

To: Strategic Communications, Inc.(tmapplicationfilings@amerilawyer.com)
Subject: U.S. Trademark Application Serial No. 97120255 - STRATEGIC.AI
Sent: August 25, 2022 10:09:39 AM EDT
Sent As: tmng.notices@uspto.gov

Attachments

[screencapture-www-marketingainstitute-com-blog-5-ways-your-ai-projects-fail-part-2-strategic-ai-failures-16614359710451](#)
[screencapture-www-technossus-com-2021-03-how-to-identify-strategic-ai-use-cases-16614360453791](#)
[screencapture-www-comparebusinessproducts-com-resources-item-6-strategic-ai-enhancements-for-your-crm-16614360736871](#)
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[screencapture-www-kungfu-ai-16614361369601](#)
[screencapture-bernardmarr-com-how-to-develop-an-artificial-intelligence-strategy-9-things-every-business-must-include-16614361872771](#)
[screencapture-grabb-ai-api-16614362710491](#)

United States Patent and Trademark Office (USPTO) Office Action (Official Letter) About Applicant's Trademark Application

U.S. Application Serial No. 97120255

Mark: STRATEGIC.AI

Correspondence Address:
STRATEGIC COMMUNICATIONS, INC.
12232 BLACK WALNUT COURT
JACKSONVILLE FL 32226 UNITED STATES

Applicant: Strategic Communications, Inc.

Reference/Docket No. N/A

Correspondence Email Address: tmapplicationfilings@amerilawyer.com

NONFINAL OFFICE ACTION

The USPTO must receive applicant's response to this letter within six months of the issue date below or the application will be abandoned. Respond using the Trademark Electronic Application System (TEAS). A link to the appropriate TEAS response form appears at the end of this Office action.

Issue date: August 25, 2022

The referenced application has been reviewed by the assigned trademark examining attorney. Applicant must respond timely and completely to the issues below. 15 U.S.C. §1062(b); 37 C.F.R. §§2.62(a), 2.65(a); TMEP §§711, 718.03.

SEARCH OF USPTO DATABASE OF MARKS

The trademark examining attorney searched the USPTO database of registered and pending marks and found no conflicting marks that would bar registration under Trademark Act Section 2(d). 15 U.S.C. §1052(d); TMEP §704.02.

SUMMARY OF ISSUES:

- Disclaimer Required
- Amendments to the Identification Required
- Amendments to the Description of the Mark Required
- Amendments to the Color Claim Required

DISCLAIMER REQUIRED

Applicant must disclaim the wording “STRATEGIC AI” because it is merely descriptive of a quality, characteristic, function, feature, purpose, or use of applicant’s services. *See* 15 U.S.C. §1052(e)(1); *DuoProSS Meditech Corp. v. Inviro Med. Devices, Ltd.*, 695 F.3d 1247, 1251, 103 USPQ2d 1753, 1755 (Fed. Cir. 2012); TMEP §§1213, 1213.03(a).

A “disclaimer” is a statement in the application record that an applicant does not claim exclusive rights to an unregistrable component of the mark. *See Schwarzkopf v. John H. Breck, Inc.*, 340 F.2d 978, 979-80, 144 USPQ 433, 433 (C.C.P.A. 1965); TMEP §1213. A disclaimer does not physically remove the disclaimed matter from the mark or otherwise affect the appearance of the mark. *See Schwarzkopf v. John H. Breck, Inc.*, 340 F.2d at 979, 144 USPQ2d at 433; TMEP §1213.

The services in the present application are for "cx automation and business continuity technical advisors". The attached evidence from technology providers demonstrates that "strategic AI" is a type and method of providing automation and technology advice using artificial intelligence or "AI". *See* <https://www.marketingaiinstitute.com/blog/5-ways-your-ai-projects-fail-part-2-strategic-ai-failures>; <https://www.technossus.com/2021/03/how-to-identify-strategic-ai-use-cases/>; <https://www.comparebusinessproducts.com/resources/item/6-strategic-ai-enhancements-for-your-crm>; <https://striatumtech.com/vidora-strategic-ai/>; https://www.worldscientific.com/doi/10.1142/9781800611337_0003; <https://www.kungfu.ai/>; <https://bernardmarr-to-develop-an-artificial-intelligence-strategy-9-things-every-business-must-include/>; <https://grabb.ai/api/>. Thus, the wording “STRATEGIC.AI” in the applied-for mark immediately names and merely describes a quality, characteristic, function, feature, purpose, and use of applicant’s services.

The wording “STRATEGIC.AI” must appear in its correct spelling, i.e., “STRATEGIC AI” in the disclaimer. *See In re Omaha Nat'l Corp.*, 819 F.2d 1117, 1119, 2 USPQ2d 1859, 1861 (Fed. Cir. 1987); *In re Carlson*, 91 USPQ2d 1198, 1203 (TTAB 2009); TMEP §1213.08(c).

Applicant may respond to this issue by submitting a disclaimer in the following format:

No claim is made to the exclusive right to use “STRATEGIC AI” apart from the mark as shown.

For an overview of disclaimers and instructions on how to provide one using the Trademark Electronic Application System (TEAS), see the [Disclaimer webpage](#).

AMENDMENTS TO THE IDENTIFICATION REQUIRED

The identification of services is indefinite and must be amended to specify the common commercial or generic name of the services. *See* 37 C.F.R. §2.32(a)(6); TMEP §1402.01. If the services have no common commercial or generic name, applicant must describe or explain the nature of the services using clear and succinct language. *See id.* First, the wording "cx automation" must be amended to state the common commercial or generic name of these customer experience automation services. Second, the wording "business continuity technical advisors" must also be amended to indicate the common commercial or generic name of the business continuity technical advisement services.

See the bold text below for acceptable options for amendments.

Applicant may amend the identification to clarify or limit the services, but not to broaden or expand the services beyond those in the original application or as acceptably amended. *See* 37 C.F.R. §2.71(a); TMEP §1402.06. Generally, any deleted services may not later be reinserted. *See* TMEP §1402.07(e).

For assistance with identifying and classifying services in trademark applications, please see the USPTO's online searchable [U.S. Acceptable Identification of Goods and Services Manual](#). *See* TMEP §1402.04.

Applicant may adopt the following wording, if accurate:

International Class 042: Providing customer experience (CX) automation through a data automation and collection service using proprietary software to evaluate, analyze and collect service data; business continuity technical advisors for computer disaster recovery planning, namely, providing technical advice relating to operation of computers, electronic data back-up services, and recovery of computer data for business continuity

AMENDMENTS TO THE DESCRIPTION OF THE MARK REQUIRED

Applicant must submit an amended description of the mark that agrees with the mark on the drawing. 37 C.F.R. §2.37; *see* TMEP §§808.01, 808.02. The current description is inconsistent with the mark on the drawing and thus is inaccurate. 37 C.F.R. §2.37; *see* TMEP §§808.01, 808.02. Descriptions must be

accurate and identify only those literal and design elements appearing in the mark. *See* 37 C.F.R. §2.37; TMEP §§808.02, 808.03(d).

When an applicant submits a drawing showing the mark in color, applicant's color claim and description must reference all the colors in the mark, including black, white and/or gray. TMEP §807.07(d); *see* 37 C.F.R. §§2.37, 2.52(b)(1). If portions of white are not a color feature of the mark, applicant must provide a statement in the description that the additional white represents background, outlining, shading and/or transparent areas and are not part of the mark. TMEP §807.07(d).

The following description is suggested, if accurate:

The mark consists of a design of a blue and white globe depicting continents and meridians and parallels, with blue shadowing under the globe and with three, white curved lines outlined in blue, intersecting the globe, to the left of the stylized wording "STRATEGIC.AI" in blue, with blue, white and gray outlining and shadowing. The other white is not claimed as a feature of the mark and represents background and transparent areas.

AMENDMENTS TO THE COLOR CLAIM REQUIRED

In connection with the above description for a color drawing, a complete list of all the colors claimed as a feature of the mark must be provided. As noted above, the applied-for mark drawing also appears to contain the color gray. Therefore, applicant must provide a corrected color claim that lists all the colors in the mark drawing. *See* 37 C.F.R. §2.52(b)(1); TMEP §807.07(a)-(a)(i).

The following corrected color claim is suggested, if accurate:

The colors **blue, white and gray** are claimed as a feature of the mark.

TMEP §807.07(a)(i).

RESPONSE GUIDELINES

For this application to proceed, applicant must explicitly address each refusal and/or requirement in this Office action. For a refusal, applicant may provide written arguments and evidence against the refusal, and may have other response options if specified above. For a requirement, applicant should set forth the changes or statements. Please see "[Responding to Office Actions](#)" and the informational [video "Response to Office Action"](#) for more information and tips on responding.

Please call or email the assigned trademark examining attorney with questions about this Office action. Although an examining attorney cannot provide legal advice, the examining attorney can provide additional explanation about the refusal(s) and/or requirement(s) in this Office action. *See* TMEP §§705.02, 709.06.

The USPTO does not accept emails as responses to Office actions; however, emails can be used for informal communications and are included in the application record. *See* 37 C.F.R. §§2.62(c), 2.191; TMEP §§304.01-.02, 709.04-.05.

Applicant May Seek Legal Counsel

Because of the legal technicalities and strict deadlines of the trademark application process, applicant is encouraged to hire a private attorney who specializes in trademark matters to assist in this process. The assigned trademark examining attorney can provide only limited assistance explaining the content of an Office action and the application process. USPTO staff cannot provide legal advice or statements about an applicant's legal rights. TMEP §§705.02, 709.06. See [Hiring a U.S.-licensed trademark attorney](#) for more information.

How to respond. [**Click to file a response to this nonfinal Office action.**](#)

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RESPONSE GUIDANCE

- **Missing the response deadline to this letter will cause the application to abandon.** The response must be received by the USPTO before midnight **Eastern Time** of the last day of the response period. TEAS maintenance or [unforeseen circumstances](#) could affect an applicant's ability to timely respond.
- **Responses signed by an unauthorized party** are not accepted and can **cause the application to abandon**. If applicant does not have an attorney, the response must be signed by the individual applicant, all joint applicants, or someone with [legal authority to bind a juristic applicant](#). If applicant has an attorney, the response must be signed by the attorney.
- If needed, **find contact information for the supervisor** of the office or unit listed in the signature block.

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5 Ways Your AI Projects Fail, Part 2: Strategic AI Failures

By Christopher S. Penn on April 11, 2022



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Introduction

The recurring perception that artificial intelligence, AI, is somehow magical and can create something from nothing leads many projects astray.

That's part of the reason that the 2019 Price Waterhouse CEO Survey shows fewer than half of US companies are embarking on strategic AI initiatives—the risk of failure is substantial. In this series, we're examining the most common ways AI projects will fail for companies in the beginning of

Part 2: Strategic Failures

Before we can discuss failures, let's refresh our memories of what the AI project lifecycle is to understand what should be happening. [Grab the full-page PDF of the lifecycle](#) from our Instant Insight on the topic and follow along.



Business Requirements Failures

The most common failure in AI projects, without question, is a failure of business requirements. More often than not, business stakeholders ask for AI not because it solves a problem well-suited to the capabilities of AI, but simply because they want to be able to say, "Our product/service/company uses AI". Technology for technology's sake is a nearly-guaranteed path to disaster.

When we consider the kinds of problems AI can solve, how many current AI projects meet those business requirements? [IBM defines](#) six primary use cases for AI:

- Accelerate research and discovery
- Enrich your interactions
- Anticipate and preempt disruptions
- Recommend with confidence
- Scale expertise and learning
- Detect liabilities and mitigate risk

We simplify these into three even broader buckets:

- Save time (reduce inefficiencies)
- Save money (put talent to work on harder problems)
- Make money (faster/better results)

The question we must ask is: Is AI the correct set of technologies to apply to the problem at hand?

Requirements gathering doesn't necessarily need to be a massive undertaking; for small projects

and proofs of concept, very often you can simply document based on these kinds of questions:

- Who is the end user of the project?
- What is the goal of the project? What are the goals of the end users?
- Why is the business undertaking the project?
- Where will the project occur? In AI, this can be a combination of private, on-premise, and cloud systems.
- When do you need to show business results/impact?

Where AI projects often fail is the complete lack of business requirements gathering. How are you gathering requirements? What's your process for other kinds of projects? Generally speaking, AI is simply software, so if your organization has become fluent at requirements gathering for more traditional software projects, there's very little extra learning curve for AI.

Analytic Approach Failures

In order to deploy AI and machine learning effectively, you need to understand the kind of problem you're solving at a slightly more technical level. Broadly, machine learning projects fall into two kinds of problems and two kinds of data.

The two kinds of problems we solve for in machine learning are:

- **Classification:** We need to bring order to chaos, to tag, sort, and categorize. This type of machine learning is typically called unsupervised learning.
- **Prediction:** We need to understand what's causing something to happen and build a model that predicts what is likely to happen. This type of machine learning is typically called supervised learning.

The two kinds of data we solve with in machine learning are:

- **Continuous** data: numerical data, data that can be expressed as numbers.
- **Categorical** data: anything that isn't a number.

Where AI projects go wrong in this stage of the lifecycle is the misunderstanding of what kind of problem you're tackling. You may think you have a problem that is non-numeric in nature (such as analyzing written content), but it may actually be a numeric problem once you've extracted and cleaned the data. Problems such as sentiment analysis and prediction fit in this category; you're often transforming categorical data into continuous data, then solving a continuous data problem.

Another classical error at this point is assuming a problem is one kind of machine learning when it may be a multi-step, ensemble approach. Again, returning to the sentiment analysis example, suppose we need to turn a pile of tweets into a prediction of what kind of tweets earn the most engagement. We think we're solving for a prediction, and that may be the last step in the problem, but before we can solve for what makes a tweet engaging, we have to solve for turning text into numbers. That's a classification problem.

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Most business applications of machine learning are ensemble problems, sometimes with many, many stages and iterations of problem solving methods. Only through time and experience will you learn how to assess the different kinds of techniques, stacked together, that you'll need to build a solution to the problem you're tackling.

Next: What Can Go Wrong in Data?

Now that we've established the most common mistakes in the business strategy portion, we'll next turn our eyes towards what things will most likely go wrong in the data portion of the lifecycle. Stay tuned!

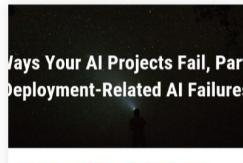
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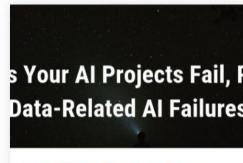
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Christopher S. Penn is cofounder and Chief Data Scientist at Trust Insights.

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7 Ways Your AI Projects Fail, Part 1: Deployment-Related AI Failures



7 Ways Your AI Projects Fail, Part 2: Data-Related AI Failures



The Wrong Way To Use AI In Business

5 Ways Your AI Projects Fail, Part 5: Deployment-Related Failures

By Christopher S. Penn | June 20, 2022

The recurring perception that artificial intelligence, AI, is somehow magical and can create something from nothing leads many projects astray.

5 Ways Your AI Projects Fail, Part 3: Data-Related AI Failures

By Christopher S. Penn | May 9, 2022

Be on the lookout for these failures—and ways to remediate or prevent them—in your own AI initiatives.

5 Ways Your AI Projects Fail, Part 4: Modeling-Related AI Failures

By Christopher S. Penn | June 14, 2022

There are two major issues during the modeling process you need to be aware of if you don't want your AI projects to fail.

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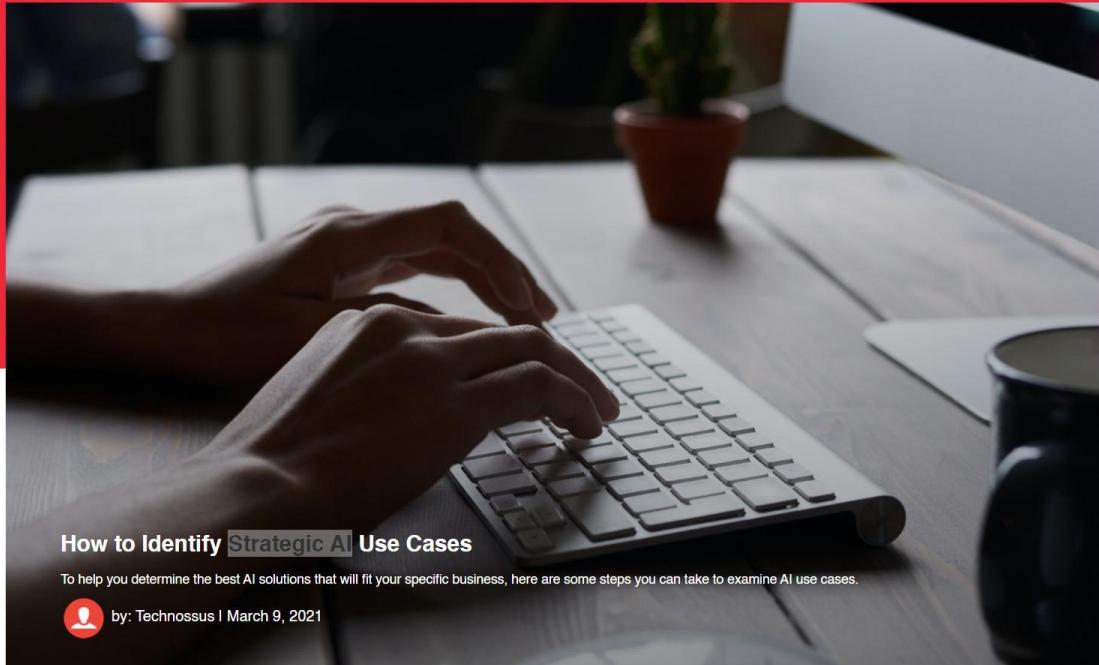
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How to Identify Strategic AI Use Cases

To help you determine the best AI solutions that will fit your specific business, here are some steps you can take to examine AI use cases.



by: Technossus | March 9, 2021



Organizations need to adopt some AI to stay competitive and efficient. But rather than simply buying AI solutions because the technology is available, companies need to define a strategy for every solution they adopt. It is good business practice and a savvy way to employ the technology.

Developing an AI strategy may take a little time and consideration. To help you determine the best AI solutions that will fit your specific business, here are some steps you can take to examine AI use cases.

Step 1 – Identify AI Use Cases

To get the most out of your AI strategy, you need to connect it to your business strategy. Thus, the first step is to identify your business goals and challenges. These may include:

- Creating Smart products
- Gaining a better sense of your customers' needs and expectations
- Developing more efficient business processes
- Automating tasks to improve the use of employee time and talent

Once you have defined your specific business goals, identify possible AI options that can help you meet those goals or overcome those challenges. These options will be your AI use cases. Don't limit yourself to a short list of possibilities but consider all the AI solutions available.

At this stage, you'll also want to write down details of your goals and challenges.

Support Strategic Business Goals

There are many different and exciting things that AI can do, and it is easy to get distracted. Every AI solution you invest in must be connected with a business goal. If the AI use case is not linked to a business goal, it may not be the best use of your resources and time.

Specify the Approach

Consider what type of AI approach you will need, such as machine learning, computer vision, etc., to achieve your goal. Also, be clear about the kind of data you'll need for your objective. It can be beneficial to hire an AI consultant to help you with this step.

Define KPI's

It is essential to define your key performance indicators (KPIs), which will help you gauge whether you have been successful with your AI adoption. Consider the indicator you can measure that is related to your business goal or objective. Although it is not vital, gathering data prior to implementing your AI solution is the best way to determine your success.

Step 2 – Rank AI Use Cases

In the first step, you may have identified a large number of AI opportunities. However, tackling them all will take time, and you'll need to prioritize the projects. The purpose of ranking your AI use cases is to narrow down your list to just one or two strategic use cases and identify some quick wins.

Decide Your Top Priorities

Your top AI priorities will be the ones that hold the most opportunity for your business or the AI use cases that will help you solve your biggest challenges. Smaller organizations may only want to tackle one top priority at a time, while a larger company could take on up to three. It is important not to take on too many AI projects but rather to stay focused on strategic ones.

Consider Quick Wins

To help your company gain momentum, look for projects on your list that would be quick and easy to implement. These will be smaller projects that won't cost too much time or money. The goal with AI quick wins is to demonstrate the power and capability of the technology. It also helps bring people around to your way of thinking, and the more support you have for your AI projects, the better.

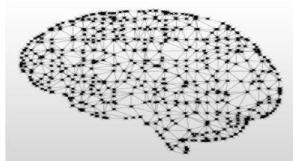
You'll likely have some projects that didn't make it to either list. Rather than tossing them away, put them to the side for now and see if you can tackle them in the future. Make it a practice to review your AI use cases every year or every time you update your business strategy.

Step 3 – Establish an AI Center of Excellence

Employing AI use cases involves more than just buying the solution and training up employees. There needs to be some long-term oversight over the project. Consider establishing a center of excellence or a group of individuals who will assume ownership of the project. This team can be charged with tracking the progress of the AI project and scrutinizing its performance over time.

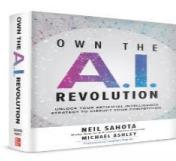
The challenge for organizations for this step is finding the right talent or expertise that can accurately monitor the project. Often times the best solution is to outsource the task to AI experts. Having the right eyes overseeing the project is key to getting the most from your AI use cases.

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Vidora – Strategic AI

Overview

Vidora's Cortex leverages Automated machine learning to enable No-Code machine learning so that anyone at a company can use **Machine Learning**. Vidora's strategic AI technology is sitting at the core of numerous 500 fortune companies.

Cortex enables any organization to quickly deploy, integrate and measure the performance of strategic AI.

Cortex leverages Integrated Automated Machine Learning technology (Integrated AutoML) to automate every step of the machine learning process, creating an end-to-end solution that works at the speed of your business. Cortex automatically takes in raw data from a variety of sources (Redshift, BigQuery, APIs) and formats (JSON, MRSS, CSV) and processes it into a form that can be used by its state-of-the-art learning algorithms. From



real-time data ingestion to advanced model training and deployment, Cortex learns the optimal path through each step for each problem so that you can quickly and effectively optimize toward your business goals.

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Key Features

- Automated Data Preprocessing.
- Automated Feature Cleaning.
- Automated Feature Engineering.
- Automated Model Selection & Learning.
- Real-Time Model Deployment.

Benefits

- Leverages strategic AI in weeks not in months.
- Put AI in hands of everyone.
- Expose valuable and Predictive metrics.



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Series on Technology Management | Artificial Intelligence and Innovation Management, pp. 37-41 (2022)
Chapter 2: A Knowledge-Based Perspective of Strategic AI Innovation Management

Erich Prem
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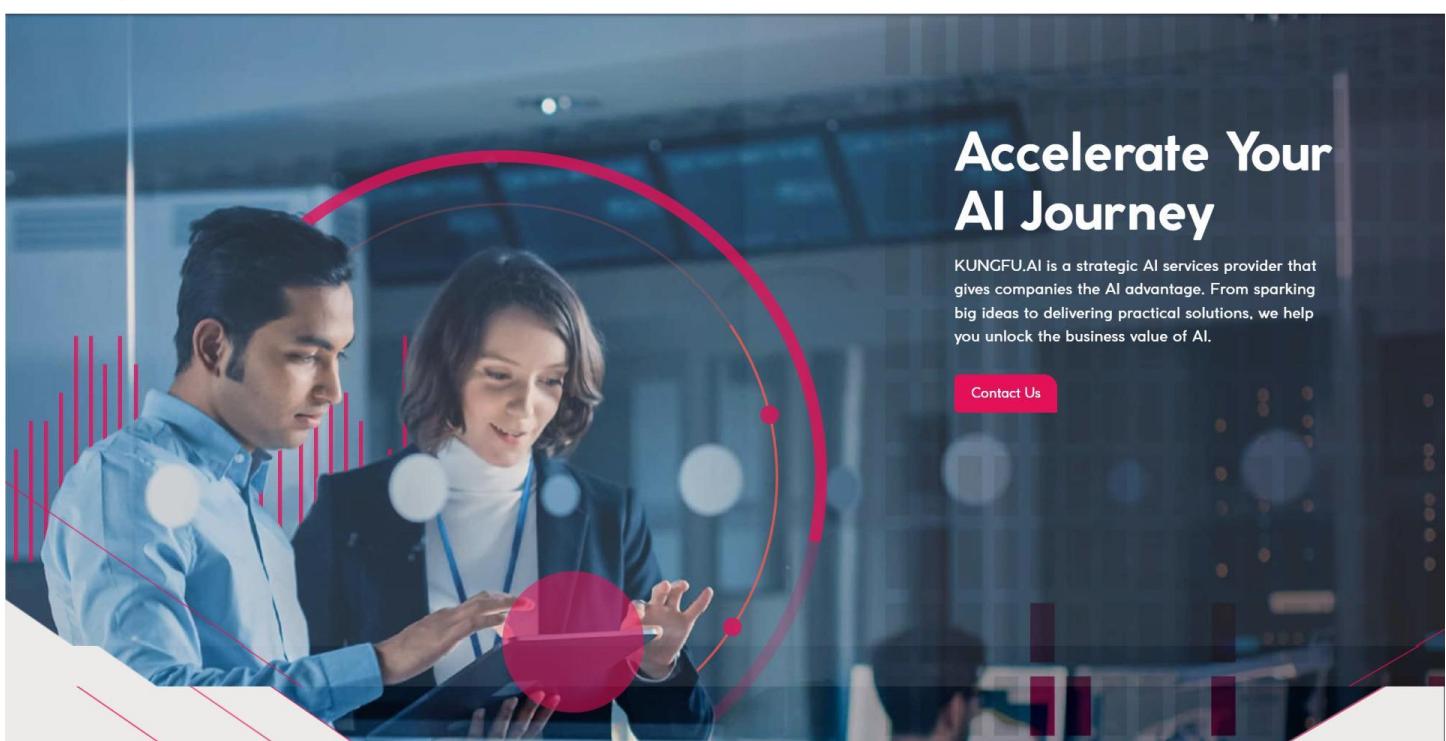
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KUNGFU.AI is a strategic AI services provider that gives companies the AI advantage. From sparking big ideas to delivering practical solutions, we help you unlock the business value of AI.

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[/kuhng foo/] Discipline or skill achieved through hard work or practice.

We help companies establish their AI strategy, develop custom solutions, and optimize their investment to ultimately transform their business using artificial intelligence.

We believe in the ethical and thoughtful application of AI that solves our clients' unique

challenges.



What we deliver will be

Built by Experts

We commit to applying our deep AI expertise and the latest research and technologies to solve your biggest challenges and achieve what others can't.





What we deliver will be

Impactful

We commit to developing strategic, well-architected solutions that drive meaningful change and tangible results in your business.



What we deliver will be

Thoughtful

We commit to delivering AI services that help you leverage AI capabilities in a deliberately responsible, transparent, and ethical way.



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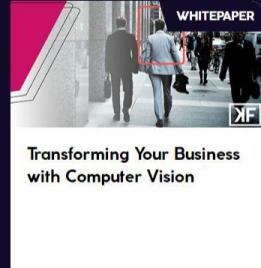
"The things that stood out immediately while working with the KUNGFU.AI team are the caliber of the resources that they bring in to bear and the other aspect is just how well they've worked with our team. KUNGFU.AI has gone out of their way to make it easy for us to work with them. These are people who are both smart and knowledgeable with different techniques, which is something we're looking for out."

techniques, which is something we're looking for out
of our partnership."

Our Resource Library



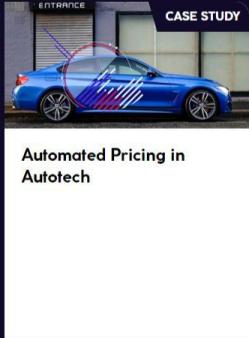
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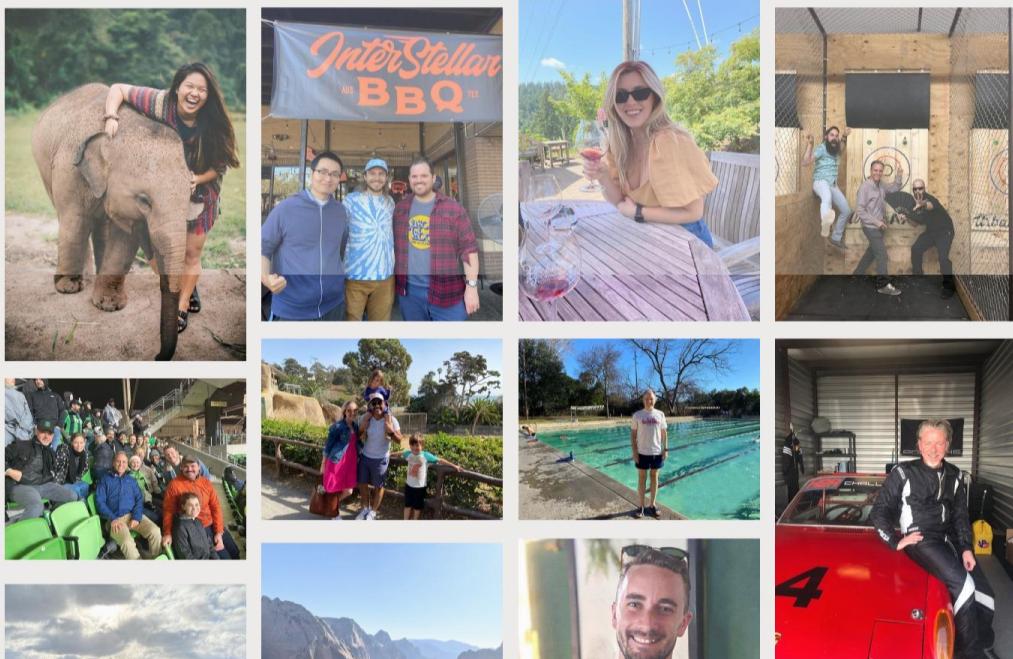
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Our People

We are a team of AI, business, and strategy experts that excel at listening to your challenges and finding the best way to address them.





We were founded by a group of serial entrepreneurs and AI visionaries who wanted to approach the coming AI revolution in a new way - one that is tailored to our clients and supportive of our people.

We hold ourselves accountable to our values of being trustworthy, inquisitive, open, caring, and inventive, and see each other as whole humans with unique lived experiences. In our free time we are painters, fly fishers, cocktail connoisseurs, racing enthusiasts, athletes, board game masters, non-profit board members, and much more.

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Written by

How To Develop An Artificial Intelligence Strategy: 9 Things Every Business Must Include

Artificial intelligence (AI) has the potential to transform every business – in the same way (and possibly more) as the internet has utterly transformed the way we do business. From smarter products and services to better business decisions and optimised (or even

Bernard Marr

Bernard Marr is a world-renowned futurist, influencer and thought leader in the fields of business and technology, with a passion for using technology for the good of humanity. He is a best-selling author of 20 books, writes a regular column for Forbes and advises and coaches many of the world's best-known organisations. He has over 2 million social media followers, 1 million newsletter subscribers and was ranked by LinkedIn as one of the top 5 business influencers in the world and the No 1 influencer in the UK.

Bernard's latest book is 'Business Trends in Practice: The 25+ Trends That Are Redefining Organisations'

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That's why you need an AI strategy for your business.

One question people often ask me is, 'Do I still need a separate AI strategy if I've already got a data strategy'? In my view, yes, you should have both. In theory, if your data strategy was extremely comprehensive and fully considered the use of AI, then that might be enough. But in practise, a data strategy alone is rarely enough. I therefore recommend every company has a separate [AI strategy](#).

So what should you include in your AI strategy? When I work with a company to develop their AI strategy, we look at the following nine areas:

1. Business strategy

automated) business processes, AI has the power to change almost everything. Those businesses that don't capitalise on the transformative power of AI risk being left behind.



Creating an AI strategy for the sake of it won't produce great results. To get the most out of AI, it must be tied to your business strategy and your big-picture strategic goals. That's why the first step in any AI strategy is to review your [business strategy](#). (After all, you don't want to go to all this trouble and apply AI to an outdated strategy or irrelevant business goals.)

In this step, ask yourself questions such as:

- Is our business strategy still right for us?
- Is our strategy still current in this world of smarter products and services?
- Have our business priorities changed?

2. Strategic AI priorities

Now that you're absolutely clear on where your business is headed, you can begin to identify how AI can help you get there.

In other words:

- What are our top business priorities?
- What problems do we want or need to solve?
- How can AI help us deliver our strategic goals?

The AI priorities that you identify in this phase are your [use cases](#). To ensure your AI strategy is focused and achievable, I'd stick to no more than 3–5 AI use cases.

Examples of AI priorities or use cases include:

- Developing smarter products and services
- Making business processes and functions (such as accounts, sales and HR) more intelligent
- Automating repetitive or mundane tasks to free people up for more value-adding activities
- Automating manufacturing processes

3. Short-term AI adoption priorities

Transforming products, services or processes is never going to be an overnight task. It may take some time to deliver the use cases you've identified. For that reason, I find it helps to also identify a few (as in, no more than three) AI quick wins – short-term AI priorities

that will help you demonstrate value and gain buy-in for bigger AI projects.

Ask yourself:

- Are there any opportunities to optimise processes in a quick, relatively inexpensive way?
- What smaller steps and projects could help us gather information or lay the groundwork for our bigger AI priorities?

Next, across each of the AI priorities or use cases that you've identified in the steps above, you need to work through the following considerations:

4. Data strategy

AI needs data to work. Lots and lots of data. Therefore, you need to review your [data strategy](#) in relation to each AI use case and pinpoint the key data issues.

This includes:

- Do we have the right sort of data to achieve our AI priorities?
- Do we have enough of that data?
- If we don't have the right type or volume of data, how will we get the data we need?
- Do we have to set up new data collection methods, or will we use third-party data?
- Going forward, how can we begin to acquire data in a more strategic way?

5. Ethical and legal issues

Let's not beat around the bush: the idea of super-intelligent machines freaks people out. It's therefore crucial that you apply AI in a way that's ethical and above board.

Here, you'll need to ask yourself questions like:

- How can we avoid invading people's privacy?
- Are there any legal implications of using AI in this way?
- What sort of consent do we need from customers/users/employees?
- How can we ensure our AI is free of bias and discrimination?

The ethical implications of AI is a huge topic right now. Notably, tech giants including Google, Microsoft, IBM, Facebook and Amazon have formed the Partnership on AI, a group that's dedicated to researching and advocating for the ethical use of AI.

6. Technology issues

Here you identify the technology and infrastructure implications of the decisions you've made so far.

Consider:

- What technology is required to achieve our AI priorities (for example, machine learning, deep learning, reinforcement learning, etc.)?
- Do we have the right technology in place already?
- If not, what systems do we need to put in place?

7. Skills and capacity

For those companies who aren't Facebook or Google, accessing AI skills can be a real challenge. Therefore, this step is about reviewing your in-house AI skills and capabilities, and working out where you need a skills injection.

For example:

- Where are our skills gaps?
- To fill those gaps, do we need to hire new talent, train existing staff, work with an external AI provider or acquire a new business?
- Do we have awareness and buy-in for AI from leadership and at other levels in the business?
- What can we do to raise awareness and promote buy-in?





8. Implementation

Here you need to think about how you'll turn your AI strategy into reality.

This might surface questions such as:

- How will we deliver our AI projects?
- What are the key next steps?
- Who is responsible for delivering each action?
- Which actions or projects will need to be outsourced?

9. Change management issues

Because people are so wary of AI, particularly what it might mean for their jobs, change management is a really important part of any AI project.

Example questions include:

- Which employees and teams will be impacted by this AI project?
- How can we communicate effectively with those people about the change?
- How should the change process be managed?
- How will AI change our company culture, and how will we manage that culture change?

Where to go from here

Once you've looked at each of these areas, you can then start to create a more formal AI strategy document. For me, this involves completing my [AI Use Case Template](#) for each of the AI uses/projects identified, and then filling in the [AI Strategy Template](#).

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Develop the data-driven mindset that will enable you to anticipate customer needs, provide more intelligent services and products, and achieve desired business outcomes.

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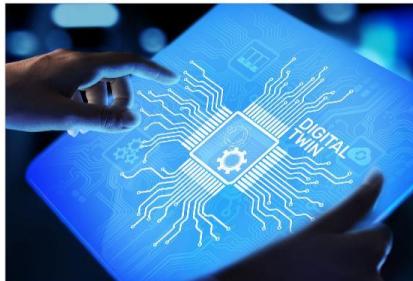


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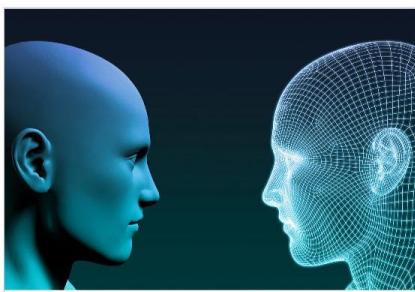
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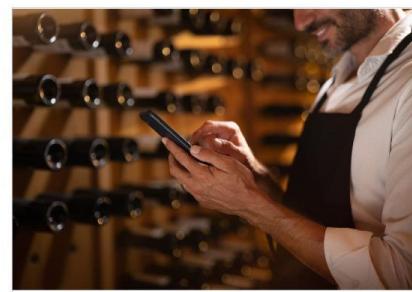
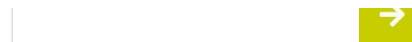
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The screenshot shows a dashboard for a client named "FRESHMART". Key sections include:

- Information from Grabb AI:** Suggested action: "Look for opportunities with this client." Status: "Highly loyal client, has improved much over time!"
- Your client info:** FM FRESHMART \$ 5,244. Address: 475, 57ième rue Nord, City: St-Georges de Beauce, Province: Qc, Postal code: G0V 1H0, Email: Q.Carmel@gmail.com, Last contact: 10 minutes ago.
- Year to year:** Bar chart showing revenue from 2019 to 2021. Revenue increased from approximately \$5.2M in 2019 to \$5.7M in 2021.
- By chart:** Line chart showing monthly revenue from January 2020 to July 2021. Revenue fluctuates between \$5.0M and \$5.7M.
- Ai client cat. 1: Loyal:** YTD target: 7 221.5, Result: 14 440.5, %: 200%, Reach: 87% of sales, %: 10%.
- Summary:** Warning: no recent activity observed! This client's long-term trend is spending less but more frequently.
- Details:** Customer Life-time Value (CLV) is below the average of active loyal clients, which corresponds to \$52.89\$ just after the client's last purchase on 2021-07-01. Customer loyalty is above the average of active loyal clients made first purchase 2239 days ago. Active Client, next transaction is expected in 56 days, before Oct 16, 2021. Warning: no recent activity observed! This client's long-term trend is spending less but more frequently.
- Suggested products:** A list of recommended products including: 4656511, 4659733, 102-110-VIBRATEUR I, 102-950-VIBRATEUR, 104-1220-SCARIFIUS, 104-1300-MEULEUSE, and 112-105-MARTEAU PH.

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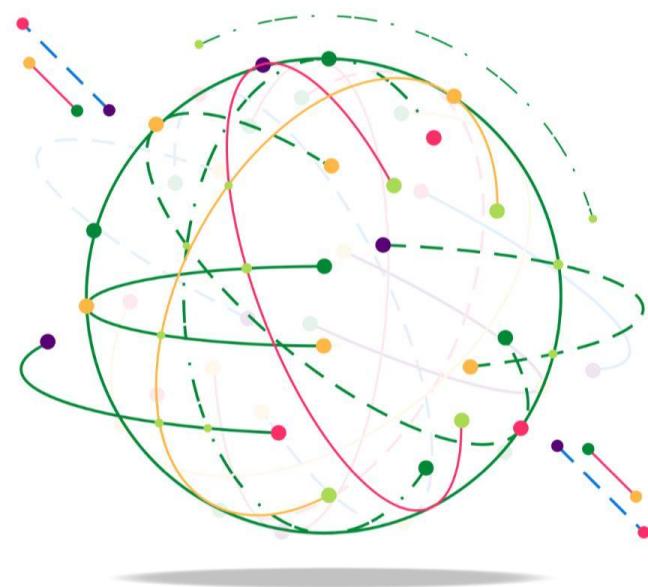
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in

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USPTO OFFICIAL NOTICE

Office Action (Official Letter) has issued
on August 25, 2022 for
U.S. Trademark Application Serial No. 97120255

A USPTO examining attorney has reviewed your trademark application and issued an Office action. You must respond to this Office action in order to avoid your application abandoning. Follow the steps below.

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9	("A I" *AI* "AI" "artificial intelligence" *n{" t":3} {"v0:2"}* *r {"t":3} {"v0:2"} {"fp":3} {"h":0: 3} {"v0:4"} {"scz"}*)[bi,ti] not dead[lid]	171427	0	0	0	0:06
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34	31 and "042"[cc]	4025	0	0	0	0:01
35	31 and ("037" "035" "042" A B "200")[ic]	2015	0	0	0	0:02
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