

AI: The Art of the Practical

Artificial Intelligence and Machine Learning at RSM



Speaker: George Casey



George Casey

Principal
Advanced Analytics
Practice Leader
Data & Digital Services
RSM US LLP
Denver, CO
george.casey@rsmus.com

Summary of experience

As the head of RSM's Advanced Analytics practice, George spearheads the delivery of innovative solutions to clients through emerging technologies such as machine learning, predictive analytics, and artificial intelligence.

With a wealth of experience in the industry, George previously held roles as the Chief Marketing Officer and Chief Technology Officer for Junction Solutions. There, he was instrumental in the development of the Multi-Channel Retail software solution which was eventually acquired by Microsoft.

Over his 25-year tenure, George provided invaluable guidance on digital transformation strategy, business intelligence and analytics strategy, and ERP/CRM system design for both B2B and B2C clients.

George's extensive knowledge and expertise have led him to be published in numerous professional and trade journals. He is also a sought-after seminar and keynote speaker. George is a Microsoft Certified Azure Data Scientist and has authored several manuals for Microsoft on Reporting and Business Analytics.

Education

Master's of Science, Predictive Analytics, Northwestern University

Master's of Business Administration, Kellogg School of Management, Northwestern University

Bachelor of Science, University of Illinois, Major: Information Systems

Speaker: Dave Mahoney



Dave Mahoney

Director
National AI Risk Leader
Security & Privacy Risk
RSM US LLP
Blue Bell, PA
dave.mahoney@rsmus.com

Summary of experience

Dave Mahoney is a seasoned Security, Privacy, and Risk Consulting Director at RSM US LLP, with over 20 years of experience in advanced information security and technology. With a deep passion for enhancing security programs within complex landscapes, Dave's mission is to assist organizations in fulfilling their brand promises.

In his role, Dave is responsible for driving business development, fostering strategic technology partnerships, and orchestrating the delivery of transformative security services. He collaborates closely with clients to uncover strategic opportunities at the intersection of security and technology, opportunities that can propel their businesses to success.

Dave's core areas of expertise span a wide spectrum, including risk management, cloud adoption, enterprise cybersecurity strategy, privacy and compliance, managed security services, and vulnerability assessments. He excels in evaluating intricate business environments, fortifying processes, and accelerating objectives.

Education

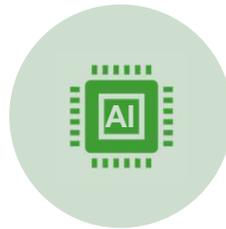
CISSP

Bachelor of Science, Strayer University, Major: Information Systems

Agenda



INTRODUCTIONS



**AI/ML READINESS
ASSESSMENT**



**MACHINE LEARNING
APPLICATIONS**



**INTELLIGENT
FORECASTING**



**CHATGPT/
GENERATIVE AI**



HOW TO START



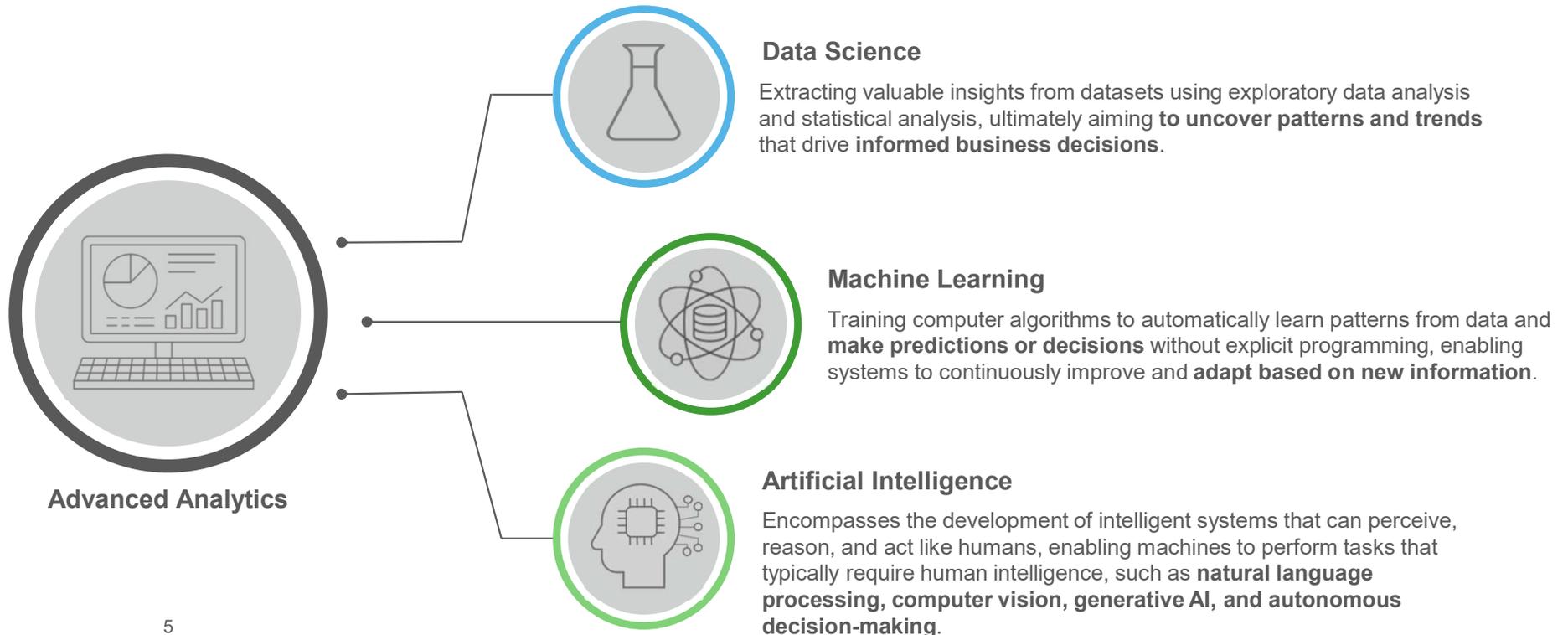
**RISK AND
GOVERNANCE**



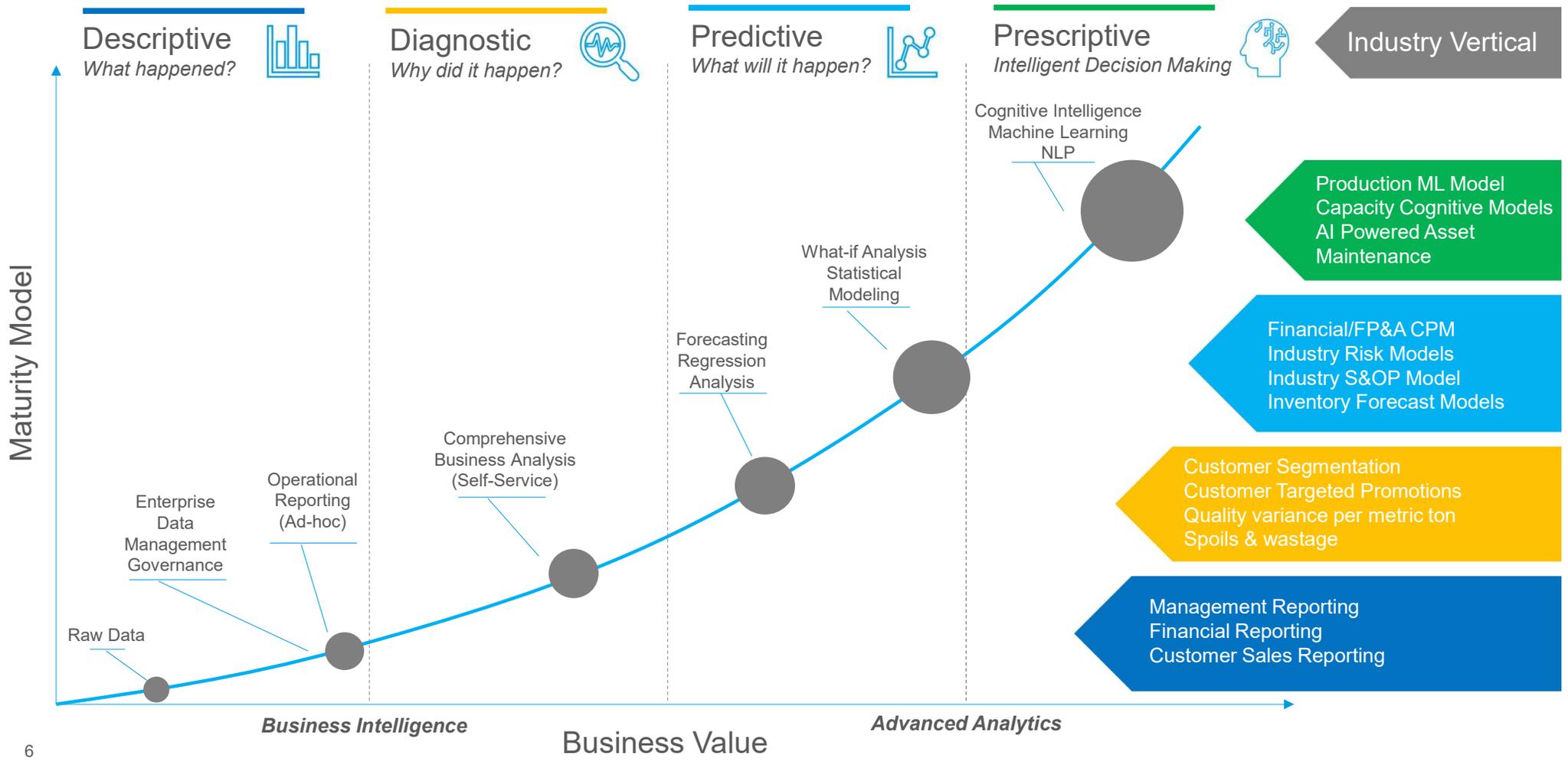
Q&A

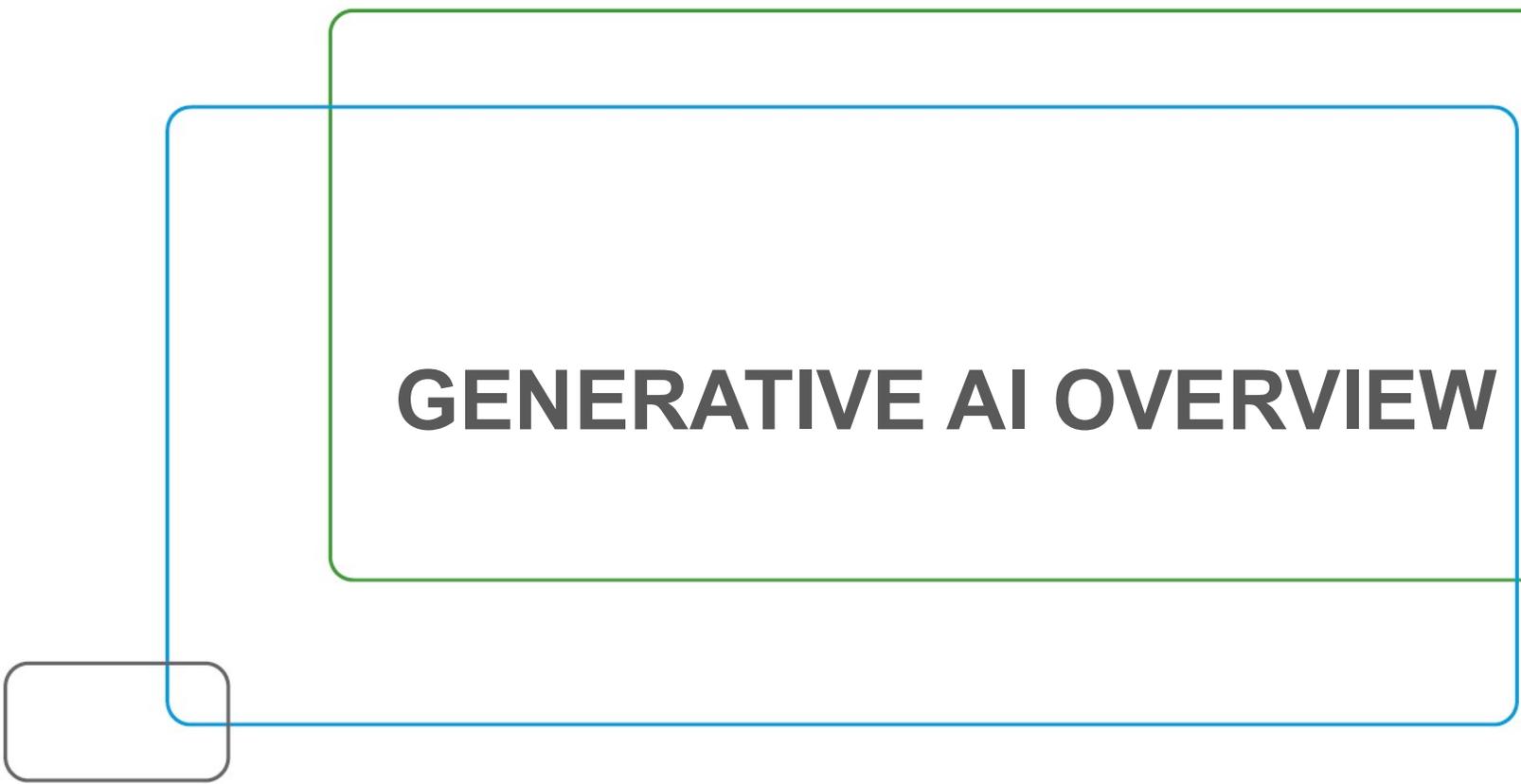
What is advanced analytics?

Advanced analytics is the application of advanced techniques and technologies, such as machine learning and artificial intelligence, to **gain insights** from data. This enables organizations to make **data-driven decision**, improving outcomes, accelerating processes, and reducing costs. The following are **3 main components** to advanced analytics:



Data analytics maturity model

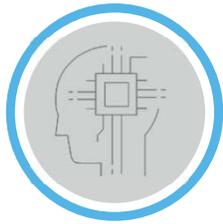




GENERATIVE AI OVERVIEW



Potential impact – OpenAI research



80% of the U.S. workforce could have at least 10% of their work tasks affected by the introduction of GPTs



19% of workers may see at least 50% of their tasks impacted



About 15% of all worker tasks in the US could be completed significantly faster, at the same level of quality



Influence spans all wage levels, with higher-income jobs potentially facing greater exposure

Generative AI application

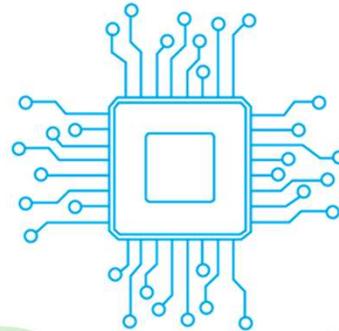
Text generator produces natural language text, ranging from simple sentences to entire articles.



Image generator can generate new images based on input parameters, turning text prompts into images and artworks.



Chatbot can engage in conversations with users in a friendly interface, providing relevant responses based on learned knowledge.



Plugins (such as those deployed by OpenAI), can be integrated into other software products, allowing for powerful capabilities within applications.



Summarization automatically generates a concise and coherent summary of any text or document.



Code generation can create and explain functional code in multiple programming languages based on user input.



What is ChatGPT?

ChatGPT is an AI chatbot powered by an **advanced large language model (LLM)** developed by OpenAI. The model powering the chatbot is called a **Generative Pre-trained Transformer (GPT)**, which is based on architecture known for its ability to effectively process and generate natural language text. It has been specifically fine-tuned for generating human-like responses in conversational contexts.

Enhancing client services

-  Quick access to information, insights, and perspectives
-  Accelerated idea generation and research
-  Enhanced productivity through automation

Common use cases



Writing agendas



Building approaches



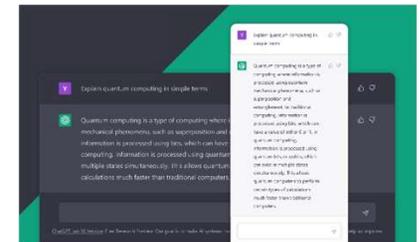
Writing proposals



High-level benchmarking

Key capabilities

- Answering questions
- Providing explanations
- Generating ideas
- Offering suggestions



Risks and considerations

Outdated data: Current data feeding algorithm is only up to 2021

Data variability: No guarantee on accuracy

Privacy concerns: All information typed into ChatGPT is part of the database (client privacy, sensitivity, IP issues, etc.)

ChatGPT examples

The following are two examples of how a law firm can use ChatGPT. Example A demonstrates how AI can quickly draft due diligence criteria. Example B shows how a law firm can draft a contract by refining outputs and asking clarifying questions to make the output more useable.

Example A: Drafting due diligence criteria



YO draft a list of due diligence questions for a teachers union with regards to employment law?



Certainly! Here is the list of due diligence questions for a teachers union with corrected numbering:

1. Employment Contracts:
 - 1.1 Are written employment contracts provided to all teachers?
 - 1.2 Do the contracts comply with applicable employment laws and include essential terms and conditions?
 - 1.3 Are there any variations in contract terms based on job positions or levels of seniority?
2. Compensation and Benefits:
 - 2.1 Are teachers' salaries and wages in line with industry standards and employment regulations?
 - 2.2 Are teachers receiving all legal benefits such as vacation pay, overtime pay,

Regenerate response

Example B: Drafting a contract



YO can you give me a list of subheadings and content that I would include in an employment contract?



YO can you draft a template of an employment contract based on this information in accordance with the Employment Standards Act in Ontario?

YO thank you. can you add a clause that covers equity-based compensation?



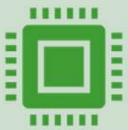
Certainly! Below is an additional clause covering equity-based compensation that you can include in the employment contract:

1. Equity-Based Compensation:
 - a) Stock Options: Subject to the terms of the Company's Stock Option Plan, you may be eligible to receive stock options as part of your compensation package. The grant, vesting, and exercise of stock options will be governed by the terms of the Stock Option Plan and any applicable agreements between you and the Company.

Regenerate response



AutoML (Automated Machine Learning) is a technology that automates the process of developing and deploying machine learning models without requiring prior knowledge or expertise in programming or data science.



It uses automated algorithms to carry out effective feature engineering, algorithm selection, hyperparameter tuning, and model deployment, resulting in accurate and scalable predictions.



AutoML empowers organizations to reduce the time-to-value for machine learning initiatives, enhance productivity and reduce dependence on manual maintenance of models.

Benefits and process of using Azure ML



Automatically build and deploy predictive models using the no-code UI or the SDK



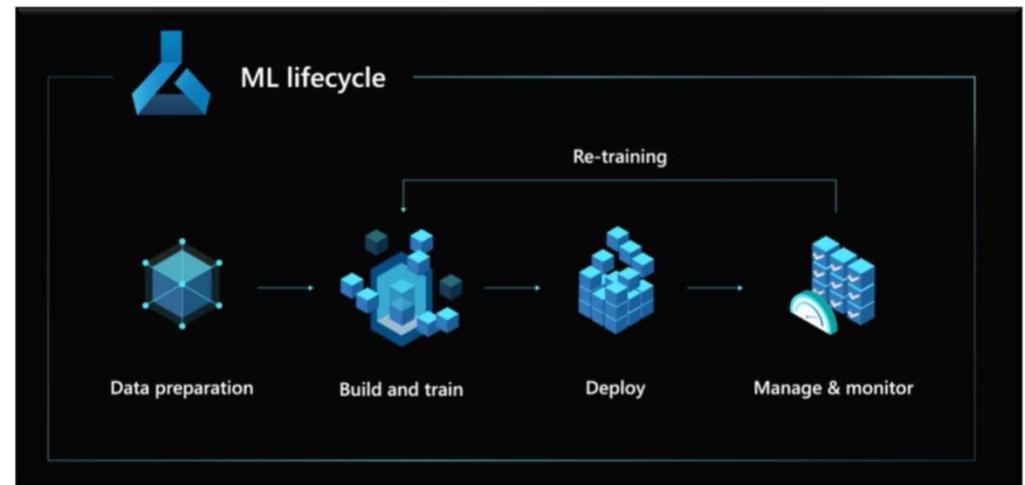
Support a variety of automated machine learning tasks



Increase productivity with easy data exploration and intelligent feature engineering using deep neural networks



Build models with transparency and trust in mind using responsible machine learning solutions

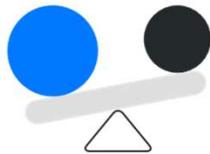


Do you *really* know what external forces affect your organization, when and by how much?

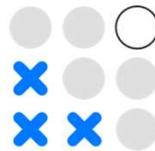
Inflation skyrocketing



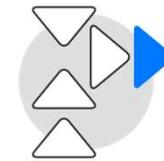
Labor imbalances



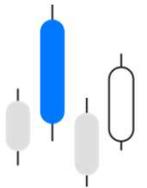
Supply constraints



Consumer spending shifts



Stock market volatility

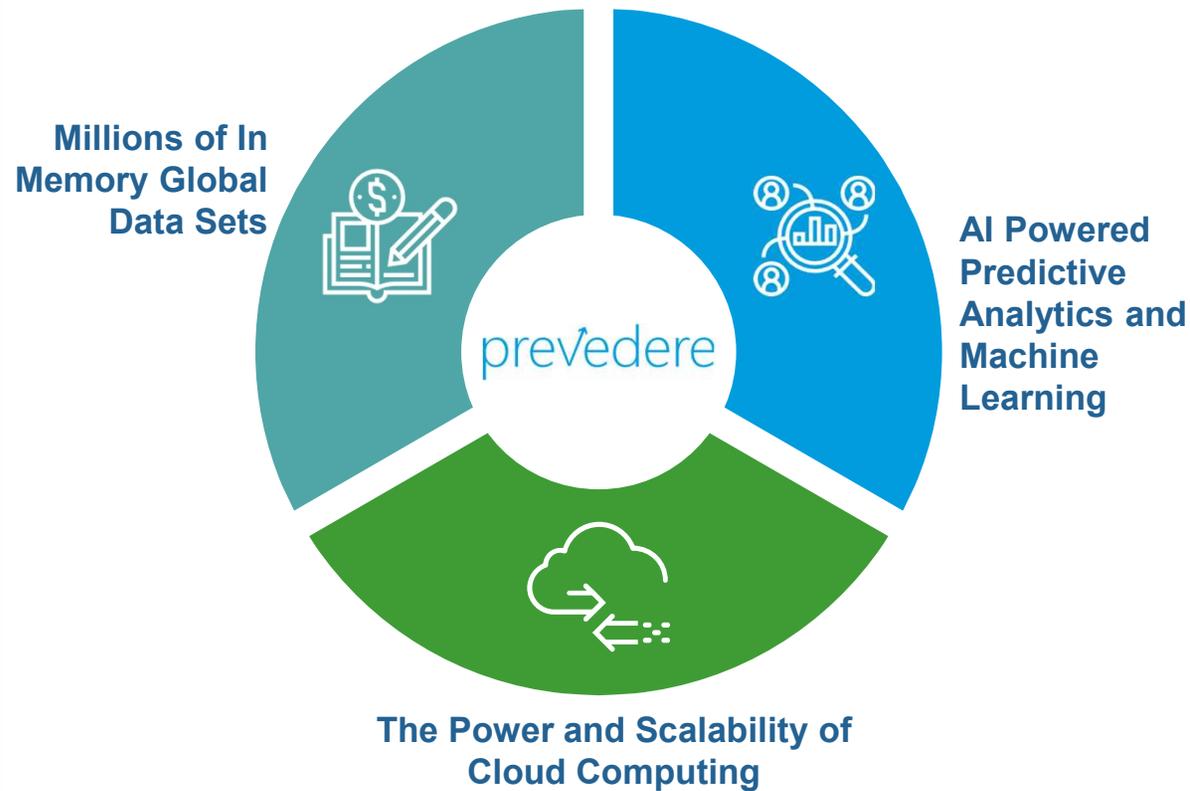


Intelligent forecasting with prevedere



Prevedere's native cloud-based solution is the most automated and advanced intelligent forecasting solution.

- ✓ 4+ Million curated global data series
- ✓ Internationally patented AI engine
- ✓ Always on real-time external insights
- ✓ Over 250 million models built and tested
- ✓ No new hardware or software to install



AI-powered predictive modeling at scale



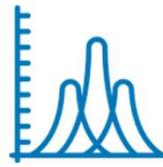
ERIN Predict decreases the time and increases the accuracy for build time series models, while providing transparent and intuitive results.



In memory client and global data



Billions of calculations in minutes



Top indicators by category or region



ERIN Predict AI-powered modeling engine



Thousands of models built and tested



Top scoring model deployed (with economist insight)

Hyper personalized campaign outreach – Generative AI



CHALLENGE

- Struggle to generate high-quality content while maintaining a consistent voice across campaigns
- Manually creating campaign **outreach** is time-consuming



SOLUTION

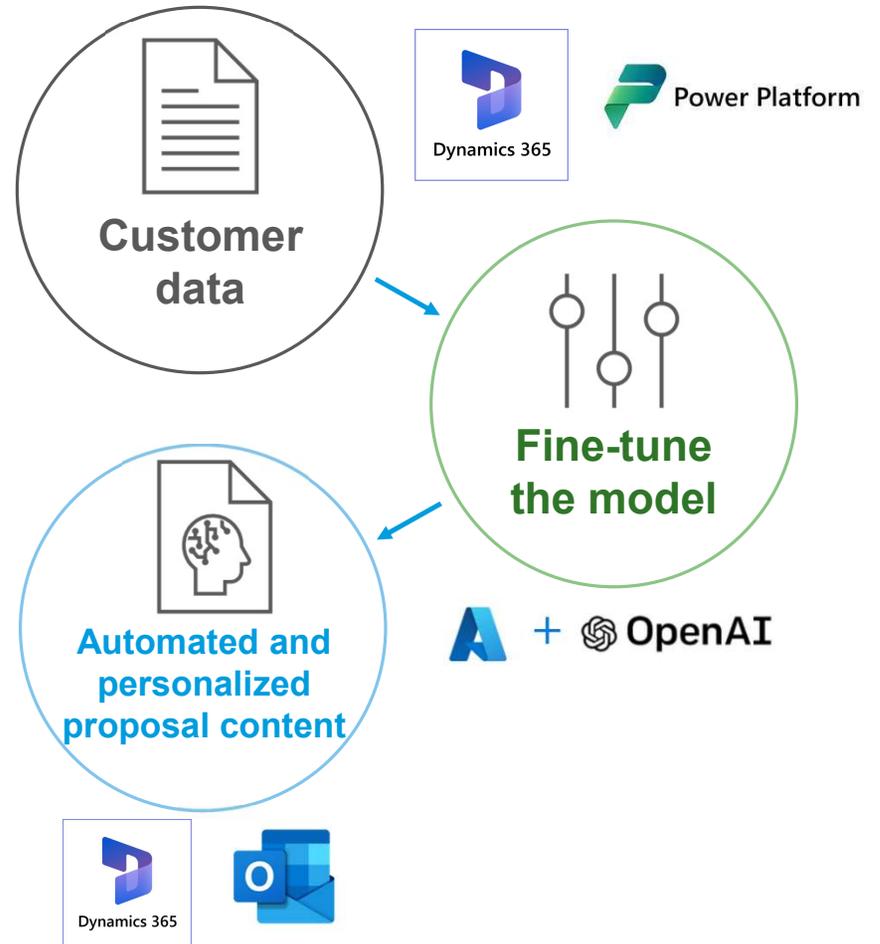
- Leverage generative AI to generate new material based on previous successful campaign outreach and specific customer criteria
- Capable of analyzing information and accurately formulating a high-quality campaign message



RESULTS

- Increased efficiency in the content generation (writing) process
- Improved quality of content
- Consistent messaging and voice across proposals leads to increased success rates
- Reduction in time spent creating content, allowing for more time to focus on other aspects of the proposal

Workflow – Proposal content generator



Customer churn – machine learning with Azure ML (MLOps)



CHALLENGE

- The client was experiencing high customer churn
- Did not have a strong understanding of which customers were churning
- Client wanted to take ownership of the machine learning process and empower the “citizen data scientist” across the organization



SOLUTION

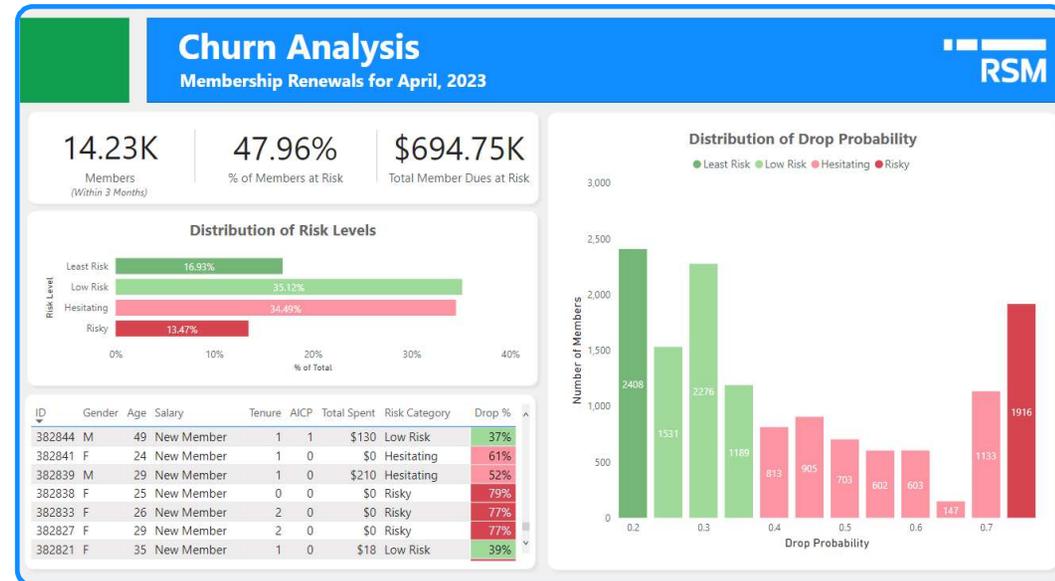
- The RSM team performed Exploratory Data Analysis (EDA) to find patterns, trends, and correlations in customer demographics and historic member interactions
- Developed a model with +85% accuracy and deployed to production



RESULTS

- The client is now able to proactively identify customers at risk of churning and can plan intervention activities accordingly
- EDA activities provide insight and documentation into model creation and bias observed (if any)
- Increased customer retention and revenues

Churn analysis dashboard

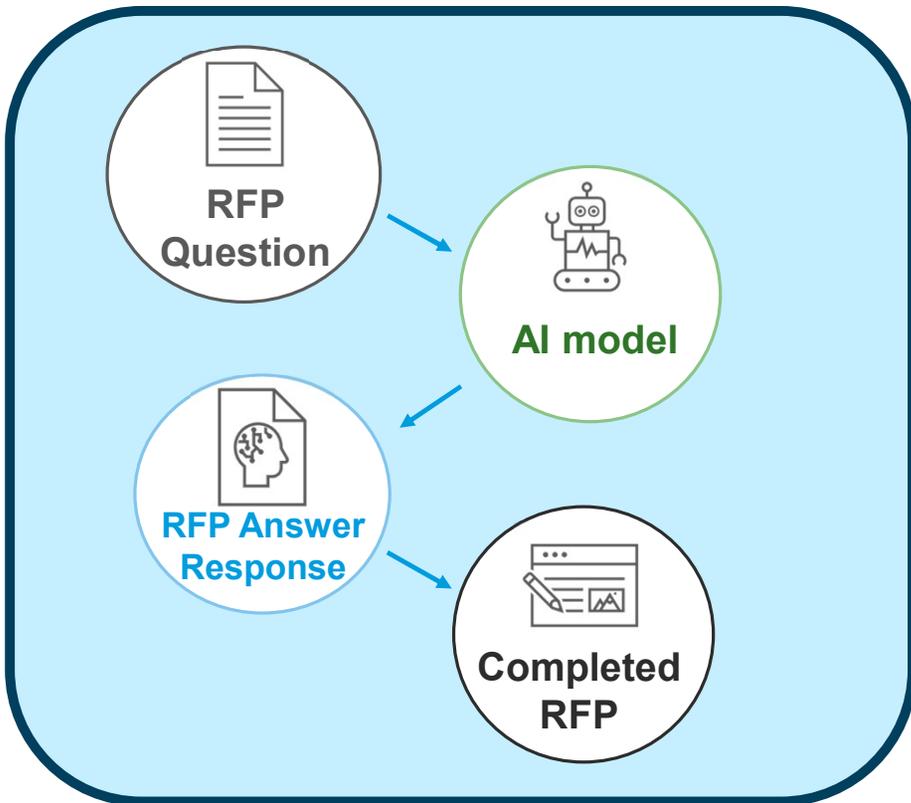


Dashboard to visualize ML model output and facilitate decision making

Request for Proposal (RFP) response app – Generative AI



Workflow – RFP Response App



CHALLENGE

- High volume of RFP's received are not able to be responded to in a proper manner-
- Completing an RFP is a manual and time-consuming process
- Technical team members are not skilled RFP narrative writers



SOLUTION

- Utilize generative AI to generate responses to RFP questions with built-in governance controls
- Leverage historical question responses and user context to develop high quality answers
- Friendly user interface to facilitate a positive user experience



RESULTS

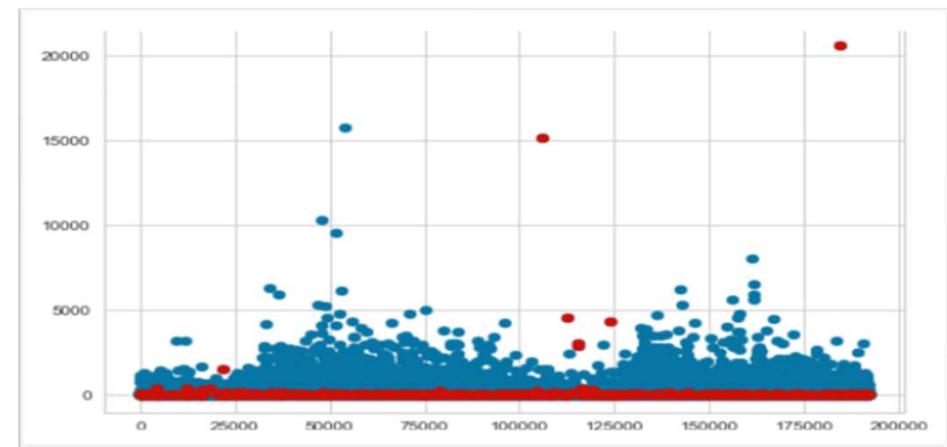
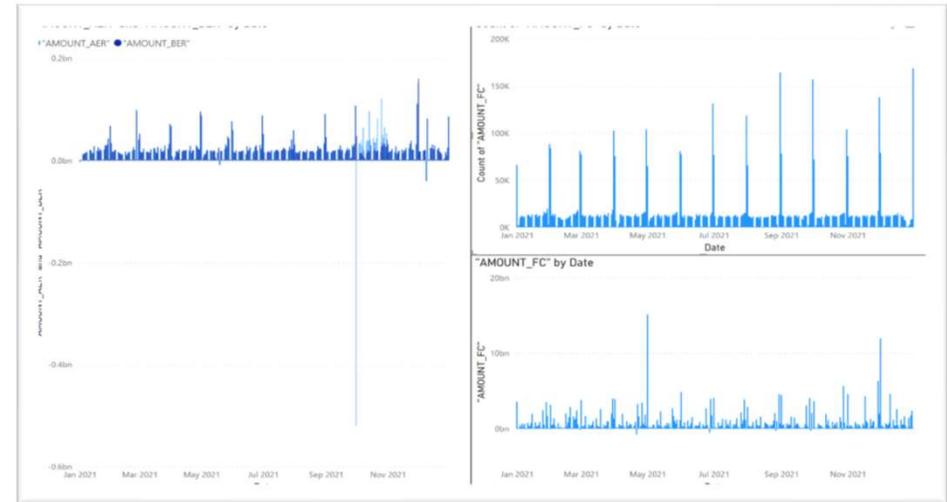
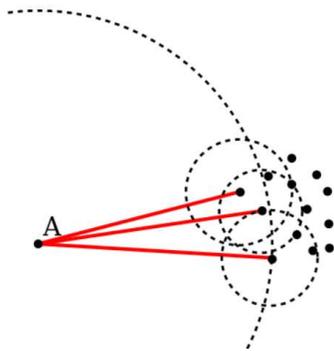
- Higher RFPs response rate
- 15-25+ hours saved per RFP
- Increased efficiency in the RFP writing and response process
- Higher volume of services able to be proposed on and completed



Outlier/anomaly detection in finance

Local outlier factor (LOF) defines outliers by doing density-based scoring. Four aspects contribute to the algorithm:

- K-Distance and K-Neighbors
- Reachability distance
- Local reachability density
- Local outlier factor calculation



Be curious!



Outcomes



Dimensions (“by analysis”)



Correlations



Explanatory variables



Research agenda



Breaking down AI tasks



Type I: mundane, redundant tasks

Examples: data entry, file organization, formatting documents, online research

Solved by: automation, generative AI



Type II: repetitive tasks that take some focus

Examples: copy/paste of data, monthly reconciliations, reviewing documents

Solved by: automation, generative AI

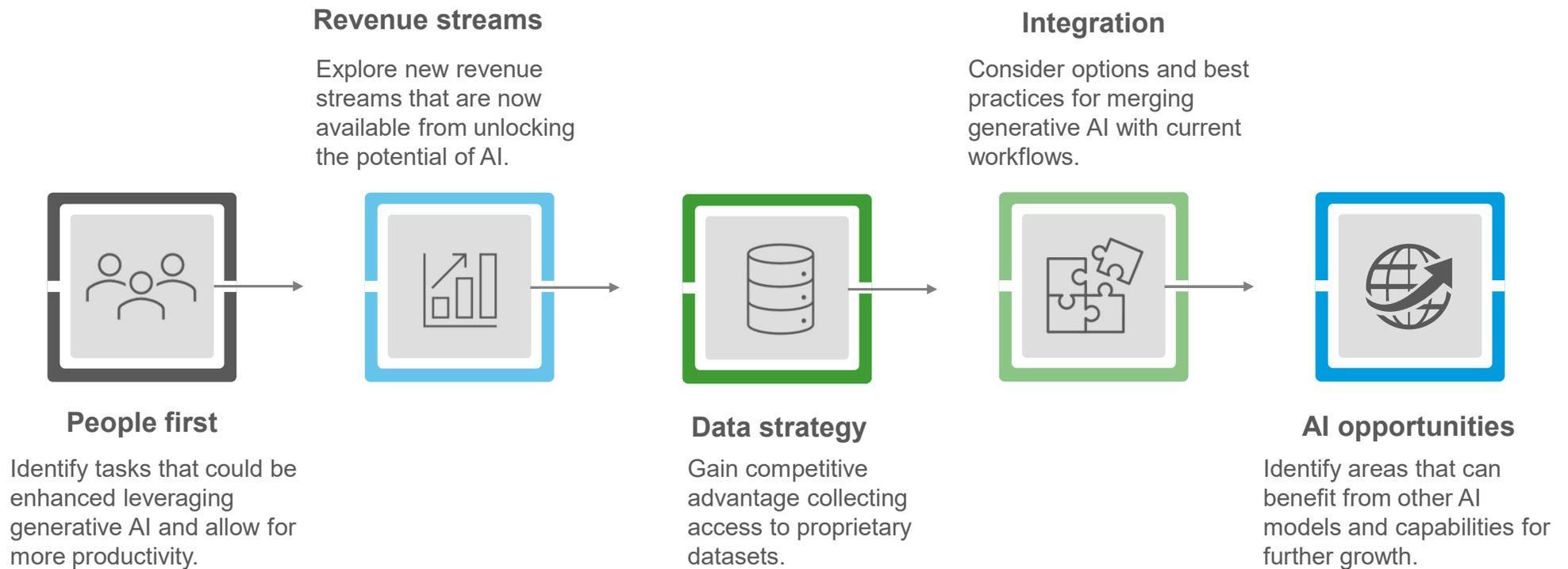


Type III: requires human thought and focus, would take time hands on keyboard

Examples: writing content, web scraping, responding to messages, emails (text generation), coding

Solved by: Generative AI

Future considerations



Accelerators and quick win offerings



**BUSINESS
APPLICATION
SPECIFIC SOLUTIONS**



**EXPLORATORY DATA
ANALYSIS**



PREVEDERE



**INVOICE DEFAULT
PREDICTOR**



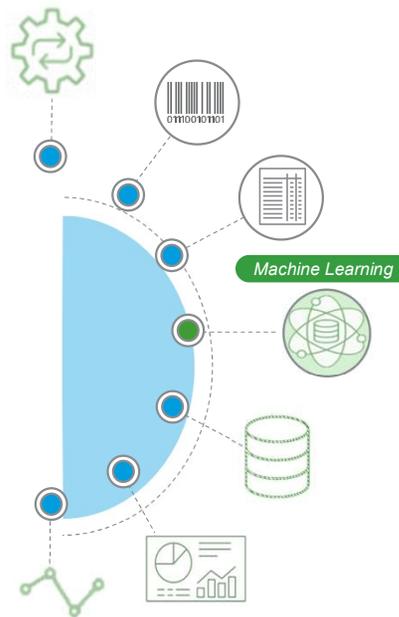
**AI USE CASE
WORKSHOP**



**“MODEL IN A DAY”
“AI IN A DAY”**

Creating value with advanced analytics - approach

Organizations are optimistic about investing in data and analytics but becoming more realistic in their journey for real value. RSM's Advanced Analytics practice provides a service offering covering strategy, design, solution development, governance and investment



Business objectives & value hypothesis

- Targeted assessment of ability to start ML project covering people, skills, knowledge, technology and data discovery and readiness
- Formulate ML vision
- ML and data literacy & workforce up-skilling

Research agenda

- Questionnaires, facilitated workshops and RSM use case catalog used to develop a prioritized list of client ML use cases

Solution development

- Software engineers (RSM-only, client paired, or client-only) develop pilot using prioritized use case, candidate data sets into test environment

Scale & mature

- Get model to 'live'
- Scaling and maturing the ML operating model
- Prioritize additional opportunities, source and curate data, ensure proper resourcing and implement model governance

Results that matter

- Clear understanding of organizational gaps that need to be resolved before starting an ML project
- Vision for use of ML
- Business case

- Inventory of use cases (backlog) appropriate for ML and automation, prioritized based upon agreed criteria
- Repeatable tool and process to keep backlog evergreen

- First model developed
- Time boxed implementation of the top prioritized use case, with training data provisioned and the model trained, evaluated and deployed to test environment

- Operating model in place with clear roadmap for –
1. Delivering additional use cases and data,
 2. Required people and domain expertise
 3. Model governance
 4. Continued investment



RSM's Advanced Analytics team

FOCUS INDUSTRIES

Retail	Food & Beverage	Life Science
Manufacturing	Distribution	Hospitality
Consumer Products	Industrial Products	
Nonprofits	Financial Services	

Organizations today face a myriad of complex business challenges — leveraging technology, managing risk, and effectively executing their goals within financial and operational constraints.

To help address these challenges, the Advanced Analytics team at RSM offers the ability for your organization to start using data as the strategic asset that it is. It can transform the mountains of raw data within your organization into actionable information and makes previously unattainable insights available regarding financial health, operational efficiency and who your buyers really are.



Deliverable Summary

<p>Current-State Analysis Report Summary of current technology, sources, reporting landscape</p>	<p>Future-State Vision Document Desired reporting & analytics capabilities</p>	<p>Phased Implementation Roadmap Capabilities enabled, major activities, required resources</p>	<p>Findings & Recommendations Support future state vision</p>
---	---	--	--

Notable service offerings:

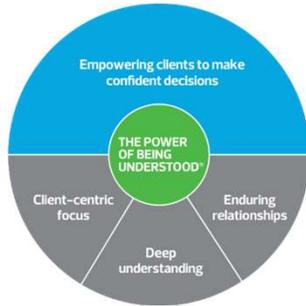
- Advanced Analytics Planning and Design
- Exploratory Data Analysis
- ML/AI Forecasting
- Lead Scoring
- Customer Segmentation/Clustering
- Customer Churn prediction
- IoT Analytics

<p>1st First Choice Advisor to Middle Market Companies</p>	<p>5th Largest audit, tax and consulting firm in US</p>	<p>90+ Data Consultants</p>	<p>141% DDS Team Growth in Last 3 Years</p>
		<p>5,800+ Consulting Clients</p>	

Example advanced analytics benefits

- Extract Key Influential Variables
- Pattern and Trend Detection
- Summarize / Detect Characteristics of Data
- Validate assumptions with statistics and advanced methods
- Detect Outliers and Anomalies
- Determine Optimal Operating Conditions
- Promotes consistent and common understanding of your data

Gold Microsoft Partner



Q&A

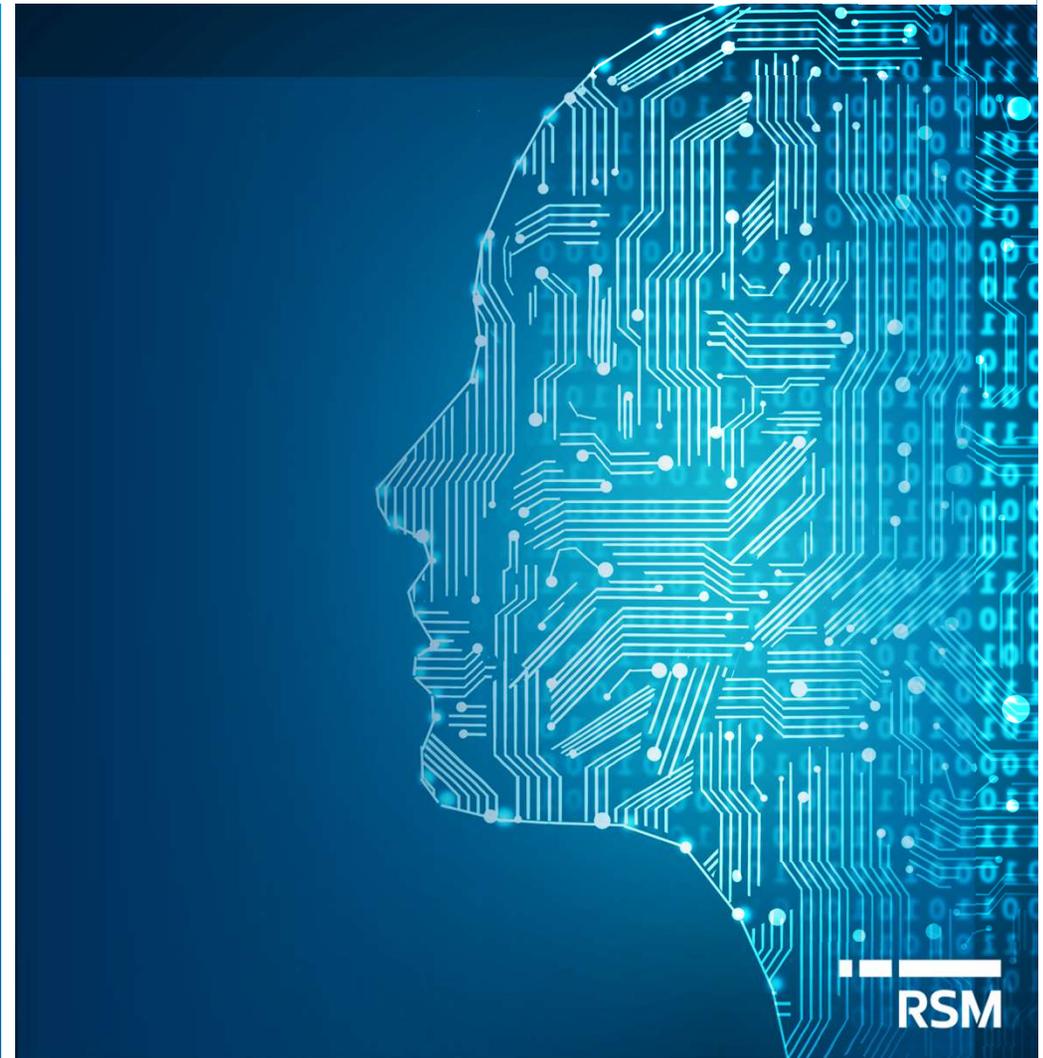


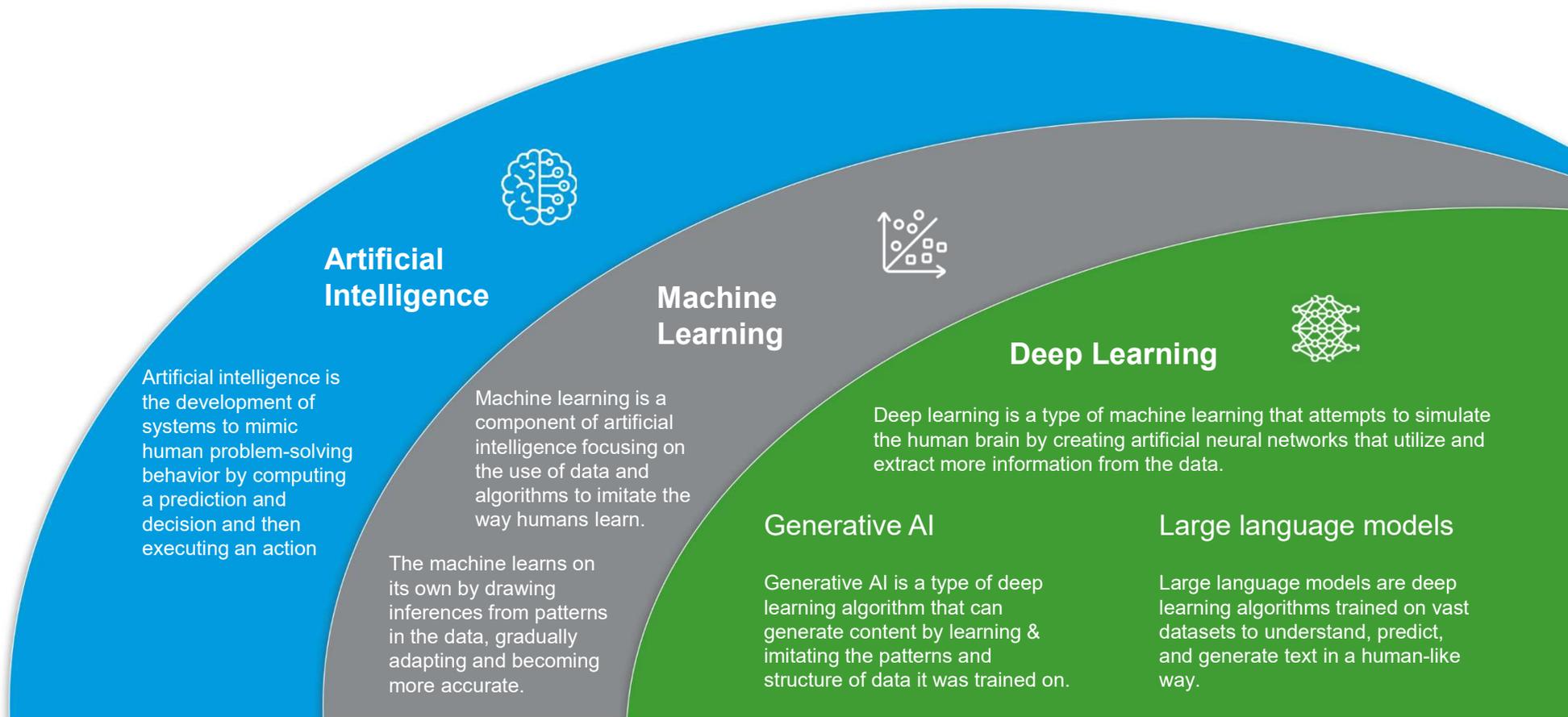
DAVE MAHONEY



AGENDA

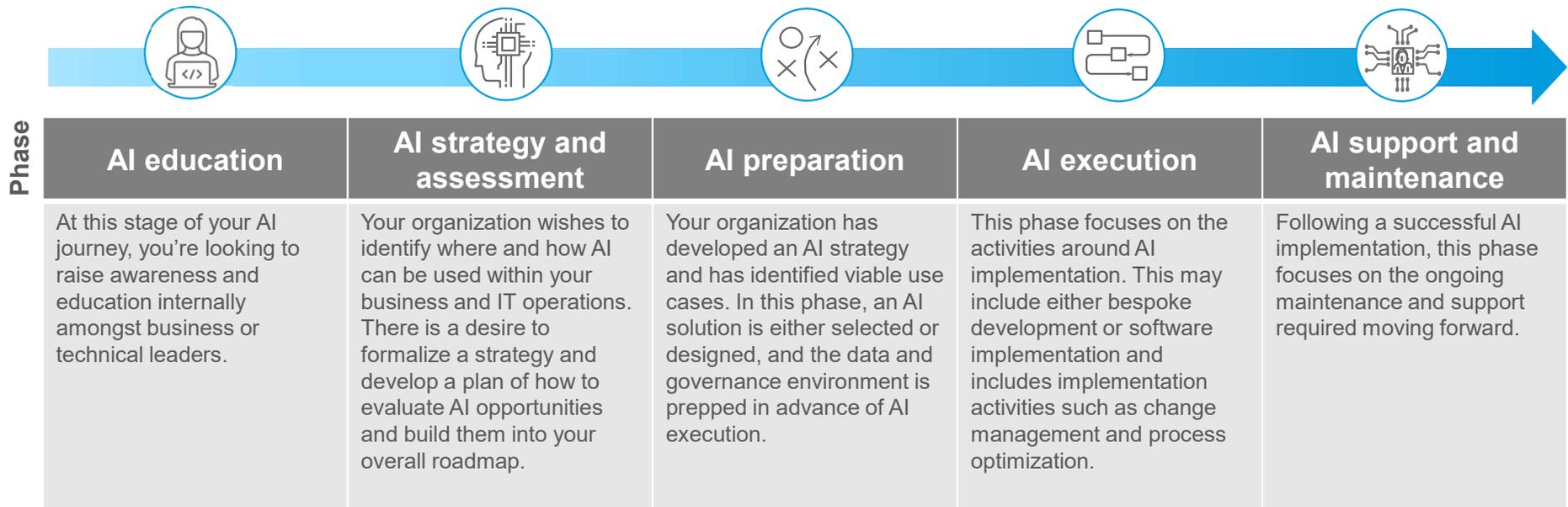
- 1 AI landscape
- 2 AI journey
- 3 Enterprise risks
- 4 Responsible governance adoption
- 5 Appendix





Client journey

AI customer journey outlines a strategic pathway for clients to harness the potential of AI at all phases. RSM can help you navigate this journey from initial education through to the implementation of tailored AI solutions. We support our clients not just with successful adoption, but also the ability to make impactful decisions and ultimately become AI champions within your organization. Specific offerings by customer journey phase are outlined in the following slide.



Risks and safeguards for AI applications



Understanding multi-dimensional AI-related risks – *regulatory, privacy, legal, ethical, operational, and financial* - is vital for smooth implementation, responsible use, trusted results, and compliance.

	01 End User	02 Product	03 Provider	04 Model
	Users or AI agents using and prompting AI products	AI-based apps, like ChatGPT, that take prompts and automate content generation	Developers and access providers to an AI model (e.g., OpenAI, MS Azure, AWS, Google)	Advanced ML models that interact and respond like humans (e.g., GPT, Claude)
RISKS	<ul style="list-style-type: none"> Misinterpretation of output Overreliance on model output Prompt hijacking Sharing sensitive data 	<ul style="list-style-type: none"> Exposure of sensitive data Bugs, defects or malfunctions Misconfiguration Unexplainable results 		<ul style="list-style-type: none"> Limited training data / obsolete Unpredictable output Inaccurate & Biased outputs Model performance drift
SAFEGUARDS	<ul style="list-style-type: none"> User education / training Application input controls Output verification Data loss prevention alerts "Acceptable Use" policy Data handling protocols 	<ul style="list-style-type: none"> DevSecOps practices Data encryption, tokenization / data masking User access & entitlements Periodic security reviews Change control Application monitoring 	<ul style="list-style-type: none"> Third-party risk assessment License agreement, terms and conditions SOC report Service level agreements 	<ul style="list-style-type: none"> Performance testing against standard test dataset Development documentation and release notes Red Team pressure testing User feedback
Cross Company: AI Policy Model Risk Management Employee Communication Culture of Accountability Feedback Channels				

Trustworthy and responsible AI solutions

Implementing AI requires a strategic combination of automated safeguards, human oversight, and layered defense to ensure reliable, trustworthy operation.

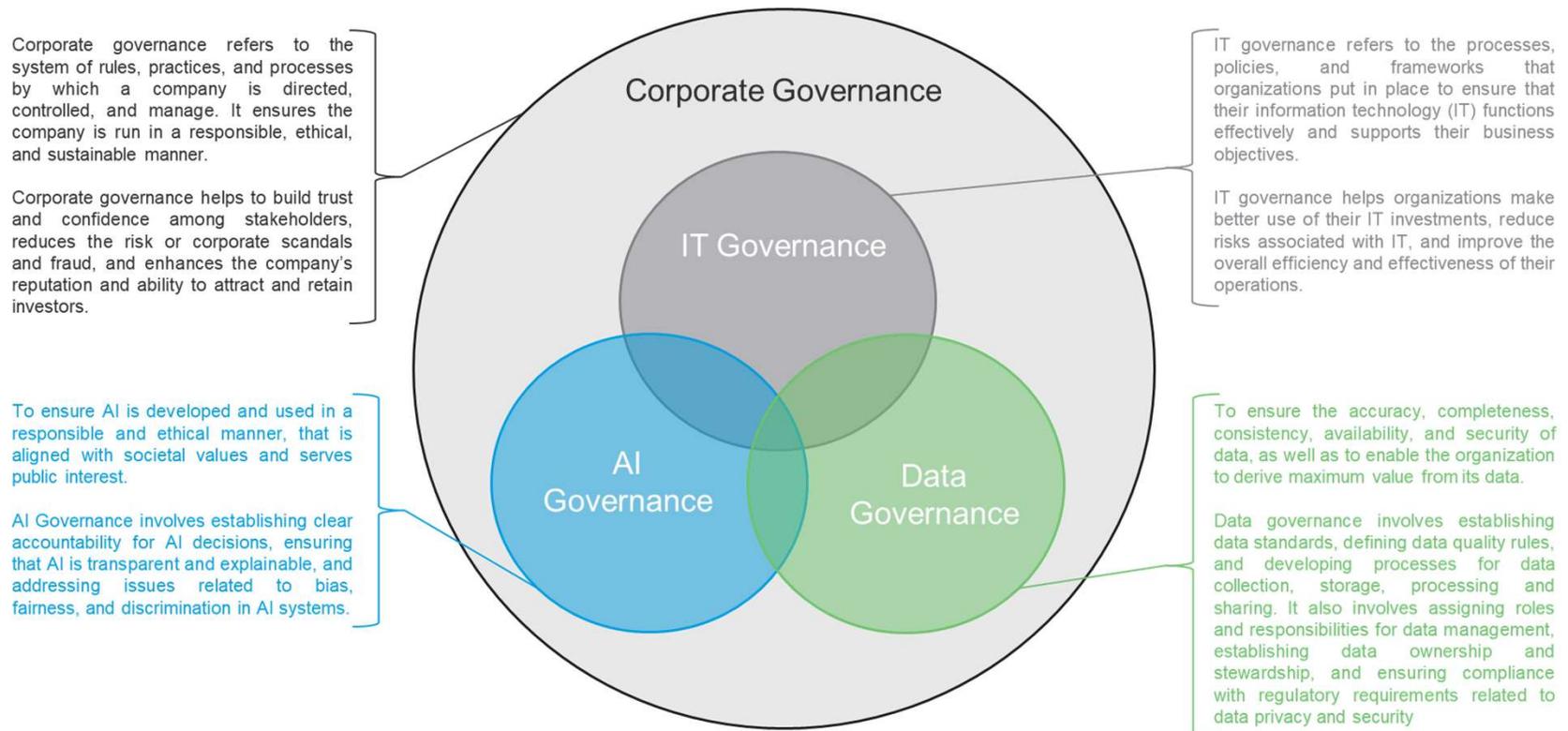


- 01 Accurate**
Produce correct and trustworthy results
- 02 Transparent & Explainable**
Clear understanding of how models operate and explain their decisions
- 03 Reliable**
Consistent performance over time
- 04 Robust**
Protection against manipulation and ability to handle unexpected inputs

- 05 Fair**
Mitigating biases to avoid discrimination
- 06 Secure & Private**
Safeguarding sensitive data and protect from unauthorized access and malicious attacks
- 07 Resilient**
Ability to recover and adapt to changes or failures
- 08 User Control**
Empowering users with ability to decide when and how AI is applied

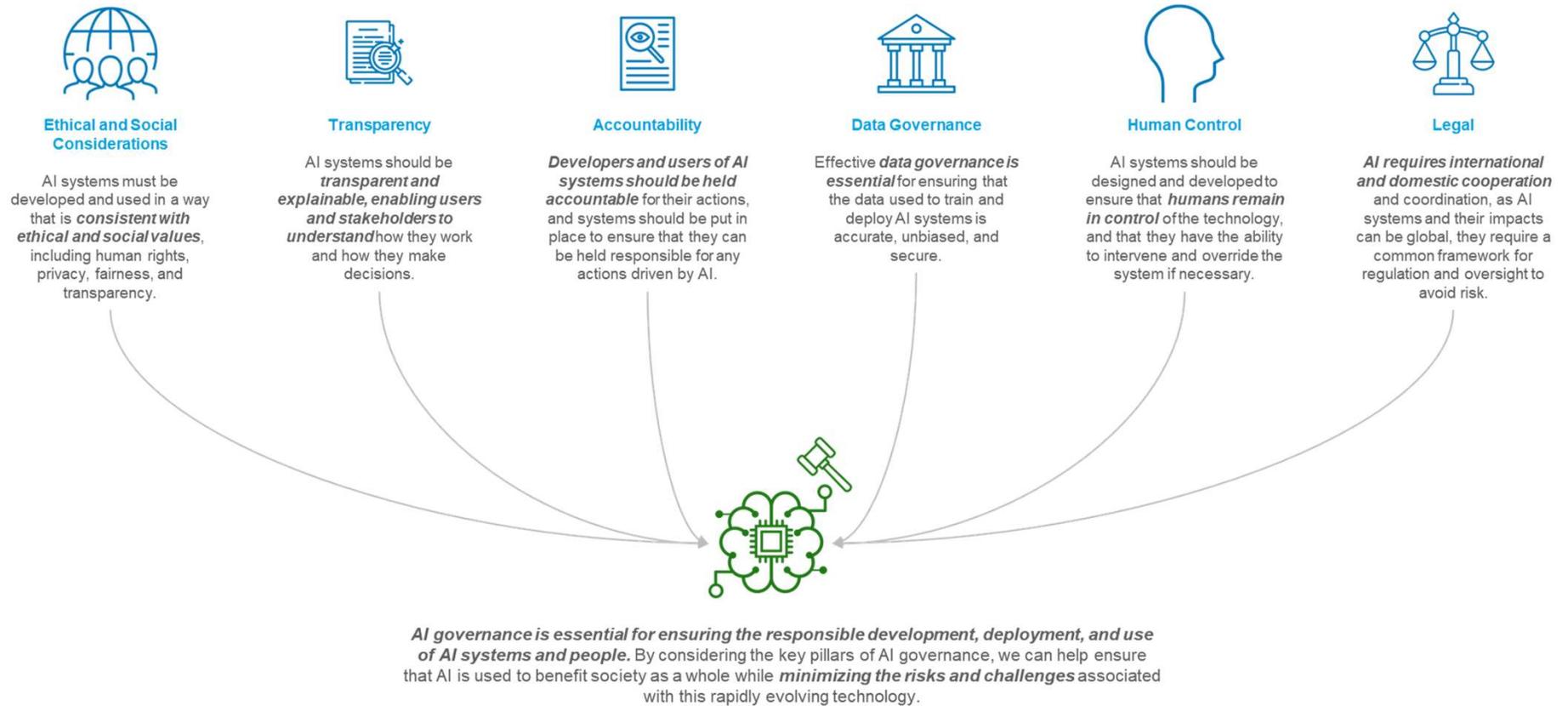
AI governance overview

AI Governance is linked to and overlaps with IT and Data Governance. RSM will ensure the AI Governance Strategy that is developed considers established structures, processes, and procedures within these realms.



Key components of AI governance

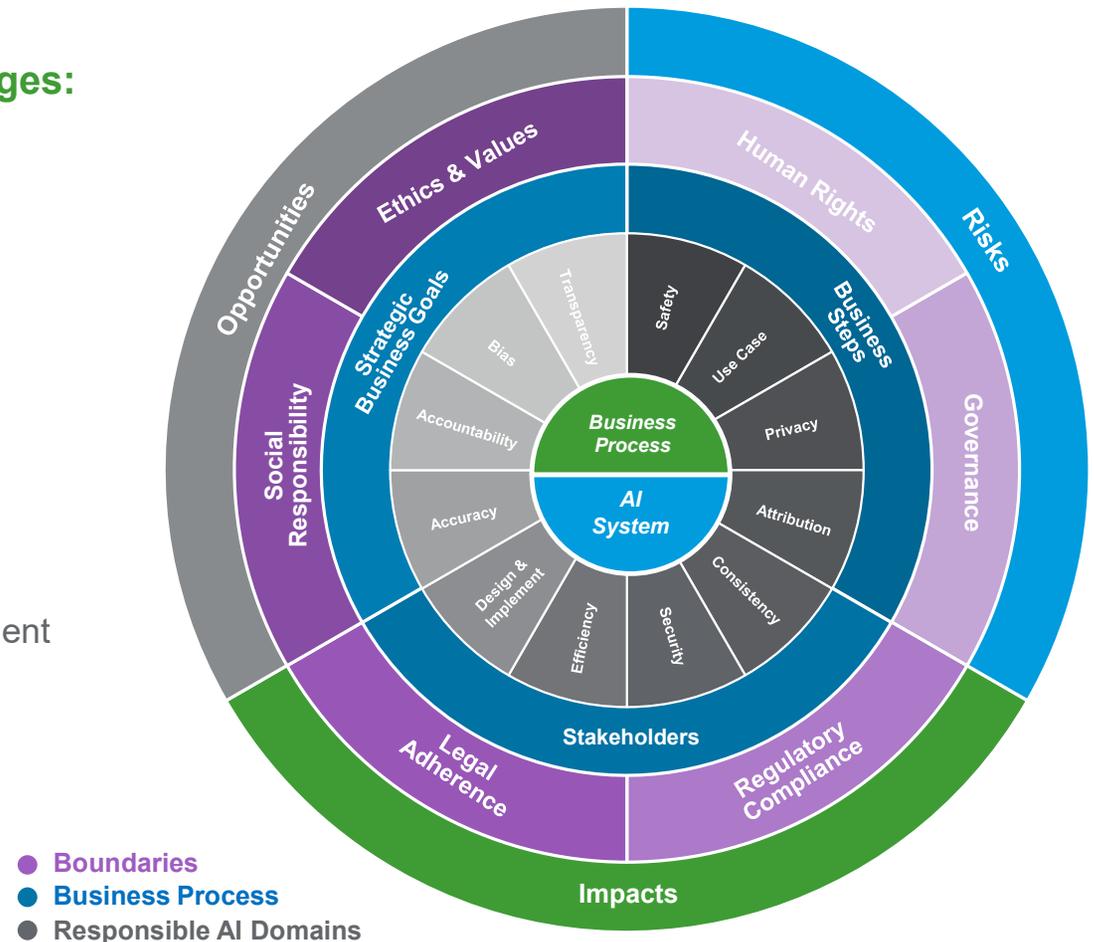
Furthermore, the following are key criteria that RSM will focus on embedding within WorkSafe BC's AI governance strategy.



Responsible governance framework

Our Solution to existing framework challenges:

- System-centric without involving the business process
- Minimum coverage regarding the impact of third-party systems
 - Supply chain
 - Partner ecosystem
 - Vendor ecosystem
- Misappropriation of trends as internal/external data bias
- RSM created a unified Enterprise Risk Management Framework by which to govern AI from inception through operations

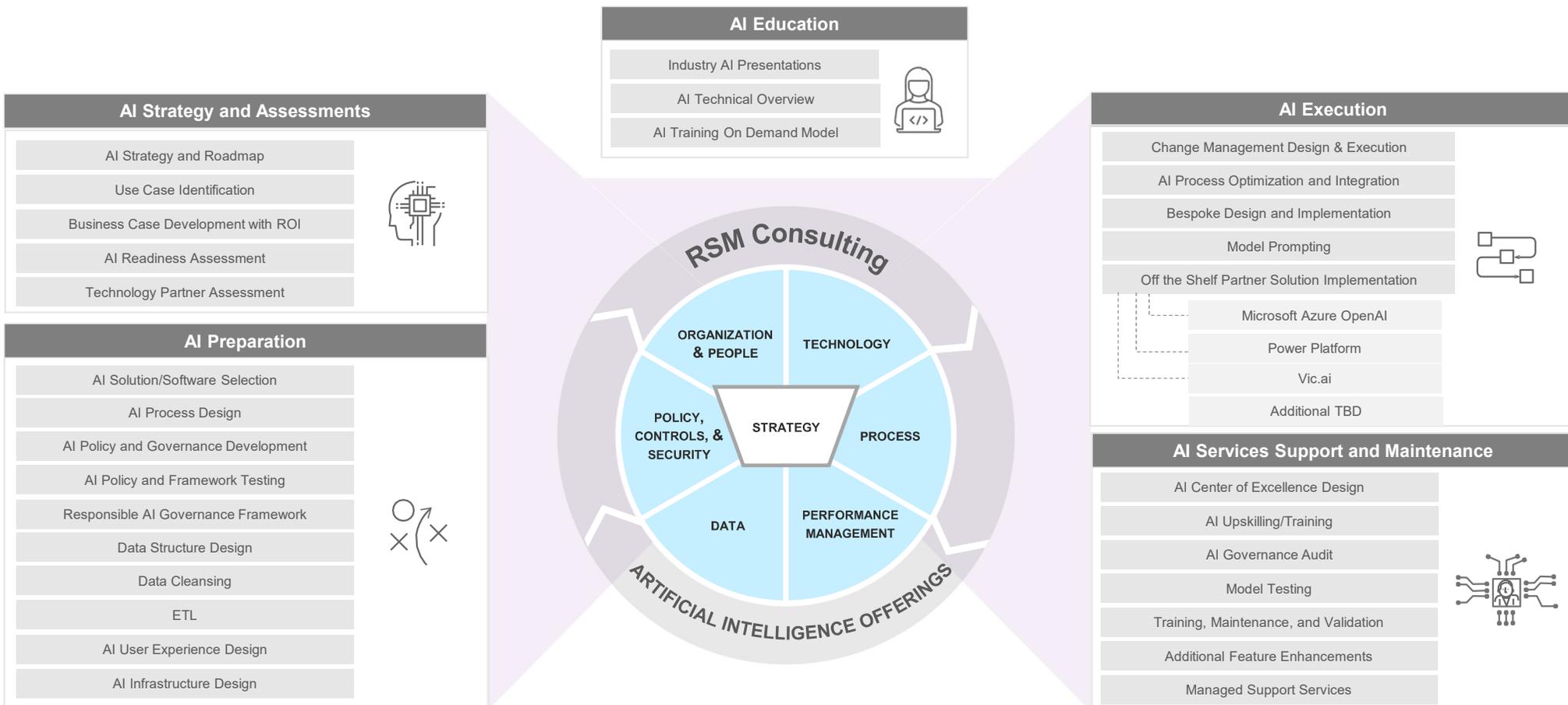




Solutions appendix

December 4, 2023

Service offerings by phase



AI governance services



Artificial Intelligence has the potential to revolutionize and optimize business processes, driving increased efficiency, cost savings, and data driven decision making. However, the implementation of this new technology also carries inherent risks that emphasizes the need for comprehensive measures to address and mitigate these challenges effectively. RSM's team of consulting leaders have the background and experience to support your organization in evaluating the implications of utilizing Artificial Intelligence, and helping you plan and prepare for the transition ahead.

Risks mitigated through RSM's Responsible AI Governance services

Governance, Value & Ethics <ul style="list-style-type: none"> ➤ Ensuring use of authorized systems ➤ Alignment of organizational values ➤ Acceptable use policies 	Regulatory Compliance <ul style="list-style-type: none"> ➤ Adherence to applicable regulations during design and implementation 	Security <ul style="list-style-type: none"> ➤ Protect AI systems from attacks ➤ Mitigate unauthorized use 	Privacy <ul style="list-style-type: none"> ➤ Safeguard organizational data ➤ Employee training on proper utilization of the system
Consistency <ul style="list-style-type: none"> ➤ Validating consistent system results ➤ Establish systematic benchmarks 	Explainability <ul style="list-style-type: none"> ➤ Verify AI decision making process ➤ Informed usage 	Accountability <ul style="list-style-type: none"> ➤ Proper ownership of the AI ➤ Audit trail of key inputs & updates 	Bias <ul style="list-style-type: none"> ➤ Ensure unbiased decision making ➤ Gather transparent sources

Contact Us

- 
Rick Shriner
 Principal, Risk Consulting
rick.shriner@rsmus.com
 +1 703 336 6544
- 
Tauseef Ghazi
 Principal, Risk Consulting
tauseef.ghazi@rsmus.com
 +1 713 375 9940
- 
Manish Thakkar
 Director, Risk Consulting
manish.thakkar@rsmus.com
 +1 704 206 7229
- 
Dave Mahoney
 Director, Security Privacy and Risk
dave.mahoney@rsmus.com
 +1 610 731 4609

Why RSM?

AI systems offer incredible potential, yet they also pose substantial risks when harnessed for business purposes. At RSM, we bring together a team of dedicated AI professionals, driven by a shared passion to collaborate with you. With our expertise, we can deliver cutting-edge business processes and technology solutions that not only minimize the risks of AI systems but also empower you to implement this transformative technology in a truly impactful manner.

- 01 Dedicated group of experienced professionals
- 02 Tailored and customized approach based on unique needs
- 03 Largest provider of audit, tax and consulting services to the middle market

About RSM

RSM is a leading provider of audit, tax and consulting services, with over **14,700** professionals in **82** cities in the US and **6** cities in Canada. RSM is a licensed CPA firm and is the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with more than **57,000** professionals in **120** countries.



- 82 Cities in the United States and six locations in Canada
- \$3.3B in revenue
- 14,700 professionals
- Founded in 1926

AI Center of Excellence design

Goal

The primary objective of this engagement is for RSM to assist client in standing up an internal Center of Excellence dedicated to artificial Intelligence across the business. The Center of Excellence will serve as the central point of contact for intelligence, awareness and subject matter expertise.

AI Offerings

- AI Digital Strategy and Roadmap
- AI Business Use Case Identification
- AI Business Case Development with ROI
- AI Readiness Assessment
- AI Solution / Software Selection
- AI Process Design
- Change Management Design and Execution
- User Experience
- AI Center of Excellence Design**

Objectives

- Understand current state operations and processes of the business
- Capture key intelligence on industry trends and competitors
- Create a highly technical understanding of AI both on the development side and use
- Hold training sessions throughout the business to increase awareness and understanding of the technology
- Create community involvement around the technology to foster Innovation
- Provide regular leadership updates to key stakeholders highlighting recent updates and important information

Outcomes

- ✓ Functional CoE dedicated to Artificial Intelligence learning, understanding and execution
- ✓ Internal sounding board for leadership and internal teams regarding AI and potential development projects

High Level Approach

RSM offers a unique approach to help enable your business to take on the challenge of new technology. By creating a Center of Excellence focused on Artificial Intelligence, CLIENT will have the framework and roadmap to operationalize and leverage their own internal group of subject matter experts to make informed and prepared decisions.



	Week							
	1	2	3	4	5	6	7	8
AI Center of Excellence Design								
Facilitate interviews and/or workshops with key stakeholders to define desired outcomes and personnel fit								
Alignment on goals and strategy								
Create charter to guide the CoE and receive sign off from leadership								
Fit-gap analysis and AI use case identification								
Cadence for regular updates to firm leadership								

AI digital strategy and roadmap



Goal

The primary objective of this engagement is for RSM to assist CLIENT in conducting a rapid assessment of the current state IT and Digital Roadmap Strategy, and to identify opportunities to adopt artificial intelligence into their IT roadmap. RSM will provide a prescriptive assessment of in-scope processes and technologies and propose potential AI use cases and solutions to incorporate into overall Digital strategy and roadmap.

AI Offerings

AI Digital Strategy and Roadmap

Business Use Case Identification

AI Business Case Development with ROI

AI Readiness Assessment

AI Solution / Software Selection

AI Process Design

Change Management Design and Execution

User Experience

AI Center of Excellence Design

Objectives

- Understand current state IT Roadmap and the alignment with business goals and objectives
- Determine design principles for future state IT Roadmap with executive team
- Document business technical requirements of current and future state business objectives
- Conduct fit-gap analysis on current technology stack capabilities and/or structure as compared to desired future state and leading practices
- Identify potential AI use cases for further assessment
- Identify gaps in AI policies and governance

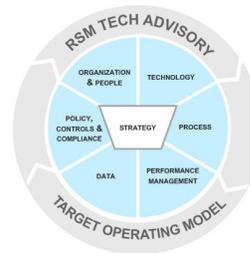
Outcomes

- ✓ Prepared recommendations and within a 3-5 year IT Roadmap in alignment with RSM's Target Operating Model Framework
- ✓ Actionable next steps with resource estimates

High Level Approach

RSM follows a standard Target Operating Model (TOM) framework when developing AI strategy. Please refer to appendix slides in this deck to review standard methodology and confirm scope for TOM elements to include in AI roadmap.

TOM Framework



Rapid Assessment Methodology

Plan Assess Analyze Prioritize Roadmap



	Week							
	1	2	3	4	5	6	7	8
AI Digital Strategy and Roadmap								
Rapid current state understanding and project initiation								
Facilitate interviews and/or workshops with key stakeholders to refine current state and define design principles								
Document business and technical requirements (current and future)								
Fit-gap analysis and AI use case identification								
Finalize AI roadmap and integrate it with existing IT roadmap								

AI business use case identification



Goal

The primary objective of this engagement is for RSM to assist clients with the identification of AI and automation uses cases within their organization. Use cases are identified by exploring areas within the organization where manual tasks are completed today and where large volumes of data is processed to develop insights and make decisions.

- AI Offerings
- AI Digital Strategy and Roadmap
- AI Business Use Case Identification
- AI Business Case Development with ROI
- AI Readiness Assessment
- AI Solution / Software Selection
- AI Process Design
- Change Management Design and Execution
- User Experience
- AI Center of Excellence Design

Objectives

- Understand current state of AI and automation program and areas of enhancement
- Develop use case identification approach, dependent on size and complexity of the organization and areas of perceived opportunity
- Develop appropriate AI and automation intake and governance structure that is right-sized and complements processes in place
- Compile use cases through utilization of intake tools and workshops
- Development of a prioritization framework to identify high-value use cases that need to be explored further

Outcomes

- ✓ AI and automation opportunity intake process and governance structure
- ✓ AI and automation backlog
- ✓ PowerBI AI and automation dashboard

High-level Approach



AI readiness assessment



Goal

The primary objective is for RSM to assist clients in conducting a comprehensive assessment of their existing infrastructures, processes, and data readiness for AI adoption. This includes optimizing software, security, and AI infrastructure, retooling processes, and conducting organizational maturity assessments to ensure a smooth integration of machine learning workflows.

AI Offerings

AI Digital Strategy and Roadmap

AI Business Use Case Identification

AI Business Case Development with ROI

AI Readiness Assessment

AI Solution / Software Selection

AI Process Design

Change Management Design and Execution

User Experience

AI Center of Excellence Design

Objectives

- Conduct a thorough examination of the organization's existing data, IT, and operational infrastructures to ascertain the current state of readiness for AI adoption.
- Examine existing software, security requirements, and AI infrastructure components for optimization to meet business need
- Retool relevant existing processes and conduct organizational maturity assessments to ensure operational infrastructure supports the machine learning workflow.
- Evaluate the quality, availability, and accessibility of data

Outcomes

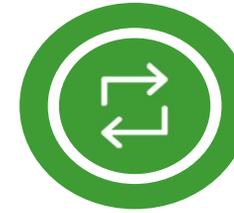
- ✓ Detailed AI Use Case Readiness Assessment Report
- ✓ Clear, tailored, and strategic AI integration roadmap

High Level Approach



People

Assess organizational readiness for managing AI technologies.



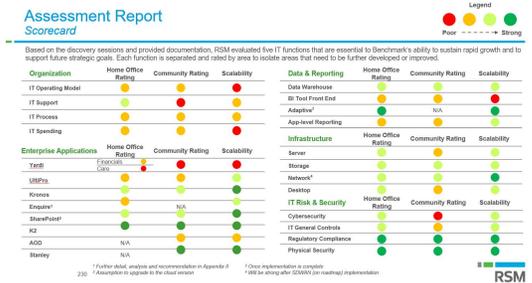
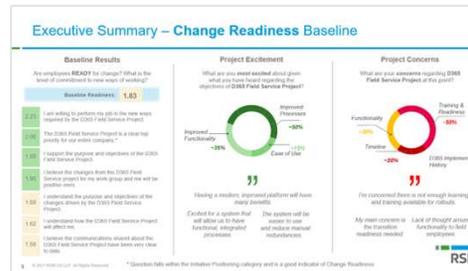
Process

Retool operations to support machine learning workflows.



Technology

Optimize software, security, and AI infrastructure, and evaluate data readiness for AI adoption.



AI solution / software selection



Goal

The primary objective of this engagement is for RSM to assist clients in assessing and selecting the best “fit-for-purpose” AI point solutions to address the specific business challenge and/or to realize the automation opportunities identified as the strategic direction in the IT roadmap. RSM will gauge detailed current state processes and desired future state functionality requirements to facilitate the selection of an AI tool that aligns with the strategic objectives and value propositions of the organization.

AI Offerings

AI Digital Strategy and Roadmap

AI Business Use Case Identification

AI Business Case Development with ROI

AI Readiness Assessment

AI Solution / Software Selection

AI Process Design

Change Management Design and Execution

User Experience

AI Center of Excellence Design

Objectives

- Review and understand specific challenges identified in the strategic roadmap that could be addressed by AI point solutions
- Evaluate the potential ROI of the AI solution, quantify the financial and operational benefits
- Document business and technical requirements of current and future state AI visions
- Conduct compatibility analysis on current technology stack capabilities with the AI point solution of interest
- Facilitate vendor engagement and present vendor analysis on functionality fit, pricing, support, and implementation, etc.

Outcomes

- ✓ Business and functional requirements log
- ✓ Solution Market scan
- ✓ Vendor Analysis
- ✓ Final selection of the suitable AI point solution

High Level Approach

RSM leverages the multi-phased approach and methodology when facilitating AI solution selection. The accelerated approach often takes 10-12 weeks to complete.

AI Solution Selection Methodology



AI Solution Selection Sample Output



Future State Requirements



Demo Script & Scorecard



Selection Criteria and down select



Vendor Analysis



Change Readiness Analysis



Program/Implementation Roadmap

AI process design

Goal

The primary objective of this engagement is for RSM to assist clients in designing and architecting robust AI processes that not only integrate seamlessly with the chosen AI point solution but also resonate with the overarching business and IT strategies, ensuring smooth execution and scalability

AI Offerings

- AI Digital Strategy and Roadmap
- AI Business Use Case Identification
- AI Business Case Development with ROI
- AI Readiness Assessment
- AI Solution / Software Selection

AI Process Design

- Change Management Design and Execution
- User Experience
- AI Center of Excellence Design

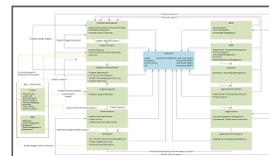
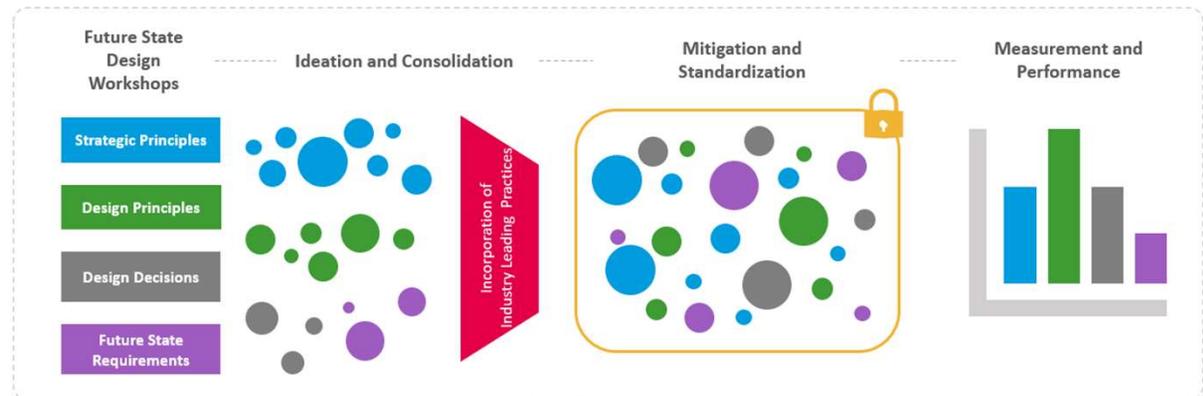
Objectives

- Chart out detailed process workflows that the AI will influence, identifying touchpoints, interactions, and potential bottlenecks.
- Determine the best utilization of hardware and software resources and other design principles, to ensure AI solution interfaces seamlessly with existing systems, while minimizing disruptions
- Design processes keeping in mind data protection standards, industry-specific regulations, and ensuring the security of both data and algorithms
- Identify potential risks in AI implementation and design processes to address or mitigate them proactively
- Establish clear metrics and KPIs to evaluate the effectiveness and efficiency of the AI processes

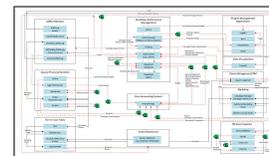
Outcomes

- ✓ AI Process Blueprint (i.e. designed processes, dataflows, integration points, and system architecture)
- ✓ Risk Assessment Matrix
- ✓ Implementation roadmap

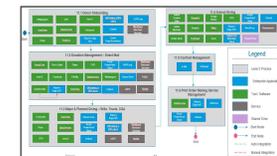
High Level Approach



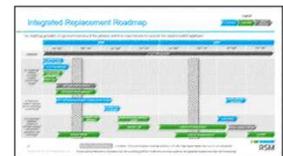
AI Process Design



Dataflow Diagram



Operation architecture



Implementation roadmap

Change management execution



Goal

The primary objective of this engagement is for RSM to assist clients in navigating through the complexities of AI adoption, focusing on clear communication, workforce transition, and sustainable change. We'll employ a structured approach to manage organizational and cultural shifts, ensuring that the integration of AI technologies is in alignment with your strategic objectives and delivers tangible outcomes for your organization.

AI Offerings

AI Digital Strategy and Roadmap

AI Business Use Case Identification

AI Business Case Development with ROI

AI Readiness Assessment

AI Solution / Software Selection

AI Process Design

Change Management Design and Execution

User Experience

AI Center of Excellence Design

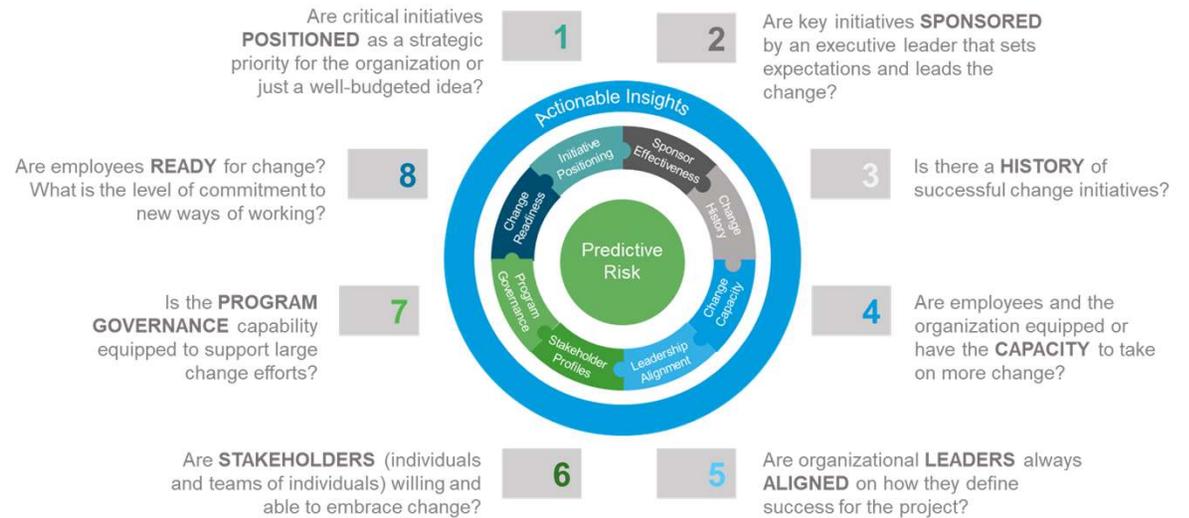
Objectives

- Develop communication strategies to keep all stakeholders informed and engaged throughout the change management process.
- Redefine talent models to address technical skill requirements and develop AI skills within the organization
- Ensure that the workforce is adequately trained and equipped to work alongside AI technologies.
- Establish metrics for measuring AI adoption success, conduct regular reviews, and update AI adoption strategy.
- Ensure that AI adoption is sustainable and scalable across the organization.
- Ensure that the organizational culture is conducive to embracing technological changes.

Outcomes

- ✓ Change Management Plan
- ✓ Training Strategy
- ✓ Cultural Change analysis and Plan

High Level Approach



User experience

Goal

The primary objective of this engagement is for RSM to assist clients with ensuring a seamless user experience - that the technology is accessible, intuitive, and genuinely beneficial to end-users. Our goal is to weave a seamless integration of technologies into the user's daily workflows and tasks, enhancing their productivity and decision-making processes without introducing unnecessary complexity. By placing the user at the heart of the development process, we aim to create AI offerings that not only solve the identified problems but also provide an engaging and straightforward user interaction, fostering user adoption and satisfaction.

AI Offerings	Objectives
AI Digital Strategy and Roadmap	<ul style="list-style-type: none"> Engage with end-users and stakeholders to gather insights and define user stories and tasks that the solution needs to address. Map user journeys to visualize and understand the user's interactions and touchpoints Establish the visual design, interface, and interactions that align with brand and user expectations Develop prototypes and conduct iterative testing to validate and refine design concepts and user flows. Integrate feedback into the design and development process to ensure our solutions align with user needs. Ensure our solutions are accessible and inclusive. Post-launch, continuously evaluate user experience through feedback and data, iterating as needed.
AI Business Use Case Identification	
AI Business Case Development with ROI	
AI Readiness Assessment	
AI Solution / Software Selection	
AI Process Design	
Change Management Design and Execution	
User Experience	Outcomes
AI Center of Excellence Design	<ul style="list-style-type: none"> By prioritizing UX, our AI solutions will be more intuitive and user-friendly, thereby enhancing user adoption and satisfaction. Ensuring solutions are tailored to meet user needs effectively, achieving intended ROI

High Level Approach

An agile approach to user experience

Employing agile methodology in UX design ensures that the development process is adaptable and responsive to changes and new insights gathered throughout the project. It allows for iterative testing and refinement, ensuring that the final product is closely aligned with user needs and expectations.

