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BUSINESS GUIDE

How to Champion AI as an Executive

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Companies operate like intricate gear systems where each department, process, and stakeholder play a role in keeping the machine running. However, the complexity of these interconnected parts makes change difficult. Even when inefficiencies are clear, adjusting one part may create friction elsewhere, leading to resistance and hesitation. Employees may see new technology potential, but legacy systems, rigid workflows, and risk-averse cultures often stall initiatives before they make an impact.

However, businesses that embraced technological change gained a competitive edge in the past. From the internet and cloud computing to mobile technology and big data, those that adapted early, improved efficiencies and created better customer experiences.

AI is advancing faster than any previous technology shift, and its ability to impact nearly every business function makes adoption both exciting and challenging. Overcoming these hurdles requires AI champions in each organization, who do more than introduce new technology. They bridge gaps between teams, translate AI's potential into real business value, and drive cultural shifts that make adoption sustainable.

Ashok Manthena, Chief Innovator – Finance/AI ChatFin

The Generational Opportunity: For Organization and Personal Growth

The rise of AI represents a rare technological revolution with immediate, transformative potential, giving organizations that adapt quickly a competitive edge. Over time, this adaptability leads to significant cost savings and enhanced agility, positioning businesses to respond swiftly to market shifts.

Companies looking to gain an edge with AI will need professionals who not only understand the technology but can pinpoint where it delivers real business value. So, companies will increasingly seek C-suite leaders proficient in AI, who will, in turn, rely on talented operators to cut through bureaucracy and drive AI initiatives. Those who can challenge conventional routines, embrace change, and build lasting value with AI will be highly sought after and rewarded.

While enterprise-wide AI adoption is slowly picking up, this window of opportunity is particularly wide open in slower-moving functions like finance. For professionals, this means a unique chance to leverage their expertise for career advancement, negotiate better roles, and

secure growth opportunities in this AI-driven era. By acting now, individuals can establish themselves as leaders in shaping AI's impact across industries.

AI's Transformative Role in Finance

Finance is one of the most data-intensive and process-driven functions in an organization, making it a prime candidate for AI-driven transformation. Unlike sales and marketing, which often receive attention for AI-powered customer experiences and predictive insights, finance remains heavily reliant on manual processes and rigid workflows. The high volume of transactions, compliance requirements, and repetitive reconciliations create an environment where AI can significantly enhance accuracy, efficiency, and risk management.

AI agents are already automating transaction reconciliation, anomaly detection, and forecasting by identifying patterns that would take humans days to analyze. Beyond efficiency, AI can help finance teams make more proactive, data-driven decisions by predicting cash flow risks, optimizing working capital, and enhancing fraud detection.

But, AI in finance isn't just one tool, it's a combination of Generative AI, predictive analytics, and machine vision, each solving different challenges but when combined, they create a more powerful and efficient vertical AI that can automate complex financial tasks.

Take invoicing as an example, machine vision can read data from a PDF invoice, Generative AI can check and organize the information, and predictive analytics can look at past payments to predict when a customer will pay. Once verified, AI can automatically post the data into an ERP system, reducing manual effort and errors. Previously, these steps required manual intervention across multiple teams, with different systems capturing different datasets, making automation challenging. However, by leveraging AI's ability to integrate these capabilities, finance teams can eliminate silos, enhance accuracy, and accelerate decision-making.

Finance is full of similar high-impact use cases where AI can read and analyze contracts, validate financial data, automate reconciliations, predict financial outcomes, and streamline reporting.

The Role of AI Champions: Why Every Organization Needs Them

Successfully leveraging AI requires more than adopting new tools; it demands strategic leadership, cross-functional collaboration, and an increased cultural shift toward innovation. At the core of this transformation are AI champions, individuals who guide their organizations through AI adoption, inspire their colleagues, and lead by example. So it's important for organizations to understand what makes these AI champions.

AI Champions: What Drives and Shapes Them

Today, learning AI is more accessible than ever, thanks to a wealth of free resources. However, finding time and energy to learn amid daily demands remains challenging. Despite this, some individuals prioritize exploring AI tools, staying ahead of the rapid changes, and positioning themselves as innovation leaders within their organizations. These AI champions are driven by a desire to learn, grow, and make an impact which makes them role models. However, their journey is not without challenges.

Overcoming Barriers to AI Adoption

A key barrier to AI success is resistance from individuals or teams hesitant to change. This reluctance often arises from fear, habit, or skepticism, especially when AI disrupts established workflows. Teams handling manual processes may resist AI automation due to job security concerns or leadership inertia. Addressing this resistance requires strategy, empathy, and building trust to gain buy-in to pave the way for a smoother transition.

AI champions help guide their peers toward seeing AI as a positive change. By educating, engaging, and bridging technology with practical needs, they demonstrate early successes, share insights, and encourage adaptation. This approach helps overcome fear, skepticism, and job-related concerns, fostering buy-in and cultural adoption across departments. By connecting leadership with their teams, AI champions advocate for resources, share progress, and resolve concerns. With AI champions embedded in every team, organizations benefit from a network of advocates driving continuous learning, best practices, and transformative growth.

How to Approach AI Initiatives

To make meaningful progress, organizations will want to avoid investing heavily in complex AI systems without addressing organizational culture and change management risks, which can lead to wasted resources and widespread disillusionment. To mitigate this risk, it is essential to bring AI champions onboard, experiment, foster a culture of collaboration, and involve stakeholders at every level.

Gaining Traction

Achieving traction for AI projects requires addressing unknowns head-on. There is significant skepticism about AI projects, with many questioning their efficacy, accuracy, and valuable use cases. This challenge is widespread, even among your competitors, but it presents an opportunity to lead.

Consider the finance teams as an example. Many finance teams are still uncertain about how AI can truly deliver value. Frameworks and analogies alone fall short of addressing their concerns. To build confidence, the key is to provide concrete proof of AI's value in real-world applications.

A strategic way to demonstrate this is by starting with one targeted use case. This approach should extend beyond controlled, sandbox environments and instead focus on bringing a specific application to production. Successfully delivering a single use case allows teams to demonstrate tangible outcomes, highlight the AI process, and showcase measurable benefits. This requires selecting an appropriate use case, automating relevant processes, and rigorously measuring the return on investment (ROI).

For example, a good place to start using AI with processes that are highly repetitive and manual in nature, such as reconciliation within controller teams. This process often takes up a lot of resources for data querying, processing, and certification and remains rigid due to audit oversight and bureaucratic complexities, deterring many companies from changing it. To begin with AI, focus on a small part, such as improving one specific account like fixed assets or pre-paid reconciliation. Once that works well, you can expand to a whole account type. It's important for the people who manage and do this work to be involved and supportive, as they hold key knowledge about the process. Early successes can help build trust and encourage more teams to adopt AI.

It's also crucial to acknowledge that not every use case will succeed. Failures can occur due to various reasons, such as insufficient data, incompatible systems, or complexity beyond current AI capabilities. When an initial project falls short, quick pivots and the exploration of new use cases are essential. Achieving success demands a tactical and adaptive approach, including the ability to recognize when it's time to shift focus to more promising opportunities.

In the early stages, the primary investment in AI should be focused on identifying areas where it can make a significant impact. Investing in AI early serves two purposes, one it delivers quick wins while preparing teams for long-term, AI-driven transformation. Second, it exposes potential pitfalls, such as cultural resistance, workflow disruptions, or skill gaps, before larger investments are made. For example, deploying an AI solution to streamline a repetitive process can reveal

not only efficiency gains but also employee sentiments about automation, adoption barriers, and the level of training required for success.

The Roi of AI Initiatives Extend Beyond Financial Gains

ROI is critical for any project within an organization, but for AI initiatives, the return on investment goes far beyond immediate financial payback. The value derived from AI projects isn't just measured in dollars. It should include the knowledge gained about what works, what doesn't, how employees respond, and the overall adaptability of an organization's culture to innovation and change. This deeper understanding can ultimately pave the way for more successful AI integration and long-term competitive advantage.

Taking Action as Individuals: How to Get Started as an AI Champion

Integrating AI into your organization goes beyond technology; it's about transforming processes, culture, and strategy. Here's a step-by-step guide for individuals to effectively harness AI's potential and drive meaningful change.

Start With Foundational AI Knowledge

To effectively bring AI into your organization, begin by understanding how AI works. Learn how AI processes data, makes decisions, and evolves from outcomes. This foundational knowledge will help you grasp both AI's potential and its limitations, enabling you to identify where it can be most impactful within your business.

Identify Organizational Problem Areas

Once you have a basic understanding of AI, reflect on the problem areas within your organization. Consider whether these issues could be solved with human effort and additional training. If so, evaluate how AI might replicate or even exceed human capabilities in these tasks. This process will help you pinpoint opportunities where AI-driven optimization can streamline workflows, enhance decision-making, or automate routine tasks.

Research and Experiment With AI Solutions

Explore the AI products available in the market and engage with vendors to gain a better understanding of various solutions. Discuss costs, key features, use cases, and scalability with vendors. Many of the ERP solutions are now incorporating AI capabilities, making it crucial to explore how these integrations can enhance business processes, decision-making, and predictive analytics. Experimenting with different AI tools and pilot projects provides valuable, hands-on experience that can set you apart from others and deepen your expertise.

Build a Strong Business Case for AI

When you're ready to advocate for a broader AI initiative, develop a compelling business case. Focus on how AI can impact core business metrics, such as revenue growth, cost savings, improved efficiency, customer satisfaction, or risk mitigation. Using concrete data and projections to tie AI initiatives directly to business goals will strengthen your case and help gain leadership buy-in.

Form Cross-Functional Teams

If you hold a leadership role, consider forming cross-functional teams that bring together experts from various departments. This approach ensures that AI initiatives address genuine organizational needs and increase the likelihood of successful implementation. Additionally, seek input from external AI experts or consultants to provide unbiased guidance, industry best practices, and a clear view of potential pitfalls.

As a Leader, Cultivate AI Champions

To maximize the success of your AI initiatives, identify and nurture AI champions within your organization. These individuals will lead by example, experimenting with AI solutions, sharing their learnings, and rallying support from their peers. Building a network of AI champions across all departments fosters a grassroots movement that accelerates adoption and promotes a culture of continuous learning and innovation.

Foster a Culture of Openness and Experimentation

Embracing AI demands openness to change, a willingness to experiment, and a commitment to transforming organizational processes. By systematically learning, experimenting, and championing AI solutions, you can unlock significant value and position your organization as a leader in the age of intelligent automation.

Seize the AI Opportunity

Becoming an AI champion goes beyond mastering technical skills and requires developing a mindset centered on continuous learning and cross-disciplinary collaboration. As AI reshapes industries, the next generation of AI champions will be those who inspire their teams to think critically, act responsibly, and open doors to meaningful progress.

"This is your AI moment. Seize it."

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