Getting Started with AI

Phase Zero Kickoff Session

Get clarity about the main pillars, objectives, and expected outcomes of your AI strategy quickly and effectively

Led by a nationally recognized AI expert, this 1-hour session will provide you with a running start for your AI journey.

Topics include:

- Reference use cases specific to your industry
- Initial discussion and feedback on your pre-session questionnaire
- Best practices for a holistic AI strategy including platform, solution portfolio, communication, talent and governance

Investment:

- 10-20 minutes prep time to complete questionnaire (page 2)
- 1-hour interactive video session
- $500 flat fee

Deliverables:

- Industry pre-meeting research material
- AI strategy best practices document
- High-level summary of discussion, recommendations and next steps

Business Goals and Impact

What are your main goals for using AI?

- Increase revenue
- Reduce costs
- Improve customer experience
- Other: _____

Is AI a "must have" or a "nice to have"

- Must have
- Nice to have

Describe a specific problem you hope AI will solve. *(Example: "We want AI to reduce customer service call times by predicting common issues and suggesting solutions to agents, saving $20,000 per month.")*

In addition to specific dollar savings or added revenue, are there other ways you plan to measure success? *(Examples: Improved customer satisfaction scores/Net Promoter Scores, reduced fraud, etc.)*

Data Availability

Do you have data for the AI project?

- Yes
- No, need help getting data
- Not sure

Is the data easy to understand by an outside resource?
(i.e. is the data well structured, neatly labeled, accessible, etc.)

- Yes
- No, need help prepping the data

Are there any rules about how you can use the data?
(i.e. we have consent to use the data, we can move the data into the cloud if applicable, etc.)

- Yes
- No

Budget

What is your approximate budget for the AI project?

- Under $50,000
- $50,000 – $100,000
- $100,000 – $500,000
- Over $500,000

Technical & Infrastructure Readiness

To what degree will the AI system need to be integrated with existing systems

- Full integration
- Lightweight integration
- No integration

Alternatives and Differentiation

Have you considered other solutions besides AI, such as Robotic Process Automation, scripts/macros, or other non-technical solutions like process changes?

- Yes, such as: _____
- No

Governance and Compliance

Do you have rules or policies for using AI?

- Yes
- No, need help setting them up

Team and Talent

Do you have any in-house AI expertise?

- Strong in house
- Some in house
- No in house

To discuss or schedule this offering, email John Frantz at jefrantz@thefrantzgroup.com or utilize the contact us form on the website. www.thefrantzgroup.com