



GenAI Planning Workbook

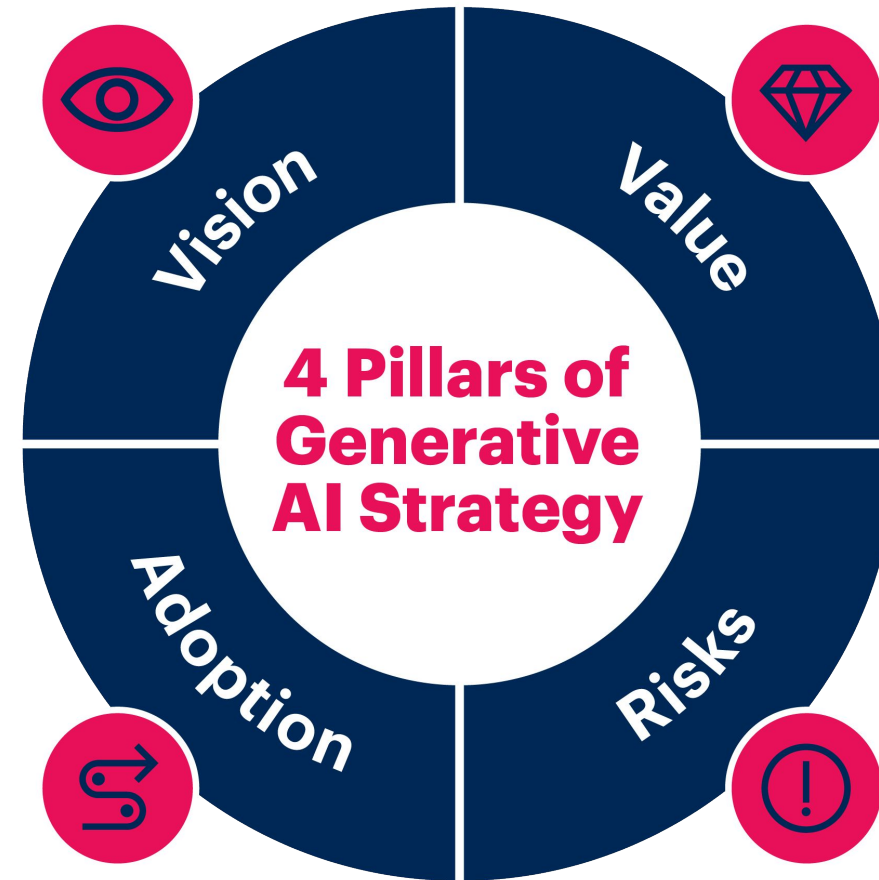
4 steps to implementing
generative AI in your enterprise

Focus GenAI conversations on real business problems and achievable use cases

Generative AI (GenAI) is suddenly on everyone's radar, but some organizations already have extensive experience and success in deploying AI techniques across multiple business units and processes.

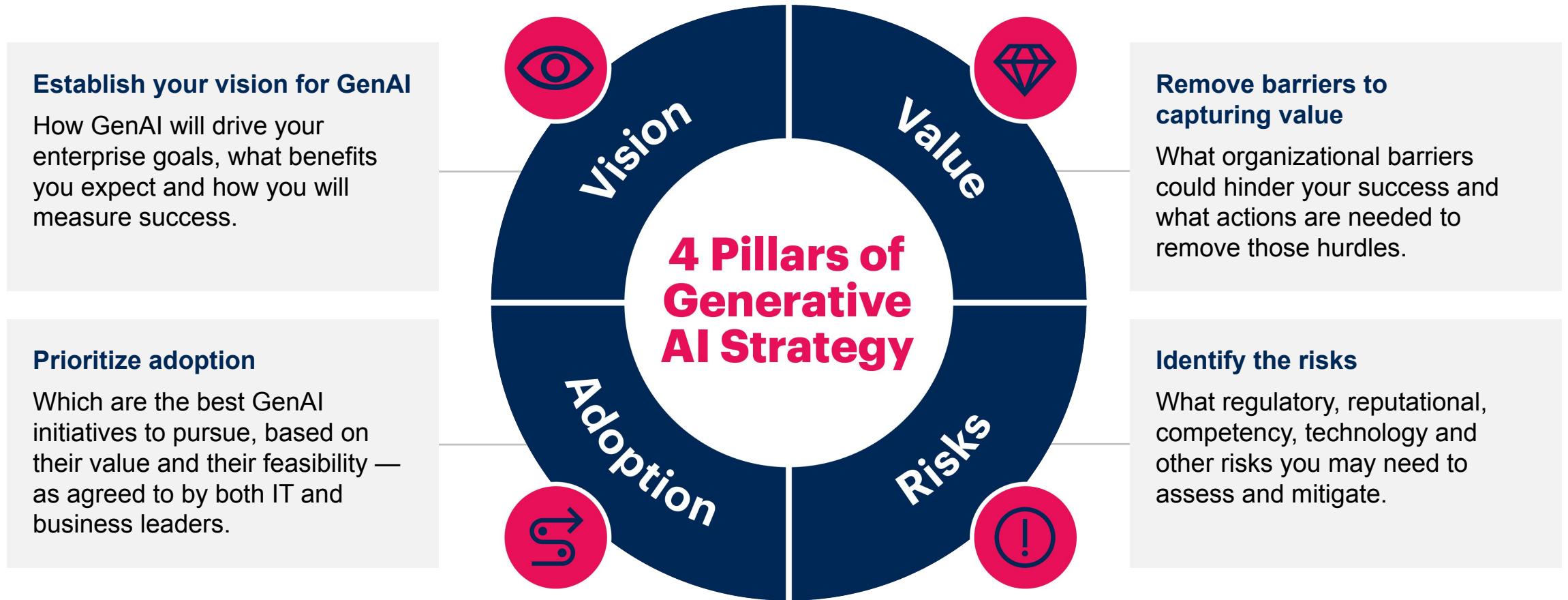
Gartner research shows these mature AI organizations represent just 10% of those currently experimenting with AI, but would-be GenAI adopters can learn a lot from them.

Use this planning workbook to focus conversations among business and IT leaders around best practices that help you focus on GenAI initiatives that are both valuable and feasible. To get there, take a strategic approach.



Source: Gartner 2422900

Actions related to the 4 pillars of GenAI strategy



Source: Gartner 2422900

Key components of your AI strategy framework



Vision

- Goals
- Benefits
- Success metrics



Value

- Business impact
- Change management
- People and skills



Risks

- Regulatory
- Reputational
- Competency



Adoption

- Use cases and value maps
- AI decision framework
- Decision governance

First, state clearly how GenAI objectives link to enterprise goals

Don't underestimate the need to level-set with stakeholders from the outset:

1. Restate the corporate vision of your enterprise:
“ ”
2. State how AI will support that vision:
 - e.g., AI will enable better business value in these areas in these ways
 - e.g., We will use AI to achieve fairer outcomes



Stating AI goals clearly is key to encouraging and enabling organizationwide fluency and adoption of AI. It will also help you to fund the right use cases — ones that will deliver clear return on investment and lead to further innovation.

Then, specify how GenAI will drive business goals

Ask why you are pursuing GenAI and what value you expect it to bring based on your major business goals, how you will measure success and what use cases could maximize that value (you will verify the value/feasibility of those use cases in the “adoption” phase).

Illustrative

Goal	How AI/GenAI Enables That Goal	Use Cases to Pursue (Illustrative Examples)
Topline revenue growth	Business model change inspired or supported by AI creates net-new business initiatives.	Behavioral analytics, contract life cycle management
Improved customer satisfaction	Greater ability to conduct customer behavior analytics increases proximity to the customer.	Virtual customer assistants
Reduced costs	Task and process automation reduce operational costs.	Risk/fraud mitigation, asset performance management
Staff augmentation and increased productivity	Augmented AI and automation increase productivity by shifting people away from managing mundane tasks.	Knowledge management and training, content generation, code generation
Improved service availability	Data-driven predictive analytics tools advance digital services.	Predictive maintenance, proactive threat management

Also, set AI success metrics

To measure the value of individual use cases, you'll need success metrics that tie into your overarching business goal. Select metrics like those listed here that relate to specific key success factors and provide a timeframe in which you expect to demonstrate value.

Business Goal	Appropriate Success Metric	Completion
Improved customer satisfaction	Customer satisfaction index/Net Promoter Score	Date
Topline revenue growth	Revenue growth for product lines	Date
New business initiatives	Number of new business initiatives	Date
Task or process automation	Reduction in processing time	Date
Reduce costs	Reduction in CapEx and OpEx	Date
Staff augmentation and increased productivity	Workforce productivity metrics, such as time spent on value-added tasks	Date
Improved service availability	% of annual availability	Date

Remove organizational barriers to capturing value

Having identified potential benefits to the business (in the vision stage), surface any strategic concerns that could hinder your ability to capture value in the way you have identified it. Also, identify solutions, responsibilities and actions as illustrated here.

Strategic Concern	Solution	Executive(s) Responsible	What the Organization Will Do
Projects aligned to corporate goals are more likely to succeed and mature.	Document goals and require a portfolio approach to AI opportunity.	CIO	<ul style="list-style-type: none"> • Indicate which corporate goals should be addressed. • Size portfolio (five or fewer pilots and minimum viable products).
Metrics deliver credibility for project maturity.	Select metrics as proxies for financial and risk results or direct such measurements.	CFO	<ul style="list-style-type: none"> • Collaborate with your chief data and analytics officer to discuss what will be most measurable and educational for future projects.
Formal structures of accountability bolster AI results.	Help complete a RACI (responsible, accountable, consulted and informed) matrix for AI strategy development and execution.	Chief data (and analytics) officers, CIO	<ul style="list-style-type: none"> • Draft a RACI matrix for all aspects of AI project and product development.



Assess and mitigate risks

Any type of AI comes with a range of risks, including those illustrated here. GenAI carries specific new types of risks, such as hallucinations and biased and inaccurate results. Log all such major risks so you can properly assess and mitigate each.

Key Types of Risks	Risk Category	Executive(s) Responsible	Action Plan		
Regulatory	Adhere to regulations	CIO/CTO and CRO	Understand the continuously evolving regulatory landscape.	Enable collaboration between AI practitioners and legal, risk and security members to evaluate use case feasibility and acceptable risks.	Create an AI governance office, which serves an independent audit committee to review results.
Reputational	Secure and safe	CIO/CTO	Acknowledge the threats against AI posed by both malicious and benign actors in your organization.	Bolster security across enterprise security controls, data integrity and AI model monitoring.	Leverage external resources to help secure your AI systems.
Competencies	Technical debt	CIO/CTO	Align AI strategy with cloud strategy and explore cloud as foundation for AI.	Create a technology roadmap to modernize data and analytics infrastructures to align with AI goals and timeline.	Create a startup accelerator program to reduce technical debt and innovate incrementally.

Prioritize projects that are valuable and feasible

Rate the feasibility and value of each project using simple criteria like those shown here, and actually score each so you can rank projects against one another. Typically, executives are keen to pursue initiatives where value is high (and risk also tends to be high, i.e., feasibility is low) but avoid projects where feasibility is so low that it makes the project impossible. A use case with a seemingly outstanding contribution to business value and strong feasibility is either a breakthrough, or the market is missing a great opportunity.

	TECHNICAL FEASIBILITY FACTORS			BUSINESS VALUE FACTORS					
Project	Access to Labeled Data	Architecture and Technology Feasibility	Have Skills/ People to Execute	Aligns With Our Mission and Values	Sponsor Support	KPIs Measurable	Overall Business Value (Scale of 1 to 10; 10 Being High)	Overall Technical Feasibility (Scale of 1 to 10; 10 Being High)	Ranking
Name	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No			
Name	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No	Yes/Maybe/No			
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Essential GenAI webinar series for business leaders

Watch our complimentary four-part, on-demand webinar series outlining how you can set up your organization with a successful GenAI strategy.



How to Start Your Generative AI Journey

Session 1: Vision

Find out what 5.2K+ viewers learned about the benefits and limitations of GenAI.

Watch Now



Generative AI's Impact On Your Industry

Session 2: Value

Find out what 5.2K+ viewers learned about the benefits and limitations of GenAI.

Watch Now



Generative AI's Impact on Governance and Policy

Session 3: Risk

Discover what 1.7K+ viewers learned about key decisions in determining cross-functional GenAI policies and governance.

Watch Now



Apply Generative AI for New Competitive Advantages

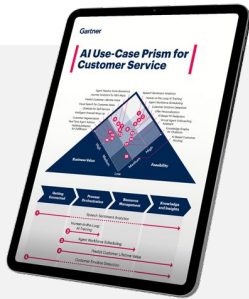
Session 4: Adoption

Be among 2.7K+ viewers who discovered how to apply GenAI in their organization to establish new competitive advantages.

Watch Now

Actionable, objective insight

Position your organization for success. Explore these additional complimentary resources and tools for your function:



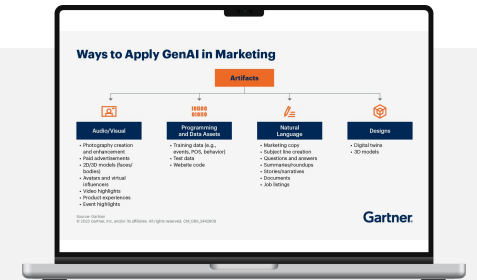
Customer Service/Support



Finance



Human Resources



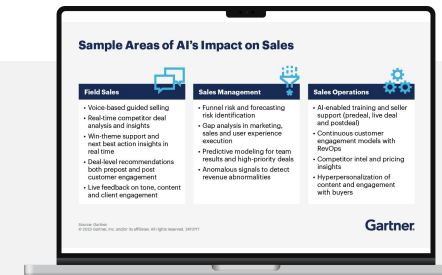
Marketing



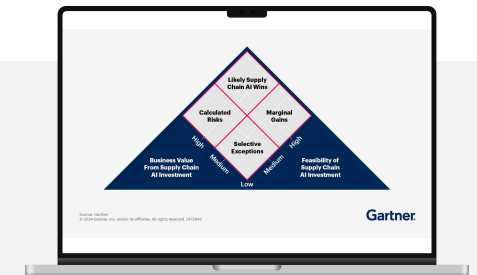
Legal & Compliance



Audit/Risk



Sales



Supply Chain

Actionable, objective insight

Position your IT organization for success. Explore these additional complimentary resources and tools for IT leaders:

Resource Center



The Top Generative AI Questions Answered by Gartner Experts

Access benefits, applications and risks of generative AI.

[Learn More](#)

Webinar



Beyond the Hype: The Practical Applications & Use Cases of Generative AI

Explore the future of generative AI and understand the many use cases.

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eBook



Augmenting Decisions With Artificial Intelligence

Decision automation can drive competitive advantage. Know when and how to use it.

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