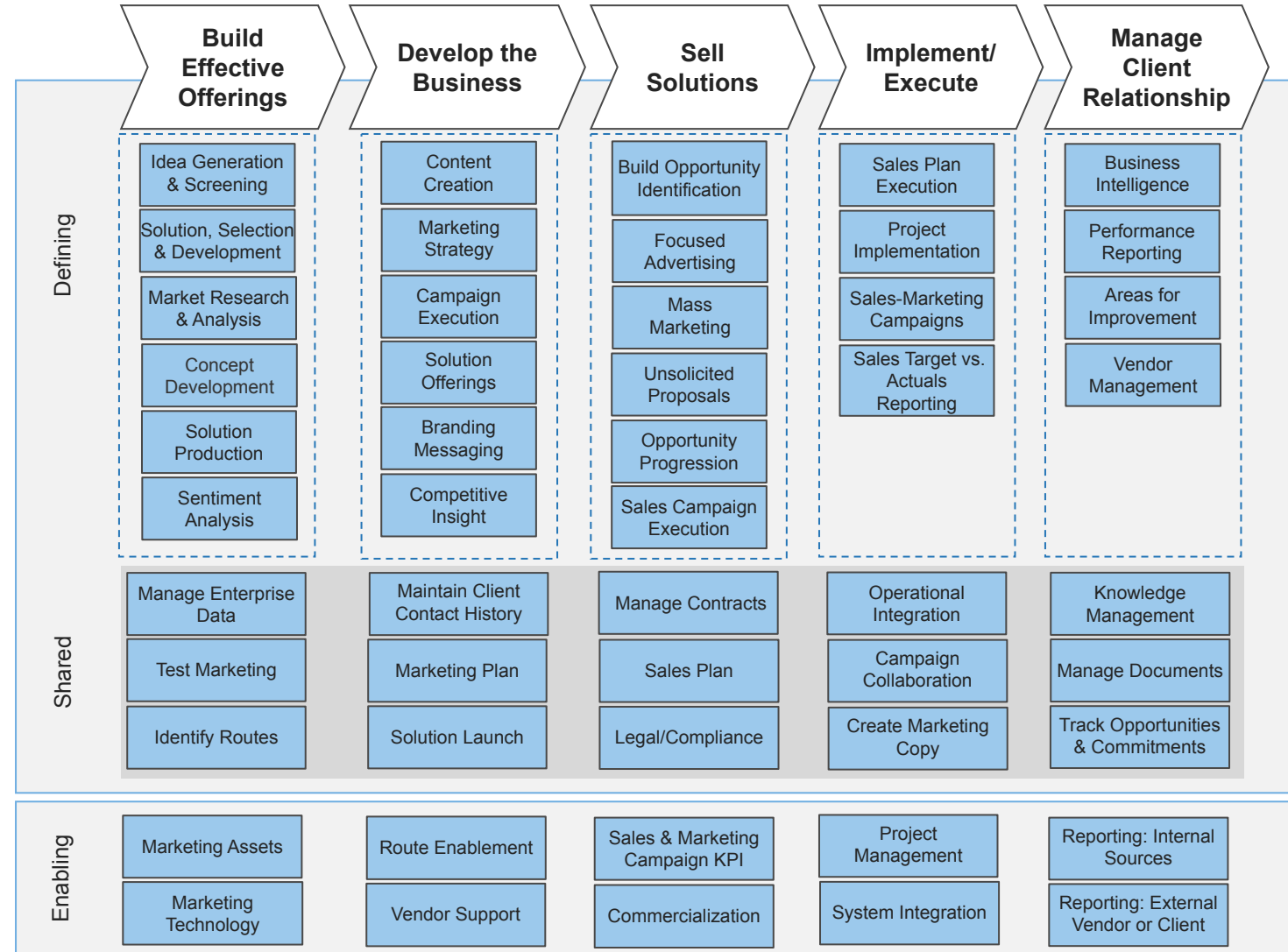
Note: This is an illustrative business capability map example for Marketing & Advertising.

If you don't have a business capability map for your organization yet, you can use Info-Tech's template to start building one.

↓ Download the _Business Capability Map Template_

Example: Marketing & Advertising Business Capability Map

|	Build Effective Offerings	Develop the Business	Sell Solutions	Implement/ Execute	Manage Client Relationship
Defining	Idea Generation & Screening	Content Creation	Build Opportunity Identification	Sales Plan Execution	Business Intelligence
	Solution, Selection & Development	Marketing Strategy	Focused Advertising	Project Implementation	Performance Reporting
	Market Research & Analysis	Campaign Execution	Mass Marketing	Sales-Marketing Campaigns	Areas for Improvement
	Concept Development	Solution Offerings	Unsolicited Proposals	Sales Target vs. Actuals Reporting	Vendor Management
	Solution Production	Branding Messaging	Opportunity Progression		
	Sentiment Analysis	Competitive Insight	Sales Campaign Execution		
Shared	Manage Enterprise Data	Maintain Client Contact History	Manage Contracts	Operational Integration	Knowledge Management
	Test Marketing	Marketing Plan	Sales Plan	Campaign Collaboration	Manage Documents
	Identify Routes	Solution Launch	Legal/Compliance	Create Marketing Copy	Track Opportunities & Commitments
Enabling	Marketing Assets	Route Enablement	Sales & Marketing Campaign KPI	Project Management	Reporting: Internal Sources
	Marketing Technology	Vendor Support	Commercialization	System Integration	Reporting: External Vendor or Client

Assess business value vs. project feasibility to prioritize candidate opportunities for AI

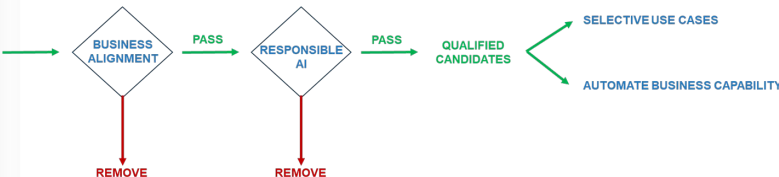**Identify business capabilities for the organization**
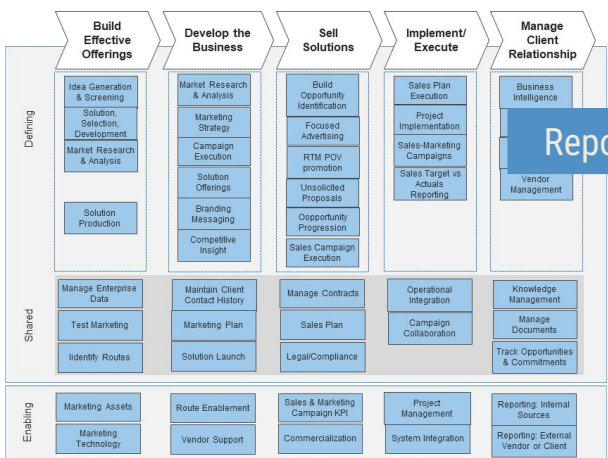
Business Capability Map
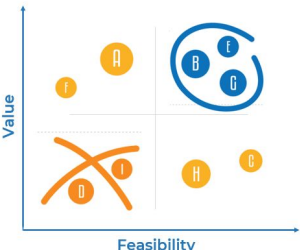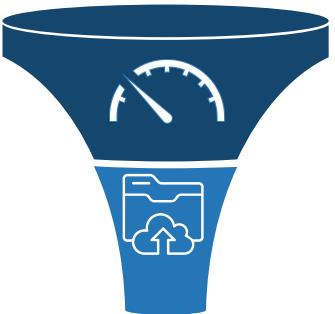
Are we solving the right problems?
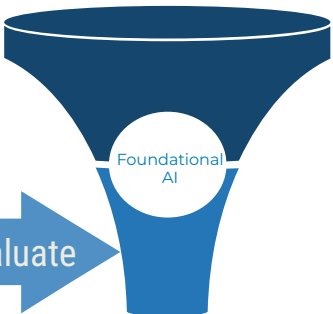
Balanced scorecard cost, benefit, risk, foundational AI, project characteristics, and considerations analysis
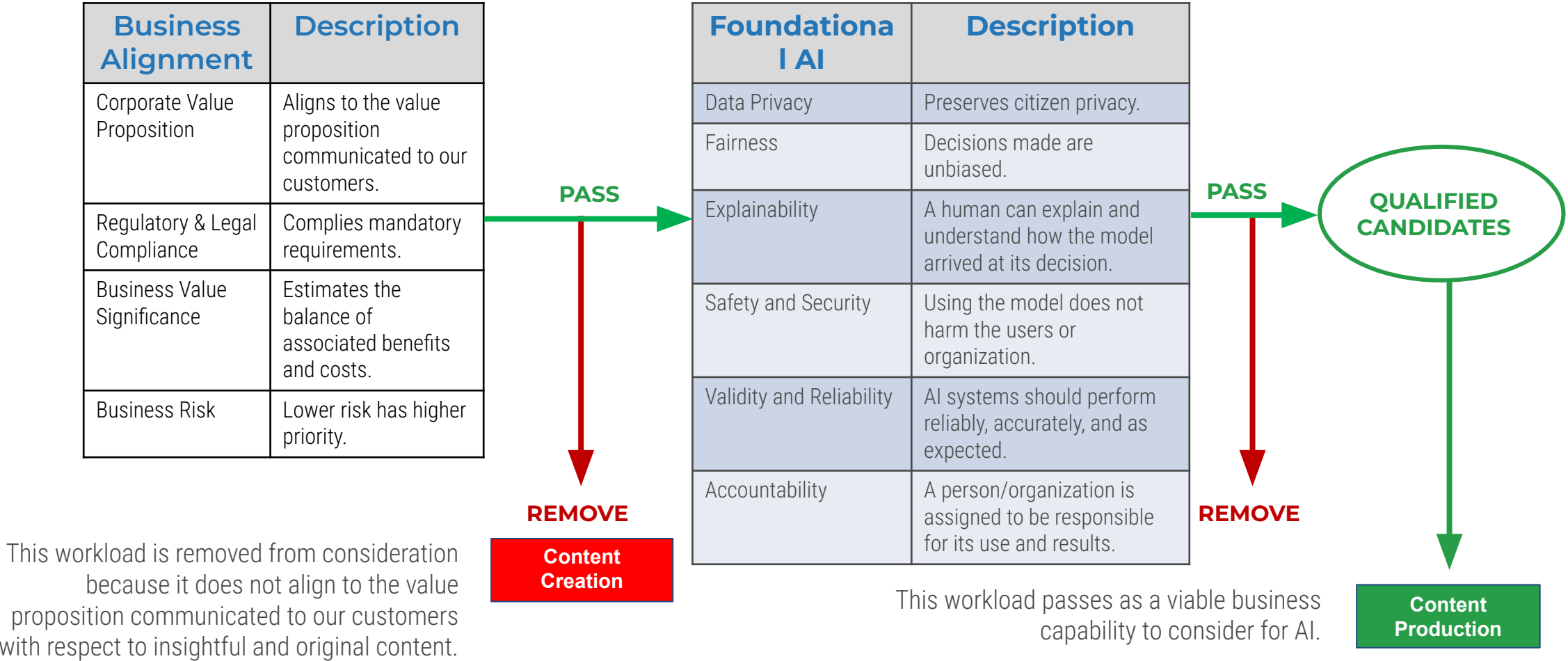
Repository to evaluate

Alignment Criteria

Aligned Candidates

Assess the value and feasibility to prioritize AI initiatives

Candidates to analyze

Prioritized AI Initiatives

Assessing content creation and content production capabilities

One is removed because it does not pass the organization/business criteria; the other passes

Business Alignment	Description
Corporate Value Proposition	Aligns to the value proposition communicated to our customers.
Regulatory & Legal Compliance	Complies mandatory requirements.
Business Value Significance	Estimates the balance of associated benefits and costs.
Business Risk	Lower risk has higher priority.

PASS

REMOVE

Content Creation

This workload is removed from consideration because it does not align to the value proposition communicated to our customers with respect to insightful and original content.

Foundational AI	Description
Data Privacy	Preserves citizen privacy.
Fairness	Decisions made are unbiased.
Explainability	A human can explain and understand how the model arrived at its decision.
Safety and Security	Using the model does not harm the users or organization.
Validity and Reliability	AI systems should perform reliably, accurately, and as expected.
Accountability	A person/organization is assigned to be responsible for its use and results.

PASS

REMOVE

QUALIFIED CANDIDATES

Content Production

This workload passes as a viable business capability to consider for AI.

Feasibility to execute also factors into the prioritization of AI use cases

Each AI use case is evaluated against the following feasibility criteria:

Feasibility Criteria

AI governance
Does the use case align with foundational AI principles, have an owner, and adhere to privacy requirements?

Data management
How easily can we extract and transform required data?

Skills availability
How confident are we that we have access to needed skills?

Tools
Do we have access to tools to automate or accelerate the development and/or implementation process?

Infrastructure
What technology infrastructure is required to support the proposed business capability?

Risk assessment
Are risks documented? Is accountability assigned and understood?

Stakeholders & organization
Are stakeholders committed, and is funding available?

Business value vs. feasibility assessment

1 **Consider common business value drivers**
- Improve customer experience
- Drive revenue
- Improve operational excellence
- Accelerate innovation
- Mitigate risks

2 **Assess common project feasibility characteristics**
- Complexity/integration/risk involved
- Resources (people, process, technology)
- Costs (acquisition, operational, support)

3 **Determine a business value and project feasibility score for the candidate business capability/initiative**

4 **Plot initiatives**

5 **Prioritize high business value and high feasibility initiatives first**
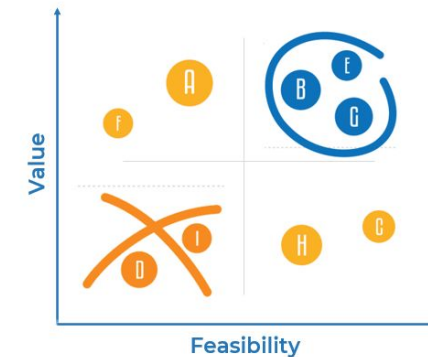
3.3 Prioritize candidate AI use cases

Identify business opportunities that have high impact on your business and its customers and low implementation complexity.

1. On Tab 2, Initiative Planning, in the *AI Initiatives Prioritization and Roadmapping Tool,* transfer your candidate AI use cases list from Activity 2.1.

2. Use the predefined criteria or customize them for your organization to evaluate candidate use cases against the organization's mission and goals, the foundational AI guiding principles, and the project's feasibility.

3. Score each candidate initiative based on its business value and feasibility.

4. Ensure that candidate use cases to be automated align with the organization's business criteria and that you have the required resources to deliver the project.

5. The tool will generate a prioritized list of initiatives and map them on the value/feasibility grid on Tab 4, Priority Grid.

6. Make sure you avoid sharing the organization's sensitive data if the application is deployed on the public cloud.

↓ Download the *AI Initiatives Prioritization and Roadmap Planning Tool*

Input

- Candidate AI use cases list
- Organization's mission, vision, and strategic goals
- AI vision statement
- Foundational AI guiding principles

Output

- Prioritized list of AI initiatives
- AI initiatives on value/ feasibility grid

Materials

- Whiteboard/flip charts
- *AI Initiatives Prioritization and Roadmap Planning Tool*

Participants

- AI initiative lead
- CIO
- Other IT leadership
- Business SMEs

Example: Prioritized AI initiatives

Each AI use case was scored against the predefined value and feasibility criteria to prioritize the initiatives with the highest potential value and feasibility to execute.
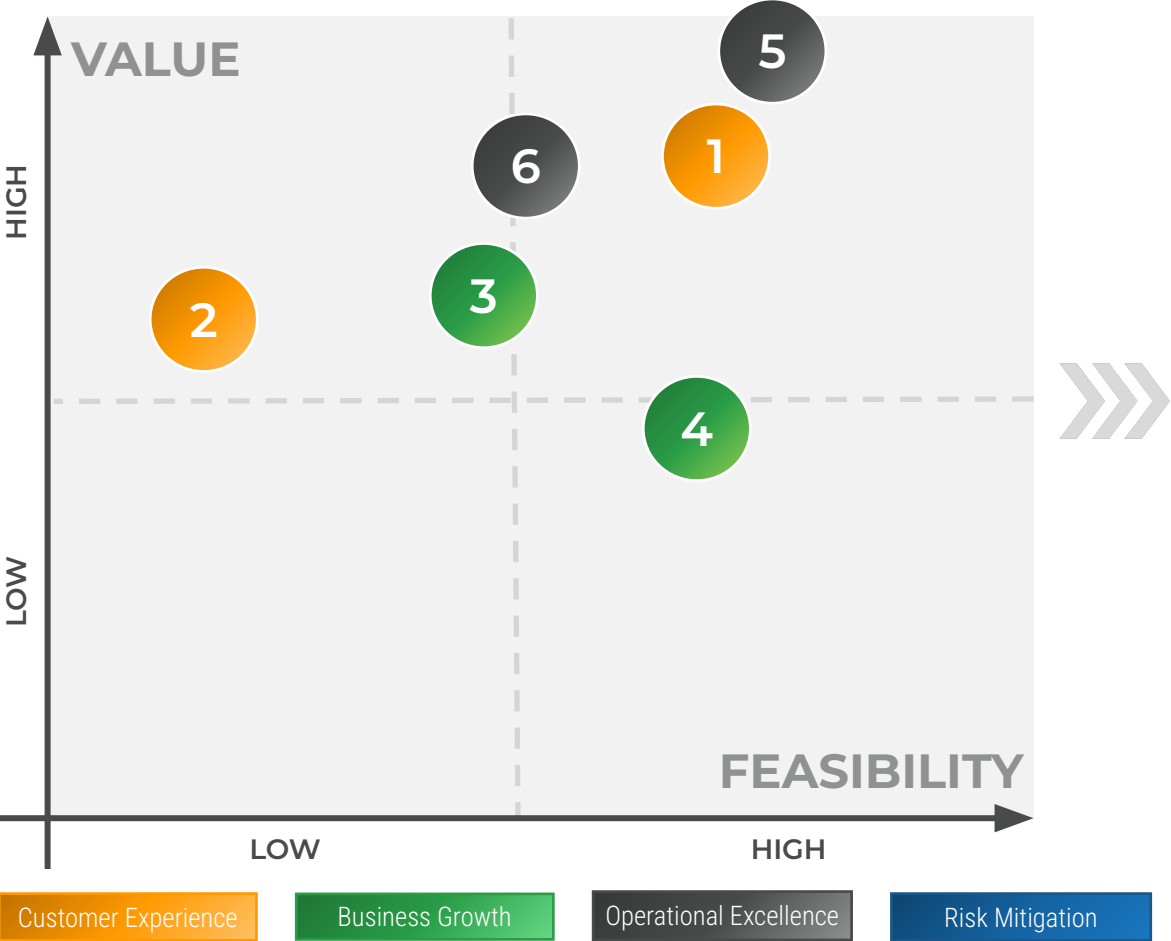
	Initiative	Description
1	**Customer Support**	Use AI to leverage the company's existing knowledge base to ensure that support representatives can provide accurate and up-to-date information to the client.
2	**Social Media Engagement**	Use AI to perform sentiment analysis and proactively engage clients to address potential concerns.
3	**Product/Service Recommendations**	Use AI to analyze client calls and recommend the product/service to best address the requirements.
4	**Personalized Marketing Campaigns**	Use AI to analyze customer data to personalize marketing collateral.
5	**Call Center Operations**	Use AI to train new employees to deliver improved service.
6	**Virtual Sales Operations**	Use chatbots to assist Sales with onboarding, product knowledge, and sales support.

Customer Experience   Business Growth   Operational Excellence   Risk Mitigation

Session 4

Develop Your AI Strategy Roadmap

Session 1
1.1 Understand business goals and value drivers
1.2 Elicit business AI goals
1.3 Construct AI vision statement
1.4 Elicit AI strategic principles

Session 2
2.1 Identify candidate AI use cases
2.2 Assess current AI maturity
2.3 Identify strategic AI investment path

Session 3
3.1 Map candidate AI use cases
3.2 Build AI initiatives one-pagers
3.3 Prioritize candidate AI use cases

Session 4
4.1 Build your AI initiative roadmap
4.2 Build a communication plan for your roadmap

This session will walk you through the following activities:

- Developing an AI roadmap
- Determining next steps and communication approach
- Presenting your AI roadmap to ELT

This session involves the following participants:

- AI initiative lead
- CIO
- Communication lead
- Technical support staff for target use case

Build Your AI Strategy Roadmap

4.1 Build your AI initiatives roadmap

The roadmap should provide a compelling vision of how you will deliver the identified AI applications by prioritizing and simplifying the actions required.

1. Leverage Tab 2, Initiative Planning, in the *AI Initiatives Prioritization and Roadmap Planning Tool* to create and align your initiatives to the key value driver they are most relevant to.

   a) Input a start date and an end date to each initiative.

   b) Assign responsible owners to each initiative.

   c) Identify which AI maturity capabilities each initiative will enhance. However, do not build or introduce new capabilities merely to advance the organization's AI maturity level.

2. Once you complete your inputs, the tool will automatically produce a roadmap in Gantt chart format on Tab 3, Timeline Roadmap.

3. Review the Gantt chart to ensure alignment and assess overlap.

↓   Download the *AI Initiatives Prioritization and Roadmap Planning Tool*

Input

- Each initiative implementation plan
- Proposed owners
- AI maturity assessment

Output

- AI initiatives roadmap and Gantt chart

Materials

- Whiteboard/flip charts
- *AI Initiatives Prioritization and Roadmap Planning Tool*

Participants

- AI initiative lead
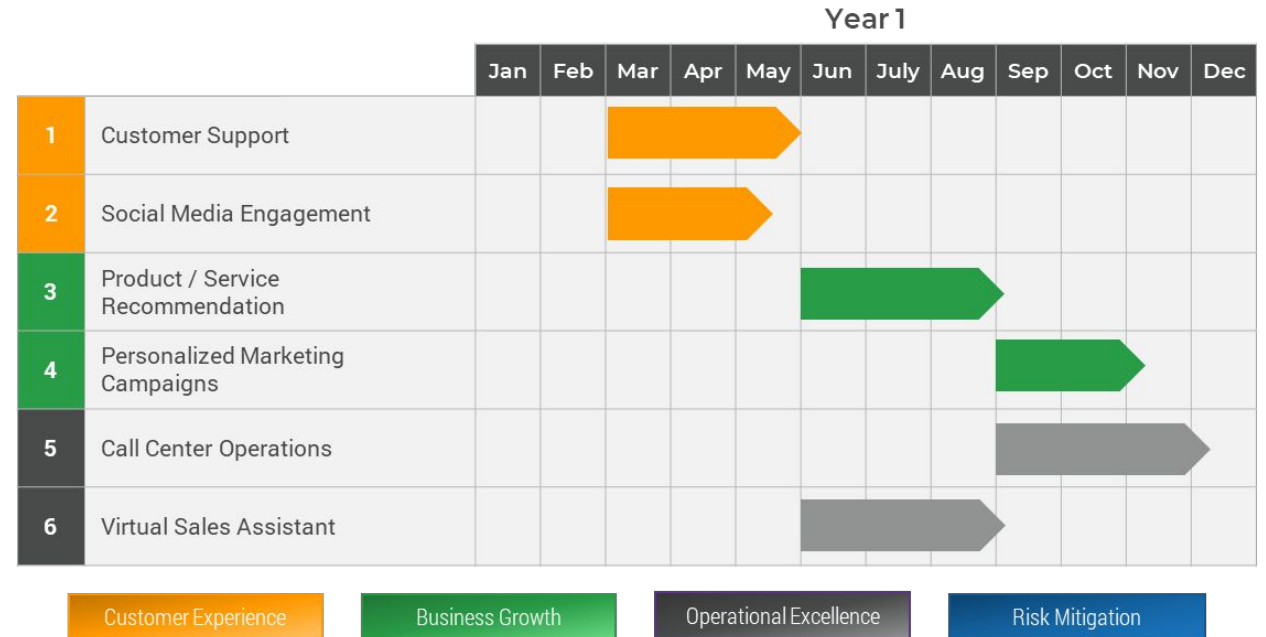- CIO
- Other IT leadership
- Business SMEs

Build your AI roadmap to visualize your key project plans

Visual representations of data are more compelling than text alone.

Develop a high-level document that travels with the project from inception through to executive inquiry, project management, and finally execution.

A project needs to be discrete: able to be conceptualized and discussed as an independent item. Each project must have three characteristics:

- **Specific outcome:** An explicit change in the people, processes, or technology of the enterprise.

- **Target end date:** When the described outcome will be in effect.

- **Owner:** Who on the IT team is responsible for executing on the initiative.

Year 1

		Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
1	Customer Support												
2	Social Media Engagement												
3	Product / Service Recommendation												
4	Personalized Marketing Campaigns												
5	Call Center Operations												
6	Virtual Sales Assistant												

Customer Experience Business Growth Operational Excellence Risk Mitigation

Info-Tech Insight

Don't project your vision three to five years into the future. Deep dive on next year's big-ticket items instead.

Optional:

Managing the strategic journey

IT is committed to frequent and effective stakeholder management to execute on our AI strategy initiatives.

Initiative	Key Implementation Teams			Business Units	Key Contacts in Business Unit	Communication Methods
1 Customer Support	Data Ops	ML Ops	Sales Ops	Customer Support	Dana Cho	Daily Standup
2 Social Media Engagement	Data Ops	ML Ops	Marketing	Marketing	Austin Wong	Weekly Status Update Meeting
3 Product/Service Recommendations	Data Ops	ML Ops	Sales Ops	Sales	Nichelle Nicols	Weekly Demo
4 Personalized Marketing Campaigns	Data Ops	ML Ops	Sales Ops	Marketing	Avery Brooks	Weekly Demo
5 Call Center Operations	Data Ops	ML Ops	Sales Ops	Sales / Marketing	Gates McFadden / Ethan Peck	Weekly Status Update Meeting
6 Virtual Sales Assistant	Data Ops	ML Ops	Sales Ops	Sales / Consulting	Andrew Robinson / Linda Park	Weekly Status Update Meeting / General Comms

Optional:

Year 1 AI Strategy Budget Snapshot

Total Estimated Budget

		Initiatives for Year 1	Incremental Cost
Business-Aligned AI Initiatives	1	Customer Support	$ 120,000.00
	2	Social Media Engagement	$ 70,000.00
	3	Product/Service Recommendation	$ 70,000.00
	4	Personalized Marketing Campaigns	$ 25,000.00
	5	Call Center Operations	$ 120,000.00
	6	Virtual Sales Assistant	$ 120,000.00
AI Operational Excellence Initiatives	7	Develop AI Committee Charter	$ 2,500.00
	8	Train and Brief AI Governance Committee	$ 10,000.00
	9	Establish AI Center of Excellence (CoE)	$ 10,000.00
	10	Improve Data Ops Capabilities	$ 275,000.00
	11	Create an ML Ops Team	$ 170,000.00
		Incremental Cost	**$902,500.0**

Include incremental costs from key initiative profiles.

Breakdown by Initiative Category

Customer Experience — $190,000
Revenue — $95,000
Operational Excellence — $240,000
AI Operational Excellence — $467,500
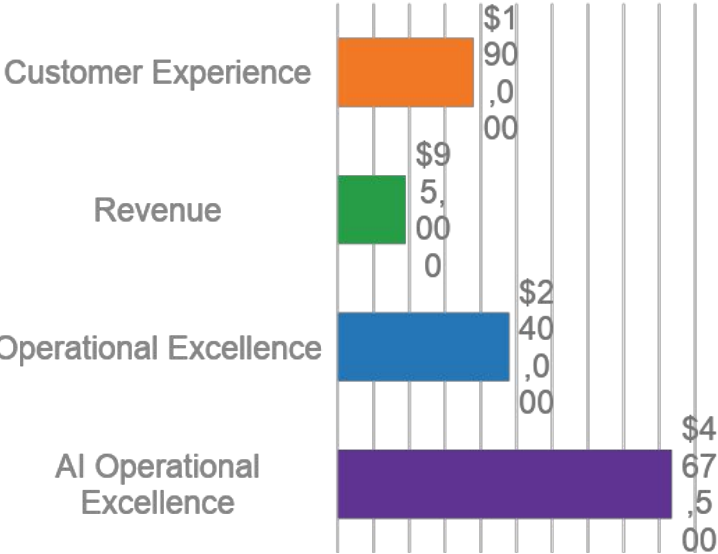
Bucket the budget into the business-aligned vs. AI foundational initiatives.

Breakdown by Expense Class

Contracts
Systems
Labor
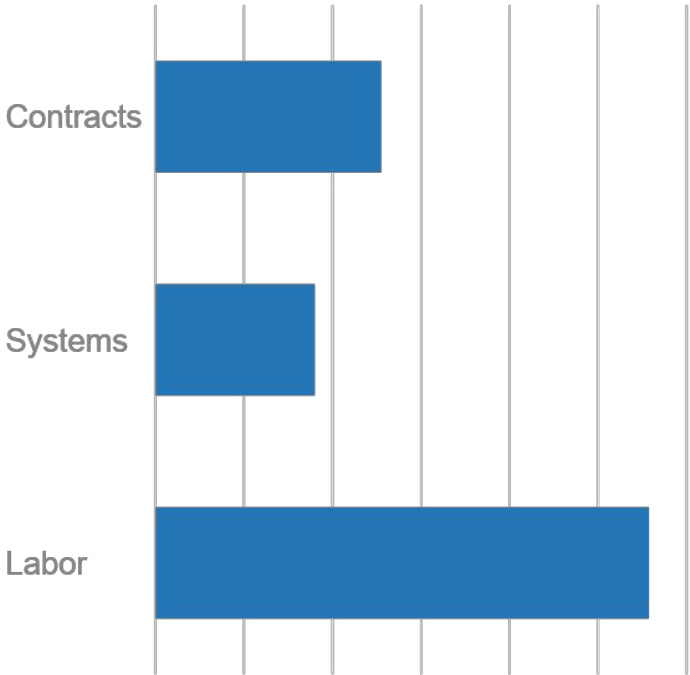
Provide an additional breakdown by expense class using the categories from each initiative overview.

4.2 Build a communication plan for your roadmap

1. Identify your target audience and what they need to know.

2. Identify desired channels of communication and details for the target audience.

3. Describe communication required for each audience segment.

4. List frequency of communication for each audience segment.

5. Complete the executive presentation leveraging the *AI Strategy and Roadmap Presentation Template*.

↓	Download the *AI Strategy and Roadmap Presentation Template*

Input

- Stakeholder list

- Proposed owners

- AI initiatives prioritization results

- AI maturity assessment

Output

- Communications plan for all impacted stakeholders

Materials

- Whiteboard/flip charts

- *AI Strategy and Roadmap Presentation Template*

Participants

- AI initiative lead

- CIO

- Communication lead

- Technical support staff for target use case

AI strategy communication plan

Well-planned communications are essential to the success and adoption of your AI initiatives

To ensure the organization's roadmap is clearly communicated across the AI, data, technology, and business groups, develop a rollout strategy, like this example.

Example

Audience	Channel	Level of Detail	Description	Timing
AI team	Email, meetings	All	• Distribute plan; solicit feedback. • Address manager questions to equip them to answer employee questions.	Year 1, Q3, (September, before entire data team)
Data management team	Email, Q&A sessions	Data management summary deck	• Roll out after corporate strategy, in the same form of communication. • Solicit feedback; address questions.	Year 1, Q4 (late November)
Select business stakeholders	Presentations	Executive deck	• Pilot test for feedback prior to executive engagement.	Year 1, Q4 (early December)
Executive team	Email, briefing	Executive deck	• Distribute plan.	Year 2, Q1

Avoid the challenges of poor change management for AI strategy

1

Deployments

- **Too frequent deployments:** The need for frequent deployments results in reduced availability of critical business applications.

- **Failed deployments or rework required:** Deployments of AI solutions are not successful and have to be backed out of and then reworked to resolve issues with the installation.

2

Incidents

- **Too many unauthorized changes:** If the process is perceived as cumbersome and ineffective, people will bypass it or abuse the emergency designation to get their changes deployed faster.

- **Changes cause incidents:** When new releases are deployed, they create problems with related systems or applications.

3

End Users

- **Low user satisfaction:** Poor communication and training result in surprised and unhappy users and support staff.

- **Low adoption rate:** Users may hold on to their current workflow and resist adopting AI.

Deliver an executive presentation of the roadmap for business stakeholders

After you complete the activities and exercises within this blueprint, the final step is to present the deliverable to senior management and stakeholders.

Know Your Audience

- Business stakeholders are interested in understanding the business outcomes that will result from their investment in AI.
- Your audience will want to understand the risks involved and how to mitigate those risks.
- Explain how the AI project was prioritized and selected and the business outcomes that will be delivered by the proposed AI application.

Recommendations

- Highlight the need for foundational AI to ensure that human-based requirements are being addressed.
- Ensure your AI team includes both business and technical staff.
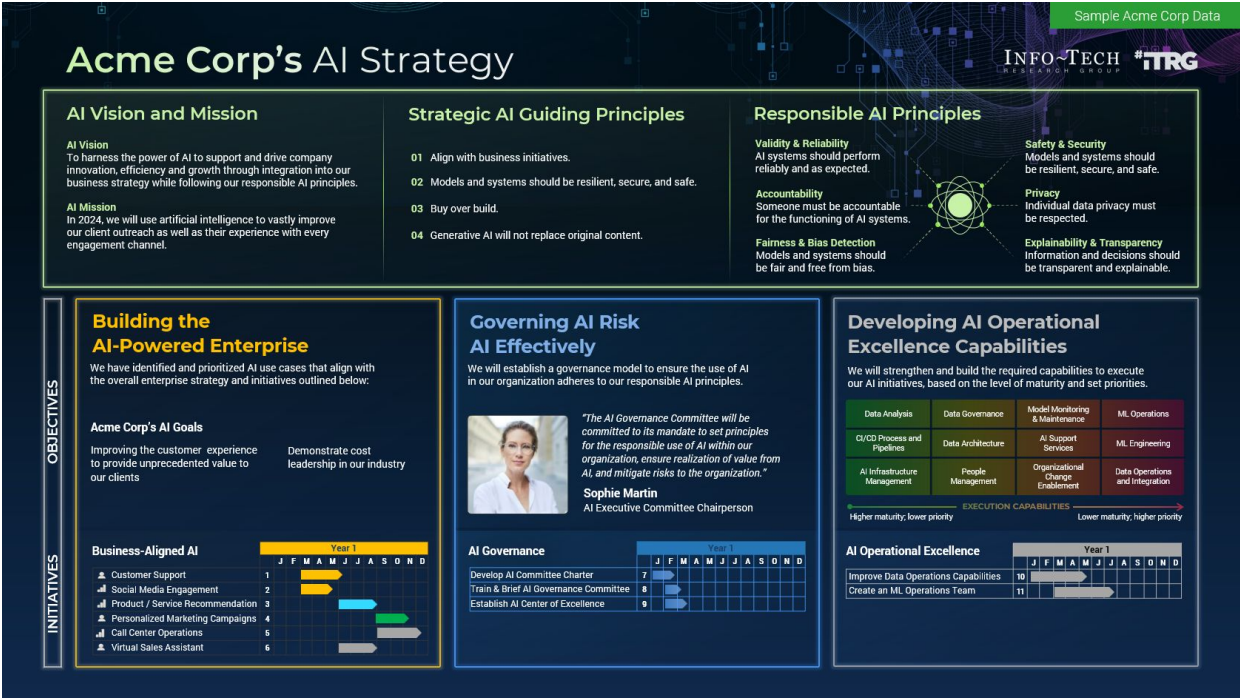
Summary of Accomplishment

AI has been disruptively transforming all industries, and it is very unlikely that its force will calm down any time soon. Organizations are all in a fierce race to keep up with this disruption, and the ones without a proper AI strategy aligned with their organizational goals and initiatives will not be able to leverage this technology in its full extent. That's why it's vital that you develop a strategy that will guide you through your organization's AI journey.

The completion of this blueprint will assist you with developing:

- Business-aligned AI goals and strategic AI principles that will define the values driving your AI strategy.

- AI use cases aligned with your organization's capabilities, goals, and value streams.

- Your current AI maturity state that shows your organization's ability to deliver AI.

- List of AI initiatives prioritized based on feasibility and value.

- AI initiative roadmap and communication approach.

> ## Info-Tech Insight
>
> Embracing AI in every corner of your organization will not end with developing a strategy. This is a ride of
>
> transformation, and further steps need to be taken to achieve your goals, such as AI vendor selection, establishing AI
>
> governance, and launching AI proof of concept.

If you would like additional support, have our analysts guide you through an Info-Tech workshop or Guided Implementation.

Contact your account representative for more information.

workshops@infotech.com
1-888-670-8889

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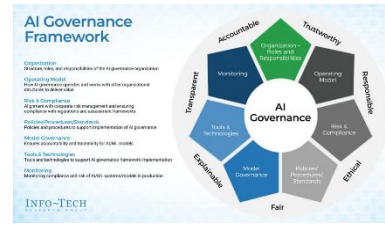"What We Believe." *Stanford Medicine Healthcare AI Applied Research Team*, 2024. Web.

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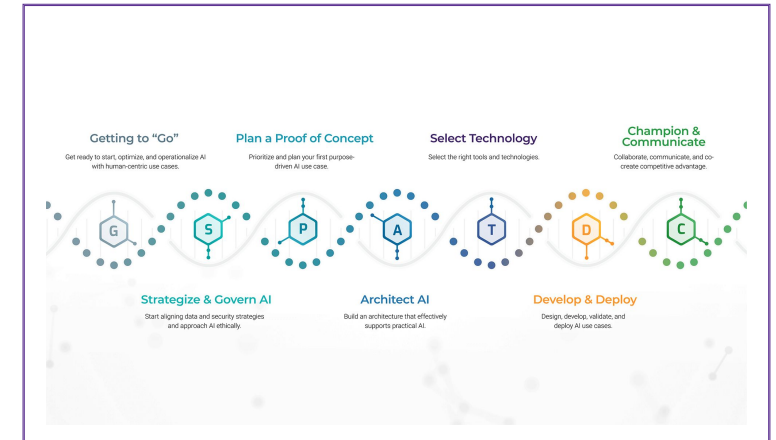
AI-related Info-Tech research
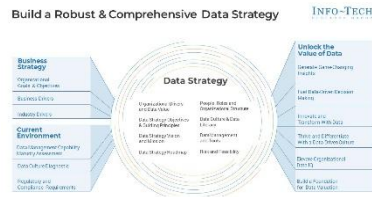
Build a Robust and Comprehensive Data Strategy

The key to building and fostering a data-driven culture.

AI Governance

A framework for building responsible, ethical, fair, and transparent AI.

Address Security and Privacy Risks for Generative AI

AI risk mitigation starts with an acceptable use policy.

Drive Business Value With Off-the-Shelf AI

A practical guide to ensure return on your off-the-shelf AI investment.

Artificial Intelligence Research Center

Augment the power of your organizational DNA through machine learning and artificial intelligence.

→ Visit the Artificial Intelligence Research Center

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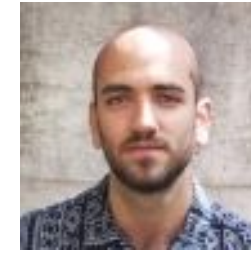Infrastructure and
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Appendix

Glossary: Key concepts

AI Vision Statement

An effective AI vision statement is usually forward-looking and aspirational and reflects the organization's commitment to leveraging AI to deliver positive and responsible outcomes.

Strategic AI Principles

Guiding principles align the business strategy with the AI strategy and reflect the organization's overall approach to the use of AI. Whether AI should be used or not and the decision whether to buy or build the AI application are examples of strategic principles.

Foundational AI Principles

Guiding principles govern the development, deployment, and maintenance of AI applications to mitigate the possible risks from deploying AI-based applications. In addition, these principles outline the human-centered requirements that every AI application must meet.

AI Strategy

A business-driven AI strategy is aligned with the firm's organizational strategy. Key components of the AI strategy include:
- AI Vision and Mission Statements
- Business Value Drivers
- Strategic AI Principles
- Foundational AI Principles

Business Value Drivers

These drivers represent the key ways value is recognized by the organization and are used to ensure candidate AI initiatives are aligned to the goals and objectives of the organization.

AI Maturity Model

AI strategic directions are part of the overall strategic planning process and are designed to align AI initiatives with the organization's vision and goals. These directions provide a roadmap regarding where to leverage AI to maximize the benefits to the organization.

Case study: Leveraging ChatGPT with your enterprise data

Azure OpenAI + Azure AI Search

- Leverage the organization's data (external to ChatGPT and not used to train the model).

- Use ChatGPT to communicate with data.

- Azure AI Search returns the most relevant data.

- With the response, ChatGPT returns the citation to the source and a list of associated sources used to formulate the response.

- The user can preview the file from the citation.

- Can return a summary of the response.

- Supports multiple languages.

- Has built-in access control and security.
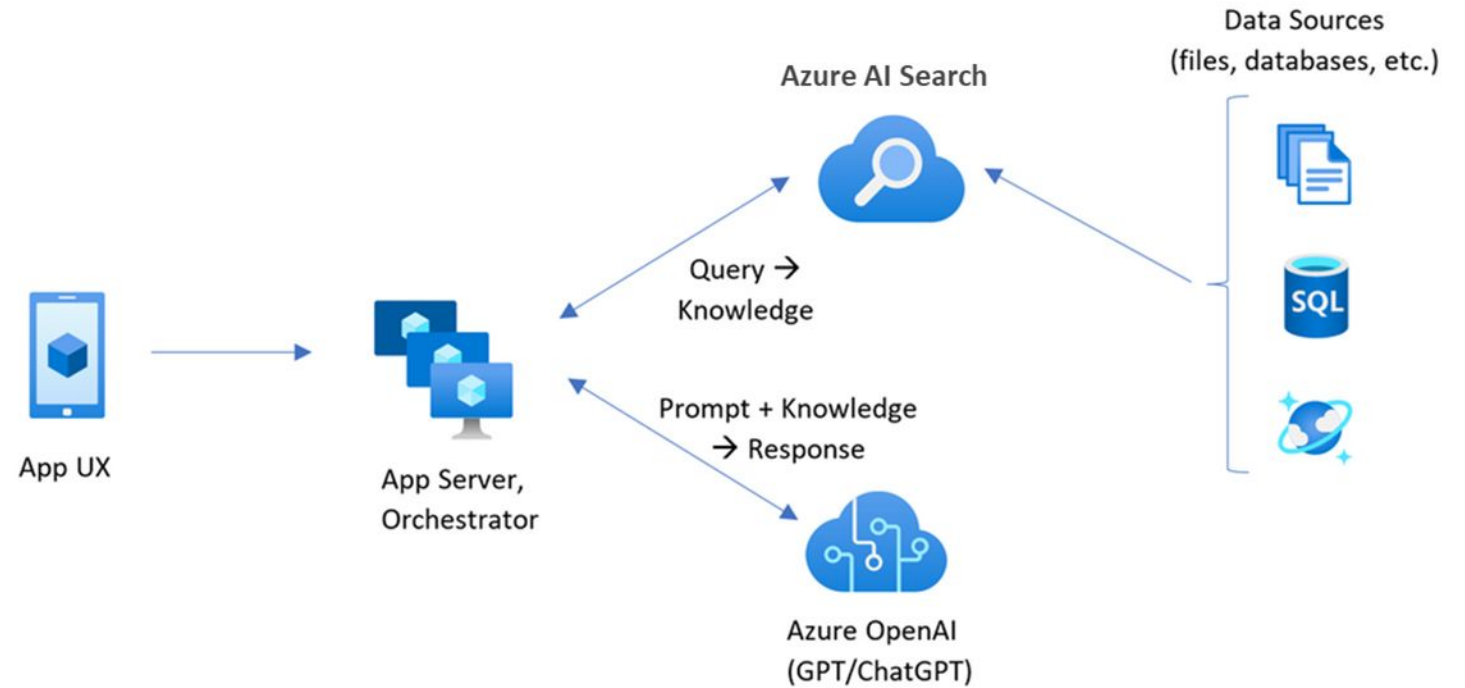
Solution Includes:

- ChatGPT from Azure OpenAI

- Azure AI Search

- Azure OpenAI Studio (optional)

Source: Microsoft Tech Community, 2023

The generative AI application ecosystem

Text

Software Development

- Gemini Code Assist (Google)
- Amazon Q Developer

Image
- DALL-E 2
- Stability AI
- Midjourney
- Craiyon
- Dream
- …

Video
- Synthesia
- Lumen5
- FlexClip
- Elai
- VEED
- …

Audio
- Speechify
- Murf AI
- Lovo AI
- …

Data
- Mostly AI
- Synthesized
- YData
- Gretel
- Copulas
- …

Cybersecurity
- CrowdStrike
- Palo Alto Networks
- SentinelOne
- Cisco
- Microsoft Security Copilot
- Google Cloud Security AI Workbench

Enterprise Software
- Salesforce
- Microsoft 365, Dynamics
- Google Workspace
- SAP
- Oracle
- Workday
- …

CRM
- HubSpot
- Freshsales
- Pipedrive
- Zoho
- Zendesk
- …

Sales Force Automation
- Salesforce
- Microsoft
- Oracle
- Zoho
- SAP
- …

Marketing Automation
- Salesforce
- Microsoft
- HubSpot
- Adobe
- Creatio
- …

Conversational AI (CX)
- Kore.ai
- Amelia
- Omilia
- Cognigy
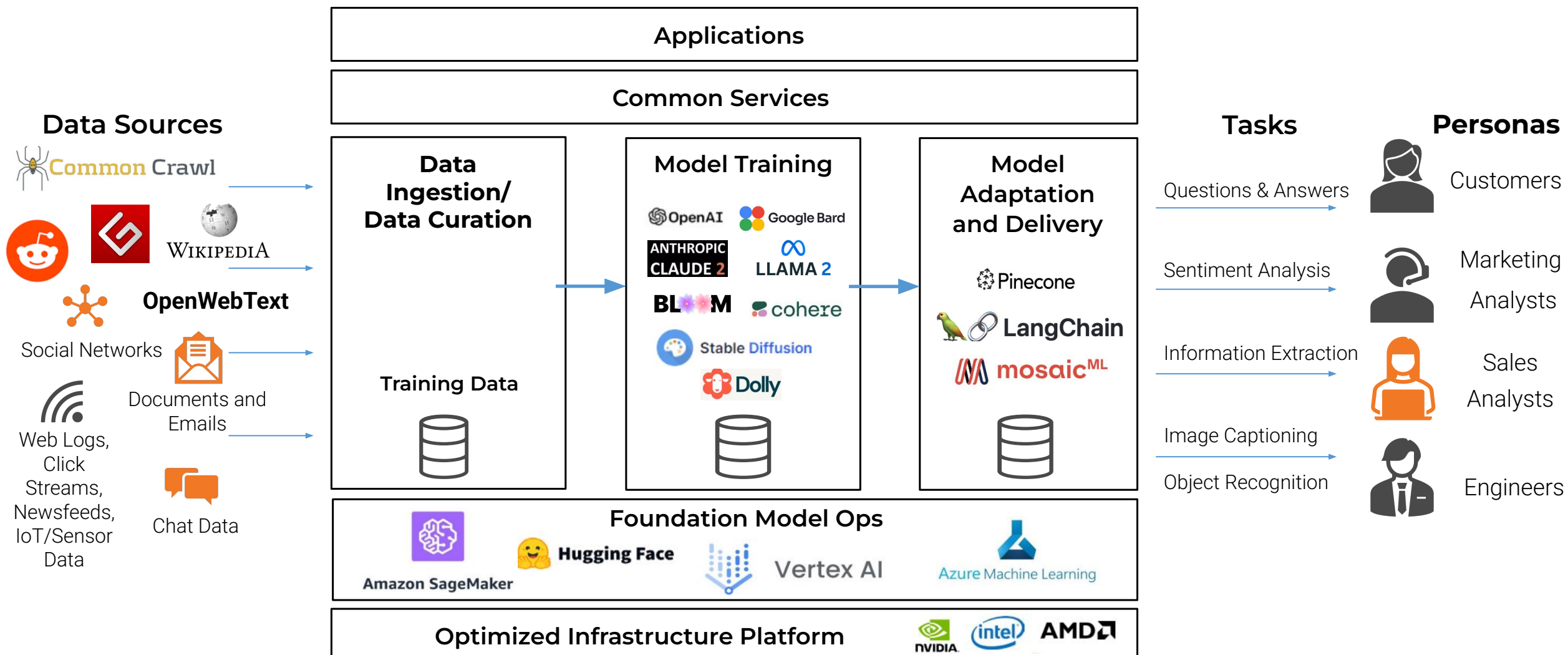- OneReach.ai
- …

Enterprise Search
- Coveo Relevance
- Sinequa
- Algolia
- Elasticsearch
- AddSearch
- …

Contact Center
- Salesforce
- Avaya
- Genesys
- Contact Guru
- Talkdesk
- …

And many, many more to come

AI Foundation Model Platform

An optimized data platform is foundational to maximizing the value of AI.

Data Sources

Common Crawl

WIKIPEDIA

OpenWebText

Social Networks

Documents and Emails

Web Logs, Click Streams, Newsfeeds, IoT/Sensor Data

Chat Data

Applications

Common Services

Data Ingestion/ Data Curation

Training Data

Model Training

OpenAI · Google Bard

ANTHROPIC CLAUDE 2 · LLAMA 2

BLOOM · cohere

Stable Diffusion

Dolly

Model Adaptation and Delivery

Pinecone

LangChain

mosaic ML

Foundation Model Ops

Amazon SageMaker · Hugging Face · Vertex AI · Azure Machine Learning

Optimized Infrastructure Platform   nVIDIA (intel) AMD

Tasks

Questions & Answers

Sentiment Analysis

Information Extraction

Image Captioning

Object Recognition

Personas

Customers

Marketing Analysts

Sales Analysts

Engineers

AI enablers

Use case requirements should drive the selection of the tool
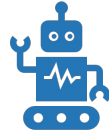
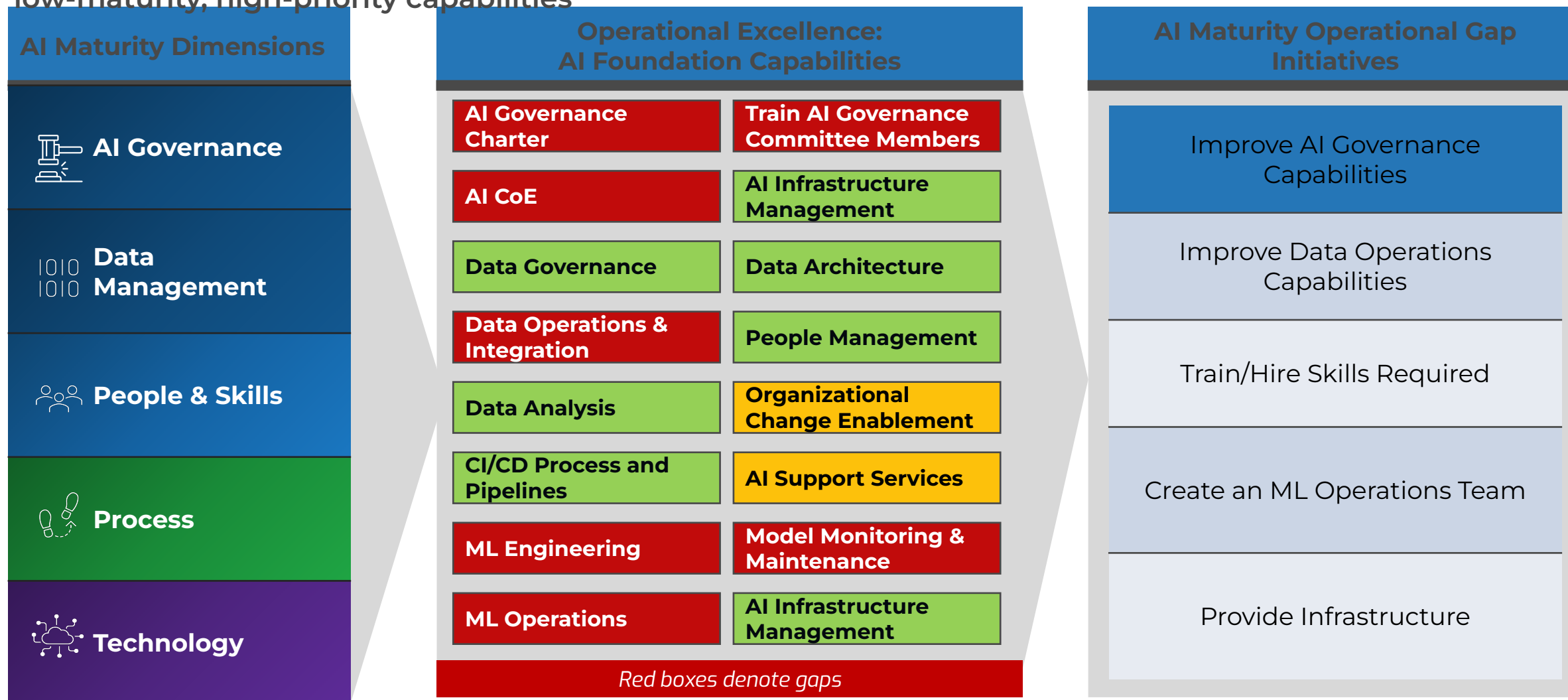|	**BPM**	**RPA**	**Process Mining**	**AI**
Use Case Examples	Expense reporting, service orders, compliance management, etc.	Invoice processing, payroll, HR information processing, etc.	Process discovery, conformance checking, resource optimization, and cycle time optimization.	Advanced analytics and reporting, decision-making, fraud detection, etc.
Automation Capabilities	Can be used to reengineer process flows to avoid bottlenecks.	Can support repetitive and rules-based tasks.	Can capture information from transaction systems and provide data and information about how key processes are performing.	Can automate complex data-driven tasks requiring assessments in decision-making.
Data Formats	Structured (i.e. SQL) and semistructured data (i.e. invoices).	Structured data and semistructured data.	Event logs, which are often structured data and semistructured data.	Structured and unstructured data (e.g. images, audio).
Technology	• Workflow engines to support process modeling and execution. • Optimize business process efficiency.	• Automation platform to perform routine and repetitive tasks. • Can replace or augment workers.	Enables business users to identify bottlenecks and deviations with their workflows and to discover opportunities to optimize performance.	Deep learning algorithms leveraging historical data to support computer vision, text analytics, and NLP.

Next steps in AI execution capabilities

A capability heat map and identified AI execution initiatives based on low-maturity, high-priority capabilities

→ Visit Build a Scalable AI Deployment Plan Workshop for more details.

AI Maturity Dimensions

- AI Governance
- Data Management
- People & Skills
- Process
- Technology

Operational Excellence: AI Foundation Capabilities

AI Governance Charter	Train AI Governance Committee Members
AI CoE	AI Infrastructure Management
Data Governance	Data Architecture
Data Operations & Integration	People Management
Data Analysis	Organizational Change Enablement
CI/CD Process and Pipelines	AI Support Services
ML Engineering	Model Monitoring & Maintenance
ML Operations	AI Infrastructure Management

Red boxes denote gaps

AI Maturity Operational Gap Initiatives

- Improve AI Governance Capabilities
- Improve Data Operations Capabilities
- Train/Hire Skills Required
- Create an ML Operations Team
- Provide Infrastructure