



Building Your AI Roadmap


From Pilot to Enterprise-Wide Adoption
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BUILDING YOUR AI ROADMAP: FROM PILOT TO ENTERPRISE-WIDE ADOPTION

OPENING – SETTING THE STAGE



"Three years ago at MIT Media Lab I got the message the 'AI's are Coming.'"

Commoditized Machine Learning

- But machine learning just might change how we solve our hardest service problems



Great at Summarizing
Great at Finding
Can't troubleshoot itself out of a paper bag.

DATA

SECTION 1 – CREATE IDEAS

Identify and Rank AI Opportunities

1. Change in Mindset
Shift in Mindset
Not Magic - Prediction
2. Fast Prototyping Process -
 - Pair a business analyst with super users
 - Build quick prototypes
3. Example Wins --
 - Email writing GPT.



SECTION 2 – TURN IDEAS

Goal: Document what it will take.



SECTION 3

TURN REQUIREMENTS into PROJECTS

Goal: Evaluate capabilities, data infrastructure, and change management

- Reporting
- Machine Learning Operations
- Feedback to the Vendor –



CLOSING – THE TAKEAWAY

- Three Keys to Success:
 1. Start with the right use cases grounded in service impact.
 2. Roll out in phases - learn, adapt And scale
 3. Be ready before you build - audit your data, document processes, prepare people.



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



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

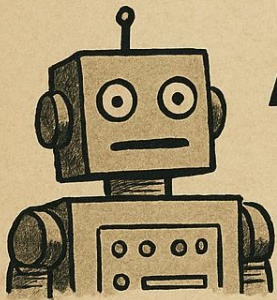


Trade Show Takeaway

John has been wrestling with Machine Learning Hype and Management Expectations for 3 years

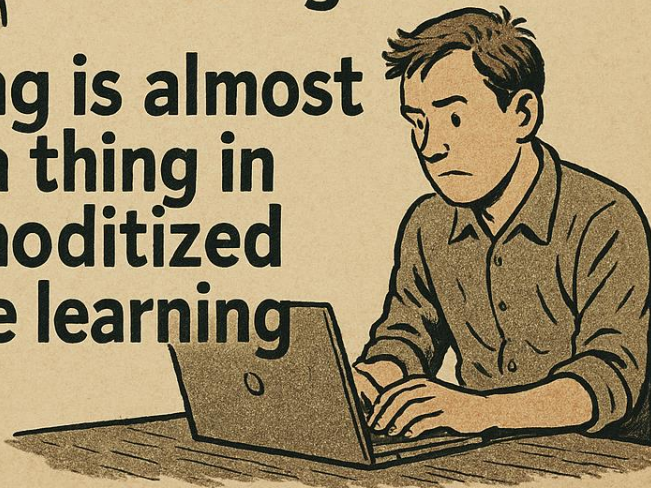
PM LESSONS LEARNED

**YOU CAN'T
MANAGE
MAGIC**



**AI is artificial
but it is not
intelligent**

**Training is almost
not a thing in
commoditized
machine learning**



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.

PM LESSONS LEARNED

**We don't NEED
ALL the
Features**



**Great at
Summarizing**



**Great
at Finding**



**Can't troubleshoot
itself out of a
paper bag.**



Lessons Learned

Proof of Concept

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

AI IS A PREDICTION MACHINE.

**Not Magic. Not Intelligent.
Just Predictions.**



- AI predicts outcomes.
- Predictions drive better service
- Start with: “What can we predict?”

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

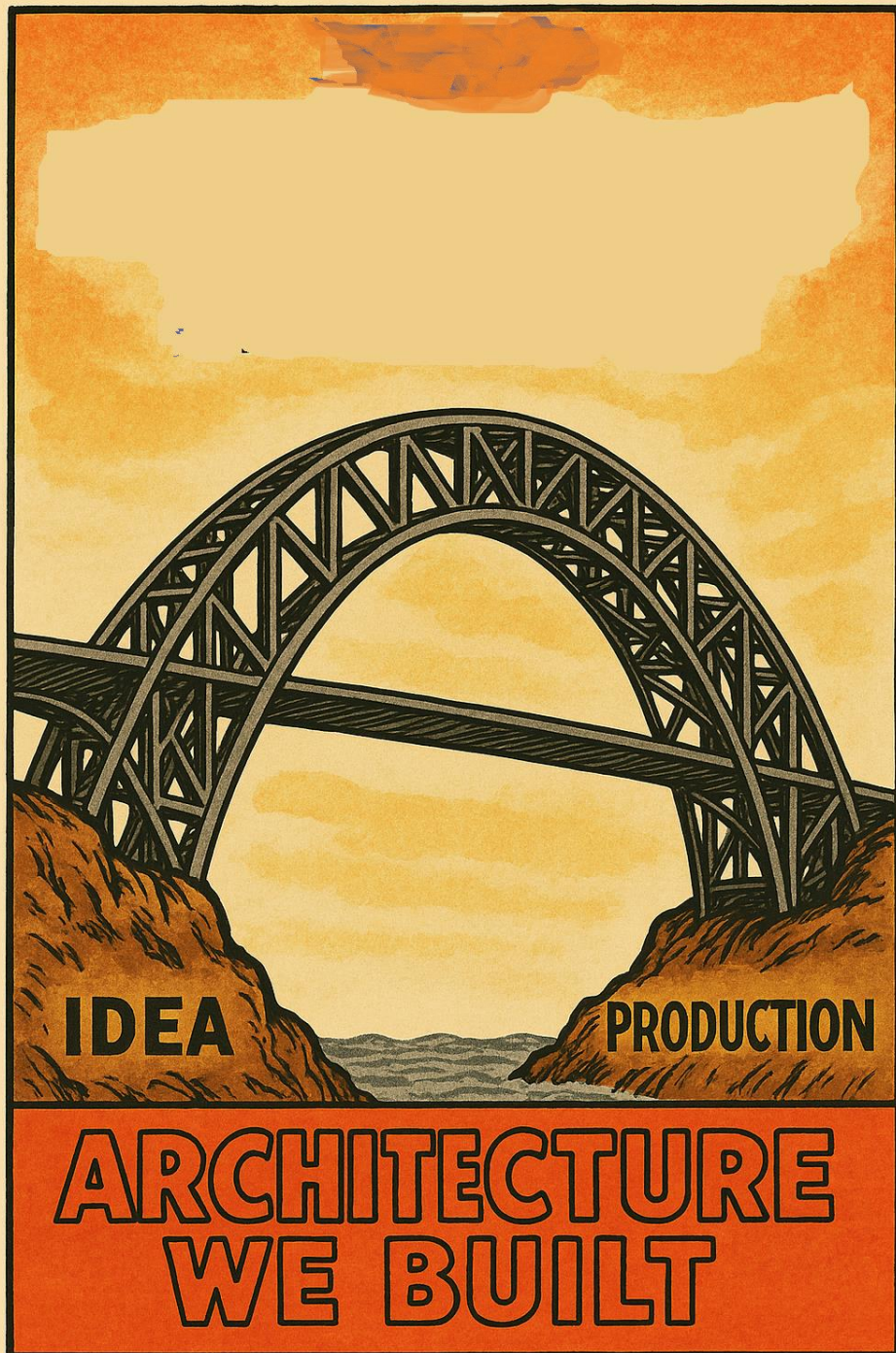
- TO TAKE OWNERSHIP OF A PROBLEM
- TO CARE
- TO MANAGE RISKS
- WHEN IT IS THE RIGHT THING TO DO.

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 Manage 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

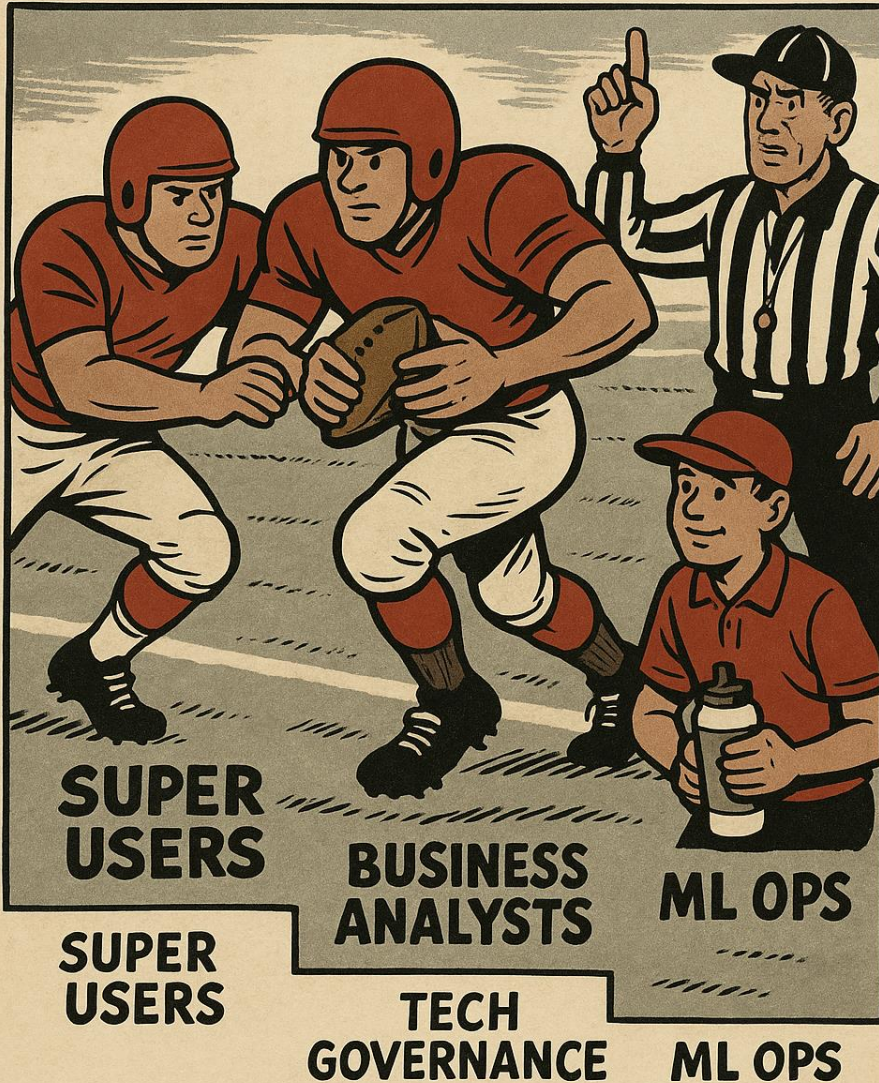
Ideas Into Requirements

Requirements Into Projects

Projects into Services

THE ML TEAM

YOU ACTUALLY NEED



The ML Team We Built

Four Roles To Start With

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

FROM IDEA TO PROTOTYPE IN HOURS



BUSINESS ANALYST

SUPER USER

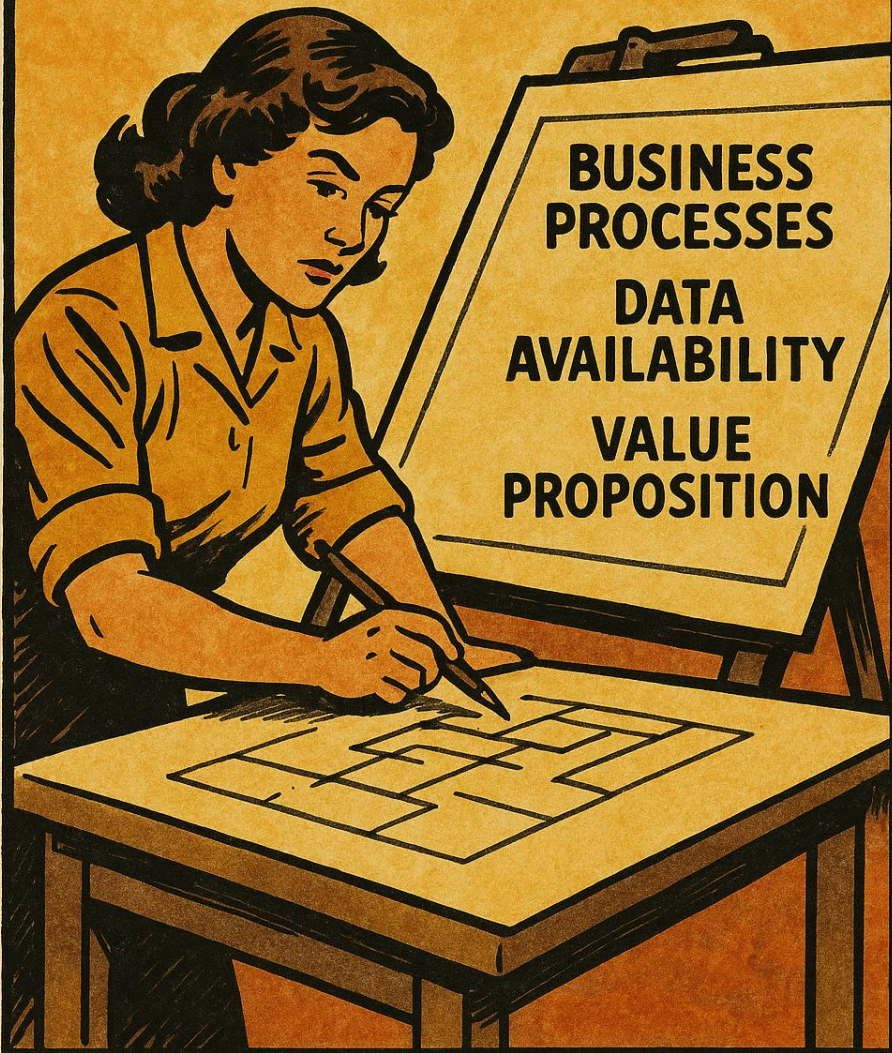
- Sit with end users
- Identify repetitive tasks
- Build a GPT that day and share it with the person doing the job.

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

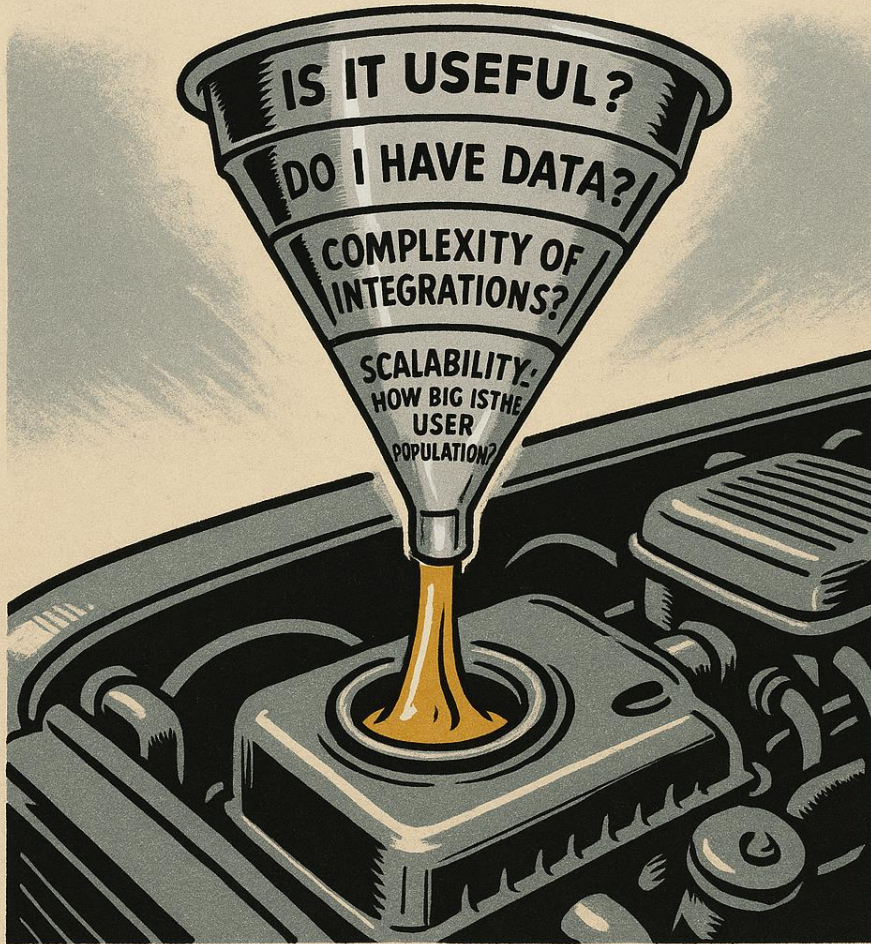


Ideas Into Requirements

Gather the Details

- Business Processes
- Data Availability
- Value Proposition

WHICH IDEAS MAKE THE CUT?



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

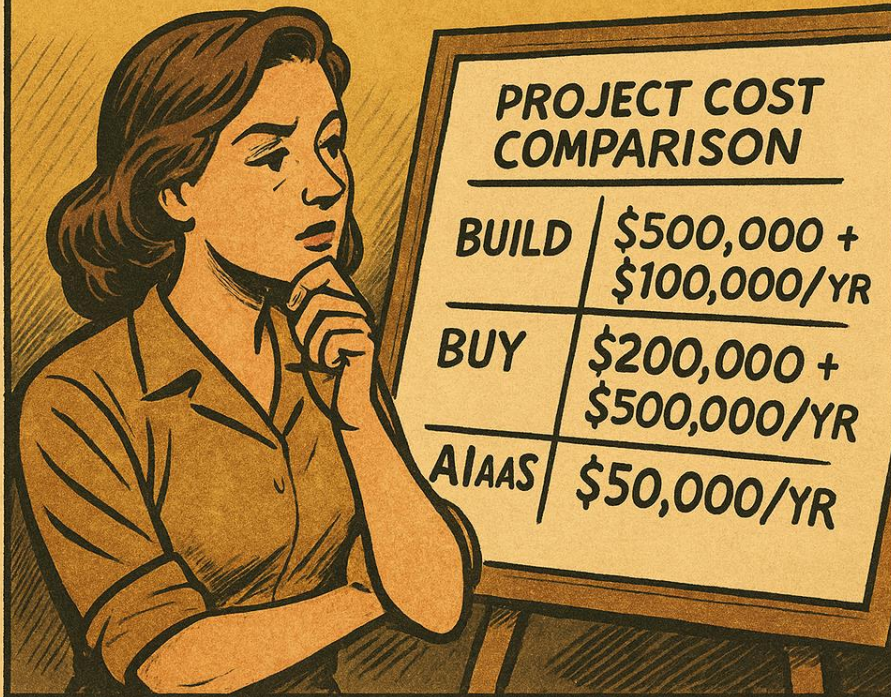


**Skipping steps causes problems—
*follow the process.***

Follow the Process Use Existing Process

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

MAJOR QUESTIONS: DO I BUILD? DO I BUY? DO I USE AlaaS?



Major Questions

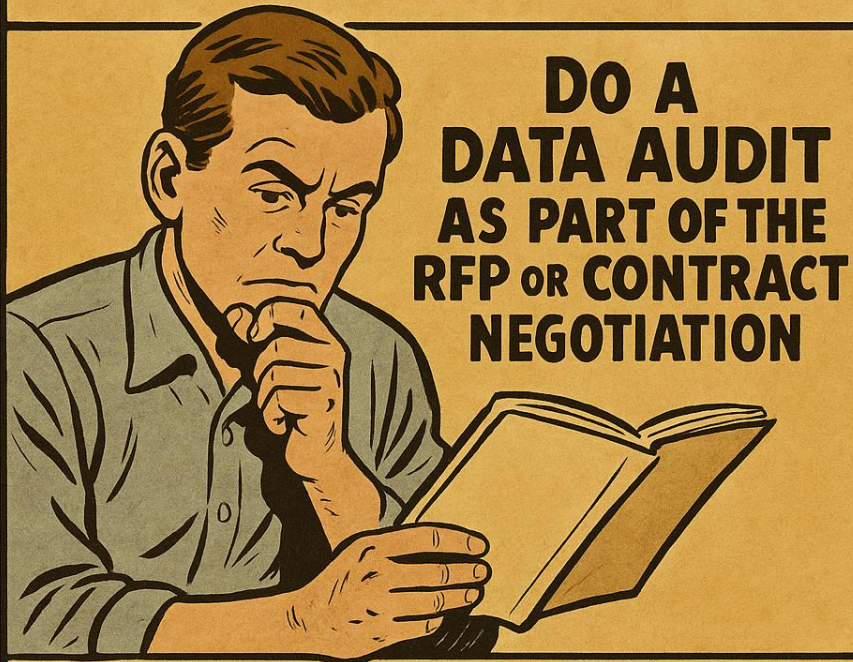
Bespoke or Off the Shelf

- Build
- Buy

Platform

- AlaaS
- Internal Architecture
- Embedded in Existing Product

LESSONS LEARNED



- **PROVIDE ONE SERVICE AT A TIME TO THE END USER**
- **DON'T OVERLOOK REPORTING**
- **PICK YOUR BETA TESTERS CAREFULLY**

Lessons Learned

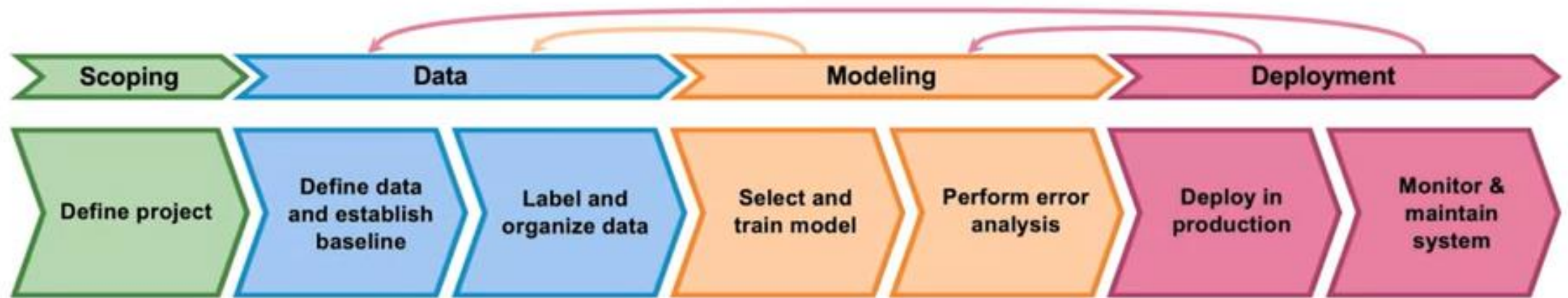
Project Lessons

- 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

The ML project lifecycle



$X \rightarrow Y$

VENDOR ACCOUNTABILITY

TRUST BUT VERIFY

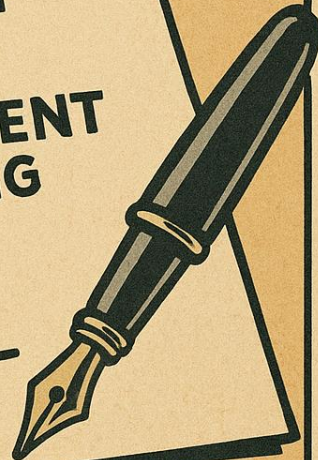
CONTRACT

KPI CHECKLIST

☒ KEEP OR BUILD
INTERNAL AI
EXPERTISE

☒ INDEPENDENT
MONITORING

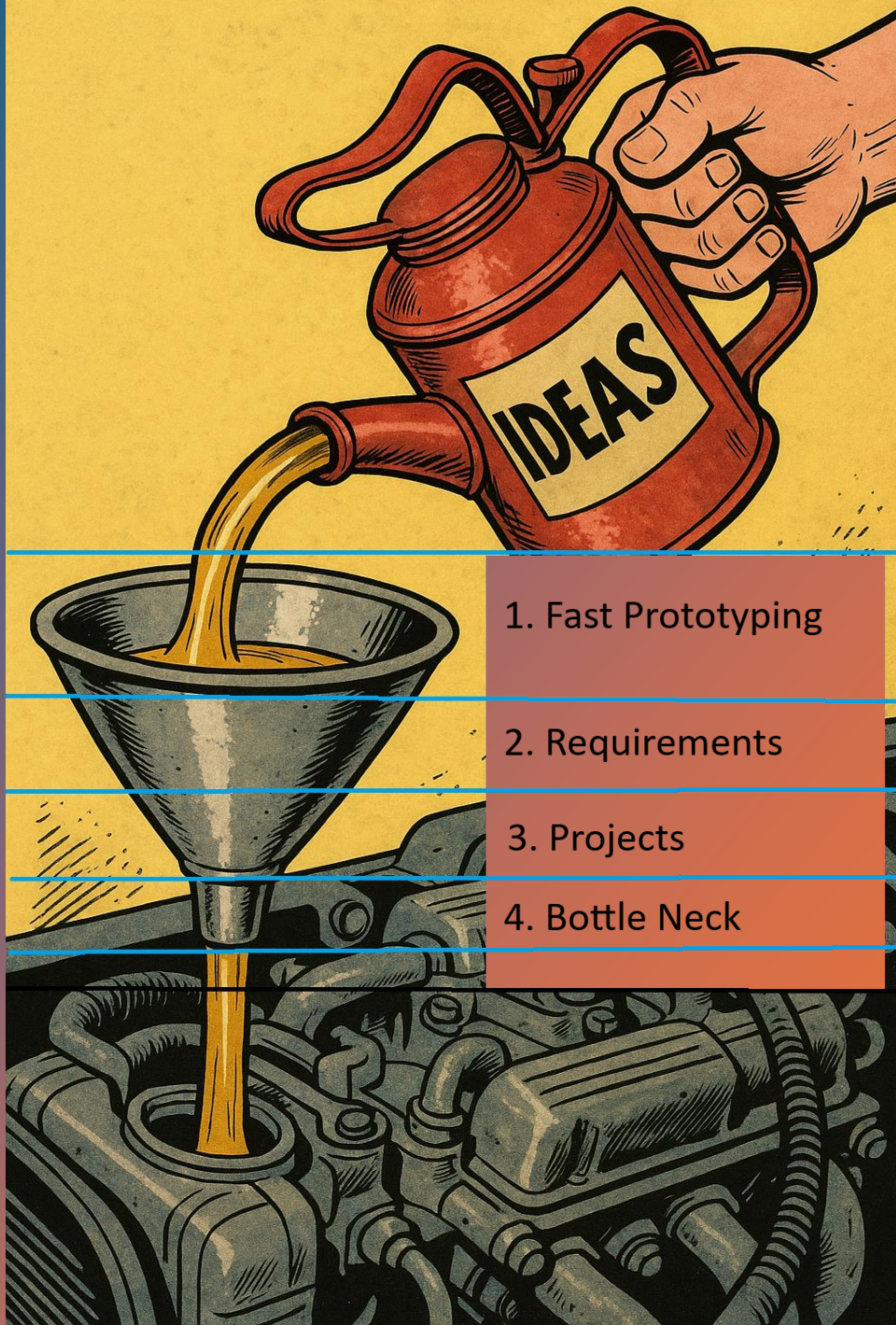
Adrian



Vendor Accountability

Trust but Verify

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



The Process

How to Avoid the Bottle Neck

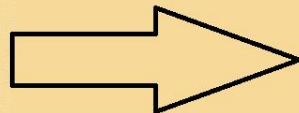
- Fast Prototyping
 - Business Analyst
 - Super User
 - Human Agent
- Requirements
 - Business Analyst
 - Vetting for Value
- Projects
 - Present to Project Governance
 - Get Resources Complete Project
- Bottle Neck
 - Data Scientist and DT Resources

THANK YOU & CONTACT INFO



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MORE RESOURCES



Thank You

Additional Resources

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