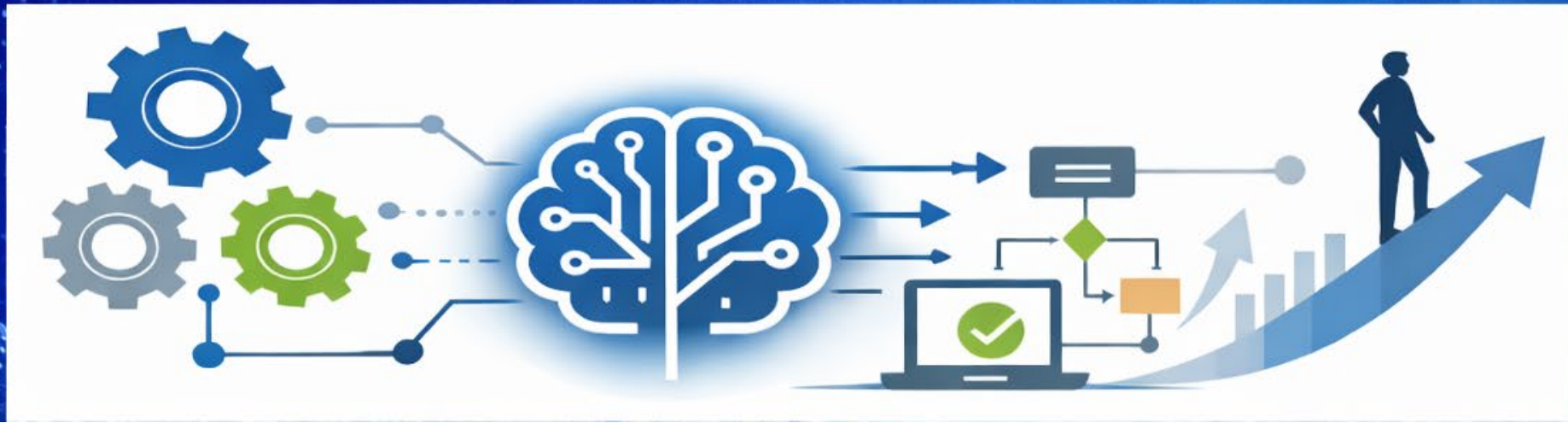


# AI Methodology With Purpose:

Methodology to Transform Processes Without Breaking What Works

Explore how to get powerful acceleration through AI Technologies



# AI Adoption Is Rising — But Results Are Not

## What's Happening

- Rapid interest in AI across industries
- Teams experimenting with tools
- Pressure to “do something with AI” and act quickly

## Where it Fails

- Disconnected pilots and initiatives
- No integration into core workflows
- Limited measurable business impact

## The Result

- Wasted time and investment
- Frustration across teams
- AI perceived as overhyped or ineffective

**Adoption without structure leads to failure**

# The Issue Is Not AI — It's Lack of Structure

## No Defined Strategy

- Undefined objectives
- No success criteria
- No alignment to business priorities

## Unstructured or Inaccessible Data

- Fragmented, unstructured
- Limited accessibility or doesn't exist
- No governance or consistency

## Workflows Not Designed for AI

- AI layered onto existing processes
- No workflow redesign
- No integration into operations

**AI fails when it's treated as a tool instead of a structured transformation**

# AI Success Requires Fundamental Shift in Approach

## Conventional Approach

- Tool-first thinking
- Isolated experimentation
- Short-term focus

## What Actually Works

- Strategy-first execution
- Workflow-driven design
- Data-centered foundation
- Phased, disciplined implementation

**AI Success comes from Structured Transformation —  
not isolated implementation.**

**It requires a disciplined, end-to-end approach.**

# What AI Is - And What It Is Not

## AI Is Not

- Replacement for Human Judgment or Workers
- Plug-and-Play Solution
- One-time Implementation
- Fully Autonomous with no Oversight
- Magic Solution for All

## AI Is

- Augments Human Capabilities
- Enhances Workflows, Processes And Decisions
- Drives Productivity And Scale
- Evolves Over Time
- Dependent On Structured Data And Disciplined Execution

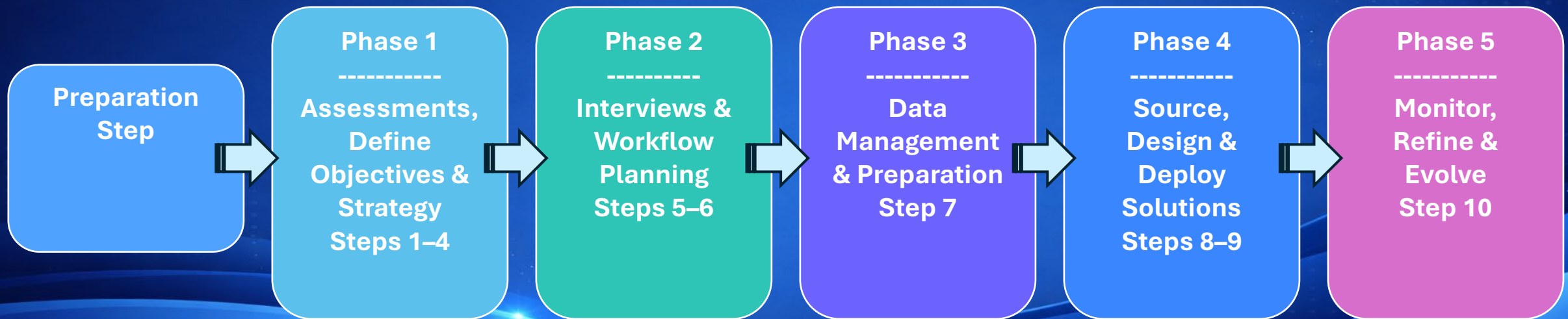
**Without Structure, AI Creates Noise.**

**With Structure, AI Drives Measurable Business Results.**

**This is Why A Structured Transformation Approach Is Required.**

# CreateInnovAI Transformation Framework™

A Structured, End-to-End Framework for  
Turning AI Into Measurable Business Results



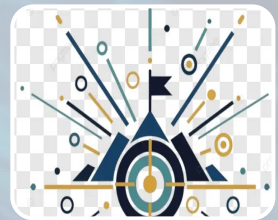
# 10 STEP METHODOLOGY

## CreateInnovAI Transformation Framework

- **Step 1: Assessments – Pre-assessment Preparation, Future Readiness And Ai Implementation**
- **Step 2: Define Ai Opportunities And Risks**
- **Step 3: Develop Ai Strategy And Roadmap**
- **Step 4: Prioritize Objectives**
- **Step 5: In-depth Interviews With Team Members**
- **Step 6: Submit Detailed Workflow Plan**
- **Step 7: Data Management And Preparation**
- **Step 8: Source Resources And Collaborate**
- **Step 9: Design And Deploy**
- **Step 10: Monitor, Optimize, Refine And Evolve**

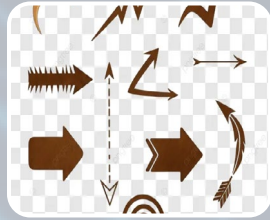
# CreateInnovAI Transformation Framework

- **Preparation Step - Initial Investigative Groundwork**
  - **Initial Discovery Meeting (Call)**
  - **Primary Decision Makers**
  - **Establish Foundation For Engagement**



**SET EXPECTATIONS FOR SUCCESSFUL IMPLEMENTATION**

Clear direction and alignment



**Organization & Technology Change**

Change, transformation & systems evolving



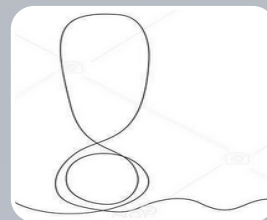
**Identify AI Vision & Goals**

Direction, vision, strategy



**DOCUMENT INSIGHTS**

Capture and structure insights



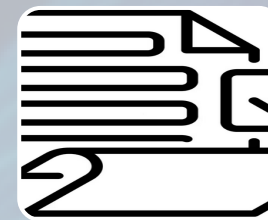
**Outline Key Concerns**

Risks, concerns, awareness



**Define Potential Roadblocks**

Obstacles and constraints



**DELINEATE SUCCESS CRITERIA**

Define success and validation

# CreateInnovAI Transformation Framework

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy

## Phase 1

- **Step 1: Assessments**
- **Step 2: Define Ai Opportunities And Risks**
- **Step 3: Develop Ai Strategy And Roadmap**
- **Step 4: Prioritize Objectives**

**Key Findings Report**

# STEP 1: ASSESSMENTS

## Assessments (About 2-4 Hours)

Comprehensive Analysis Of Current Operations And Pain Points

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy

### 1. Future Readiness Assessment

Evaluate Current Systems And Workflows

Identify Bottlenecks, Inefficiencies, And Gaps

Assess Team Ai Adoption Capability

### 2. Ai Implementation Assessment

Evaluate Company's Readiness To Integrate Ai

Current Tech Situation

Data Capture Situation

# STEP 1: ASSESSMENTS

## Assessment Tools

### Online Tools

**Company List** + Add

**Company Level**

Assess overall organizational readiness for future challenges

CreateInnoval

Select Assessment Focus

You can select multiple assessments. They will be presented one after another.

Select All Topics

AI Strategy Development  AI-Driven Predictive Maintenance

**Company List** + Add

**AI Implementation Assessment**

Select Assessment Focus

You can select multiple assessments. They will be presented one after another.

Select All Topics

AI Implementation Focus Points  AI-Enhanced Decision Support Systems

Assets & Product Development  Change Management & Organizational Culture

Clones and Digital Twins  Conversational AI & Chatbots for Internal Support

Customer Data & Insights  Customer Service

Cybersecurity  Data Strategy

Employee Training & Skill Development  Finance & Accounting (Cash Flow Management)

### Excel or Google Spreadsheets

COMPANY LEVEL	AREAS OF INTEREST TO ASSESS	QUESTIONS TO ASK
	AI Strategy Development	How does your AI strategy align with broader business goals and priorities? What specific areas are prioritized for AI integration, such as decision-making, customer experience, or operational efficiency? How do you measure the success of AI initiatives across the organization? How often is the AI strategy reviewed and updated to stay relevant? What challenges do you face in aligning AI efforts with business objectives?
	Process Automation	What processes are automated, and what impact has automation had on efficiency and cost? How do you identify additional areas for process automation?

ASSESSMENT AREA	QUESTIONS TO ASK	ANSWERS
Marketing: Lead Generation & Business Development	How do you currently identify and prioritize potential leads? What challenges do you face in converting leads into customers? How effective is your current marketing personalization strategy, and what tools are you using? Are there any repetitive tasks in lead management that could benefit from automation? How do you track and analyze the success of your marketing campaigns?	
Data Infrastructure Modernization		
Sales & Conversion	How do you measure the effectiveness of your sales strategies? What are the most common obstacles in your sales conversion process? Do you use any analytics tools to understand customer behavior during the sales process? How do you personalize your sales approach for different customer segments? Are there areas in your sales process that could benefit from predictive analytics or AI-driven insights?	
Productivity	What are the biggest productivity bottlenecks in your company? How are routine or repetitive tasks currently managed across teams? What tools do you use to track productivity metrics, and how effective are they? Are there specific areas where automation could save time or reduce errors? How do you ensure that productivity goals align with overall company objectives?	
Customer Service	How do you currently handle high-volume customer queries and complaints? Are there common issues or questions that could be addressed by automated systems? What tools are in place for tracking customer satisfaction and feedback? How do you prioritize and manage responses to customer inquiries? Would your team benefit from a chatbot or other conversational AI tools for initial customer interactions?	
HR & Recruiting	How do you identify the best candidates for open roles? What challenges do you face in onboarding new employees effectively? Are there any recurring tasks in HR or recruiting that could be automated?	

# STEP 2: DEFINE AI OPPORTUNITIES & RISKS

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy

- **Map Out Potential AI Use Cases** across Departments and Workflows
- **Align AI Opportunities** with Business Objectives and Strategic Goals
- **Assess Technical, Ethical, and Operational Risks** Associated with AI Adoption



# STEP 3: DEVELOP AI STRATEGY & ROADMAP

- **Create A Phased AI Implementation Plan With Milestones And KPI's**
- **Define Clear Ownership, Timelines, And Success Indicators**
- **Incorporate Short-term Wins And Long-term Transformation Goals**

Steps 1– 4:  
Assessments,  
Define Objectives  
& Strategy



# STEP 4: PRIORITIZE OBJECTIVES

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy

- **Rank Opportunities Based On ROI, Feasibility, And Strategic Alignment**
- **Focus On Quick Wins That Build Momentum And Stakeholder Buy-in**
- **Sequence Initiatives To Minimize Disruption And Maximize Synergy**



# PHASE 1: KEY FINDINGS REPORTS

**Provide Clear, Actionable Insights To  
Future-proof Effectively**

**Steps 1– 4:  
Assessments,  
Define Objectives  
& Strategy**

## **FUTURE READINESS ASSESSMENT**

- **Strategic Approach And Roadmap**
- **Swat Analysis**
- **Key Opportunities And Risks**
- **High Leverage Opportunities**
- **Initial, Detail Workflow Suggestions**
- **Actionable Recommendations**
- **Quantified Impact Of Implementation**
- **Conclusion And Next Steps**

## **AI IMPLEMENTATION**

- **Insights For Implementing Ai Into Workflows And Departments**
- **Detailed Findings Area-by-area**
- **Key Opportunities And Risks**
- **Actionable Recommendations**
- **Conclusion And Next Steps**

# CreateInnovAI Transformation Framework

## PHASE 2

- **STEP 5: INTERVIEW TEAM MEMBERS**
- **STEP 6: DETAILED WORKFLOW PLANS**

Steps 5-6:  
Interviews  
& Plan  
Workflow

## PHASE 3

- **STEP 7: DATA MANAGEMENT AND PREPARATION**

Step 7: Data  
Management

# STEP 5: INTERVIEW TEAM MEMBERS

Steps 5-6:  
Interviews  
& Plan  
Workflow

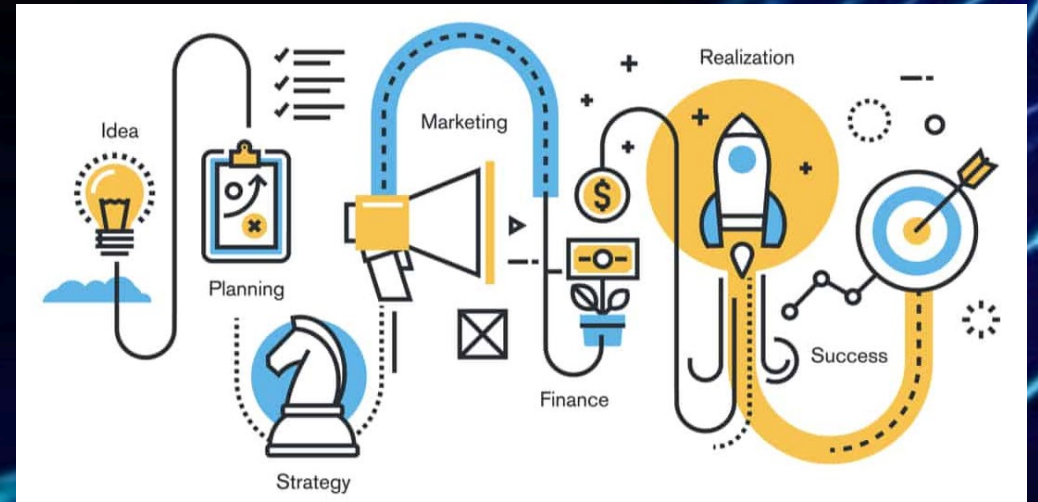
- **Talk To Individual Team Members**
  - **Skills**
  - **Mindset**
  - **Comfort Level With Ai**
- **Conduct Value And Business Process Mapping**
  - **Scale Value Through Ai**
  - **Enhance Business Processes To Add Value**
- **Workflow Details**
- **Data Sources, Management And Output**
- **Technology Used**



# STEP 6: SUBMIT DETAILED WORKFLOW PLANS

Steps 5-6:  
Interviews  
& Plan  
Workflow

- **Set Up Detailed Workflows**
  - **Workflow Analysis**
  - **Visual Flow Layout**
- **Individual Check-in**
  - **Review And Validate With Individual**
- **Deliver Detailed Workflow Plans**



# STEP 7: DATA MANAGEMENT AND PREPARATION

Step 7: Data Management

- **Understand**
  - What data exists and how it's used
- **Prepare**
  - Clean, structure, and organize
- **Enhance**
  - Label, enrich, and validate
- **Enable**
  - Deploy, govern, and maintain



# CreateInnovAI Transformation Framework

## PHASE 4

- **STEP 8: SOURCE RESOURCES AND COLLABORATE**
- **STEP 9: DESIGN AND DEPLOYMENT**

Steps 8-9:  
Design and  
Deploy  
Solutions

## PHASE 5

- **STEP 10: MONITOR, REFINE AND EVOLVE**

Step 10:  
Monitor,  
Refine,  
Evolve

# STEP 8: SOURCE RESOURCES AND COLLABORATE

Steps 8-9:  
Design and  
Deploy  
Solutions

- WHAT RESOURCES ARE REQUIRED
- WHO WILL DESIGN
- WHO WILL IMPLEMENT
- OTHER CRITICAL RESOURCES NEEDED
  - CHANGE MANAGEMENT
  - TRAINING



# STEP 9: DESIGN AND DEPLOYMENT

Steps 8-9:  
Design and  
Deploy  
Solutions

- **SET UP TOOLS**
  - APPS/TOOL SET UP
  - REGISTRATION, ETC
- **WORKFLOWS**
  - DESIGN
  - TEST
  - DEPLOY
- **CORDINATE WITH BUSINESS AND IMPLEMENTATION TEAM**
- **TRAINING AND CULTURE**



# STEP 9: DESIGN AND DEPLOYMENT

## HOW WE DIVIDE THE WORLD OF AI TO TEACH IT



**Assets, Design, Communications, Etc**

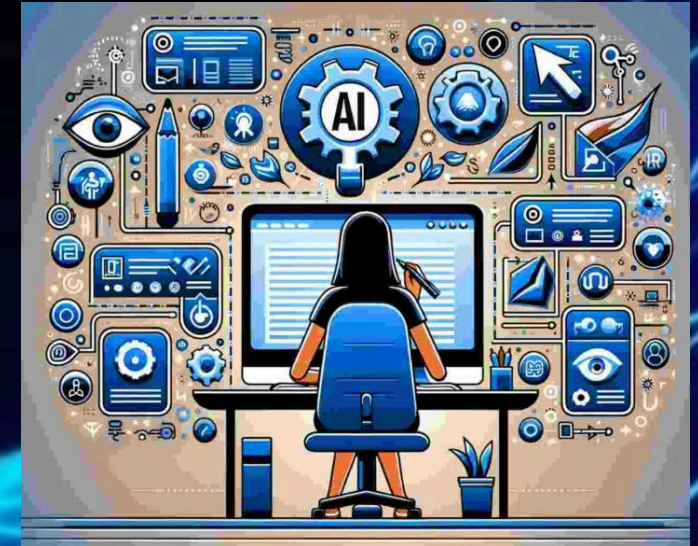
**Workflows, Agents, App Building, Etc**

**Education, understanding, strategy, paradigm shifts, etc**

# STEP 10: MONITOR, REFINE AND EVOLVE

Step 10:  
Monitor,  
Refine,  
Evolve

- **MONITOR – CONSTANTLY**
  - **RETAIN HUMAN-IN –THE-LOOP**
  - **EVOLVE WITH NEW DATA**
  - **TWEAK PROMPTS**
  - **RESEQUENCE WORKFLOWS**
  - **CHANGE AND EVOLVE TO NEW TOOLS**
  - **ONGOING TRAINING**
    - **PROMPTING AS IT EVOLVES**
    - **NEW FEATURE SETS**
- **CHECK-IN TO ENSURE CONTINUED SUCCESS AND GROWTH**



# From Insight to Execution

Structured path from AI opportunity to Future-Ready results

## Where You Are Today

- Fragmented processes
- Untapped data potential
- Limited AI integration

## What We Deliver

- Clear AI strategy & roadmap
- Prioritized, high-impact workflow use cases
- Structured implementation approach

## What You Gain

- Increased efficiency & margin
- Scalable, AI-enabled operations
- Competitive advantage for the Future

**The difference isn't understanding AI  
it's executing it correctly.**

**LET'S GET STARTED TO FUTURE PROOF YOUR  
COMPANY & GROW YOUR REVENUE TOGETHER!  
SCAN THE QR CODE TO START!**

