

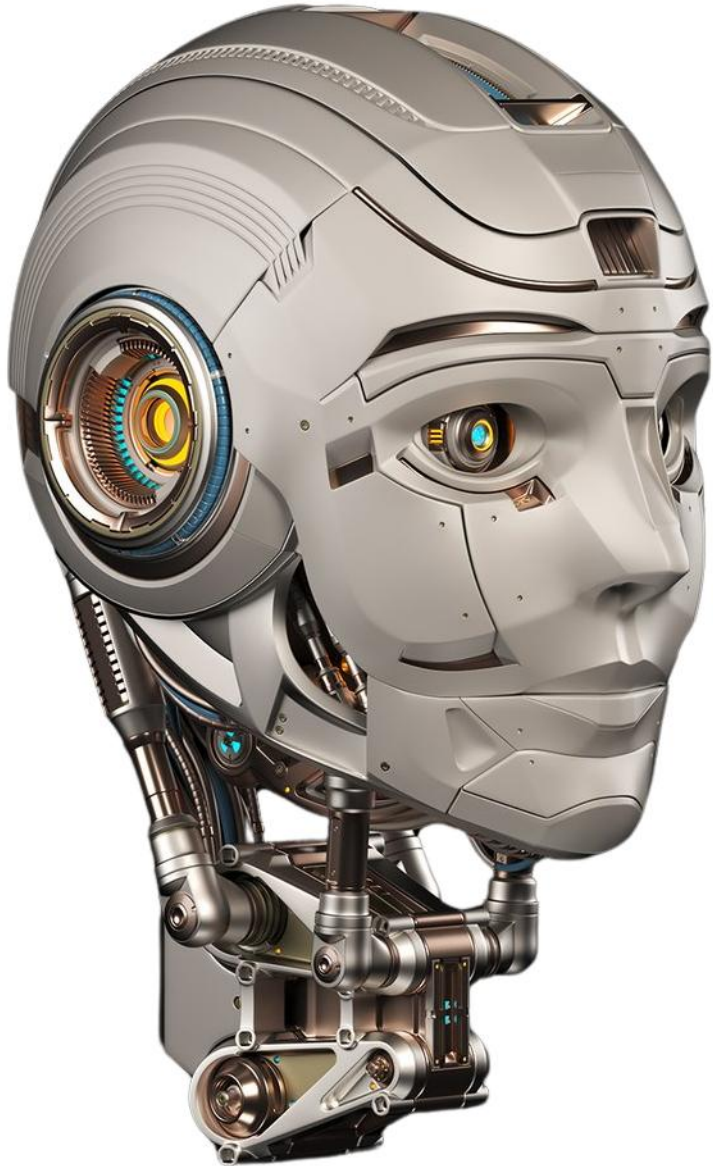
The AI Adoption Playbook is licensed under a  
Creative Commons Attribution 4.0 International License (CC BY 4.0)  
<https://creativecommons.org/licenses/by/4.0/>

You are free to use the contents but  
you must attribute the original authors;  
Hugh Abbott, Chris Fox, Priscille Livenais

All enquires to: [hugh.abbott@gmail.com](mailto:hugh.abbott@gmail.com)  
<https://www.linkedin.com/in/hugh-abbott/>

Version	Date	Authors	Comment
1.0	01.05.2024	Hugh Abbott	First complete version
		Chris Fox	
		Priscille Livenais	

# AI ADOPTION PLAYBOOK



# AI ADOPTION PLAYBOOK

for companies that want to start their AI journey



# AI ADOPTION PLAYBOOK

## Who is this playbook for ?

This playbook is for you if:

- you want to get started with AI
- you don't know where to start
- you are concerned about risks

This playbook helps you to start in a structured way.

### THIS PLAYBOOK WILL HELP YOU

- identify areas & process that might be impacted by AI
- analyse benefit, costs and **risks**
- articulate next steps



# AI ADOPTION PLAYBOOK

## AI Playbook – Three Layer Model

The playbook breaks down AI into three layers:

1. **AI for Personal Productivity**  
AI for day-to-day tasks
2. **AI for Automation**  
AI used to automate stable corporate processes
3. **AI for Transformation**  
AI used for projects that will change organisations





# AI ADOPTION PLAYBOOK

## Each Layer – Three Considerations

And three simple considerations for each layer:

### 1. Emotional Engagement

AI rouses strong emotions, hearts need to be won

### 2. Business case

high-level business case; cost, training, time saving etc

### 3. Risk

manage risks for each application of AI

Personal Productivity	<ul style="list-style-type: none"><li>• Emotional Engagement</li><li>• Business Case</li><li>• Risk</li></ul>
Automation	<ul style="list-style-type: none"><li>• Emotional Engagement</li><li>• Business Case</li><li>• Risk</li></ul>
Transformation	<ul style="list-style-type: none"><li>• Emotional Engagement</li><li>• Business Case</li><li>• Risk</li></ul>



# AI ADOPTION PLAYBOOK

## Consideration #1 – Emotional Engagement

AI has the ability to rouse emotions in a way that other tech does not. Conversations about mass-unemployment seem to be compulsory. So, it is essential to win hearts, it's key to win the emotional battle.

### DELIVER DELIGHT

There are so many free AI services that amaze and delight.

It is relatively easy to find tools that make people's work easier.

Giving someone a tool that saves 5 or 10 minutes is an easy way to **deliver delight**. The breadth of AI services means that it is probably best to create a group of enthusiasts who can help hunt out tips, tricks and methods of saving time.

It is relatively easy to win the emotional battle but it is key to success !



# AI ADOPTION PLAYBOOK

## Consideration #2 – Business Case

Changes in the way we work should deliver business benefits for the organisations we work with. And implementing AI should be no different than any other technology. AI needs to deliver a return for the business. The following points might be assessed:

- define the business problem (what is the problem or process being addressed)
  - articulate the benefit (saving time, increasing accuracy, winning business)
  - propose technical solution (what is the technology to be used)
  - feasibility (% likelihood of a successful outcome)
  - costs (licence costs, training costs, usage costs)
  - Risks
- Implementation plan (PoC, buy-in / develop internally, training, stakeholder engagement)
- RoI (what is the expected time-period to pay back the investment)

Each implementation of AI should be judged on its own merits.

Each implementation must deliver a return for the business.



Many organisations won't use AI because of perceived risks.  
Most risks can be relatively easily mitigated.  
Below are some risk associated with LLMs.

- Risks need to be assessed with a risk matrix and actively managed.





# AI ADOPTION PLAYBOOK

## Personal Productivity Layer - Definition

The layer is about using AI tools to help with every-day office tasks.  
AI can be used to save time with many daily chores.  
And every week more AI tools are launched!

AI can help with tasks such as:

- taking meeting notes
- writing first draft documents
- conducting research

### AI IS GREAT AT

AI is great at analysing data, doing research, creating first drafts.  
AI is great at creating first draft emails, first draft reports, first draft minutes.  
We need humans to edit and polish but AI generated docs really save time.



# AI ADOPTION PLAYBOOK

## Personal Productivity Layer - Definition

The layer is about using AI tools to help with every-day office tasks.  
AI can be used to save time with many daily chores.  
And every week more AI tools are launched!

AI can help with tasks such as:

- taking meeting notes
- writing first draft documents
- conducting research

### AI IS GREAT AT

AI is great at analysing data, doing research, creating first drafts.  
AI is great at creating first draft emails, first draft reports, first draft minutes.  
We need humans to edit and polish but AI generated docs really save time.



# AI ADOPTION PLAYBOOK

## Personal Productivity Layer – Example (s)

There are so many brilliant AI use-cases.  
Here is a pick of a few worth considering.

- use Microsoft Copilot to handle incoming emails
- use Gemini Deep Research to create in-depth reports
- use ChatGPT to analyse the data from large spreadsheets
- use ChatGPT to generate images for presentations
- use Gemini to summarise long documents
- use Gemini to extract key data from long documents
- use ChatGPT to brain-storm ideas
- use ChatGPT to write first-draft emails

### AI EVERYWHERE

AI features are being built into virtually every software offering.

AI features are designed to enrich your experience and save time – give them a go!



# AI ADOPTION PLAYBOOK

## Personal Productivity Layer - Getting Started?

### DELIGHT

The easiest way to push adoption of AI is to deliver delight.  
Like no-other technology, AI has the ability to deliver delight.

Audience:	gather a regular audience; lunch & learn, webinars,
Show & Share:	show great AI tools, encourage others to share their own use
Delight:	deliver delight; if you deliver delight, you will push adoption

### CHAMPIONS

Don't do this level on your own ... find your champions!  
Enthusiasts, early adopters and leaders; people that enjoy sharing.  
Work with your champions to deliver AI delight.



# AI ADOPTION PLAYBOOK

## Automation Layer - Definition

This layer is about automating existing, stable, 'manual' processes.  
AI can super-charge automation because AI can handle unstructured data.  
AI can be used to automate processes that previously were not automatable.

Unstructured data might be:

- emails
- documents
- chat conversations

AI IS GREAT AT ...

AI is great at categorising unstructured data.  
AI is great at extracting key data from unstructured data.  
AI is great at extracting meaning from documents and images.

AI's capacity to categorise and extract data and meaning make it possible to automate many processes that were not previously automatable.



# AI ADOPTION PLAYBOOK

## Automation Layer - Example

This is a real-life example that was made possible by using AI.  
A life insurance company received Requests for Quotes (RFQs) by email.  
Two people were employed to type quote information into a database.  
The diagram shows the high-level architecture of the to-be, automated process.

### To-be - Automated Process

#### 1. CATEGORISE



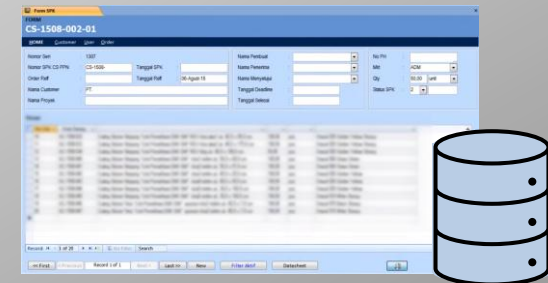
AI used to categorise incoming emails.  
Request for Quotes are forwarded.

#### 2. KEY DATA EXTRACTION



AI used to extract key data from Request for Quote emails.

#### 3. ROBOTIC PROCESS AUTOMATION



RPA used to enter data into the database



# AI ADOPTION PLAYBOOK

## Automation Layer – Getting Started?

### AUTOMATION OPPORTUNITY ASSESSMENT

This layer is about using AI to automate stable processes.

Tedious, repetitive and boring processes.

Process that consume lots of time.

The best way to get started is to conduct an Automation Opportunity Assessment.

Identify processes that might be automated using Artificial Intelligence.

Output a ranked list of candidate processes and with a clearly defined business case.

sample from Automation Opportunity Assessment

Rank	Process Name	Cost of Process	Complexity	Possible Tech	Risks	Emotional Engagement	Next Steps
#1		Estimate cost of this process xx hours per week ? yy cost per hour ? Total cost per year.	How many steps? How rigid are the rules? How long does it take? Which systems are used? What are the volumes? Variance in the volumes?	list tech that might be used to automate the task	data privacy bias hallucination transparency contamination accuracy	Who are the stakeholders ? How do they feel about AI ?	Gather more data ? Create detailed process map ? Have meeting ? Contact Automation Consultant ?



# AI ADOPTION PLAYBOOK

## Transformation Layer - Definition

This layer focuses on using AI to **change how the organisation operates**.

It's not about saving minutes—it's about:

- redefining services
- redefining business models
- redefining customer experience

### Key Characteristics:

Cross-functional impact

High complexity, high reward

Linked to strategic priorities

### Reflection:

The digital revolution forced banks to morph into tech companies.

And the AI revolution will fundamentally change many business.

And with all change, there will be winners and there will be losers.





# AI ADOPTION PLAYBOOK

## Transformation Layer – Example



AI has the power to transform business and create new offerings. One example is ElliQ is an AI start-up focused on loneliness in the elderly. ElliQ provides conversation, chat and companionship.

### ELLIQ FEATURES

- conversation and chat
- connects to family members
- reminds about health & wellbeing goals

### THE OPPORTUNITY

24% of the UK population is over 60

Over 900,000 people suffer from dementia.

And the average cost of residential care is more than £50,000 per annum.

ElliQ is a frontrunner in bringing AI to elderly care.

[UK Gove - Future of Ageing](#)   [OECD Ageing - Fiscal Challenges](#)



# AI ADOPTION PLAYBOOK

## Transformation Layer - Getting Started

This layer is about **fundamentally changing organisations.**

**It's about understanding where your company, competitors and markets will be in 5 years.**

**To help you investigate your future you might use the following exercises**

Facilitated workshops considering:

- Situational Analysis
- Macro-scanning & Scenario Analysis
- Goal & Direction Setting
- Road mapping
- Strategy Scorecard (progress tracking)



StratNavApp is a great low-cost tool that can help with these exercises.