# 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