

Integrating Emerging Technologies

Research, Analysis, Guidance,
Education and Data Management
Support for Navigating Change.





Research

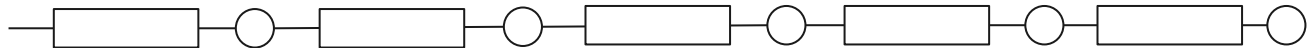
Analysis

Guidance

Education

Data Management

Overview



A Five Stage Data and AI Readiness Journey

1. Discover with Research - ASSESS your readiness and identify opportunities.
2. Scope with Analysis - ALIGN resources and prioritize impactful projects.
3. Develop with Guidance - CAPTURE value with pilot projects and clear success metrics.
4. Deploy with Education - DELIVER solutions, test and document, then deploy to your team.
5. Scale with Knowledge Management - MAINTAIN processes, monitor outcomes, make improvements





1. ASSESS

Checklist to Assess Resources and Capabilities with Research

- ✓ Conduct an AI readiness assessment to evaluate your organization's capacity for AI integration.
- ✓ Document 3–5 key business challenges that AI or data-driven solutions could address.
- ✓ Catalog data sources and education materials to guide your understanding of AI integration.
- ✓ Facilitate leadership orientation sessions to build awareness of AI's potential.
- ✓ Designate an AI Champion or Task Force to guide the process and drive alignment.

Rationale:

The Align stage establishes a strong foundation by evaluating your organization's readiness for data and AI integration. It identifies key challenges and opportunities, ensuring that efforts are focused on areas with the highest potential impact.



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ASSESS

ALIGN

2. ALIGN

Checklist to Align Resources and Capabilities with Analysis

- ✓ Compile and review internal and external data sources used for operations and decision-making
- ✓ Research, document and distribute successful AI use cases within your industry.
- ✓ Create a ranked list of potential AI projects based on ROI, business value, and feasibility.
- ✓ Identify areas in your operations where a pilot project could demonstrate measurable value.
- ✓ Develop a high-level roadmap to scope and prioritize your pilot initiatives.

Rationale:

The Analysis stage explores viable AI use cases and prioritizes projects based on ROI and strategic value. This ensures that investments are directed toward initiatives with clear business benefits. By scoping projects thoughtfully, businesses can mitigate risks and maximize returns before committing significant resources.



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CAPTURE

3. CAPTURE

Checklist to Capture Value from Resources and Capabilities

- ✓ Document deliverables and their relationships to measurable business outcomes.
- ✓ Assign roles, establish timelines, and outline responsibilities for the project team.
- ✓ Establish clear KPIs and develop scenario funnels for varying levels of success.
- ✓ Conduct risk assessment and document mitigation strategies.
- ✓ Document chain of command and secure resources for implementation.

Rationale:

In the Guidance stage, we transform ideas into actionable plans with defined deliverables and success metrics. Aligning projects with business outcomes ensures that every initiative contributes directly to organizational goals. By planning effectively, businesses can avoid missteps during implementation.



4. DELIVER

Checklist to Educate with Resources and Capabilities

- ✓ Develop and test a Minimum Viable AI Solution (MVAIS) with your data.
- ✓ Develop training or hands-on opportunities for teams to explore and adopt new capabilities.
- ✓ Gather feedback from users and refine the solution based on actionable insights.
- ✓ Document lessons learned during the pilot to guide future deployment.
- ✓ Establish mechanisms to monitor and track pilot performance.

Rationale:

This Education stage focuses on building and testing solutions while empowering your team through training and hands-on experience. Learning from early deployments enables scaling with confidence and clarity.



5. MAINTAIN

Checklist to Maintain Resources and Capabilities

- ✓ Establish governance policies for data organization, privacy, security, and ethical AI use.
- ✓ Deploy documentation, capabilities and processes to entire enterprise.
- ✓ Design staff trainings for adoption and integration of capabilities.
- ✓ Set up performance monitoring dashboards to track and measure ROI from implementation.
- ✓ Document roles and processes for continuous operational improvement.

Rationale:

The Data Management stage ensures that capabilities are scalable, sustainable, and governed responsibly. Proper oversight and continuous monitoring safeguard against risks and ensure ongoing process improvement.