AI Operating Model Transformation

STRATEGIC RECOMMENDATIONS BRIEFING DECK

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Executive Summary

▶ Phased AI transformation roadmap for a global professional services firm.

▶ Focus: Business value, stakeholder alignment, and scalable enablement.

▶ Includes maturity model, CoE framework, and change management strategy.

Strategic Objectives

- Leverage AI for operational agility and scalability

- Improve stakeholder alignment and decision transparency

- Ensure ethical, secure, and scalable AI deployment

- Achieve measurable business value through phased execution

AI Maturity Model

- **Level 1:** Ad Hoc – Isolated pilots, no strategy
- **Level 2:** Emerging – Executive interest, early data pipelines
- **Level 3:** Defined – AI aligned to KPIs, initial policies and roadmap
- **Level 4:** Integrated – Cross-functional delivery, tracked metrics
- **Level 5:** Optimized – Strategic advantage, continuous learning
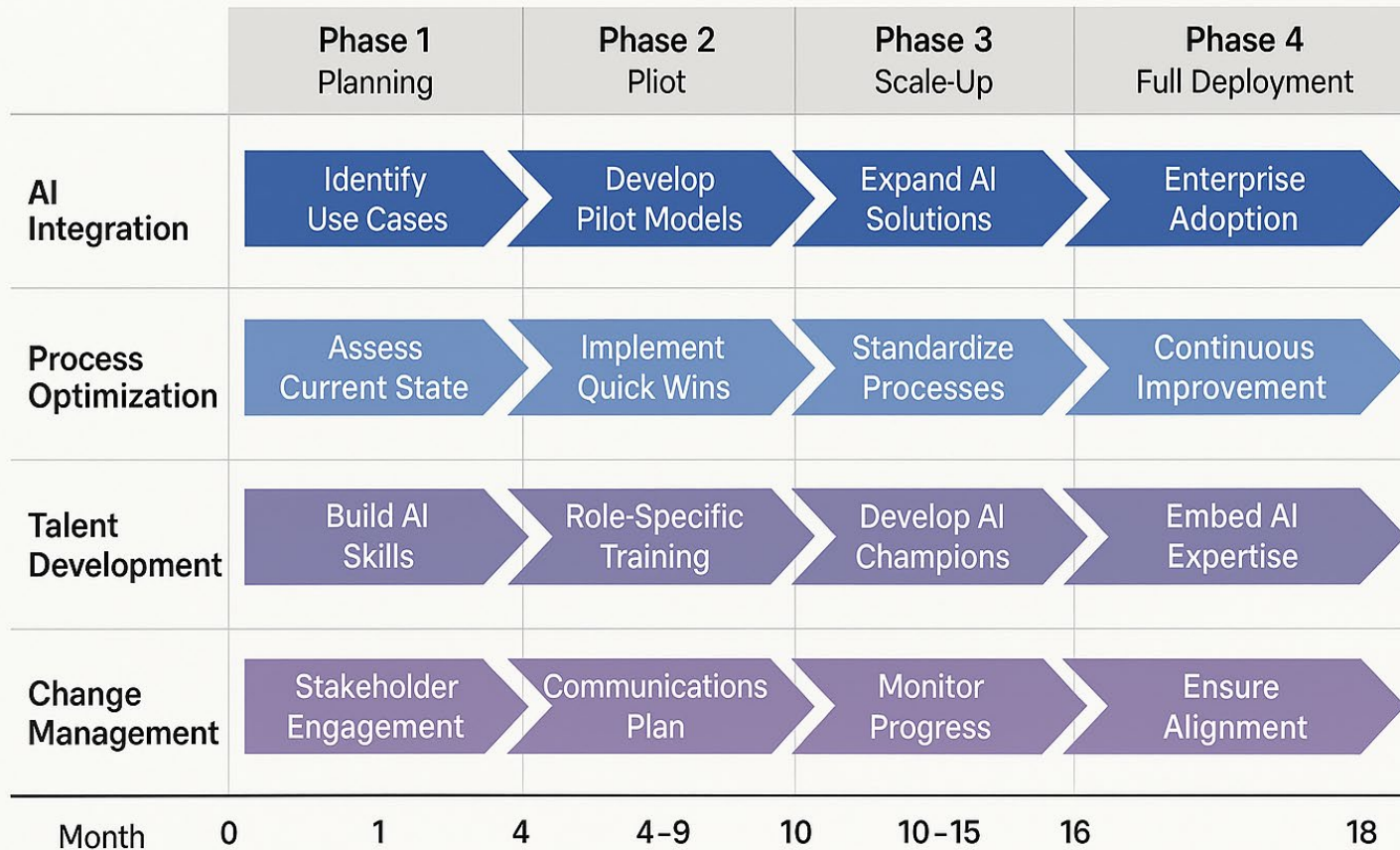
AI Center of Excellence Framework

- **Functions:** Governance, Innovation, Tools, Talent, Risk Management

- **Structure:** Federated with central CoE + business line liaisons

- **Deliverables:** AI policy handbook, training, dashboards, reusable assets

Change Management Strategy

- Phase-based engagement, communication, and capability building

- Comms tailored by audience (execs, managers, end users)

- Metrics: adoption, sentiment, training, alignment with KPIs

Final Recommendations

- **AI Use Case Targeting** – Prioritize high-impact, low-effort cases

- **Governance & Risk** – Establish AI Governance Council

- **Org Design & Talent** – Create hybrid roles (AI translators, etc.)

- **Measurement** – Track adoption and KPIs aligned to value

Next Steps & Measurement

- Proceed to KPI definition and dashboarding (Folder 08)

- Set AI usage, efficiency, and sentiment targets

- Launch quarterly value realization reviews to track ROI