

The background of the image is a dark blue field filled with a complex network of glowing blue lines and nodes. The nodes are small circles of varying sizes, some of which are significantly brighter than others, creating a sense of depth and activity. The lines connect these nodes in a web-like pattern, with some lines being thicker and more prominent than others. The overall effect is that of a digital or neural network, with a futuristic and technological feel. The text 'AI Assessment' is centered in the middle of the image in a clean, white, sans-serif font.

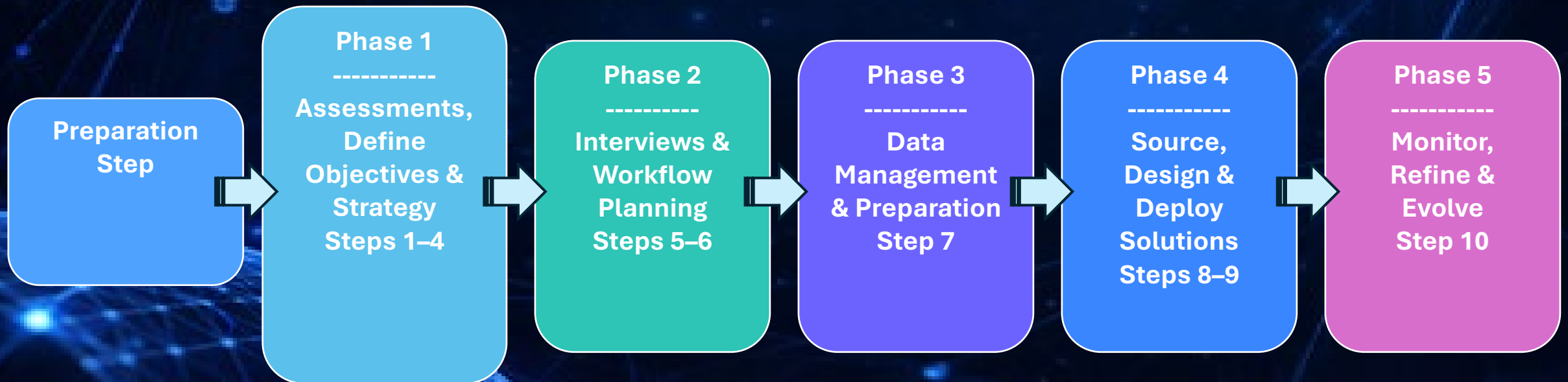
# AI Assessment



WHAT IS AN  
ASSESSMENT?

# CreateInnovAI Transformation Framework™

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



# Assessments

- **Collaborative Interview and Discussion**
  - Key Stakeholders, Decision makers and Leadership
  - Zoom Meeting
- **Structured Exploratory Process**
- **Identify and Clarify Visions and Goals**
- **Efficient and Successful AI Implementation**
- **Information Gathering Process to Create AI Strategy and Actionable Roadmap**

# Purpose of Assessments

 Discover Leverage Points, Opportunities and Threats

 Identify Future Proof Competitive Position

 Reduce Inefficiencies and Costs/Time

 Enhance Employee and Team Experience

 Increase Revenue

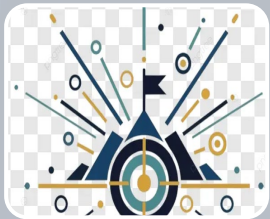
# What Happens Before AI Assessments

- **Research Company**
  - Organizational Chart(s)
  - Websites and Social Media Links
  - Public Financial Information
- **Research Industry**
  - Competitors
  - Customer base
- **Pre-Assessment Discussion**
  - Understand AI Vision and Goals
  - Identify Key Outcomes and Objectives
  - Determine Scope and Focus of Assessment
- **Schedule Meeting Times and Attendees**



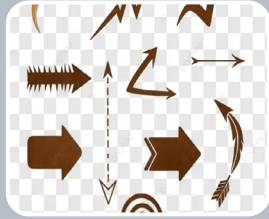
# CreateInnovAI Transformation Framework™

- **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



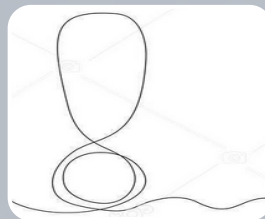
**Identify AI  
Vision &  
Goals**

Direction,  
vision, strategy



**DOCUMENT  
INSIGHTS**

Capture and  
structure  
insights



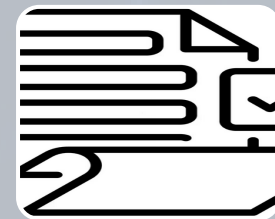
**Outline Key  
Concerns**

Risks,  
concerns,  
awareness



**Define  
Potential  
Roadblocks**

Obstacles and  
constraints



**DELINEATE  
SUCCESS  
CRITERIA**

Define success  
and validation

# 2 Assessments are Conducted

## Comprehensive Analysis of Operations and Pain Points

- **Future Readiness Assessment**
  - Evaluate Current Systems And Workflows
  - Identify Bottlenecks, Inefficiencies, and Gaps
  - Assess Team AI Adoption Capability
- **AI Implementation Assessment**
  - Evaluate Company's Readiness To Integrate AI
  - Current Tech Situation
  - Data Capture Situation

# What Happens During Assessment

## In Depth Discussions and Conversations

- **Structured Questions**
  - Tailored Focus (Company, Department, Team, or Individual)
  - Specific Topics with 5 Questions Each Topic
  - Start with Broader Questions then Drill Down
- **Explore and Align on Vision and Hopes**
  - Define Specific Goals
  - Look for Patterns, Leverage and Pain Points
- **Explanation of Processes, Decision Making Process and Bottlenecks**
  - Impact and Costs
- **Define Criteria for Success (What Success Looks Like?)**

# Assessment Support Tools

## Online Tools

**Company List** + Add  
CreateInnovat

**Company Level**  
Assess overall organizational readiness for future challenges

**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  
CreateInnovat

**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  
Monitoring and

Assets & Product Development  
Change Management & Organizational Culture  
ment

Clones and Digital Twins  
Conversational AI & Chatbots for Internal Support  
strategy

Customer Data & Insights  
Customer Service

Cybersecurity  
Data Strategy

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

## Excel or Google Spreadsheets

AutoSave OFF FUTURE READY ASSESSMENT FOR AI CONSULTING - Protected... Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

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 operations? 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	
	Data Governance Framework	
	Data Infrastructure Modernization	
	Advanced Analytics and Business Intelligence	

AutoSave ON AI IMPLEMENTATION ASSESSMENT - Protected... Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat

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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?	
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?	

# What Happens After Assessments

- **Map and Make Connections**
  - Identify Patterns
- **Understand and Expand Opportunities**
  - Gather Insights to Drive Better Decision
  - Evaluate Risks and Blind spots
- **Identify Quick Wins and Long-Term Transformations**

# Define AI Opportunities & Risks



- **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**

# Develop AI Strategy and Roadmap

- **Create Phased AI Implementation Plan with Milestones And KPIs.**
- **Define Clear Ownership, Timelines, and Success Indicators**
- **Incorporate Short-term Wins and Long-term Transformation Goals**



# Prioritize Objectives



- **Rank Opportunities Based On ROI, Feasibility, and Strategic Alignment**
- **Focus on Quick Wins that Build Momentum and Gain Stakeholder Buy-in**
- **Sequence Initiatives to Minimize Disruption and Maximize Synergy**

# Results: Key Findings Reports

- **Clear, Actionable Summary**
- **Strategic Approach and AI Roadmap**
- **SWOT Analysis**
  - Strengths, Weaknesses, Opportunities, Threats
- **High Leverage Opportunities**
- **Initial, Detail Workflow Suggestions**
- **Quantified Impact of Implementation**

# Key Findings Report

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

- **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 ASSESSMENT**

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

# What's Next

## Steps 5 and 6: Interviews and Detailed Workflow Plans

### Step 5. Interview Team Members

- Skills
- Value and Process Mapping
- Workflows
- Technology

### Step 6. Create and Submit Workflow Planning

- Flow Design and Validation
- Deliver Workflow Details

## Step 7: Data Management

- Strategy
- Collection & Audit
- Clean
- Structure and Format Transformation
- Enrichment
- Integration
- Validation
- Load
- Maintain & Govern

**LET'S GET STARTED TO FUTURE PROOF YOUR  
COMPANY & GROW YOUR REVENUE TOGETHER!  
SUBMIT A REQUEST TO GET STARTED !**



**[Link to Request Form](#)**