



# 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



- 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



SECTION 3  
TURN REQUIREMENTS into PROJECTS  
Goal. Evaluate capabilities, data infrastructure, and change management

2. Fast Prototyping Process -
  - Pair a business analyst with super users
  - Build quick prototypes

3. Example Wins --
  - Email writing GPT.

• 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

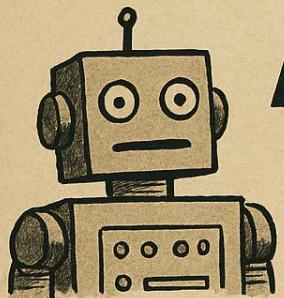


Trade Show Takeaway

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

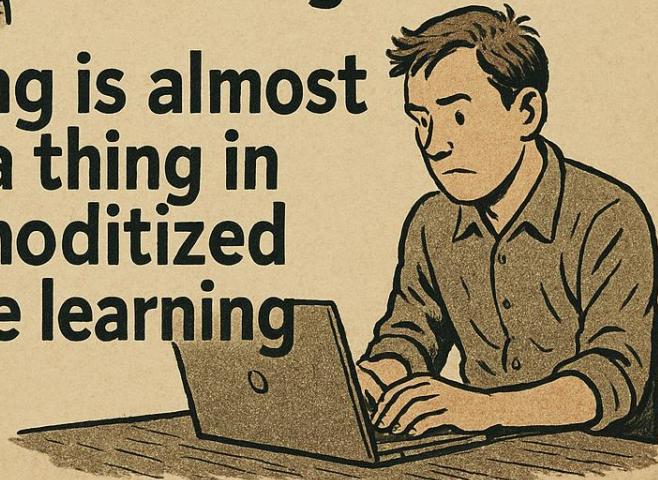
# PM LESSONS LEARNED

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

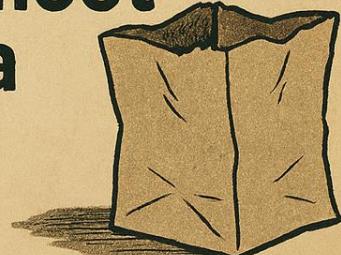


Great at  
Summarizing



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

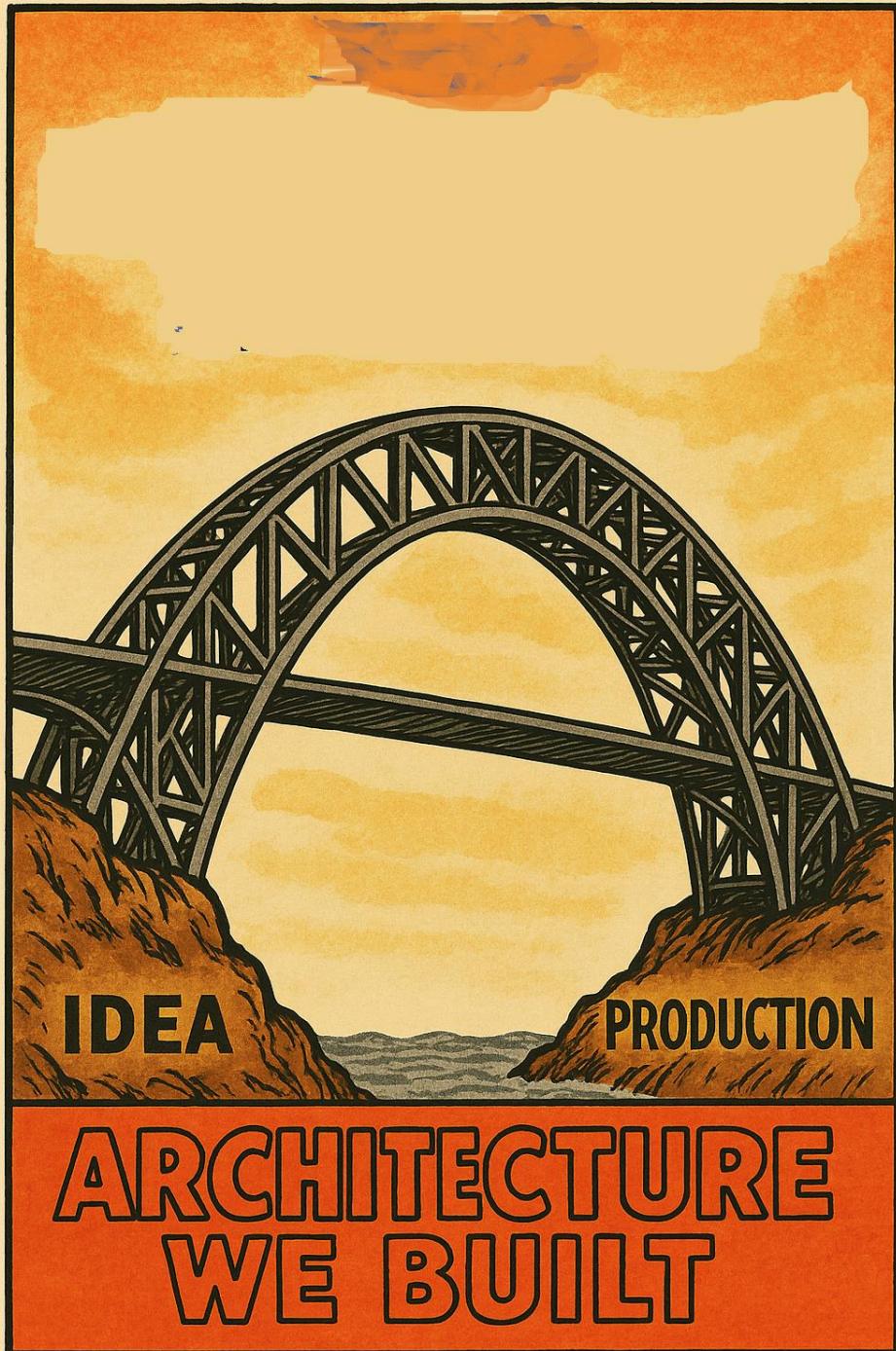
- TO TAKE OWNERSHIP OF A PROBLEM
- TO CARE
- TO MANAGE RISKS
- WHEN IT IS THE RIGHT THING TO DO.

## 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

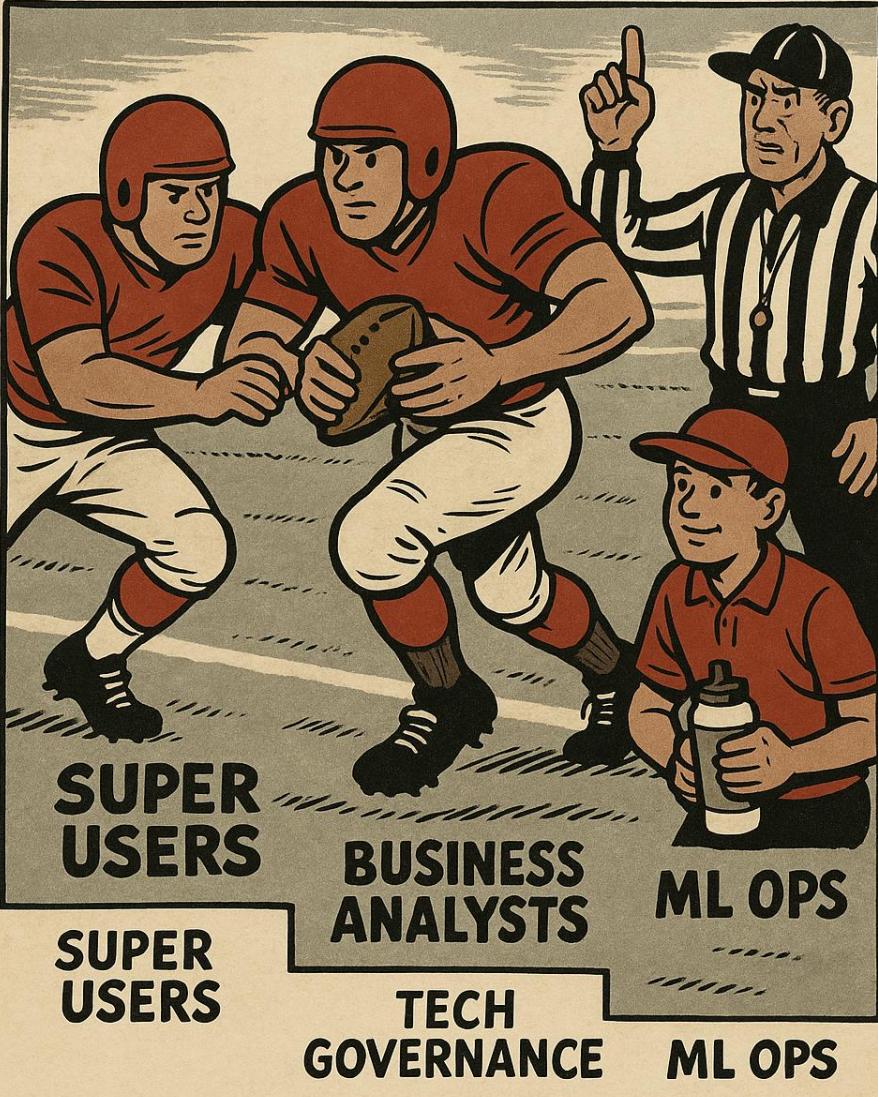
Create Ideas

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



- 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

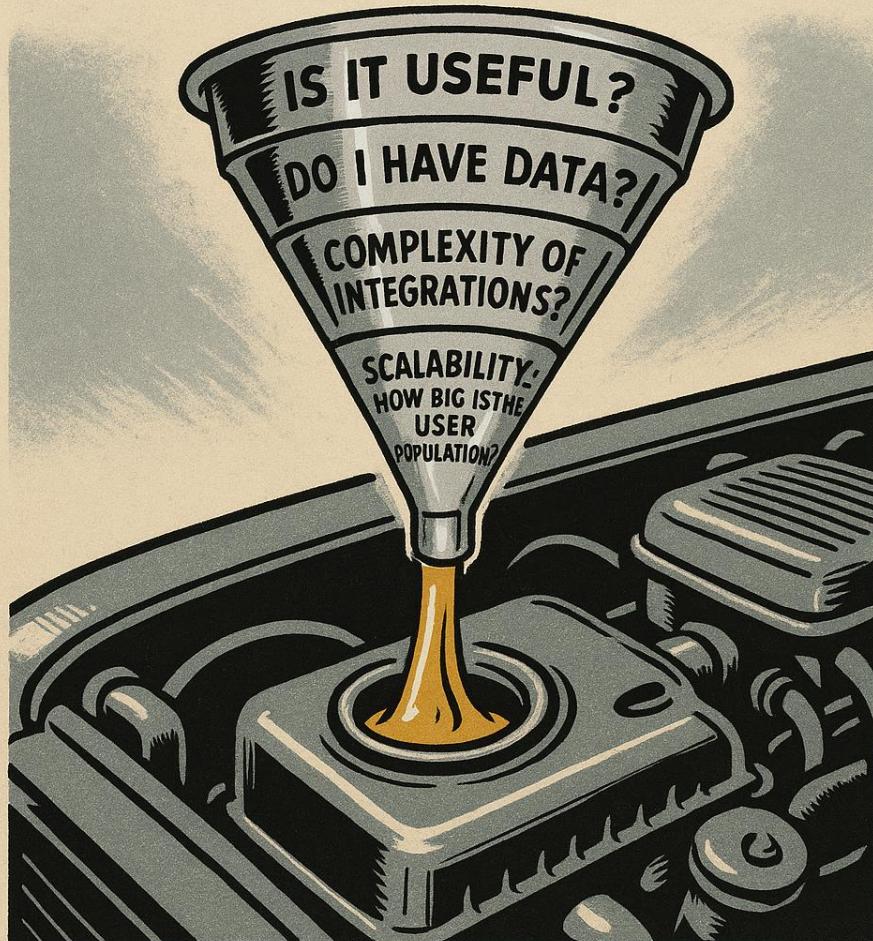
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## Gather the Details

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- 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

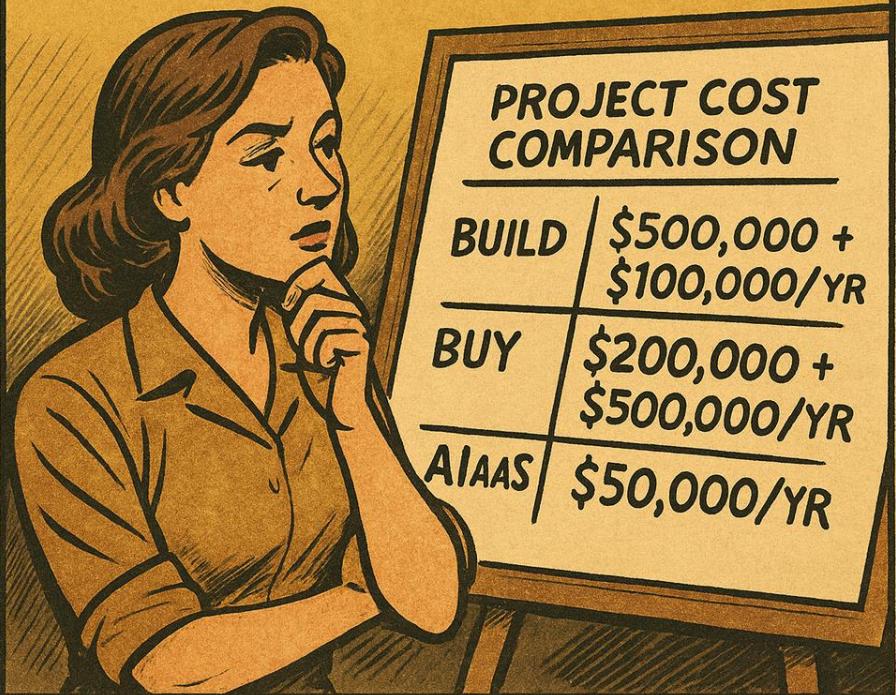
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## Use Existing Process

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- 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

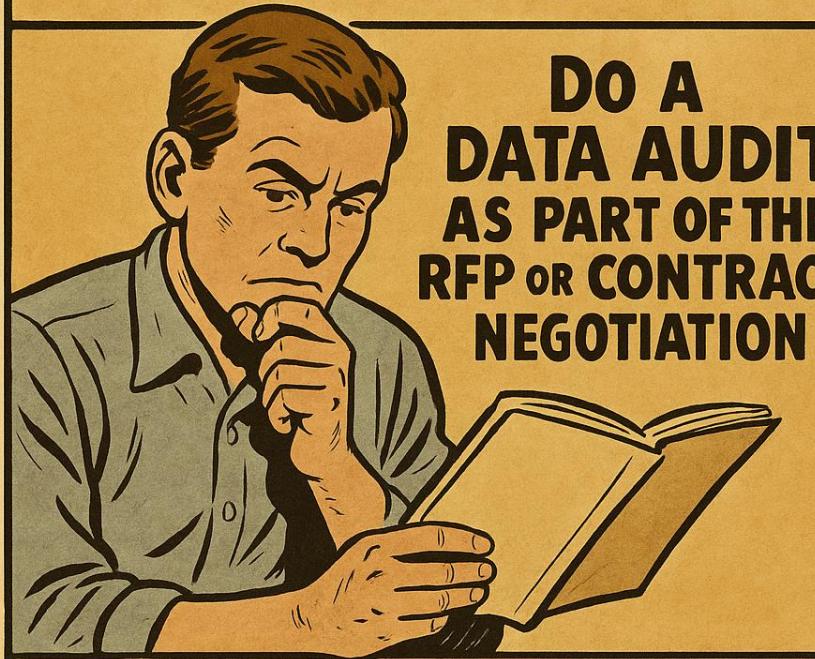
Bespoke or Off the Shelf

- 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

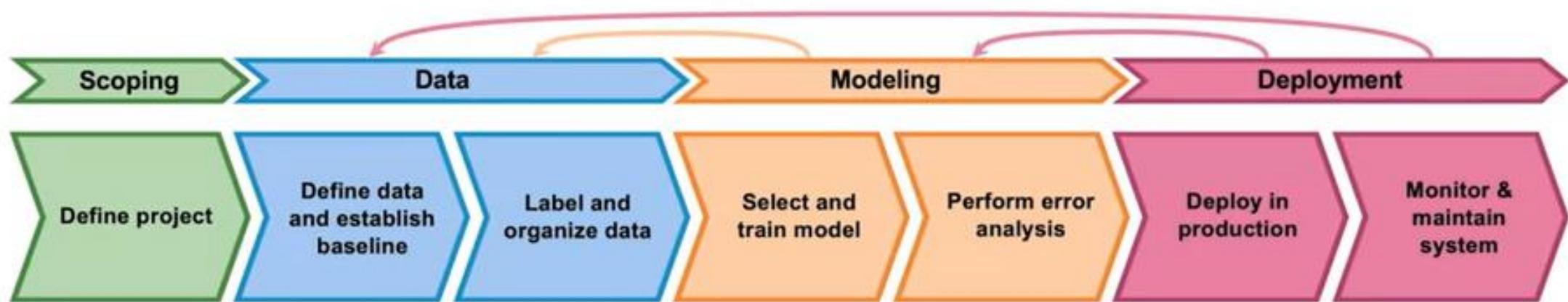
### Project Lessons

- 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

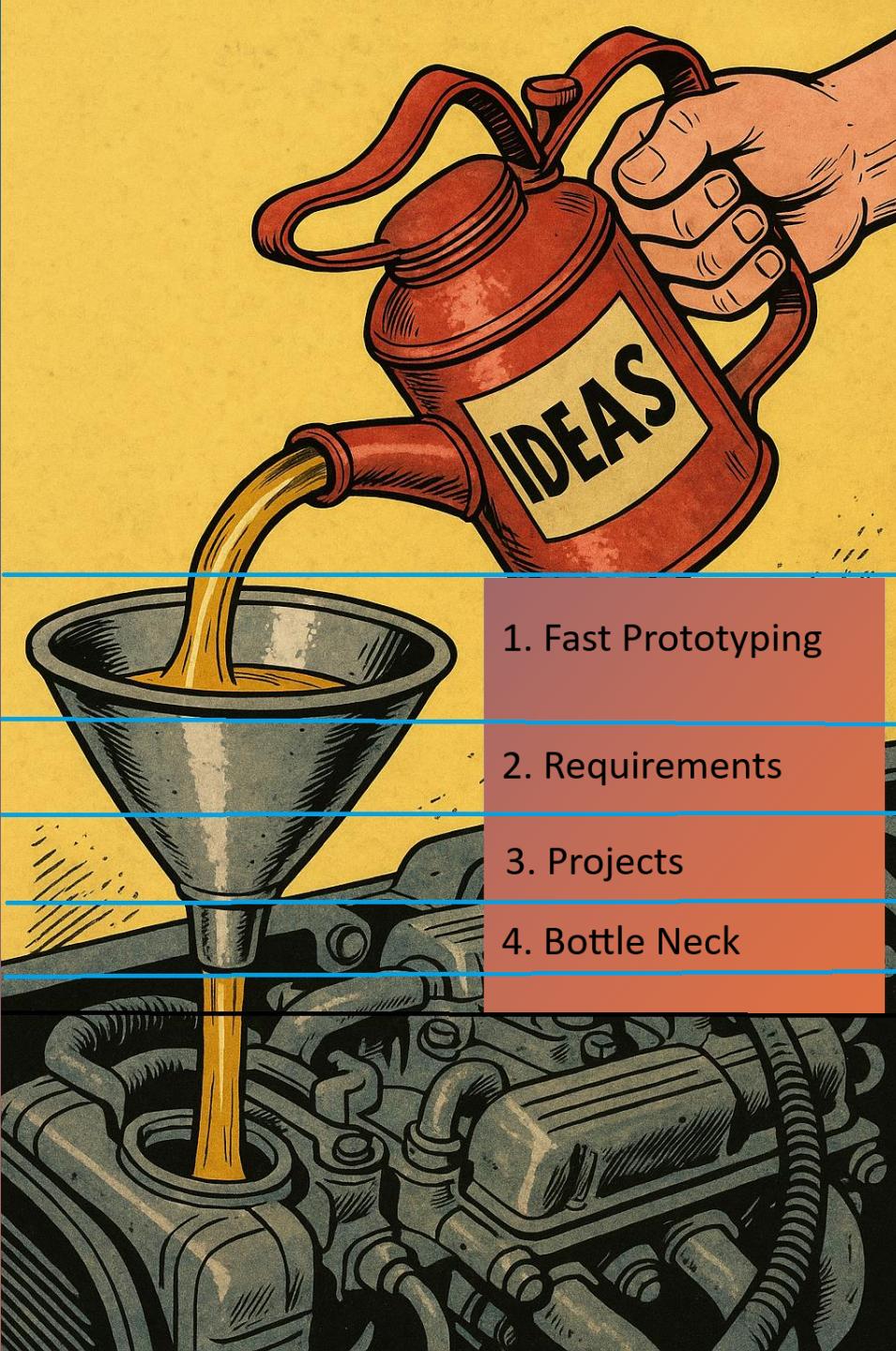
*John*



## 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

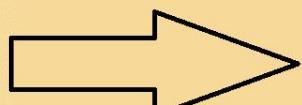
# THANK YOU & CONTACT INFO



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## MORE RESOURCES



# Thank You

## Additional Resources

- Email
  - [John.tocado@BlueCadence.tech](mailto:John.tocado@BlueCadence.tech)
- Phone
  - 610-866-4080

