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AI TRANSFORMATION SERIES

DIAGNOSE BEFORE YOU DEPLOY

A Process-First Guide to Finding High-Value AI Opportunities

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INTRODUCTION

AI TRANSFORMATION STARTS WITH OPERATIONAL INSIGHT

Most leaders have received the same mandate: use AI to optimize operations, reduce cost, and scale. The instruction is clear. What to actually do about it is often less so.

That pressure tends to send teams outward. Demos get booked, vendor lists circulate, and within a few weeks the conversation has become a comparison of platforms. It feels like progress. Many of these projects stall, not because the technology failed, but because no one was sure which problem it was meant to solve.

On the other end, we all know that person in the company who is eager to leverage their enterprise AI account to build a solution for their as-is process. It may work in the short term, but it fails to address the operating model around it. Multiply that by every team doing the same thing and the firm ends up with a dozen private tools, no shared view of how the work actually runs, and a new dependency on whoever built each one.



Buying first

Platform comparisons and demos that commit to a tool before the problem is defined.



Building first

Private, one-off tools built around the as-is process, creating new key-person dependencies.



Buying and building fail the same way: both commit to a solution before anyone has described the problem.

AI is often perceived as magic: plug it in and the hard work disappears. What these tools actually do is narrower. They work with the material in front of them, whether that is a document, a spreadsheet, an email thread, or a system record: pulling out what matters, comparing it against other sources, drafting and summarizing, following a sequence of instructions, and flagging what looks unusual. What they lack is the finer detail of your business nuances: which spreadsheet your controller trusts, why a deal was turned down two years ago, or which step in month-end close depends on one person remembering to send an email. AI performs only as well as the process, data, and instructions it is given.

That is why understanding your process is the real first step. The better question is not "What AI tool should we buy?" but "Where does our operating model create avoidable friction?" The good news is that answering it is far less painful than it sounds. It does not require a multi-year transformation program or a new department. It takes a handful of focused conversations with the people who do the work and a structured way to capture what you learn.

PERSPECTIVE

LOOK INWARD BEFORE YOU BUY OUTWARD

Traditional technology projects begin with the market: compare tools, pick the closest fit, and bend the organization around the product. AI reverses that dynamic. Because it can work with documents, emails, and plain-language instructions, it can be shaped around how your firm actually operates, but only once someone has taken the time to understand and describe those specifics.

That is why the strongest use cases rarely come from a product brochure. They come from a close look at where knowledge lives, where handoffs slow things down, where data is retyped between systems, and where everything depends on one experienced person. These pressure points often surface after a period of growth, or when a key person leaves and the team discovers how much of the process left with them.



THE FRAMEWORK

A FIVE-STEP DIAGNOSTIC FOR AI ENHANCEMENT

None of these steps requires technical expertise, just curiosity and access to the people doing the work. Most teams can work through a single process in a matter of days, and much of what they learn is valuable before any AI is involved.

This exercise is not new. What is new is that the hardest findings are no longer dead ends. Automation once required structured data and connected systems, which ruled out anything running on email, documents, or judgment. Those constraints no longer apply, so the items you would once have set aside are now worth the closest look.

THE FIVE STEPS



01

Map the process as it exists today

Capture the real workflow, not the version in the policy manual. Ask the people who do the work to walk through a recent example from start to finish, including the shortcuts and workarounds that never made it into the official procedure. Where does the work begin? Who are they waiting on? A simple flowchart or numbered list is enough. You can even record the walkthrough and have AI draft the first version from the transcript, which captures the edge cases and caveats that get lost when someone writes it up afterward.

02

Identify manual effort

Mark every point where someone is copying figures from a PDF, rekeying the same data into two systems, clicking through several screens to find one number, or keeping an offline tracker. These are often the first places AI can help, and they are easy to spot once you look.

03

Trace handoffs and knowledge dependencies

Look at where work passes between people or teams. Handoffs are where delays build up, ownership blurs, and context gets lost. Ask “What happens when this person is on vacation?” to find knowledge that lives in someone's head rather than in a system. The messiest handoffs, the ones that run on email, attachments, and follow-up, were once beyond automation’s reach. They are now where agentic orchestration does its best work.

04

Follow the data

Note where information originates, where it goes, and how it gets there. Which systems are connected, and which are bridged by email attachments and manual uploads? You don’t need a technical diagram, just a clear sense of where data gets stuck.

05

Prioritize opportunities

Most teams end up with a longer list of pain points than expected. Rank them by business value, risk, scalability, data readiness, and suitability for governed automation (e.g. whether a person can clearly check and approve the work). The aim is not to fix everything at once. Choose one or two opportunities where the value is clear and the path forward is manageable. The result is a short, specific list grounded in how your firm really operates.

SELECTION CRITERIA

WHAT GOOD AI OPPORTUNITIES LOOK LIKE

Not every pain point is a good candidate for AI. The strongest opportunities tend to share a few characteristics:

Process-specific friction
They address process-specific friction rather than forcing a one-size-fits-all solution.

Throughput
They increase throughput without requiring headcount to grow at the same rate.

Institutional knowledge
They preserve institutional knowledge and reduce key-person risk.

Usable history
They create a usable history that improves future decisions.

Clear guardrails
They operate within clear guardrails for security, compliance, and human review.

PARTNERING

FINDING THE RIGHT PARTNER

If you bring in help anywhere, bring it in on the first process. Evaluate them on these points:

People who will sit in the room with your team, working peer to peer with your subject-matter experts rather than presenting to them.

Genuine industry expertise, so they can tell a harmless workaround from a real control gap and understand why a step that looks redundant may exist for a regulatory reason.

Strong applied AI knowledge, including what AI can realistically do today, where it still needs human oversight, and how to use it safely in a regulated environment.

A focus on your gaps, not their product. Be cautious of anyone whose diagnosis always arrives at the same answer. Sometimes the right fix is a process change or a clearer handoff.

An approach that keeps your people at the center. Your leaders and experts should remain the human orchestrators: setting objectives, applying judgment, and defining guardrails.

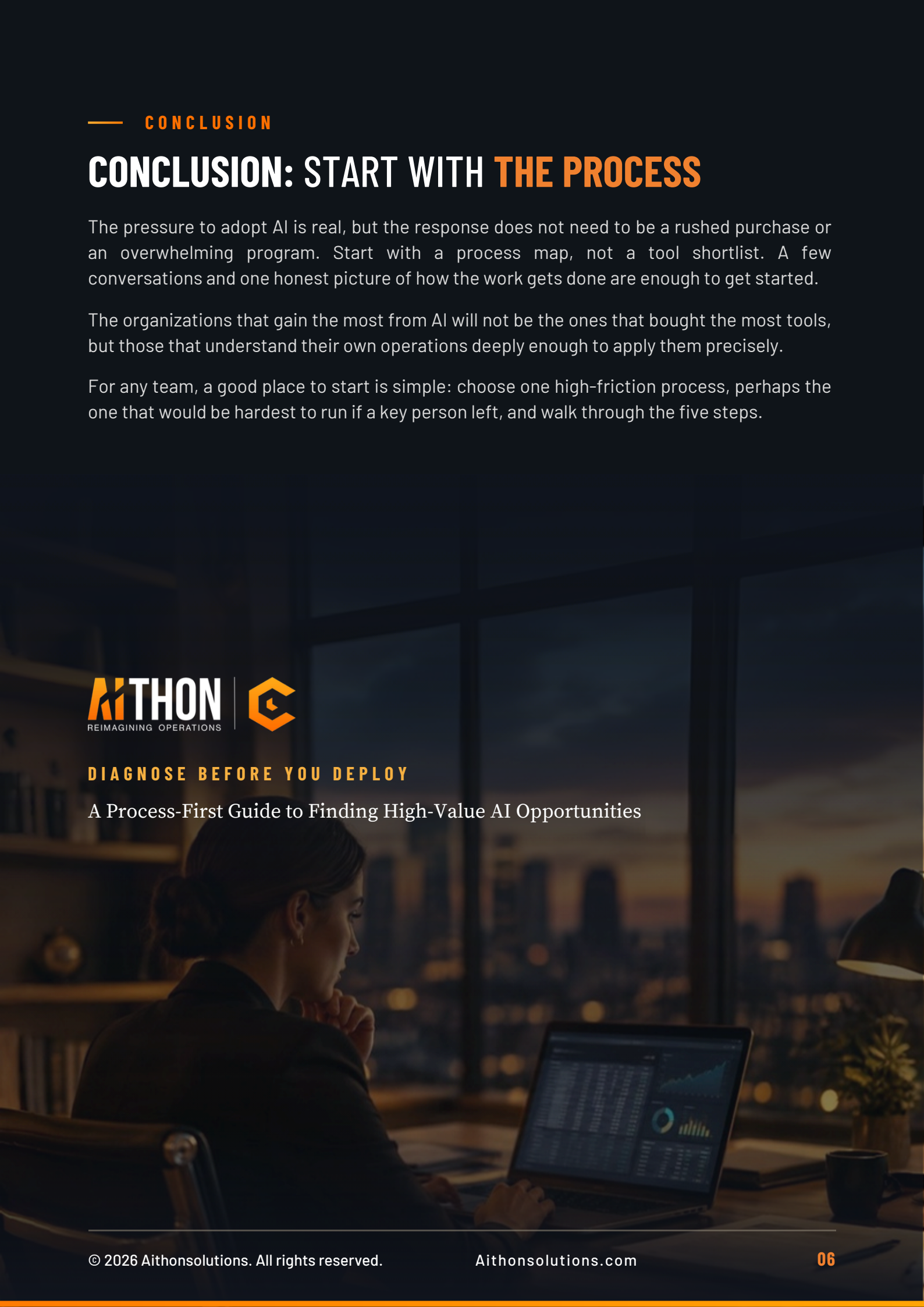
After going through the diagnostic, you will arrive at a clearer picture of your operations and better questions. The right AI partner will want to start with your process map anyway, not their product demo.

CONCLUSION: START WITH THE PROCESS

The pressure to adopt AI is real, but the response does not need to be a rushed purchase or an overwhelming program. Start with a process map, not a tool shortlist. A few conversations and one honest picture of how the work gets done are enough to get started.

The organizations that gain the most from AI will not be the ones that bought the most tools, but those that understand their own operations deeply enough to apply them precisely.

For any team, a good place to start is simple: choose one high-friction process, perhaps the one that would be hardest to run if a key person left, and walk through the five steps.



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