AI Portfolio Roadmap

Treating AI as a Strategic Investment Portfolio — Not a Tool Experiment

business technology consulting inc.

AI GOVERNANCE
Ethics · Compliance · Model Risk · Human Oversight

1. AI Strategy

Why AI exists and where leadership wants advantage.

- Market differentiation
- Strategic themes

Outputs
- AI Strategic Intent
- Executive charter

Strategic Alignment

2. Use Case Intake Funnel

Department Inputs
- Finance
- Operations
- Customer Experience
- Risk

Opportunities + Pain Points

Qualified AI Candidates

BTC Facilitation
- Workshops
- Executive interviews
- Benchmarking

Qualified Opportunities

◇ Gate 1: Capability Check ◇

3. AI Maturity Assessment

Assess Current / Target across 7 Domains:
Strategy · Value · Organization · People
Governance · Engineering · Data

Outputs
- AI Maturity Heatmap
- Risk Rating
- Wave 1 / 2 / 3 classification

Feasible Portfolio

◇ Gate 2 — Risk & Readiness ◇

4. Value Prioritization Board

Governance Review Board

- T / I / OE scoring
- Cost of Delay
- ROI

Outputs
- Force Ranking

Funded Initiatives

◇ Gate 3: Capital Approval ◇

5. Execution Governance

5c Engineering Delivery

Outputs
- Production AI
- Integration
- MLOps

Production Release

5b People & Culture

Outputs
- AI literacy roadmap
- Role transformation
- Incentive alignment

Adoption Ready

5a Organization Ownership

Outputs
- Executive sponsor
- AI product owner
- Portfolio intake governance

Accountability Established

◇ Gate 4: Value Confirmation ◇

6. Value Realization Loop

- Execute Maturity-aligned UC
- Measure outcomes
- Compare promised vs actual

Outputs
- Scale
- Improve
- Kill initiative

PORTFOLIO FEEDBACK LOOP

AI DATA FOUNDATION
Quality · Lineage · Security · Access · Pipelines

BTC Role • Strategic PMO Advisory

Portfolio Governance | Executive Decision Support | AI Investment Alignment