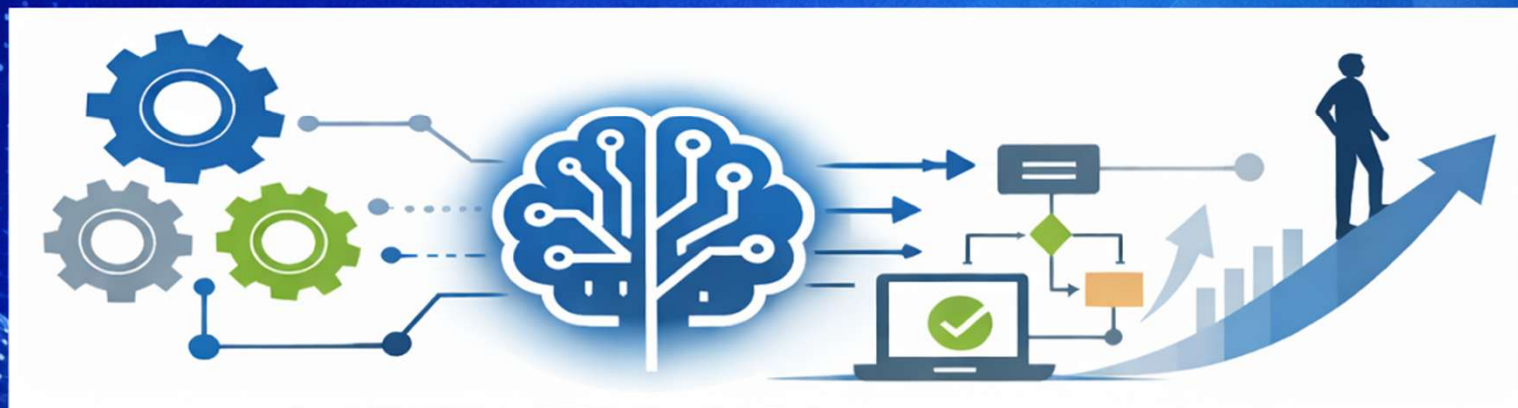


# AI Methodology With Purpose:

Methodology to Transform Processes Without Breaking What Works

Explore how to get powerful acceleration through AI Technologies



# AI - What It Is and What It Isn't

AI is the NEW Operating Environment



# What AI Actually Is

- Workflow optimizer
- Decision accelerator
- Digital workforce extender
- Integration creates value



Workflow Optimizer



Decision Accelerator



Digital Workforce Extender



Creates Value

# AI - What It Is and What It Isn't

## What It Is



Augments human capabilities



Optimizes processes and decisions



Drives productivity and innovation



## What It Isn't



A replacement for human workers



Fully autonomous with no oversight



A magic solution for everything



# AI is the **NEW** Operating Environment

- **90%** of businesses exploring AI
- **95%** of AI pilots are failing
- **37%** faster growth when implemented correctly
- Will you operationalize AI — or experiment with it?



# CreateInnovAI Transformation Framework™

A Structured, Proven Methodology for Turning AI Strategy into Measurable Business Results

Initial  
Groundwork  
Preparation  
Step

AI Vision & Goals  
Stakeholder  
Alignment  
Engagement  
Foundation  
Risks & Constraints  
Success Criteria

Assessments,  
Define  
Objectives &  
Strategy  
Steps 1-4

1. Assessments  
Future Readiness, AI  
Implementation  
2. Define AI  
Opportunities &  
Risks  
Use Cases, Risk,  
Business Alignment  
3. Develop AI  
Strategy &  
Roadmap  
Plan, KPIs, Timeline  
4. Prioritize  
Objectives  
ROI, Quick Wins,  
Sequencing

Interviews &  
Workflow  
Planning  
Steps 5-6

5. Interview Team  
Members  
Skills, Workflow,  
Technology  
6. Workflow Planning  
Process Mapping, Flow  
Design, Validation

Data  
Management &  
Preparation  
Step 7

7. Data Management  
& Preparation  
Audit, Clean,  
Structure, Govern

Source, Design  
& Deploy  
Solutions  
Steps 8-9

8. Source Resources &  
Collaborate  
Talent, Tools, Change  
Management  
9. Design & Deploy  
Solutions  
Build, Test, Integrate,  
Train

Monitor, Refine  
& Evolve  
Step 10

10. Monitor, Refine &  
Evolve  
KPIs, Improve, Scale,  
Optimize

# 5 PHASE PROCESS FOR AI-IFYING

## Initial Groundwork

- Identify AI Vision and Goals



# 10 STEP METHODOLOGY

## CreataInnovAI 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: INDEPTH 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 OF AI AND SUCCESSFUL IMPLEMENTATION**
        - **ORGANIZATIONAL AND TECHNOLOGY CHANGE**
      - **IDENTIFY AI VISION AND GOALS**
      - **DOCUMENT INSIGHTS,**
      - **OUTLINE KEY CONCERNS**
      - **DEFINE POTENTIAL ROADBLOCKS**
      - **DELINEATE SUCCESS CRITERIA**

# CreteInnovAI 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)

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy

### 1. FUTURE READINESS ASSESSMENT

COMPREHENSIVE ANALYSIS OF CURRENT OPERATIONS  
AND PAIN POINTS

IDENTIFY WORKFLOWS COULD BE AI-IFIED

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 2: DEFINE AI OPPORTUNITIES & RISKS

- **MAP OUT POTENTIAL AI USE CASES ACROSS DEPARTMENTS AND WORKFLOWS**
- **ASSESS TECHNICAL, ETHICAL, AND OPERATIONAL RISKS ASSOCIATED WITH AI ADOPTION**
- **ALIGN AI OPPORTUNITIES WITH BUSINESS OBJECTIVES AND STRATEGIC GOALS**

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy



# STEP 3: DEVELOP AI STRATEGY & ROADMAP

- **CREATE A PHASED AI IMPLEMENTATION PLAN WITH MILESTONES AND KPIS.**
- **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

- **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**

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy



# PHASE 1: KEY FINDINGS REPORTS

Steps 1–4:  
Assessments,  
Define Objectives  
& Strategy

## FUTURE READINESS ASSESSMENT

- PROVIDE CLEAR, ACTIONABLE INSIGHTS TO FUTURE-PROOF EFFECTIVELY
- 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**
- **DATA SOURCES, MANAGEMENT AND OUTPUT**
- **TECHNOLOGY USED**
- **WORKFLOW DETAILS AND PROCESSES**

# 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**

# STEP 7: DATA MANAGEMENT AND PREPARATION

Step 7: Data Management

- **ANALYSIS COMPANY, DEPARTMENT AND INDIVIDUAL**
  - **UNDERSTANDING DATA AND GROWTH**
- **DATA STRATEGY AND UNDERSTANDING DATA**
  - **WHAT IS IT, WHERE STORED, HOW USED, WHO HAS ACCESS**
- **DATA COLLECTION AND CLEANING**
  - **DATA WRANGLING AND SOURCES**
    - **DATA TYPES – STRUCTURED, SEMI-STRUCTURED, AND UNSTRUCTURED**
  - **DATA LABELING**
  - **CATEGORIZATION**
  - **CLEANSING AND PREPARATION**
  - **TEST AND REFINE**
- **DATA DEPLOYMENT**
  - **DATA USES**
  - **TRAIN BOTS**

# 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**
  - **DESIGNS**
  - **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

The background features a dark blue grid floor that recedes into the distance. Three glowing spheres are positioned on the grid: a medium-sized blue sphere on the left, a large light blue sphere in the center, and a medium-sized purple sphere on the right. Each sphere has a dark rectangular area on its front. Swirling around the spheres are ribbons of binary code (0s and 1s) in various colors (blue, purple, white).

**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**

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

