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Practical Approach to Artificial Intelligence

A look at AI fundamentals and AI strategy and how leading organizations are winning by doing things differently

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Speakers



Alexa Myers
Data Scientist Manager



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Digital Growth Director



Chris Handrick
Market Leader – Assurance

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SESSION GOALS

What We'll Accomplish Today

Understand what AI is and what it can (and can't) do

Use AI safely – know the privacy do's and don'ts

Understand what leading companies actually do with AI strategy and how it translates into meaningful business outcomes.

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For You to Get the Most Out of Our Session Today

Three ground rules before we get started.



Let's be interactive

We want to talk with you, not at you. Jump in any time.



Ask questions

This is a safe space; there are no stupid questions.



Share and steal ideas shamelessly

The rising tide raises all boats. The leading ideas in the room are everyone's.

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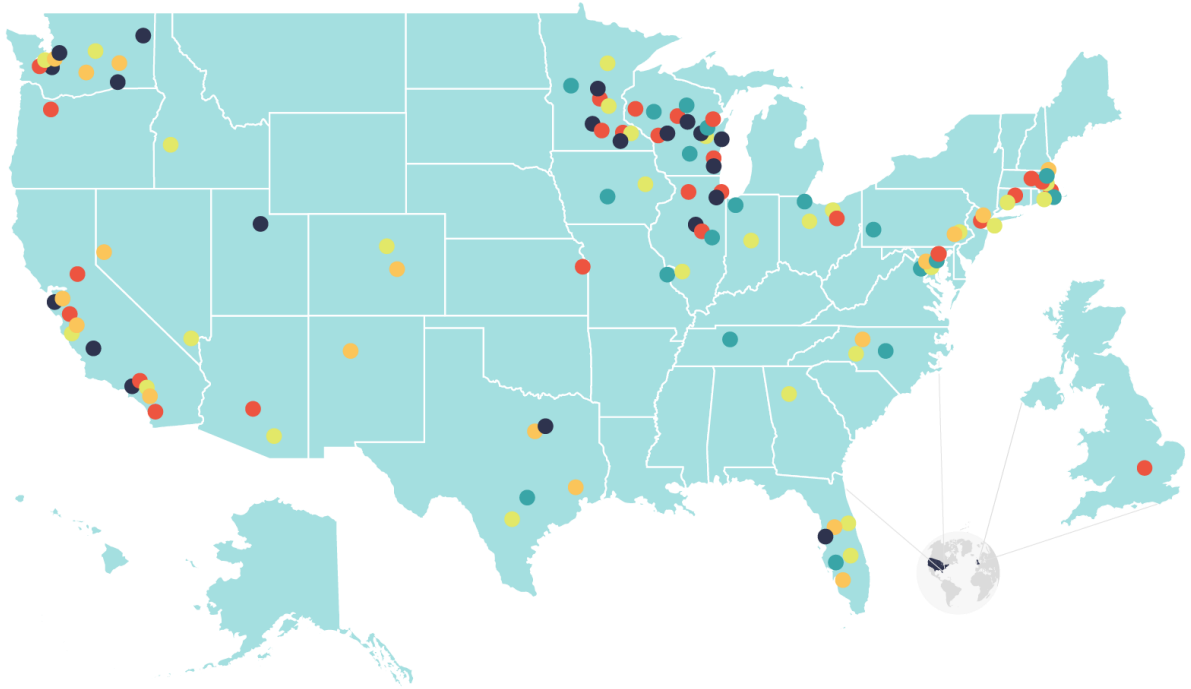
National and International Reach

9,000
NEARLY 9,000 PEOPLE

120+
LOCATIONS

AN INDEPENDENT
NETWORK MEMBER OF

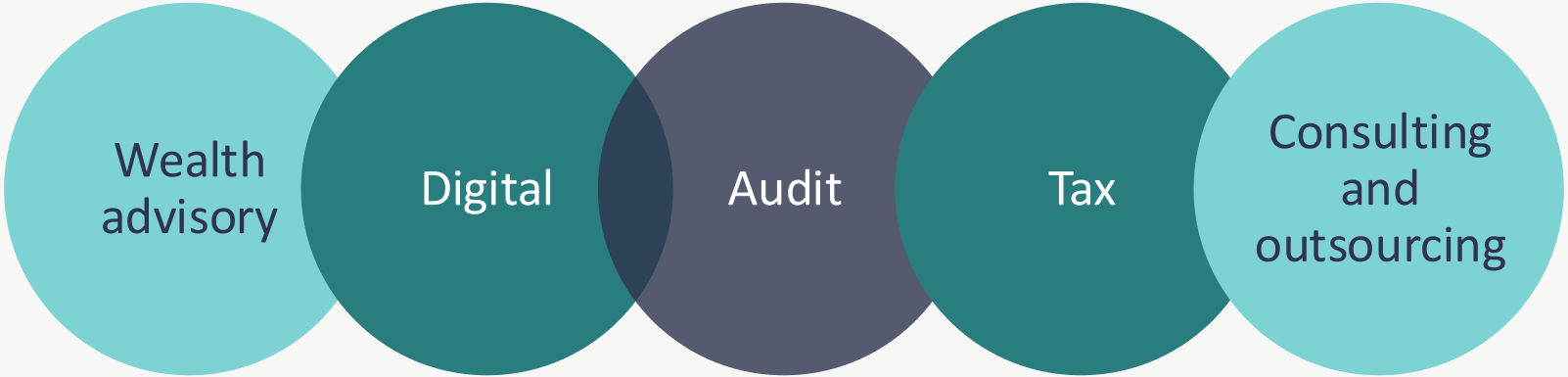
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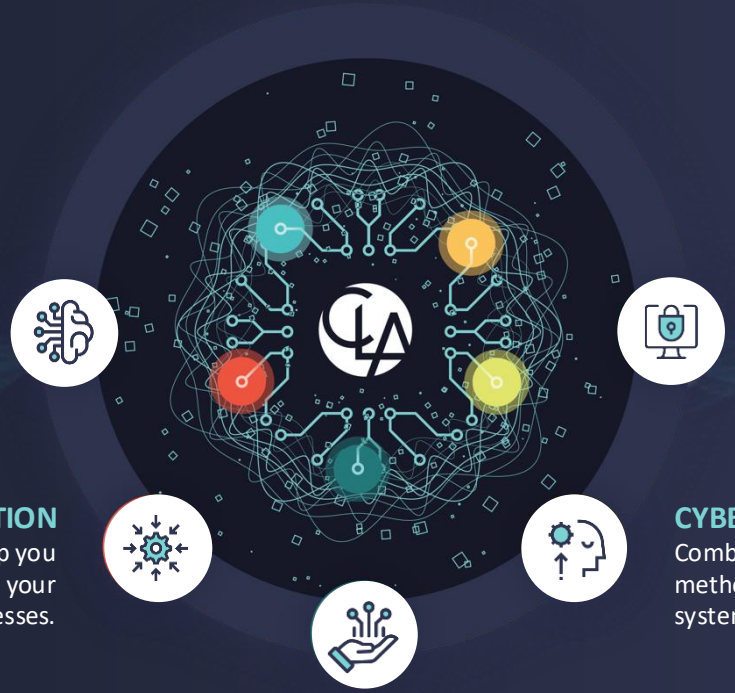
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Helping You Is Our Passion



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CLA's ***strategic consulting services can help you*** to turn challenges into opportunities with an ROI driven roadmap for modernized systems and processes adapted to your business.



DATA ANALYTICS AND INSIGHTS

Developing customized dashboards and data warehouse strategies to highlight key metrics, benchmarking, and performance indicators.

ENABLEMENT SERVICES

Digital enablement aligns PM, OCM, process improvement, and QA to accelerate adoption, reduce risk, and deliver consistent, measurable performance.

SOFTWARE IMPLEMENTATION

Software strategies to help you automate and streamline your processes.

CYBERSECURITY

Combining technical experience and risk-based methodologies to help protect an organization's systems and data with a strong cybersecurity plan.

AI AND AUTOMATION

Leveraging the power of AI and automation to enhance operations, streamline workflows and communication, to achieve strategic outcomes.

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AI Fundamentals:

Understanding AI – and Your Role in It



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Discussion Question

What is AI?

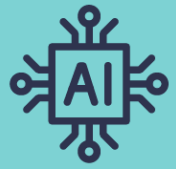
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What Is *Artificial Intelligence?*

Artificial Intelligence (AI) refers to any technology or machine that can perform complex tasks typically associated with human intelligence

It powers recommendations on streaming services, voice assistants, email filters, navigation apps, and much more

AI is not new – it has been evolving since the 1950s, but recent breakthroughs in computing power have made it dramatically more capable



AI is already everywhere

Search • Social media • Email • Navigation • Shopping

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Types of Artificial Intelligence

Generative AI is just one small part of a much broader field.

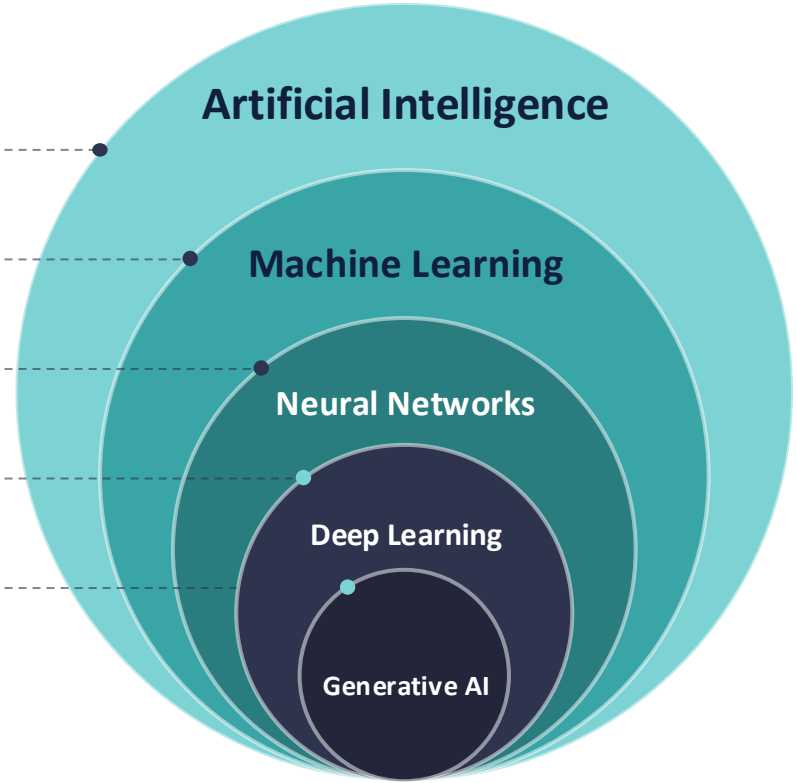
Artificial Intelligence
Any system that mimics human intelligence

Machine Learning
AI that learns from data instead of rules

Neural Networks
Systems modeled on the human brain

Deep Learning
Many-layered networks that find complex patterns

Generative AI
Creates new content: text, images, code



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What Is Generative AI?

Generative AI creates new content (text, images, code, music, etc.) by learning patterns from language and data. This is the breakthrough driving today's AI revolution.

It creates

Text, images, summaries, code, presentations, content that didn't exist before

It learns

Trained on billions of pages of text, learning language patterns, facts, and reasoning

It converses

You interact through natural conversation, no coding or technical skills required

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Discussion Question

What have you tried with AI so far?
What surprised you, or what would you like to try?

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Key Tools



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The GenAI Landscape

The market includes many general-purpose and specialized AI tools. Rather than evaluating every product, begin with the use case, data requirements, risk profile, and tools approved by your organization.

ChatGPT	**Claude**	**Copilot**	Gemini	Perplexity	Grok
Midjourney	DALL-E	Adobe Firefly	Jasper	Notion AI	Grammarly AI
Runway	Synthesia	ElevenLabs	Sora	Copy.ai	Meta AI
Cursor	GitHub Copilot	Otter.ai	Canva AI	Descript	Writesonic
Stable Diffusion	Character.ai	Poe	Luma	HeyGen	Pictory

Three commonly encountered options: Copilot, Claude, and ChatGPT

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Choosing the Right AI Tool

Copilot

- Built into Microsoft 365 – Word, Excel, Outlook, Teams
- Drafts emails, summarizes meetings, analyzes data
- Among the best when working inside Office apps
- Often used for: document editing, email, meeting notes

Claude

- Commonly known for careful reasoning and nuanced writing
- Handles very long documents and complex analysis
- Excellent for research, book writing, and detailed work
- Often used for: long-form writing, research synthesis, analysis

ChatGPT

- Supports a broad range of use cases – Can generate images, browse the web, and run code
- Great for creative tasks
- Largest ecosystem of plugins and custom GPTs
- Often used for: creative writing, image generation, ideation

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Public vs Enterprise AI

Public or individually managed tools

- Data handling varies by provider, plan, and settings.
- Use only public or non-confidential information unless your organization has explicitly approved the environment.

Organization-approved enterprise tools

- These may provide additional contractual, security, privacy, and administrative controls.
- Follow your organization's data-classification and acceptable-use requirements before sharing sensitive information.

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Leading Practices



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Ground Rules for Responsible AI Use

"Hallucination" **–** when AI states something false with high confidence. *This is the #1 reason you stay in the Pilot seat.*

Always verify outputs

AI can be wrong *– and do so confidently. Before putting your name on it, check it.*

Watch what you share

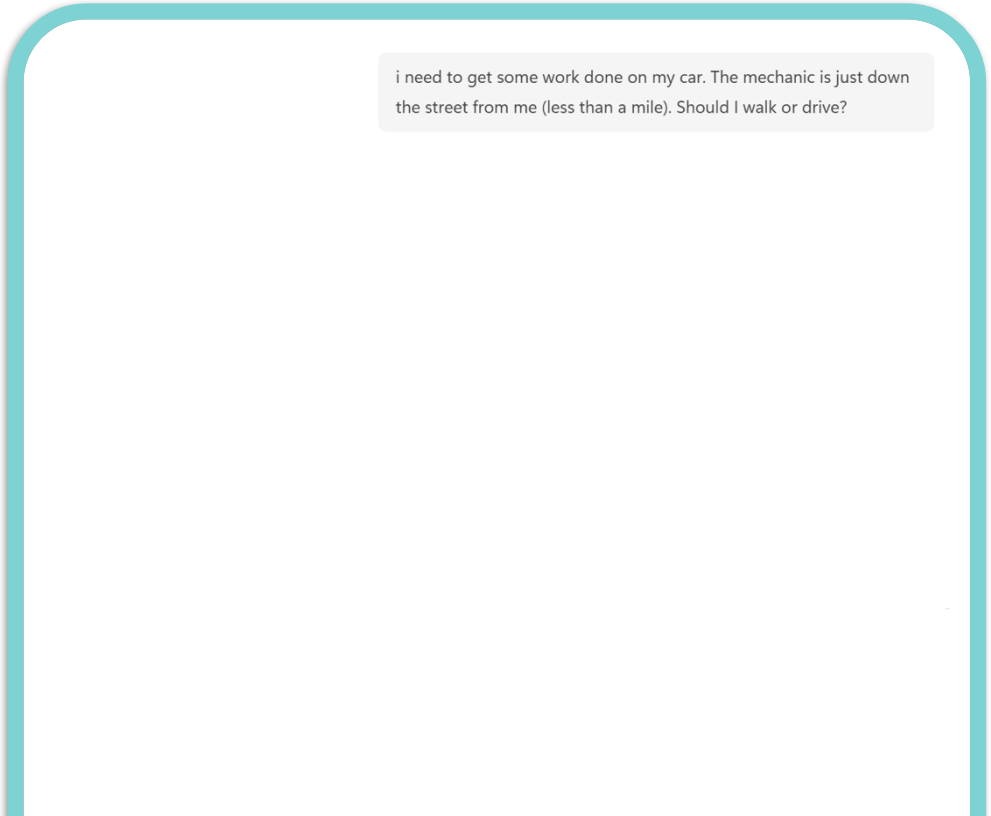
- *Financials and deals*
- *People and relationships*
- *Confidential conversations*

AI is a *tool*

Not a replacement*. It augments your judgment; it doesn't substitute for it.*

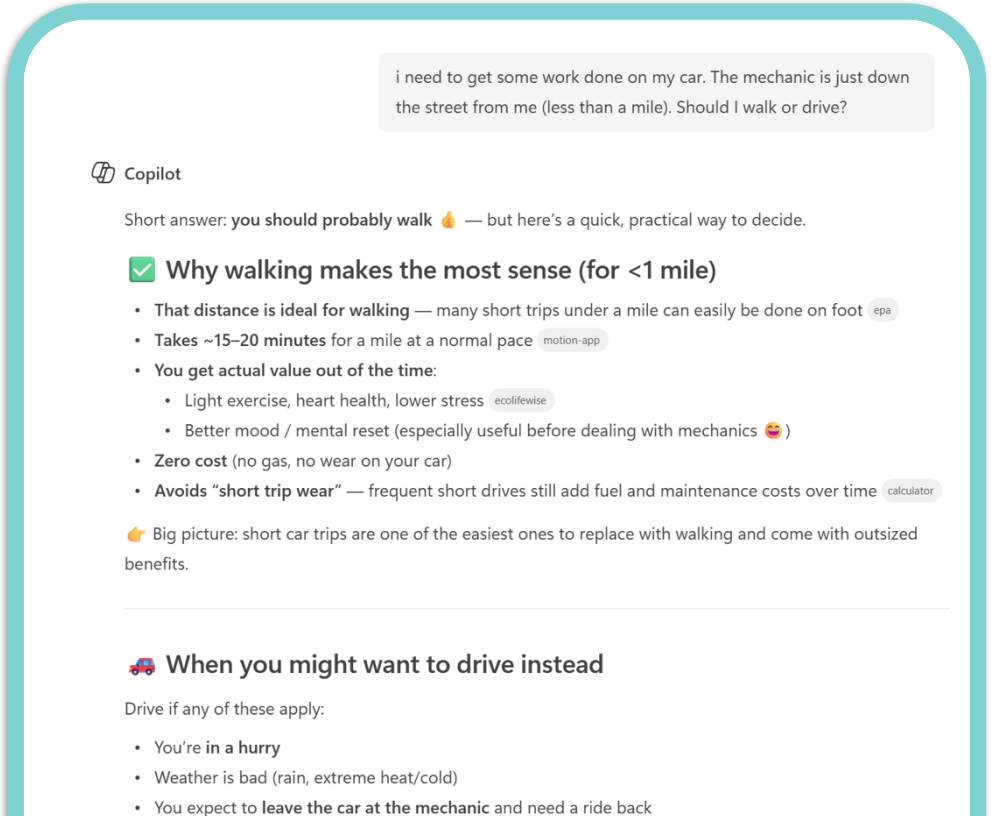
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Notice Anything Off?



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Notice Anything Off?



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Using AI Safely

Use AI for

- Summarizing public documents, articles, or reports
- Drafting emails, memos, or creative writing
- Brainstorming ideas and exploring hypothetical scenarios
- Researching topics with public information
- Organizing thoughts and creating outlines

Pause before you prompt

- Never share passwords, account numbers, or government IDs
- Keep financial, health, legal, and confidential business data private
- Do not share others' information without consent
- Pause on names, numbers, HR, conflict, and performance matters
- Get professional review for legal, compliance, or confidential board matters

AI can assist. People make the final decisions.

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Discussion Question

Where in your work would you feel comfortable using AI today?
Where would you still want a person's judgment, and why?

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THE MOST IMPORTANT TAKEAWAY

You Are the Pilot. AI Is Your Assistant.

Fast and capable

Speed + synthesis

Never in charge

You hold the controls

You **bring judgement**

Context + accountability

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AI Strategy

Why strategy matters and how we think about it



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What Leading Organizations Do Differently

AI strategy as a competitive advantage

Three pillars that separate the leaders from everyone else

PILLAR 1

VALUE

Strategy

Use AI to amplify what already makes you win, not to chase trends.

PILLAR 2

RISK

Governance

Set guardrails up front. Make governance prescriptive, not a checklist.

PILLAR 3

CHANGE

Transformation

Treat AI as an organizational shift; literacy and operating model matter as much as the tech.

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Value



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Value: The Argument

PILLAR 1 · VALUE

AI strategy does not start with AI. It starts with business strategy.



STRATEGY vs. OPERATIONAL EFFECTIVENESS

Doing the same things faster is not strategy.

Most organizations pursue AI as operational effectiveness (i.e., doing the same things faster). Strategy means performing different activities, or similar activities in different ways. **The distinction matters.**



RESOURCES AND CAPABILITIES

Buying the same tools as your competitor is not advantage.

Sustained advantage derives from resources that are valuable, rare, and hard to imitate. The advantage lives in proprietary data, organizational know-how, and capabilities that are difficult to replicate.

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Value: What Leading Organizations Do Differently



They treat AI as a strategic choice, not a tool selection.

Strategic choices create differentiation and involve trade-offs. They ask what NOT to do as much as what to do.



They learn from other transformation parallels.

The productivity payoff came only after organizations reorganized around the technology, not when they first bought it.



They run both top-down and bottom-up.

Top-down addresses core competencies and positioning. Bottom-up fills the long tail of operational effectiveness. Neither is sufficient alone.



They tie strategic priorities to measurable outcomes.

Each use case has a priority and a success measure.

Examples: cycle-time reduction, added capacity, stronger controls, improved resilience, margin protection, or greater decision confidence.

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Risk



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Risk: The Governance Gap

An operating model translates governance principles into day-to-day decisions.

FRAMEWORKS

What good governance looks like

Frameworks like NIST AI RMF describe principles and outcomes, but they offer very little guidance on how to build the operating model that makes them real.

OPERATING MODEL

What governance actually decides

- Who reviews use cases?
- How fast are decisions made?
- What information is required?
- How does escalation work?

THE TOP-TIER RISK

Organizations face two failure modes: failing to adopt AI, or failing to adopt AI responsibly.

Governance must be prescriptive, not a checklist, risk management cannot itself become a risk.

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Risk: What Leading Organizations Do Differently

Governance must be prescriptive, the operating model decides how it actually runs.



Tiered review

Not all use cases carry the same risk. Low-risk cases get lightweight review in days, not months.



Decision rights

Who approves, rejects, or escalates at each tier is specified in advance.



Information requests

Teams know what to provide. Standardization reduces friction and forces upfront risk thinking.



Speed as design

Three months on a low-risk use case isn't rigor, it's dysfunction.



Feedback loops

Post-decision reviews and continuous improvement are part of the model.

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Change



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Change: The Co-Invention Bottleneck

The bottleneck is not the technology, it is the organization's ability to adapt.

CONCEPT

Co-invention.

General-purpose technologies do not raise productivity by themselves. They usher in a period of co-invention during which firms experiment, redesign, and reorganize around the new capability.

HISTORICAL PARALLEL

Electrification.

It wasn't enough to swap a steam engine for an electric motor. The factory floor had to be reimagined. The payoff took decades, but not because the tech was lacking, but because organizations hadn't reorganized around it.

The payoff arrives only after the operating model catches up.

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Change: What Organizations Get Right

Four moves that separate organizations where change sticks.



Infrastructure, not mandates

Training, experimentation time, evaluation frameworks, and change management, not declarations.



Activate middle management

Executive sponsorship sets direction. Middle management determines whether transformation sticks.



Address meaning, not just skills

AI literacy is necessary but insufficient. They confront what happens to the meaning of work when cognitive tasks are automated.



Culture as a design choice

Culture is the most underinvested dimension of AI maturity, and the most correlated with success. Not a background condition.

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Discussion Question

Where could AI strengthen something your organization already does especially well?

What business outcome would show it is working?

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Integrations and Data Infrastructure



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Data: Where Every AI Use Case Starts

Good AI starts with good data. And improving the data doesn't automatically mean replacing your systems.

THE PRINCIPLE

Garbage in, garbage out.

When data is inconsistent, results follow suit. The root issue is typically the data, not the prompt.

THE PRACTICAL TRUTH

Meet you where you are.

You don't need a full technology overhaul to get started. Focus on one use case, align the data behind it, and demonstrate value. That foundation makes the next use case faster and easier.

Start with the use case in front of you, not the data platform you wish you had.

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Integrations and Data: What Leading Organizations Do

How to keep your data from getting more scattered as you add new tools.



Start where you can show value

Start with the workflow you actually want to fix. You don't have to fix everything upfront. Start where you can make progress and build from there.



Connect your data across systems

AI is limited when it only leverages one system. It creates more value when it can work across multiple data sources, not just within one.



Govern the inputs, not just the outputs

Get the data right up front. Clear ownership and definitions at the source are easier than working backwards once issues show up in the output.



System-flavored AI cuts both ways

Vendors are adding AI into their own tools. It works well in that system, but for that system and its data only. That becomes a limitation when you need to work across systems.

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Discussion Question

Where is your data and integration foundation strongest, and where is the biggest gap that would hold back the AI use cases you actually care about?

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Why Strategy Matters and How We Think About It

The case for AI strategy



The world is shifting

Work, as we know it, is fundamentally changing.



Access isn't the gap

AI tools are cheap and everywhere, yet outcomes are uneven. Why?



Winners play their game

Leaders use AI to amplify what already makes them win, not to chase trends.



New kind of leadership

AI demands a different muscle than traditional IT; it's a business decision, not a tech one.



Guardrails are non-negotiable

Governance, risk, and compliance are required from day one.

THE EQUATION

Strategy + people + tech = capability

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Discussion Question

What business priority could an AI-enabled experiment support?

What outcome will you measure, who will own it, and what guardrails must be in place before it begins?

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Thank you!

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