

AI Quick Wins vs. Long Game: Many Leaders Get This Balance Wrong

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When I stepped away from the C-suite in December, I'll admit - I had my doubts.

After years driving digital transformations at some of Europe's large financial organizations, helping bloom the Netherlands' first digital bank, and leading award-winning AI initiatives at Virgin Money, I wondered: could I really build something meaningful starting from scratch? Just me and a simple question: what if software and humans could work like a team, amplifying each other?

That experiment became Claridora, and then 4 AI agents. Since launching my "How-to Guide to Agentic AI" and beginning interviews for my upcoming book "Care, Dare, Share: Lead and Thrive with Heart, Mind, AI" something unexpected happened. Board members, CEOs, and chairmen started reaching out, not for polished consulting presentations, but for honest conversations about their AI transformation struggles.

The pattern became clear: transformations were an art at the best of times, but now, with the advent of AI, they are crucially needed and require a real balance between difficult choices: on people, on processes, on methods, on strategy. Senior leaders are facing difficult choices with little basis of experience.

So in this Newsletter, I will tackle, week after week, the key questions senior leaders raise with me and propose a simple, practical, action-driven approach to solve them.

We start with the one I hear the most: how to choose between AI quick wins and long-term transformation... Before we start, let me just tell you my opinion: it is a false choice, that's

costing organizations millions in lost opportunities and wasted resources. The magic answer is BALANCE....and I have a simple approach for it.

Here's the uncomfortable truth I've witnessed in enterprises' boardrooms across financial services, manufacturing, and technology: 70% of AI transformation success comes from getting the balance right and the humans on board. Get it wrong, and you'll either burn through budgets on impressive demos that never scale, or invest years in initiatives that never deliver tangible value.

The Psychology of Change: Start with Trust-Building

Here's where most AI strategies fail: leaders underestimate the human dimension of technological change. Your employees aren't just skeptical about AI capability, they're anxious about their own relevance.

I worked with a global financial services company where leadership had developed sophisticated AI models for risk assessment, processing complex scenarios 50x faster than human analysts, for example in fraud. But when we surveyed their workforce, 80% believed AI meant job elimination, not enhancement...and so started the unhelpful tug of war between super fast detection and back rowing in detailed assessments.... Guess what clients were not happy as the blocking rate skyrocketed.

Recently, I worked with a financial services firm that had built state-of-the-art AI models for risk detection, able to process complex fraud scenarios up to 50 times faster than human analysts. But when we surveyed the frontline teams, more than 80% believed AI was a threat to their jobs rather than a tool to elevate them. That fear sparked an unproductive tug-of-war: the algorithms flagged faster than ever, but analysts resisted the outcomes, rechecking and second-guessing the system. Blocking rates soared, friction mounted, and customers began to feel it.

The turning point came when we applied my "Care, Dare, Share" frameworks (outlined further down). Rather than leading with the most dazzling use case, we focused on what the analysts found most draining: triaging false positives. In under six weeks, they used AI to automate the tedious review of low-risk alerts, freeing up over 300 hours a month and restoring focus to complex cases that genuinely needed human judgment. Trust grew, morale lifted, and the AI-human partnership finally began to click...And finally those poor couples who had just married or given birth to a child stopped being blocked for going on a slight unexpected spending spree.

The transformation wasn't in the technology, it was in the mindset shift. When people experienced AI solving their daily pain points rather than threatening their expertise, they became advocates instead of obstacles. The same analysts who worried about replacement started asking, "What other tedious tasks could we automate so we can focus on strategic analysis?"

Anchor Your Future with Strategic Moonshots

While trust-building wins create momentum, you need substantial initiatives that will fundamentally change how your organization competes. The key insight: quick wins must build capabilities for long-term bets....see it as digging the hole for the foundations of a house: while digging a hole is a pretty simple conceptual job, digging the right depth and the right shape for the future actual house that will be built is essential.

A global manufacturing conglomerate mastered this balance by connecting their automation wins across 15 business units with a simultaneous investment in enterprise-wide predictive maintenance. The automation taught their workforce to trust AI decision-making, while the predictive system required exactly that trust to work effectively.

One year later, that system prevents equipment failures across 50+ facilities, saving hundreds of millions in unplanned downtime. More importantly, it created what their CEO called "a human-AI culture" where data-driven decisions are considered, but humans get involved before confirming adoption. Best of both worlds....

The Momentum Paradox: When Quick Wins Fund Transformation

The best implementations create a virtuous cycle where early wins generate the credibility, resources, and organizational capability to pursue ambitious goals.

Consider the large bank that transformed their customer experience through this approach. They started with credit card fraud detection across several markets, preventing €15 million in fraudulent transactions while reducing false positives by 60%.

But the real value was in the learning: how to integrate AI into customer-facing processes, maintain human oversight, and build trust with employees and customers. That foundation enabled them to scale to AI-powered personalized banking to most of their products - turning transformation into an execution challenge, not a learning challenge.

Practical AI Implementation Framework: The Care, Dare, Share Framework

My core philosophy provides the framework for getting this balance right:


Care about your people's experience with change. Start with AI applications that solve genuine daily frustrations, not just impressive technical challenges.


Dare to pursue transformational goals that will define your competitive future, even when the path isn't clear.


Share the learning from every implementation across your organization, building collective AI capability rather than isolated successes.


Start with Strategic Alignment


Before diving into specific use cases, ensure your AI initiatives align with one of these five strategic directions for your business:

 **Operational Streamlining** - Cut waste and simplify workflows using AI to reduce costs, delays, or errors through automation and process reengineering.

 **Outcome Optimization** - Improve results and decision-making quality, focusing on doing the right things better - enhancing customer satisfaction, accuracy, or quality.

 **Empowered Workforce** - Free up human capacity by removing repetitive work and boosting team effectiveness, enabling more accomplishment without burnout.

 **Knowledge at Scale** - Capture institutional or expert knowledge into scalable systems like diagnostic engines, recommendation tools, or decision support systems.

 **Growth Acceleration** - Create new value streams through new offerings, business models, or market opportunities focused on expansion, not just optimization.

The First-Pass Framework: 8 Critical Questions

Start small and pragmatic. Pick 5-20 simple, clear use cases. Give yourself 6 months. Get wins. Build trust inside your organization.

For each potential use case, answer YES or NO:

1. **Impact:** Will it grow revenue, cut costs, improve quality, or solve a real daily pain point (bottlenecks, constraints, pressure relief on critical roles, tedious processes)? (Yes +2, No -2)
2. **Complexity:** Can you buy/subscribe a tool that's >90% trained? (Yes +1, No -2)
3. **Team:** Do you have the multi-disciplinary team (business AND tech/IT AND compliance/legal) to develop it, and can they be removed from current duties? (Yes +1, No -2)
4. **Data:** Is the specific data you need >80% clean and structured, and can it be ring-fenced to avoid risk of large data leaks or corruption? (Yes +1, No -6)

5. **Integration:** Does it require deep integration into legacy systems that can't be easily automated with scraping tools? (Yes -4, No +1)
6. **Reputation:** If the AI tool hallucinates or performs inconsistently, will this cause significant embarrassment? (Yes -5, No +1)
7. **Bias/Explainability:** Is it necessary to explain every outcome (e.g., due to regulatory requirements)? (Yes -5, No +1)
8. **Influence:** If it succeeds, will it be relevant and helpful for more than 30% of your company (employees, departments, or countries)? (Yes +2, No -2)

Once you have your first ranking, dive deeper into the top candidates using these same dimensions with more nuanced analysis of pros, cons, and metrics.

5 Principles for Bringing Effectively AI in the Enterprise

1. **Keep It Simple** - Adopt the lowest possible level of AI brain/agent that can accomplish the task. If basic automation can do it, don't overcomplicate with advanced capabilities.
2. **Focused Tools, Not Swiss Knives** - Split complex human tasks across multiple specialized AI agents rather than creating one do-everything system.
3. **Trust but Verify** - Build multiple checkpoints throughout processes so you can monitor decisions, actions, and data transformations at each step. Transparency is crucial for building organizational confidence.
4. **Multiple Perspectives** - For tasks involving judgment, creativity, or customer-facing outputs where failures are costly, use a combination several *and different* AIs, for example: one proposer, one challenger, one coordinator. Solutions move forward only when all three align.
5. **Explain, explain, explain:** create internal champions, bring people on board, keep explaining why you are doing it and bring the notion of “amplification of humans” instead of replacement.

The key is to adopt a progressive methodology: **Build. Succeed. Showcase. Repeat.**

Start with high-scoring use cases from your framework assessment, implement using these principles, demonstrate success to build organizational trust, then expand to more complex applications.

The Truth About AI Transformation

It's not about choosing between speed and strategy. The organizations that win understand that quick wins and long-term transformation aren't competing priorities - they're mutually reinforcing elements of a single approach.

Your early AI successes should build the organizational capability, cultural acceptance, and strategic insight needed for transformational change. Your long-term AI vision should guide which quick wins to pursue and how to connect them into coherent progress.

In the enterprise AI journey, momentum and direction are both essential. Master the balance, and you'll build competitive advantages that compound for decades.

What's been your experience with balancing AI quick wins and long-term strategy? Reply and tell me which aspect feels most challenging for your organization right now.

Wishing you clarity on your AI transformation journey,
Allegra

*N.B. - If you want to get in touch visit **allegrapatrizi.com***

P.S. - If this resonated with your current AI challenges, share it with your leadership team. The conversation about finding the right balance is one every organization needs to have.