Building Your AI Roadmap

From Pilot to Enterprise-Wide Adoption
August 2025

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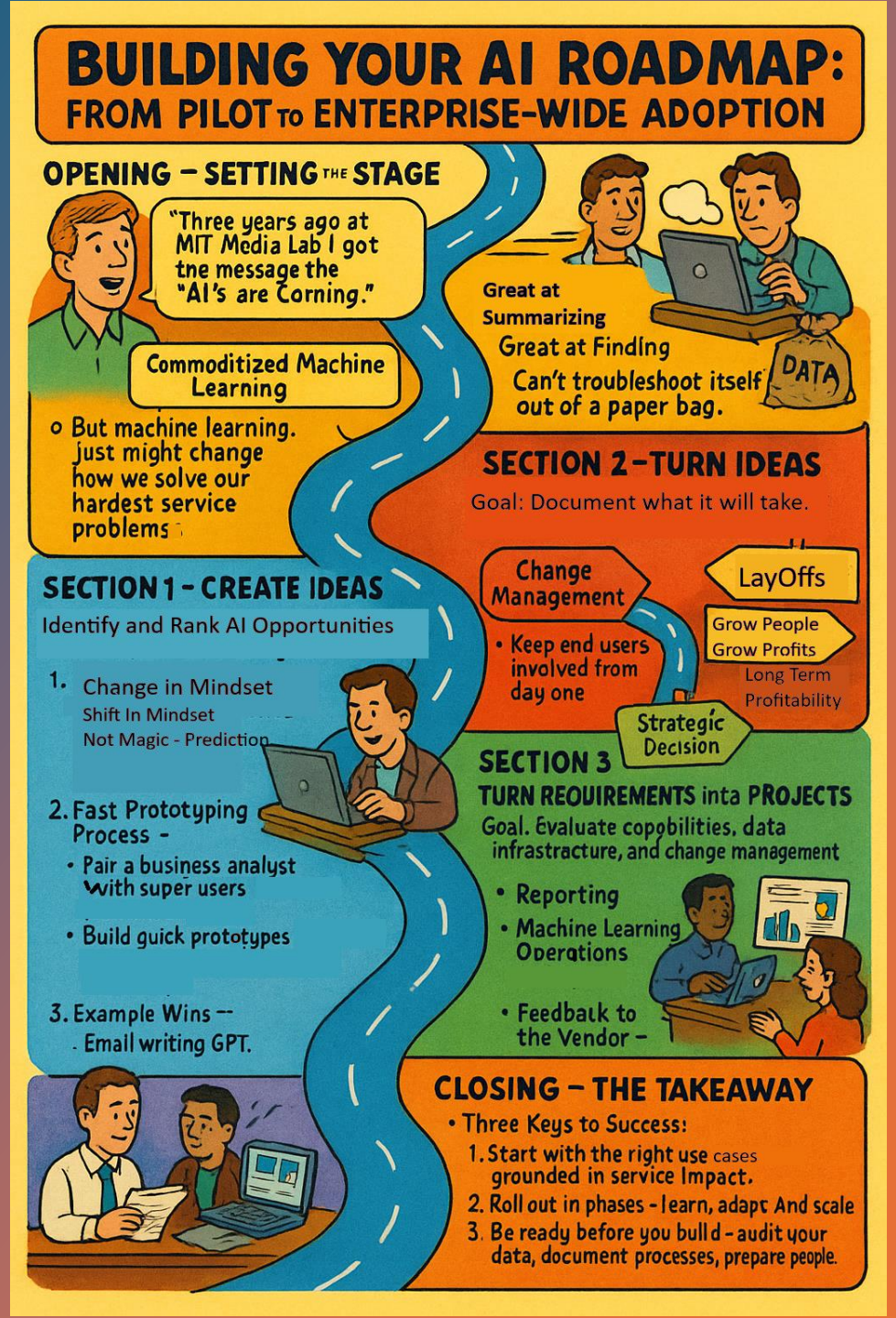


Directions

Leave now

- Create Ideas
- Ideas Into Requirements
- Requirements Into Projects
- Projects into Services

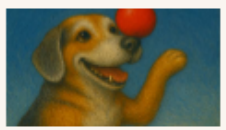
John Tocado – Principal Analyst, JLG

JLG (2015 – present):
– Leading contact-center innovation with ML integrations
– Serve as Business Analyst, Project Manager, Team Lead

EmTech

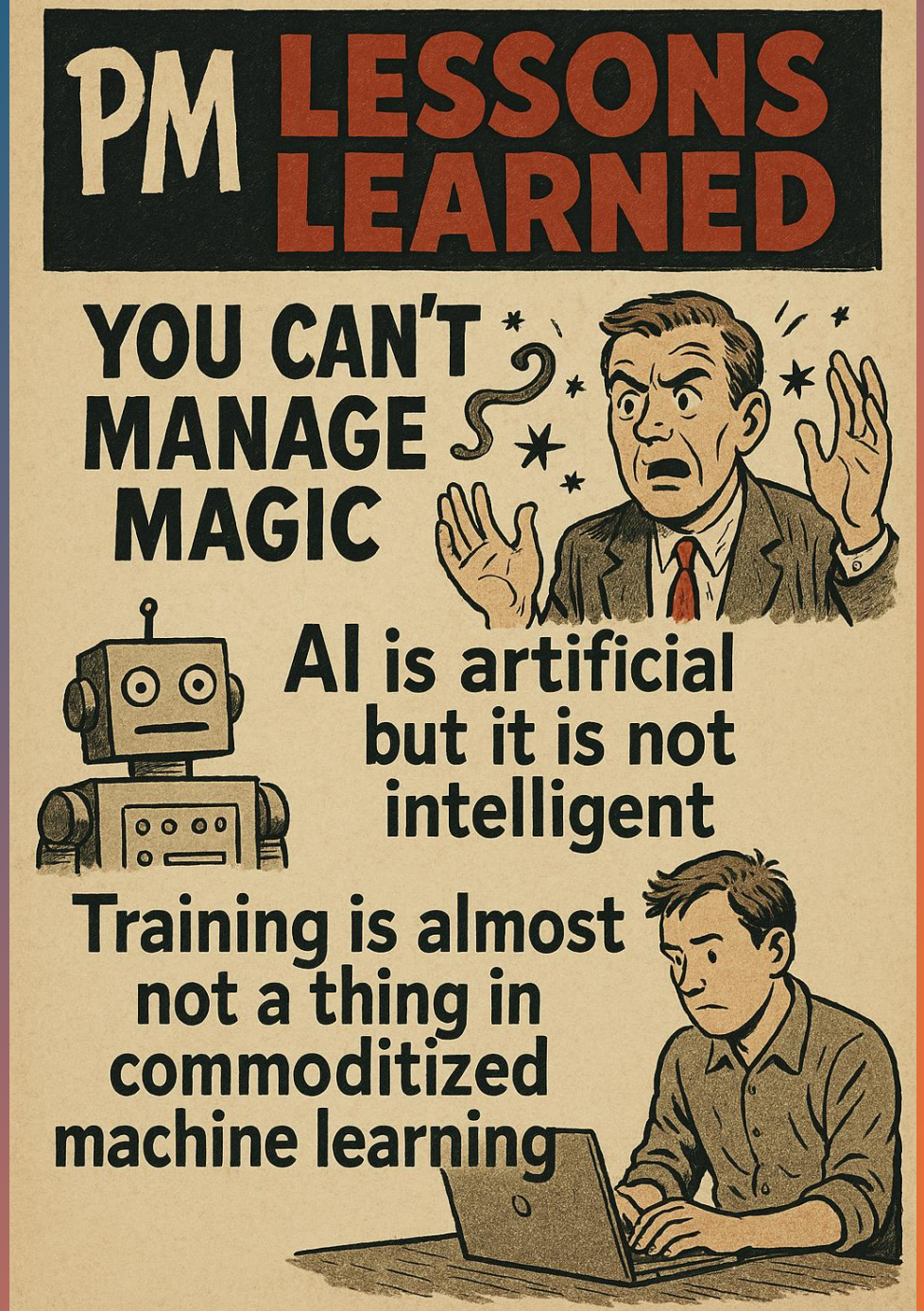
MIT Tech Conferences:
– Attended EMTech Digital at MIT Media Lab (2022): Explored breakthroughs in AI
– Attended EMTech Future Compute (2022): Focus on machine learning infrastructure, security, and metaverse

Former US Army Helicopter Mechanic:
– MOS 67 Uniform Medium Helicopter Repair
– Maintained and repaired the CH-47 Chinook



Old Dog Learning New Tricks

🎯 Trade Show Takeaway
John has been wrestling with Machine Learning Hype and Management Expectations for 3 years



Lessons Learned

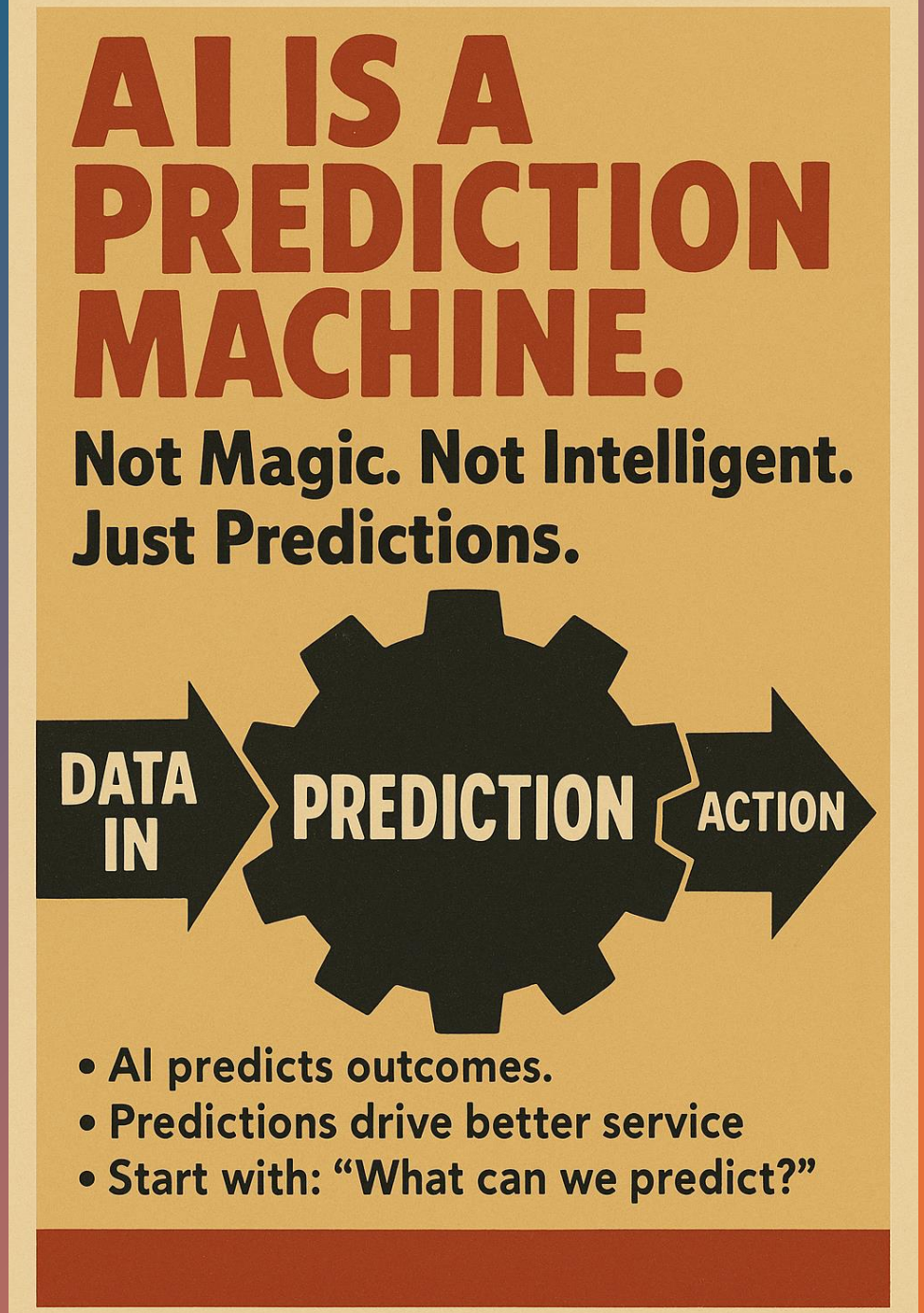
Before Proof of Concept

- It's not Magic, it's Math
- AI is artificial but it is not intelligent.
  - It is a Prediction Machine.
- Training is almost not a thing in Commoditized Machine Learning.
  - Everything is Pretrained.
    - Example:
      - Model that does voice to text - untrainable.

Lessons Learned

Proof of Concept

- We Don't Need All the Features
- Great at Summarizing
- Great At Finding
- Cannot Troubleshoot With Our Data



What AI Is

AI is a Prediction Machine

- AI Predicts Outcomes
- Predictions Drive Better Service
- Start with:

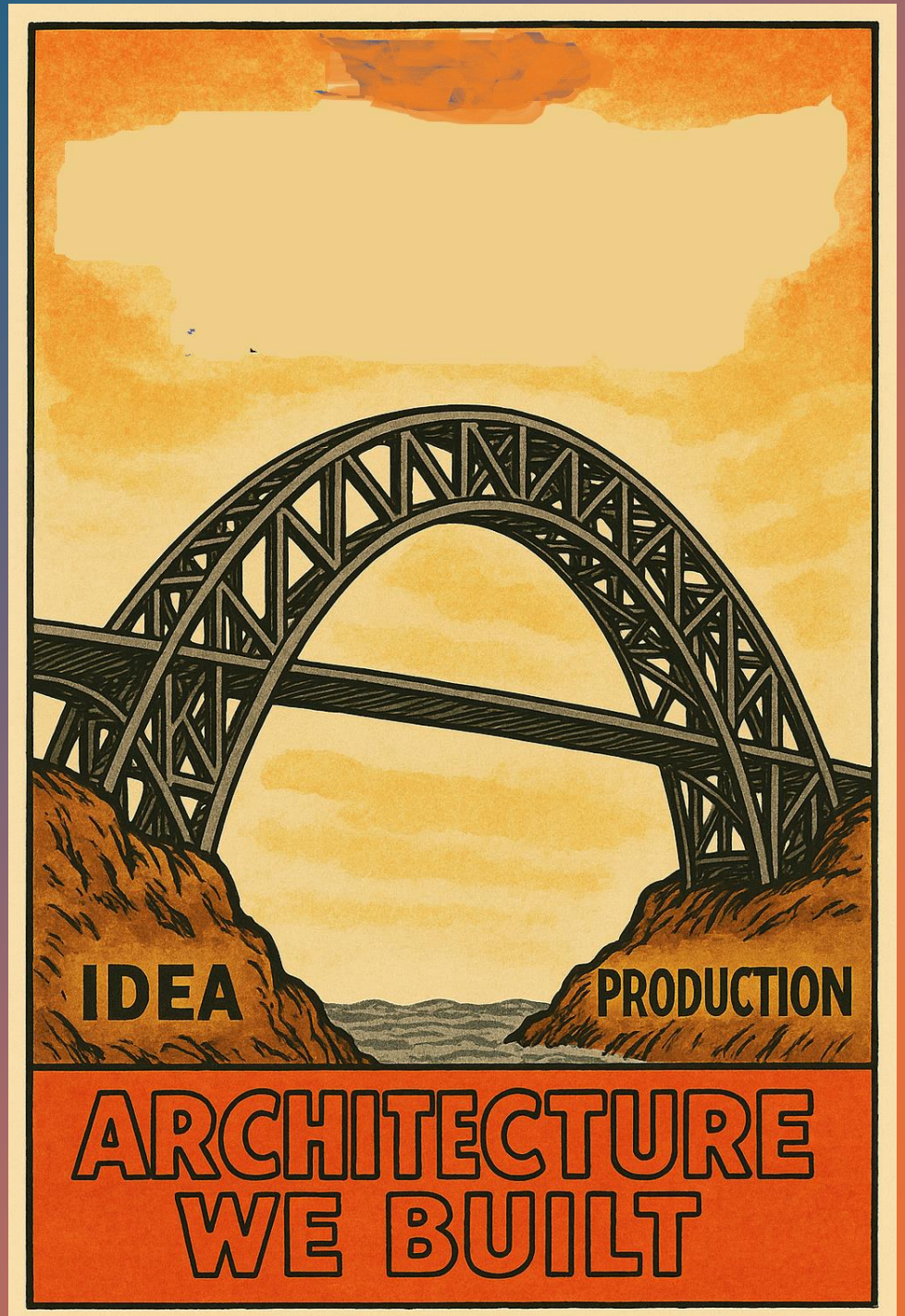
What Can We Predict?

What AI Cannot Do

Not Now, Not Soon, Maybe Not Ever

The Reason you Hire People

- To Take Ownership of a Problem
- To Care
- To Mange Risks
- To Go Out On a Limb
  - When it is the right thing to do.



Prototype to Production

The Architecture We Built

The Process

Create Ideas

Ideas Into Requirements

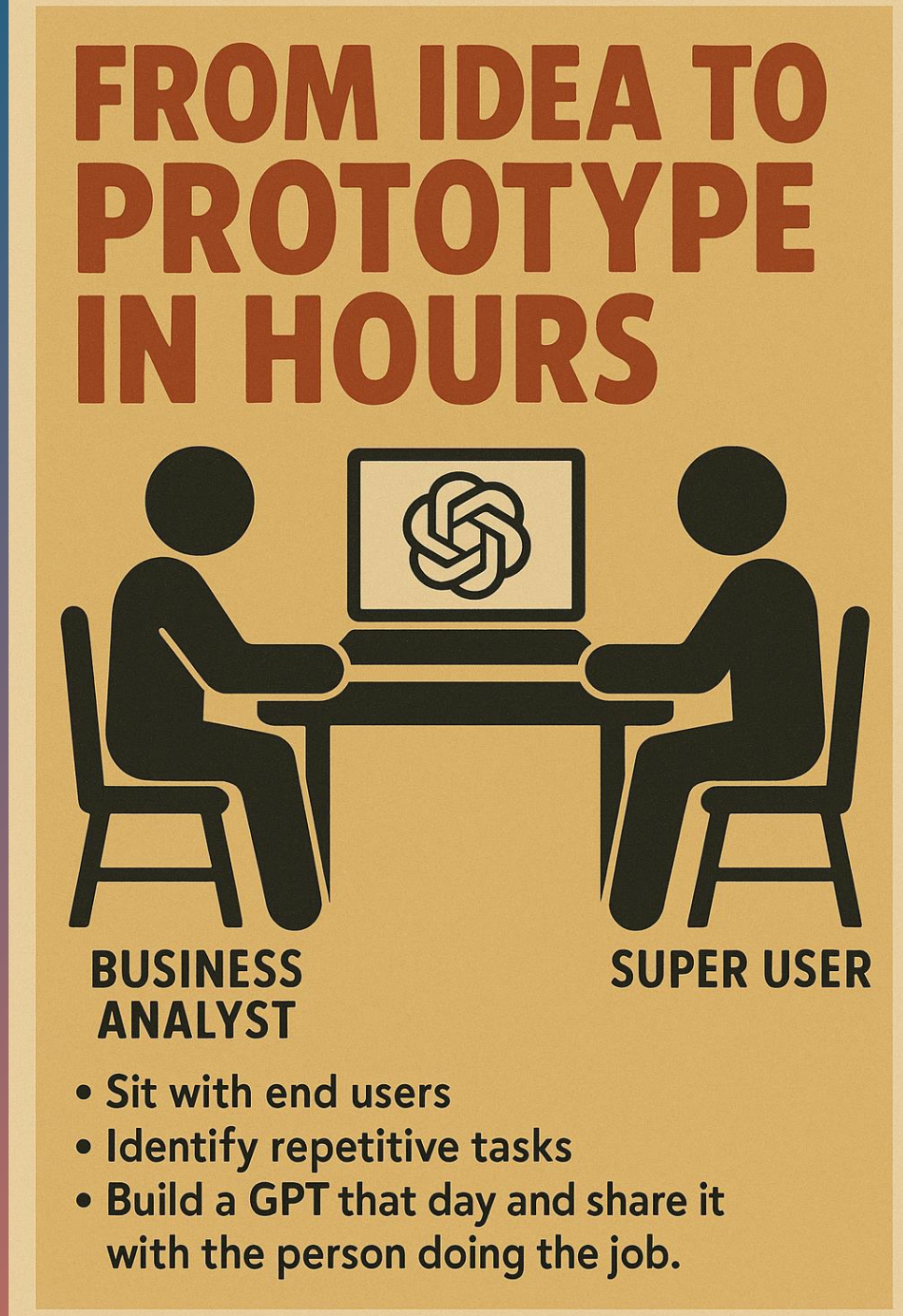
Requirements Into Projects

Projects into Services

The ML Team We Built

Four Roles To Start With

- Super Users
- Business Analysts
- Tech Governance
- ML Ops



Fast Prototyping Method

From Idea to Prototype in Hours

- Team
  - End User
  - Super User
  - Business Analyst
- Work Together to Find Value
  - Can the problem I am trying to solve be fixed by Prediction.
  - What would a solution look like.
- BA and Super User Build A GPT
- End User Starts Using It

Ideas Into Requirements

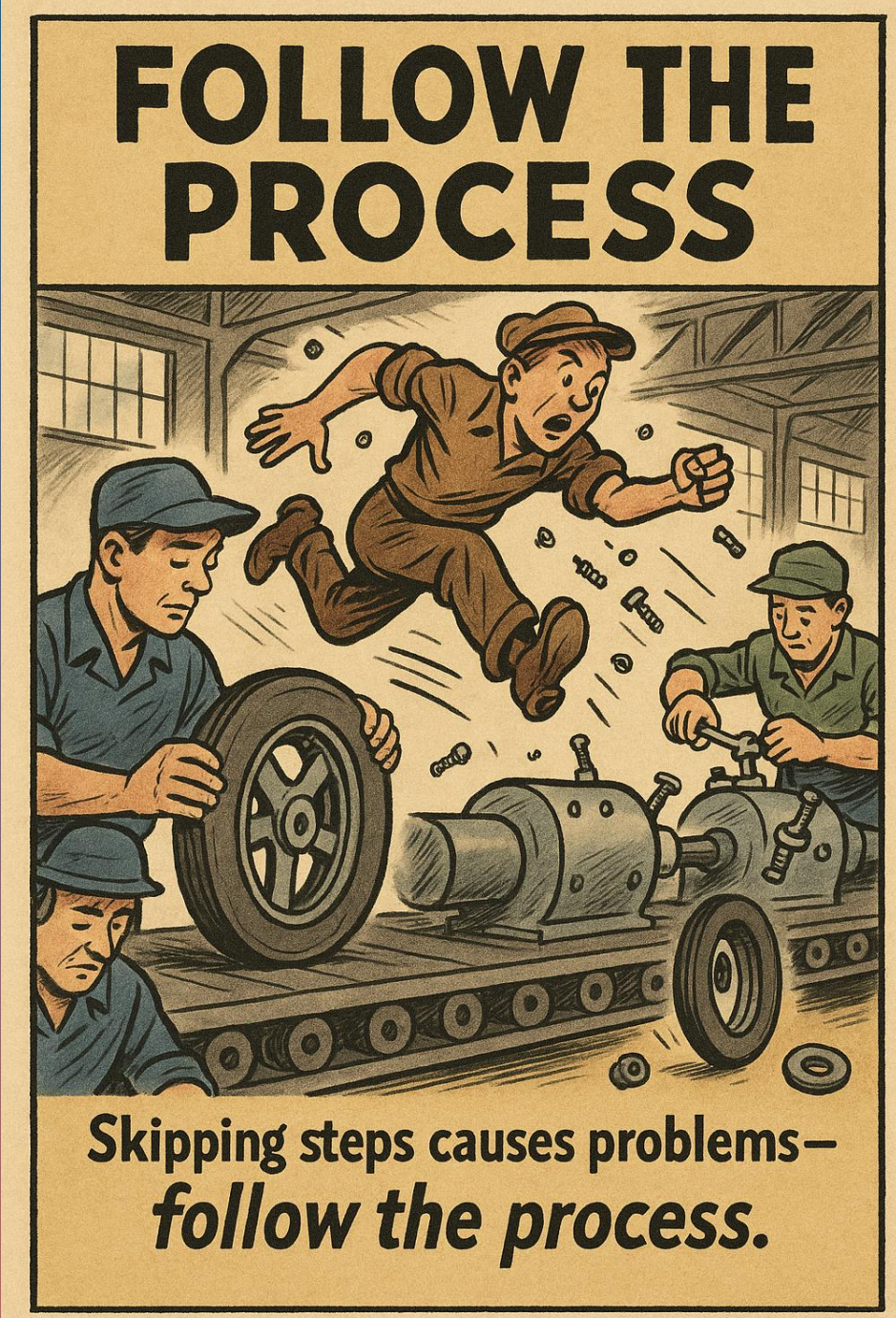
Gather the Details

- Business Processes
- Data Availability
- Value Proposition

Ranking Ideas

What Ideas Make the Cut

- Criteria in Funnel Stages
  - Is It Useful?
  - Do I Have Data?
  - Complexity of Integrations?
  - Scalability. How Big is the User Population?



Follow the Process

Use Existing Process

- Engage Project Governance Team
- Work Through Security
- Have Data Scientist Review

Major Questions

Bespoke or Off the Shelf

- Build
- Buy

Platform

- AIaaS
- Internal Architecture
- Embedded in Existing Product

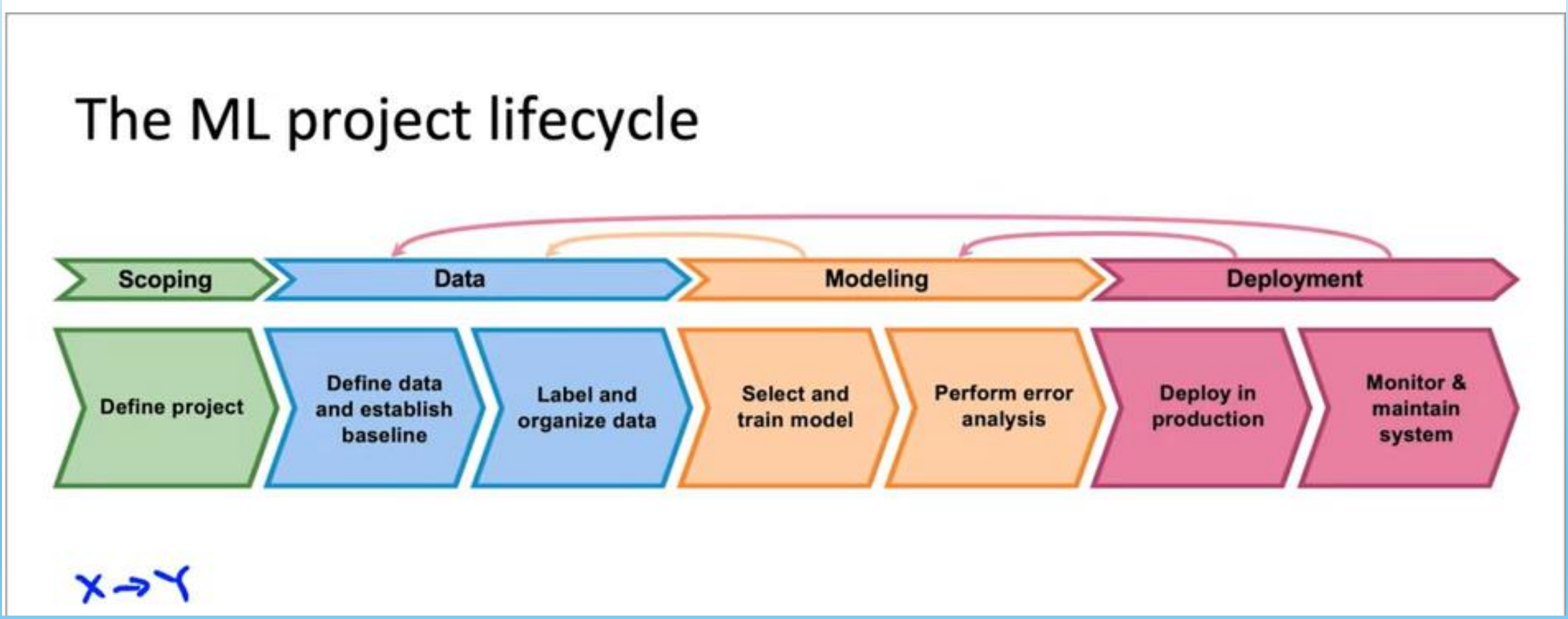
Lessons Learned

Project Lessons

- Do a Data Audit
  - Part of the RFP
  - Contract Negotiation
- Provide One Service at a Time
- Don't Overlook Reporting
- Pick Your Beta testers Carefully

Machine Learning Operations

Standing Up a Practice



Vendor Accountability

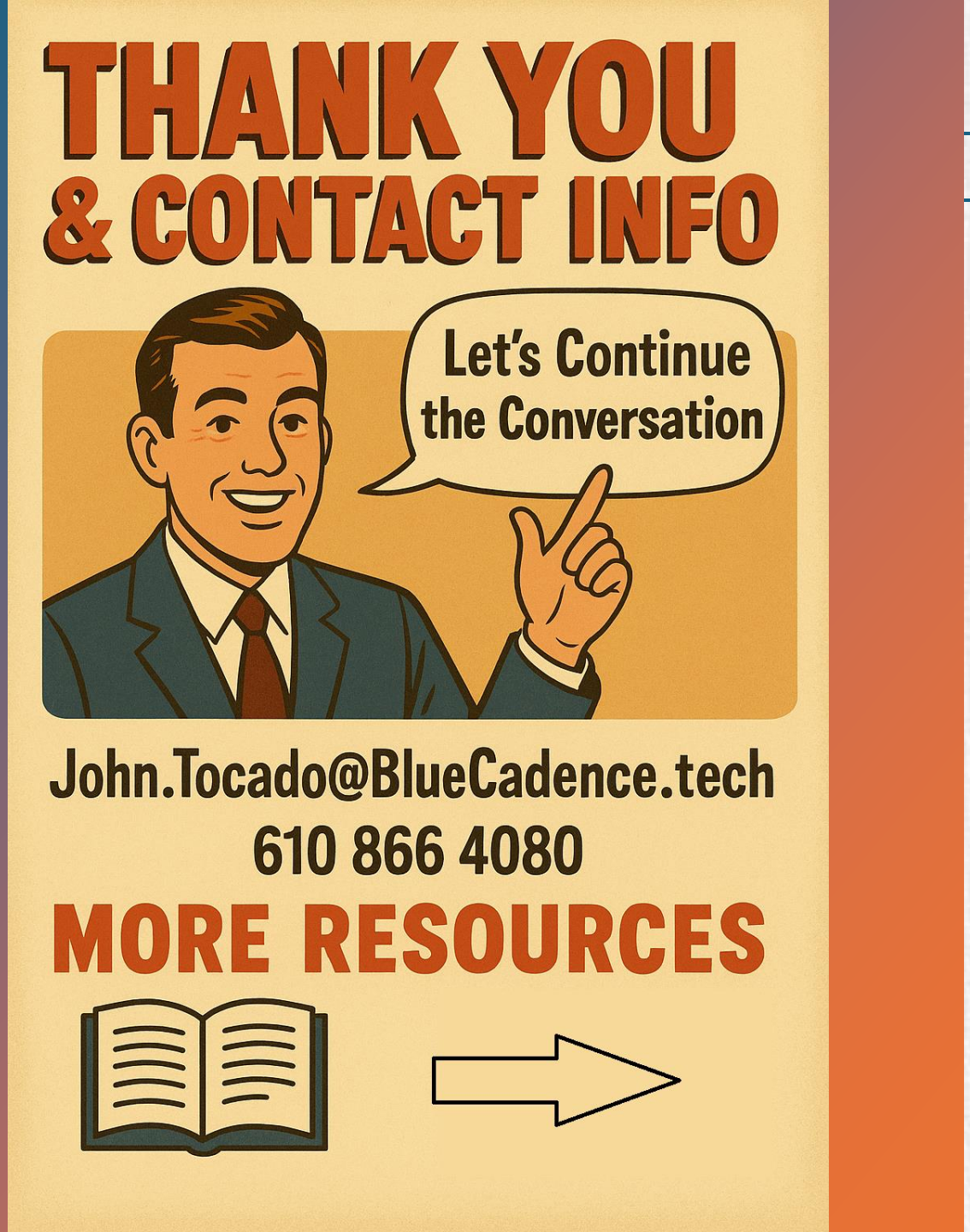
Trust but Verify

- Create Internal AI Expertise
- Maintain Independent Monitoring
- Feedback to Vendor Process

The Process

How to Avoid the Bottle Neck

- Fast Prototyping
  - Business Analyst
  - Super User
  - Human Agent
- Requirements
  - Business Analyst
  - Vetting for Value
- Projects
  - Present to Project Governance
  - Get Resources Complete Project
- Bottle Neck
  - Data Scientist and DT Resources



Thank You

Additional Resources

- Email
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- Phone
  - 610-866-4080