



Beyond the Hype: Measuring AI ROI

Delivering Sustained Value from Enterprise AI

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Session Roadmap

01

Challenge Analysis

Understand why AI initiatives often fail to deliver long-term ROI and identify common pitfalls.

02

Framework Introduction

Introduce Synozur's Messaging & Positioning Framework (MPF) as a strategic alignment tool.

03

Metrics Reimagined

Learn the four dimensions of ROI beyond just dollars to measure AI success comprehensively.

04

Interactive Application and Blueprint

A design-thinking exercise to apply these concepts to your own AI projects.



ABOUT SYNOZUR

Making the desirable achievable

Synozur - the **transformation company** - is an advisory firm that transforms business for our clients.

Our team of leaders from across the Fortune 500 delivers **high-impact outcomes** for our clients.

We believe in **empathetic** approaches, ensuring that your unique journey is supported with the right strategies and solutions.

From efficiency and ROI to market success and adoption, we'll help you find the tangible **results** you're seeking.

Our Four Pillars of Transformation



Strategic Transformation

Leadership alignment, Company Operating System implementation, and fractional CxO support to drive organizational change

- Executive alignment and vision setting
- Strategic planning and execution frameworks
- Interim leadership and advisory services



GTM Transformation

Brand messaging evolution, integrated marketing campaigns, and Microsoft partner ecosystem development

- Market positioning and messaging strategy
- Campaign development and execution
- Partnership and channel optimization



Technology Transformation

AI strategy and design, comprehensive IT modernization, and security and compliance framework implementation

- AI roadmap and architecture design
- Cloud migration and modernization
- Cybersecurity and governance



Experience Transformation

Employee engagement programs, comprehensive change management, and enhanced customer experience design

- Culture and engagement initiatives
- Training and upskilling programs
- Customer journey optimization

MICHELLE CALDWELL

Chief Executive Officer

Michelle is a **workplace experience leader** with over 25 years of experience delivering **transformative solutions** to diverse organizations powered by **Ethical AI**

Michelle's experience spans generative AI, content AI, and knowledge AI landscape leveraging Microsoft 365 Copilot and SharePoint Premium for knowledge management, content generation, and content processing and automation.

Her experience includes helping clients and delivery teams identify the opportunities that generative AI could enable by leveraging a strategy led approach that has led to successful pilot programs for engineering, energy, professional services, and agriculture.

Michelle has been part of Microsoft's Content AI Partner Program since 2017 and has advised customers globally. As a result of her involvement with Microsoft Product Engineering and Marketing teams she has gained valuable insight on how to help customers achieve success and measurable results leveraging Microsoft's AI capabilities.

Michelle is a retired Microsoft MVP and Regional Director and is recognized as a highly ranked international speaker on topics such as AI and Workplace Experience,



CHRIS MCNULTY

Chief Technology Officer

Chris is an award-winning **product, marketing and technology executive** with experience spanning generative AI, Copilot, and Microsoft 365 for knowledge management, content management, and automation.

Chris McNulty leads marketing and strategic technology engagement for Synozur.

Prior to Synozur, Chris was Senior Director of Product Marketing for Microsoft 365, Copilot, Viva, Syntex, Teams, OneDrive, and SharePoint at Microsoft, where he oversaw product planning, customer communications, go-to-market, field readiness, channel partners and executive briefing engagements.

A co-creator of Microsoft Viva and Syntex, Chris's experience as CTO includes companies such as Dell and Quest Software and executive IT leadership at Santander, GMO, and State Street, along with several board seats. He was first recognized as a SharePoint MVP in 2013 and a Copilot MVP in 2025. A frequent speaker at events around the globe, Chris is the author of the "SharePoint 2013 Consultant's Handbook" among other works & holds several patents. He holds an MBA from Boston College in Investment Management and hosts the Polaris podcast.



DELL Technologies



The AI Maturity Model



Synozur AI Maturity Model (5 Minutes)

Online <https://aka.synozur.com/aimm>



The screenshot shows the homepage of the Synozur AI Maturity Model. The header features the Synozur logo and a navigation bar with a search icon. The main title "Discover Your AI Maturity" is prominently displayed in large, bold, blue text. Below the title, a descriptive paragraph explains the purpose of the assessment. A note at the bottom indicates it's a beta version and encourages users to sign up for updates. Three buttons are visible: "Start Assessment" with a right-pointing arrow, "Learn More", and "Sign Up". A large callout box titled "Your AI Maturity Journey" contains a graphic of a blue line with circular markers, one of which has a purple and pink starburst icon, set against a dark background with abstract network shapes.

How we made it:

M365 Copilot

- "Create a specification for a prototype website that helps users identify how they use AI in their organization through a series of guided questions. The site should calculate an AI Maturity Score, provide an interpretation of that score, and deliver personalized recommendations for improvement."

[Maturity Model Text]

Replit.com

- Purpose & Experience Goals
- Purpose:
Enable users to identify their organization's AI maturity through a guided assessment, receive a precise AI Maturity Model Score (100-500), and get tailored recommendations for advancing their AI journey.
- Experience Goals:
 - Conversational, intuitive, and visually engaging.
 - Empathetic, business-outcome focused, and custom to the user.
 - Clear, actionable, and easy to share.
- 2. Core User Flow
- Welcome & Context
 - Brief intro to Synozur's AI Maturity Model and the value of assessment.
 - [Graphic Placeholder: "AI Maturity Journey" – Prompt: "Create a stylized roadmap graphic showing five stages from Nascent to Transformational, with icons for each."]
- Guided Assessment (Questionnaire)
 - 10-15 dynamic, multiple-choice questions, grouped by maturity dimensions:
 - Strategy & Leadership
 - Talent & Skills
 - Data & Infrastructure
 - Use Case Integration & Value Focus
 - Governance & Responsible AI
 - Culture & Change Management
 - Each question uses plain language, with tooltips for definitions/examples.
 - [Graphic Placeholder: "Interactive Progress Bar" – Prompt: "Design a horizontal progress bar with milestone icons for each maturity dimension."]

Synozur AI Maturity Model

Mentimeter www.menti.com 6223 5288



Synozur AI Maturity Model

01

Explore

Initial experimentation and pilot programs to understand AI capabilities and potential impact areas

02

Build

Foundational infrastructure development and targeted use case implementation with governance frameworks

03

Scale

Enterprise-wide deployment across multiple business functions with standardized processes and training

04

Transform

Business model innovation and core operation transformation through integrated AI capabilities

05

Frontier

Industry leadership through cutting-edge AI applications and continuous innovation culture

Our maturity model synthesizes leading frameworks from Accenture, Google, and Deloitte into actionable stages. Only 12% of companies reach high AI maturity ("AI Achievers"), but these leaders see 50% higher revenue growth. Key success factors include strategic alignment, executive sponsorship, robust cloud and data infrastructure, responsible AI governance, and continuous upskilling.

Common obstacles include pilot paralysis, siloed efforts, talent gaps, fragmented data, and organizational resistance. Synozur guides clients through targeted interventions at each stage, breaking down silos, investing in talent development, and embedding AI into core business operations.

The ROI Dilemma



The AI ROI Dilemma

Stark Reality

74% of companies have not seen tangible value from AI at scale. Only 1 in 4 have moved beyond pilots to real results.

Hype vs. Reality

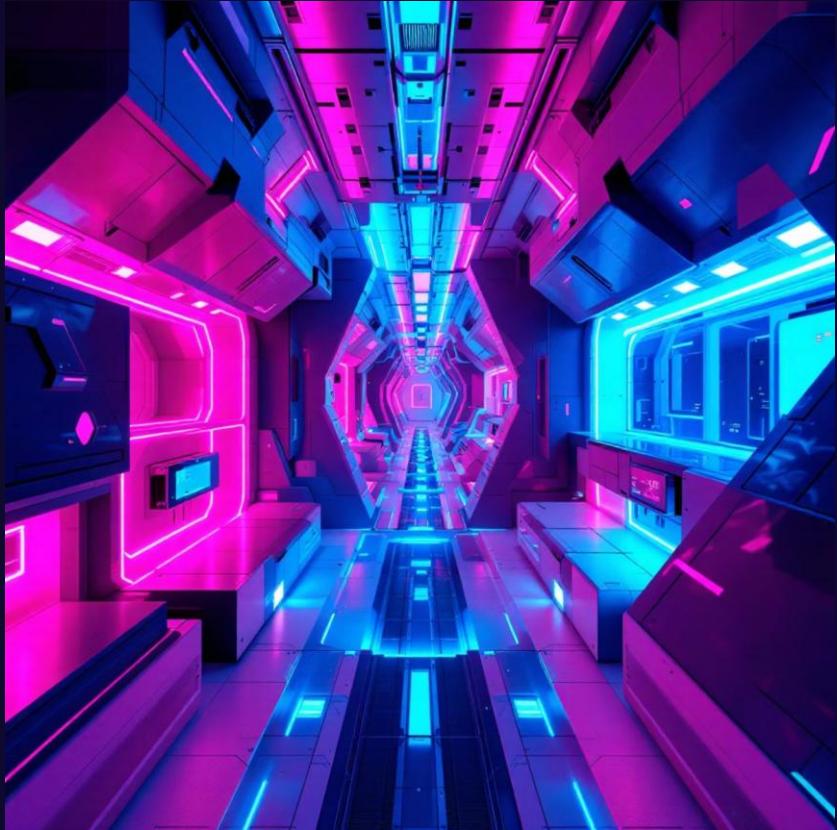
Initial excitement often yields vague outcomes or stalled pilots. Promising AI projects frequently fizzle out despite significant investment.

Critical Question

"How do we move beyond the hype to sustainable ROR?"



Why AI Projects Fall Short



Lack of Strategic Alignment

AI solutions built in isolation often miss real business needs. "Cool tech, but what problem does it solve?"



People & Process Gaps

70% of AI project challenges are people and process issues, not technology. Users aren't ready or willing to adopt.



Undefined Success Metrics

Without clear outcomes, AI pilots drift endlessly with no proof of value or path to scale.

- ☐ Key Insight: Successful AI = Technology + Strategic Alignment + Change Management

The MPF - Strategy and Vision



Introducing Synozur's MPF

What is MPF?

Messaging & Positioning

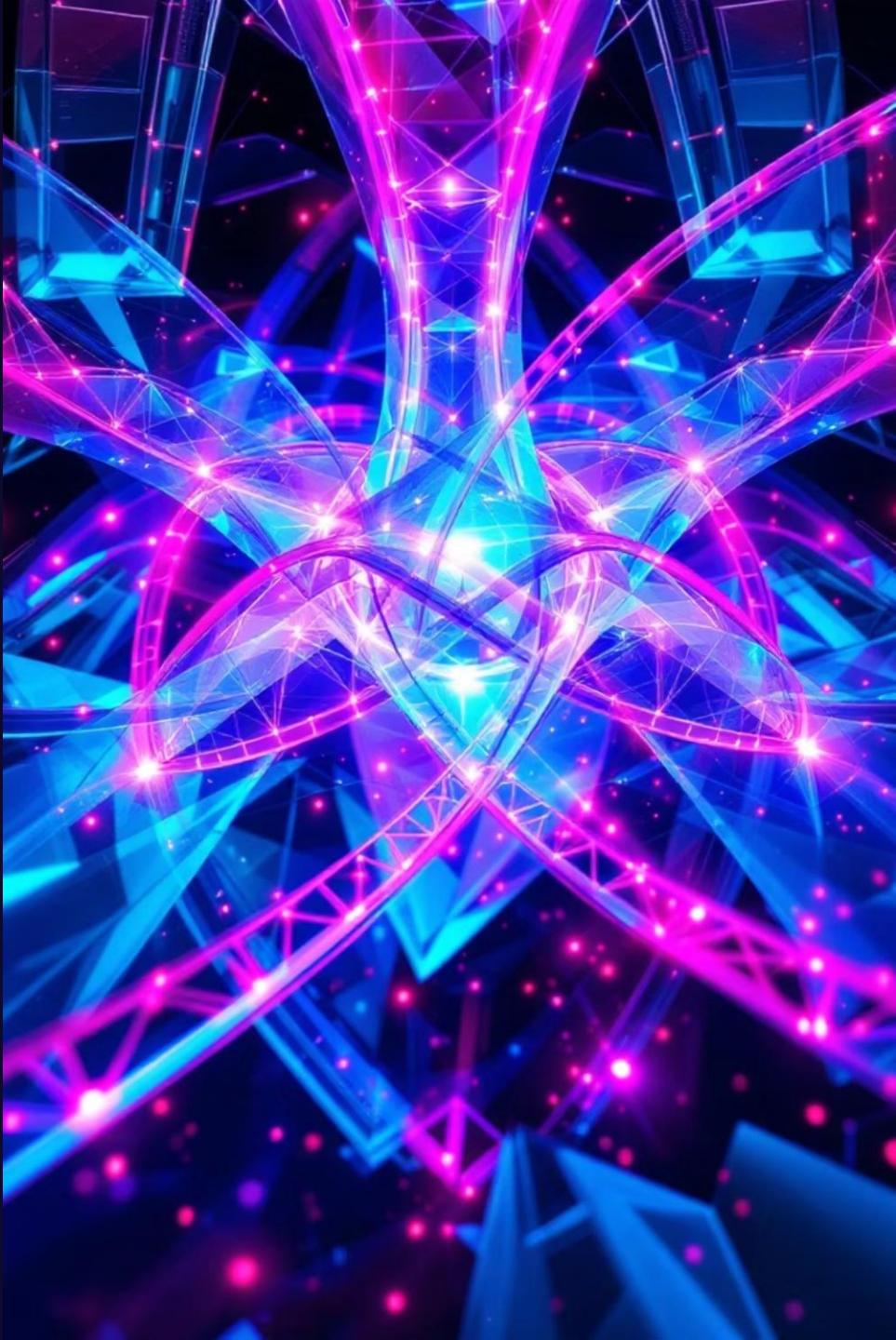
Framework – Synozur's strategic playbook for articulating an initiative's value and ensuring stakeholder alignment.

From Marketing to AI Strategy

Originally designed to define product value propositions, now repurposed to clearly define AI project purpose, alignment, and success metrics upfront.

Collaborative by Design

Built through cross-functional workshops and stakeholder interviews, capturing diverse perspectives to ensure comprehensive understanding and buy-in.



AI Strategy and Design (MPF Excerpt)

Our expertise in AI technologies like Copilot ensures that you're **fully equipped to implement and manage AI solutions** that transform productivity and business processes.

We take **a human-centric approach to AI**, ensuring that your solutions are ethical and considerate of their impact on your workforce.

We **map AI to achievable business outcomes**. Whether it's improving customer experience, driving efficiency, or unlocking new revenue streams, we deliver tangible outcomes.

Finally, **we design and implement pilot programs and rollouts** with a customized curriculum-based campaign

How to think strategically



Think long-term



Recognize patterns



Customer obsessed



Forecast the future...smartly.

- Caution: *Data* is historical, not forward-looking.



Question-driven process to formulate strategy

- Don't start with a solution.
- "What would happen if...?" and "What would need to be true in order to..."



Strategy is FIRST about having a theory about *where to play and how to win*.

- Influencing customer's choice, not internal capabilities.

Alignment



Aligning AI with Business Vision



Start with "Why"

1

Tie every AI project to a specific business goal or vision. Ask: "Which top priority does this AI initiative serve?"



Concrete Example

2

Vision: *Customer-centric innovation* AI Initiative: Intelligent chatbot to improve customer experience, reducing support calls by 30% and raising satisfaction scores.



Avoid the Silo

3

No "AI for AI's sake." Secure leadership buy-in by speaking in KPI terms that directly impact business outcomes.

Purpose Statement Template: "We are implementing AI to ___, in order to ___ (business outcome)."



Aligning AI with Culture



People First Approach

Assess organizational readiness. Are employees prepared to work with AI? Do they trust the technology and understand its benefits?



Champions & Leadership

Identify executive sponsors and early adopters to champion the AI initiative and model positive attitudes throughout the organization.



Change Management

Allocate significant effort to training, communication, and process changes. Remember: **AI success is 70% about people**, not just technology.



Address Concerns

Acknowledge employee fears about job replacement and frame AI as an empowerment tool that enhances their capabilities rather than replaces them.





Aligning AI with Operations



Data Readiness

Ensure quality data availability. Assess if data integration or cleansing is needed before AI deployment can be effective.



Tech Infrastructure

Evaluate if IT systems—cloud, compute, security—can reliably scale and support the AI solution long-term.



Governance Framework

Implement clear ownership, maintenance processes, and ethical guidelines. Plan for performance monitoring and model retraining.



Right-Sized Ambition

Match project scope to current capabilities. Start with pilots to prove value, then expand as organizational maturity grows.

Measuring Success



Measuring AI Success – Beyond Dollars

Traditional ROI focuses solely on financial returns, but this narrow view misses significant AI benefits that translate to long-term value.

Efficiency & Productivity

Doing things faster, cheaper, and better.
Measuring time savings, output improvements, and error reduction.

Strategic Adaptability

Boosting organizational agility and future-readiness. Building capabilities for rapid market response.



Employee Experience

Making work more engaging and rewarding. Tracking satisfaction, retention, and meaningful work allocation.

Market Differentiation

Strengthening customer value and competitive edge. Enhancing service quality and innovation capabilities.

Market Differentiation Metrics

Customer Satisfaction

Net Promoter Score (NPS) improvements driven by AI-enhanced experiences

Retention & Churn

Customer loyalty metrics showing AI's impact on relationship strength

Market Share

Competitive positioning gains through AI-powered differentiation

New Revenue

Income from AI-driven products and services competitors cannot match

AI as Your Value Proposition

Product Innovation

AI features that competitors lack, creating unique market positioning and customer value

Hyper-Personalization

Tailored experiences that boost customer loyalty and lifetime value significantly



Market Impact Evidence

3X

Higher Market Returns

Companies excelling in AI-driven personalization achieved 3x higher market returns versus peers

AI becomes a powerful brand differentiator when executed strategically and measured properly.





Strategic Adaptability

"Has this AI initiative made us more agile and future-ready?"

Building organizational resilience through intelligent automation and data-driven insights.

- Decision making speed
- Innovation rate
- Market response time

Aligning ROI Goals to Maturity Stages



Setting expectations and communicating progress at each stage



ROI Expectations by Stage

Set different ROI goals at each maturity stage, from learning KPIs early to innovation metrics later.

Communicating Executive Milestones

Use clear milestones tied to maturity stage progress to engage executive buy-in effectively.

Investment Justification

Link budget requests directly to maturity gains to justify infrastructure and scaling investments.

Avoiding Growth Plateau

Use a maturity roadmap to prevent stalling and unlock new ROI streams at advanced stages.

Leadership buy-in, investment framing, and avoiding stagnation



Setting ROI Expectations

Early ROI may be qualitative like faster insights and skill development, setting clear journey expectations is crucial.

Using Maturity Model

The maturity model communicates current and future goals, reassuring stakeholders about phased ROI progress.

Tangible ROI at Stage 3

Stage 3 delivers tangible ROI, marking a decisive phase for companies aiming to become industry leaders.

Avoiding Complacency

Align incentives to prevent stagnation and keep pushing towards Stage 4 capabilities to stay competitive.

Interactive Activity



Interactive Framework Application

01

Setup (1 min)

Think of an AI project you're involved with or considering for your organization

02

Reflect (2 min)

Identify: business goal, one culture factor to address, one ROI metric to track

03

Pair & Share (2 min)

Share your project with a neighbor, discuss insights and challenges

04

Group Debrief (1 min)

Volunteer to share interesting discoveries with the larger group

Conclusions





Key Takeaways



Alignment is Everything

Start with clear business goals, ensure cultural alignment using frameworks like MPF



Measure Broadly

Define success across efficiency, employee impact, market impact, and adaptability dimensions



People + AI = ROI

Invest in training and change management. Empowered people plus AI drive sustainable returns



Iterate & Learn

Treat AI initiatives as journeys, continuously refining strategy and metrics as you learn

A photograph showing a group of people from the waist up, all holding their hands up in front of them to form a large, collective heart shape. The background is a bright, overexposed sky.

Thank you.

