AISWITCH AI PRACTICE COOKBOOK: 2021 AI-RPA STRATEGY MAP TEMPLATE

Who should read this: Enterprise AI CoE leaders, CDO, CIO, CEO (for strategic AI initiatives), AI Business User Leaders, AI Solutions & Service Providers

Why the need to build your 2021 AI-automation strategy using a Strategy Map template?

2020 surveys show 45% enterprise leaders see AI initiatives coming from their CIO or IT organizations. But this trend is changing fast- 20%+ organizations that have been proven early movers in AI, have run their strategic AI initiatives as part of their digital arm, and 35%+ organizations have been running major AI initiatives directly from their businesses.

When AI & intelligent autonomous automation initiatives are increasingly moving beyond just IT or CIO offices and are being led by businesses and COO or other CXO functions, it is imperative that your AI-automation strategies 2021 onwards must be built like a typical business strategy. That's why- the standard balanced scorecards and strategy maps approaches that are most commonly used for business strategy development and articulation, are the most relevant approaches for AI-automation strategy formulation for any enterprise.

Balanced scorecards represent four key aspects/ objectives/ metrics of any business strategy:

Figure 1- Examples of AI strategic objectives in a Balanced scorecard

Financial objectives:	Customer objectives:
• Process/ ops cost reduction • Revenue growth • Profitability growth • New markets/ customers • New products/ services	• NPS targets • CSat targets • New customers growth • New services uptake • Cross-sell/ upsell effectiveness
Internal objectives:	Learning & knowledge management:
• Business process productivity • Process quality • Reduced rework • Service consistency/ reliability	• Proactive upskilling/ reskilling • Proactive process knowledge contributions • Knowledge/ intelligence usage/ value

What should a 2021 enterprise AI-RPA Strategy Map include?

Following AI-automation strategy map template includes all the essential and minimalistic elements, with examples of target objectives/ metrics.

BSC Perspectives	How to leverage AI in your business impact long-term shareholder value (Overarching strategic goal)?			
Financial	**AI-RPA supporting productivity** (e.g. reduce business service costs (front-end e.g. customer service, back end e.g. contracts / invoice processing), improve data assets and capabilities utilization)		**AI supporting business growth- new / existing businesses** (e.g. improve agility, dynamic response capability and scalability by enabling dynamic, quick/ Real-time/ Any-Time fulfilment/ provisioning)	
	Improve business operations cost structure	Improve business data/ enterprise intelligence assets utilization	AI (e.g. autonomous recommenders, promotional conversational usecases, new product design simulators) enabling organization to expand revenue opportunities	AI enabling organization to enhance customer value (24X7 Real-time response/ fulfilment, zero latency business processes, no waiting, service consistency & reliability)
Customer/ Business Users perspective	Product/ service attributes: Business service cost and price, recovery models, quality of service, availability, alternative solutions/ service options for business users/ customizable to different customer segments/ user groups, functionalities and flexibility		Relationship: Real-time response, actions on customer feedback, traceable interactions/ intelligence, consistent/ reliable/ intelligence-powered involvement	Image: Business operations protecting and enhancing brand image (e.g. Green, sustainable, risk-managed operations)
Internal	**AI-RPA in operations management process:** Usecases for evaluating/onboarding/managing suppliers/sourcing/ tools/ platforms/ legacies	**AI-RPA in customer management processes** (acquisition, retention, growth): more service requirements coming from business users	**Innovation:** AI to continuously improve services with innovations, to provide better support to business needs	**AI in Regulatory, ESG and social processes:** AI usecases for legal, compliance, regulatory & quality audits
Learning and growth	Intangible assets			
	AI in upskilling/ training: Impact on Human capital	**Data/ Information and infrastructure capital**		**Organizational capital**
	Skills, talent, experiential knowledge retention & leverage, documented know-how in autonomous SOPs & knowledge graphs	AI Infrastructure- capacity and capabilities		Leadership, alignment, teamwork, culture

123 Action items for Monday Morning

Key actions	Key actors
Step 1- CXOs and BU leaders meet up with AI CoE leaders to sync up 2021 business strategic objectives with enterprise AI strategy.	AI CoE leaders, CXOs, organizational AI governance councils/ steering committee
Step 2- Senior leadership team in AI CoE define the 2021 AI strategic objectives, factoring inputs from	AI CoE leaders, AI-business & functional leaders
Step 3- AI CoE practice leaders prioritize the AI-RPA roadmaps based on the 2021 AI strategic objectives & priorities and set the combined target objectives of these initiatives, to build the 2021 AI-RPA BSC & strategy map for their enterprise.	AI CoE Strategy/ Practice team

For further information on benchmarking & techniques: ras@aiswitch.org