

AI Portfolio Roadmap

Treating AI as a Governed Investment Portfolio – Not a Tool Experiment



1. Educate & Frame

Create a shared executive understanding of AI

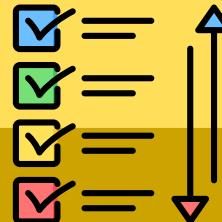
- Common AI language
- AI as capability, not software
- Clear guardrails & compliance



2. Identify Use Cases

Treat AI ideas like project ideas

- Business problem defined
- Value hypothesis
- Data & risk awareness



3. Score & Prioritize

Decide what goes first

- Value vs Risk
- Feasibility & readiness
- Force-ranked backlog

“AI succeeds when governed like a portfolio”



4. Execute in Waves

Wave 1 Operational Efficiency

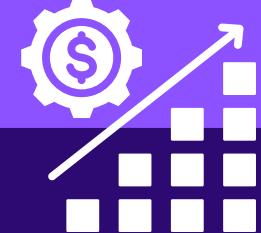
Low Risk | Fast ROI

Wave 2 Decision Advantage

Moderate Risk

Wave 3 Growth & Innovations

Higher Risk



5. Govern & Scale

Prevent entropy and compound value

- Portfolio reviews
- ROI & risk tracking
- Retire low-value AI

Foundation

Visibility

Governance

Value Realization

Compounding Advantage

AI Portfolio Principles:

- ✓ Governed like capital
- ✓ Continuously re-ranked

- ✓ Sequenced by value & risk
- ✓ ROI & risk tracking

- ✓ Aligned to strategy