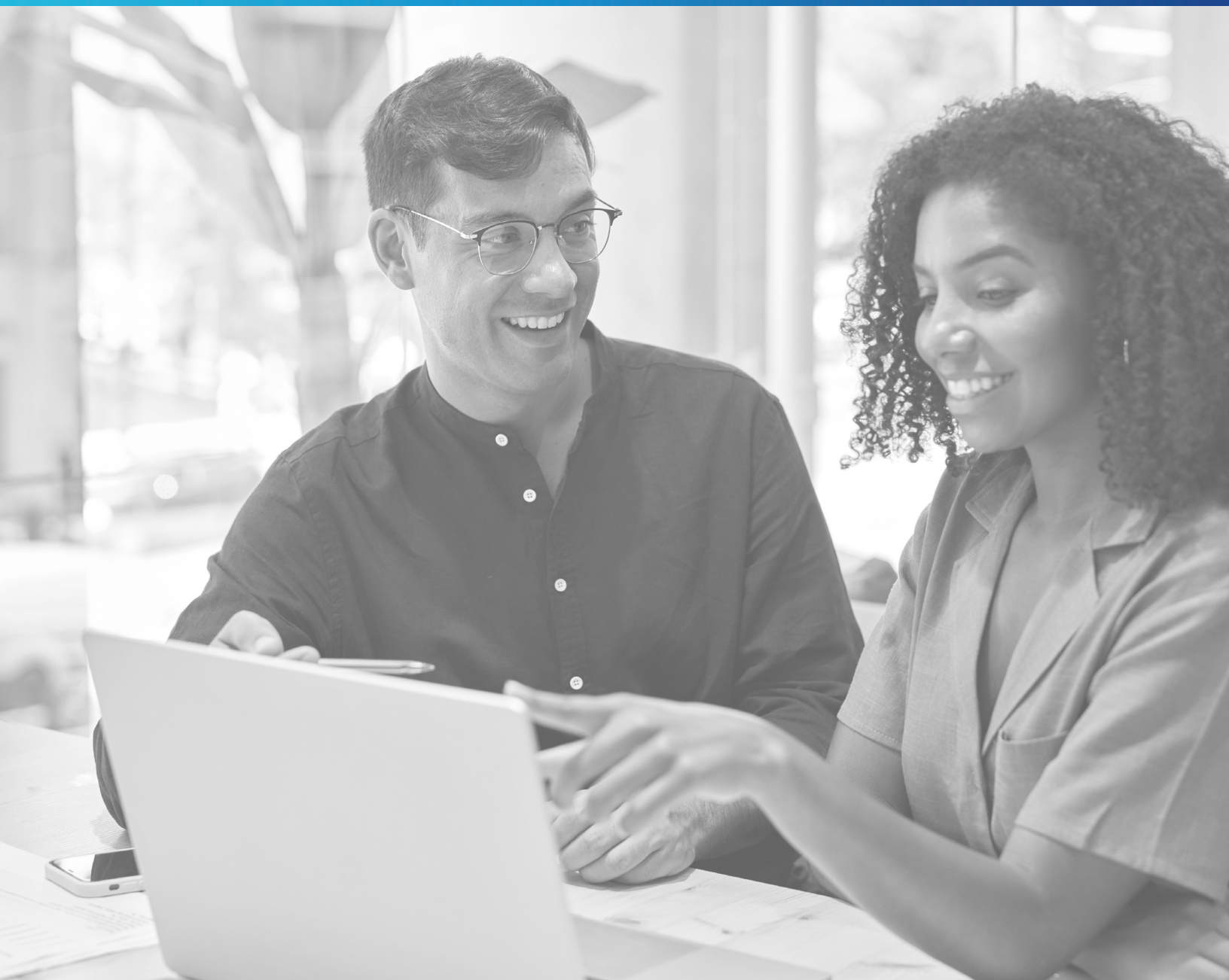




From Vision to Value

Building Profitable AI Foundations



Welcome to From Vision to Value: Building Profitable AI Foundations

AI has become a buzzword, often generating excitement just by being mentioned. But for many small and mid-sized businesses, the real challenge is knowing where to start.

Some organizations are eager to explore AI, while others are unsure of what's possible—but most want practical direction, not hype.

This booklet is for leaders who want to align AI with their goals and see real outcomes. We'll cover how to move from concept to execution and build a strong, profitable AI foundation.

Further Resources can be found at:

[Mytech.com/ai-resources](https://mytech.com/ai-resources)

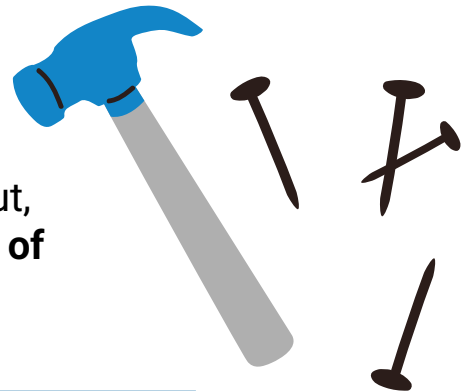


AI Is Merely a Tool

At its core, artificial intelligence (AI) is **simply a tool**. Like any other technology or system considered for a business, it should be evaluated with clear intent and purpose. Just as you would not adopt a new platform or process without a solid business case, the same standard should apply to AI.

There must be a reason for using it, a specific problem to solve or an opportunity to pursue. One guiding principle to keep in mind is this: **do not spend \$20,000 to solve a \$10,000 problem**. The investment should always align with the value it creates.

Just like a hammer can drive nails, pull them out, or even break something apart—**AI has a range of applications.**



It is also important to acknowledge that, like any tool, AI can be used for both good and bad. Consider the hammer. It can be used to build a home or to cause harm. The same is true of AI. There are individuals and organizations that will misuse it, just as there are many who will use it to improve how they serve clients, streamline operations, and enhance efficiency.

The difference lies not in the tool itself but in how and why it is used. When guided by thoughtful strategy and ethical intent, AI can become a powerful asset in building a stronger and more effective organization.



1

AI Vision & Guidelines

[Download A Sample AI Company Policy](#)



Defining your AI vision and guidelines is a critical first step in building a secure, strategic foundation. Start by asking: What is our organization's vision for how AI should be used? Some organizations limit AI to public data to reduce confidentiality risks. Others—especially in regulated industries—must align usage with compliance and data handling rules.

Consider your overall approach. Will you build AI in-house or use existing tools? There's no single right answer, but a clear direction ensures consistency and minimizes risk.

AI is likely already in use within your organization. Employees may be using free tools without understanding the risks—possibly entering sensitive data into unsecured platforms. It's essential to define what's considered confidential and set clear guidelines for responsible use.



Once your vision is in place, communicate it. Don't let it sit on a shelf—share it through meetings, policies, or informal conversations so everyone understands their role.

Finally, stay adaptable. AI is evolving fast, and your strategy should evolve with it. Keep your vision active and responsive to change.

2 Value-Based AI Evaluation Framework

Once your organization has defined its AI vision and guiding principles, the next step is to evaluate potential AI initiatives. **The focus should not be on building use cases for their own sake, but on identifying where AI can deliver real value.**

Start by setting clear criteria. Every initiative should address a meaningful business problem or deliver measurable benefits such as time savings, increased productivity, or cost reduction. It's easy to get drawn to tools that seem interesting or cutting-edge, but without a clear return, they may not be worth the investment.

AI doesn't have to be rolled out across the entire organization. Often, the best results come from applying it to specific departments or workflows where it can solve real challenges and make a noticeable impact. **Below are real-world examples of AI tools, the problems they solve, and the value they can deliver across different departments.**

AI Tool	Problem It Solves	ROI/Value	Departments Involved
AI Chatbots	Repetitive customer questions	Lower support costs, faster responses	Customer Service, IT
Invoice Automation	Manual data entry and reconciliation	Fewer error, faster processing	Finance, Accounting
Document Summarization	Time consuming document reviews	Major time savings	Legal, HR, Operations
AI Recruiting	Slow, inconsistent hiring processes	Faster hires, better candidates	HR, Talent Acquisitions

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Define AI evaluation criteria based on ROI and impact.



Evaluate cost-saving and opportunity-driving AI across and within departments.



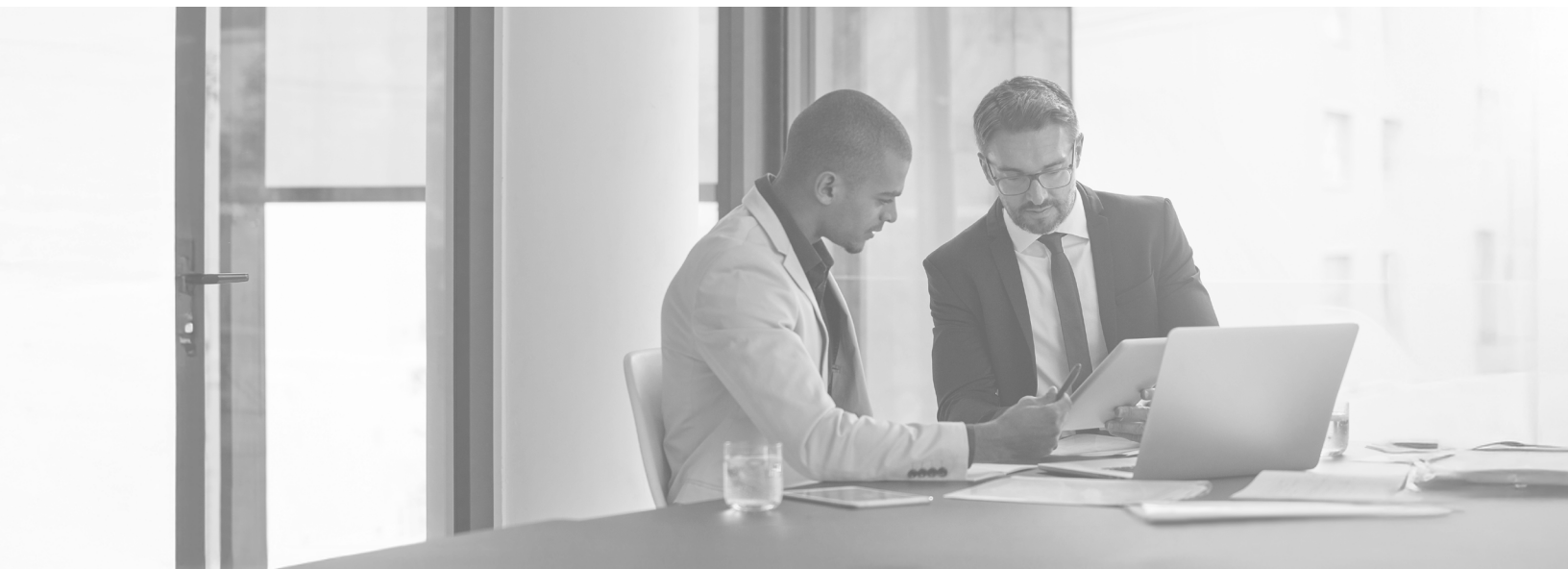
Set a minimum value threshold for AI investment justification.



Define Suggested Criteria for Prioritizing AI Opportunities.

It's helpful to set a minimum threshold for value—whether a dollar amount, time savings, or another metric that justifies the effort. If the benefit doesn't exceed the cost, including deployment and support, it may not be worth it.

The best AI projects drive clear business outcomes. When AI boosts productivity, profitability, or creates new opportunities, it becomes a strategic asset—not a distraction. A value-based approach helps you focus on what matters most.



3

Establish an AI Champions Community

After defining your AI vision, setting evaluation criteria, and establishing value thresholds, the next step is to identify your AI champions and create a space for them to collaborate.

These champions naturally connect business challenges with AI solutions. They're passionate about working smarter and open to change for the sake of improvement. **Typically, they make up about 15% of your organization, though this may vary.**

Once identified, invest in their education and provide training. Set expectations for regular collaboration to share ideas, wins, and lessons learned.

Supporting a champions community fosters engagement and creativity. Consider offering early access to tools or other incentives to keep them motivated. This group becomes a key force in driving adoption and continuous improvement.



Typically 15% of your Company are Champions!

70%

70% will follow.

Open to change with the right tools and training.

15%

15% are Champions.
Eager to lead, shape, and own tools.

15%

15% resist change.
Prefer their own processes and avoid new tools.

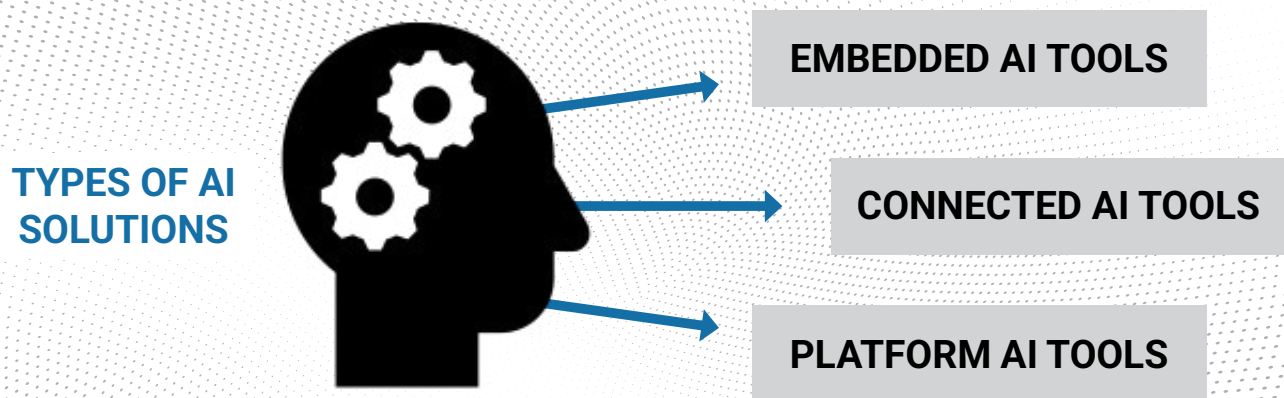
[Download Copilot Champions Group Charter](#)



4 Education, Awareness & Exploration of AI Solutions

Once your AI champions community is in place and engaged, the next step is to focus on ongoing education and awareness of available AI solutions.

It may seem obvious, but it's important to set clear expectations. A helpful tool is a group charter that outlines roles and responsibilities. **Champions should commit time to training and exploration—this investment helps them understand AI's potential and prepares them to engage with vendors and new technologies effectively.**



AI solutions can generally be grouped into three categories:

1. Embedded AI Tools

Built into software you already use—like Microsoft Copilot in Word, Excel, or PowerPoint—these tools work within familiar apps and require little to no setup.

2. Connected AI Tools

Third-party tools that connect to your systems via APIs or integrations. They're ready-made but require some setup and ongoing management. You rely on the vendor for updates and support.

3. Platform AI Tools

These offer flexible environments for building custom AI solutions. They provide the most control but require more effort to develop and maintain.

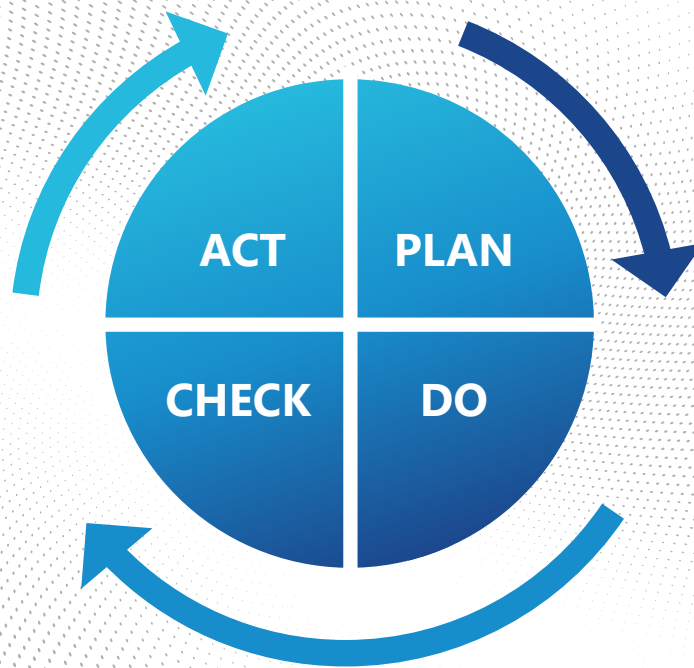
Helping your AI champions understand these categories equips them to spot opportunities that align with your business needs. This foundation supports smarter, more strategic adoption.

5 Deploy, Invest, Iterate & Measure

Before committing to a long-term AI tool, begin with short-term trials (**1–3 months**) to validate whether it solves the problem, fits your workflows, and meets your needs—minimizing risk before larger investments. Focus on high-priority initiatives aligned with your AI strategy, and involve internal champions early to support adoption, training, and feedback.

Set clear success metrics and establish a process for continuous improvement. As tools evolve, revisit past options—new features or pricing may now make them a fit. Stay flexible with renewals and regularly assess alternatives that offer better value or alignment.

Ensure users know how to report issues and share feedback. Acting on this input creates a cycle of learning and improvement. **By testing strategically and refining continuously, you build a strong foundation for long-term AI success.**



This approach reflects the **Deming Cycle** (Plan-Do-Check-Act)—a continuous improvement loop that can be applied to how AI tools are tested, evaluated, refined, and optimized over time.

By leveraging this framework, organizations can reduce risk, improve decision-making, and ensure every AI investment delivers sustained, measurable value.

6 Oversight, Governance, Risk and Compliance

Moving AI from planning into daily operations requires ongoing oversight—closely tied to change management and continuous improvement. This isn't about creating a **"Big Brother"** environment, but about staying aware of potential unintended consequences.

If your organization already has a governance process for reviewing initiatives, AI should be included. This provides checks and balances to ensure compliance with policies, regulations, and confidentiality standards.

Governance is about identifying risks you want to avoid and confirming AI tools are working as intended. This often requires collaboration between AI teams, compliance officers, and governance leaders.

Potential Risks:



Misaligned Decisions

AI acts against company values or policy without proper human oversight.

Privacy & Compliance Breach

Mishandling of personal data risks legal fines and reputational damage.

Data Exposure & Uncontrolled Access

Employees access sensitive info they shouldn't, due to weak or missing AI safeguards.

AI governance shouldn't be separate from broader risk and compliance strategies. It must be integrated into your existing framework. **With AI evolving rapidly and impacting many areas, managing it effectively demands extra attention—just like any other critical business tool.**



AI Feels Different. And the Same.

AI is the fastest-growing technology in the world—with immense potential for both benefit and risk. But at its core, AI is still a tool. Like any tool, it must create value, solve real business problems, and deliver a clear return on investment.

That's why it's critical to approach AI like any other business tool: understand its purpose, align it with real needs, and apply it with clear intent and oversight.

As one speaker put it well, **"We don't need to be the first; however, we definitely do not want to be the last to adopt AI."** This captures the balance between thoughtful planning and timely action.

If you haven't started your AI journey, now is the time. Waiting another 12–18 months could leave you behind competitors who are already moving forward.

The goal isn't perfection—it's momentum. Set a clear vision, stay open to learning, and be ready to adapt. AI is evolving quickly, and even the experts don't have all the answers.

Start now, and your organization can grow with the technology—rather than play catch-up. The support exists to help turn your vision into measurable value.



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