

AI Strategy Roadmap Template

By Designing AI Heroes

Purpose of this Framework

This framework helps organisations develop a structured, actionable roadmap for applying AI and staying aligned with strategy, people, and processes.

Note



- This roadmap is a living document. Adjust it based on new insights, learnings, and AI developments.
- Pair it with your AI Maturity Assessment results to track progress over time. Use it in strategy meetings, innovation workshops, and executive updates.

You will find:

1. Current State Assessment (Status Quo)
2. Strategic Objective Mapping
3. Use Case Development & Prioritisation
4. Roadmap & Timeline Planning
5. Tracking & Continuous Improvement
6. Enablement & Communication

1 Current State Assessment (Status Quo)

How to analyse your AI Capabilities

- **Current AI Implementation Inventory**
 - Document any existing AI projects (operational, in development, or failed).
 - Evaluate the integration of AI with core business processes.
- **AI Expertise Evaluation**
 - Map internal AI and data science expertise.
 - Identify skills gaps and training needs.
 - Assess data literacy across the organisation.
 - Evaluate leadership's understanding of AI capabilities and limitations.
- **AI Readiness Scoring and AI Maturity Index**
 - Develop a scoring mechanism to rate organisational readiness for AI.
 - Benchmark against industry standards and competitors.
 - Identify critical bottlenecks and enablers.

Key Questions:



- Which areas or processes show potential for AI?
- What AI initiatives, tools, or pilots are already in place?
- What is our AI maturity level?
- What internal capabilities (data, people, tech) do we already have?

Self-Assessment Table:

Dimension	Current Status	Notes / Gaps
Data Readiness		
Technical Stack		
Organisational Buy-in		
Skills & Knowledge		
Existing Initiatives		

2 Strategic Objective Mapping

How to set strategic objectives

- **Business Goal Articulation**

- Conduct workshops with executive leadership to clarify strategic priorities.
- Document key performance indicators for the business.
- Identify critical business challenges and growth opportunities.
- Determine tolerance for risk and innovation.

- **Value Driver Identification**

- Map how AI could impact key value drivers (revenue growth, cost reduction, risk mitigation).
- Prioritise business areas with the highest potential impact.
- Identify "quick wins" vs. transformational opportunities.
- Document relevant industry benchmarks and competitive advantages.

- **Stakeholder Mapping**

- Identify key stakeholders across departments and their priorities.
- Document decision-making processes and authority structures.
- Assess change management readiness and potential resistance points.
- Develop communication strategies for different stakeholder groups.

Strategic Objective Mapping - Critical Questions

Business Goal Articulation

- What does AI success look like for us?
- What is our 6-12 month AI vision?
- What are the top 3-5 strategic priorities for our organisation over the next 1-3 years?
- Which specific metrics define success for our organisation right now?
- What are our biggest competitive threats or market challenges?
- Where are we experiencing the most significant operational pain points?
- How does our leadership team define innovation, and what is our risk tolerance?

Value Driver Identification



- Which business processes have the highest operational costs or inefficiencies?
- Where do we see the greatest opportunity for revenue growth or margin improvement?
- Which areas of our business could benefit most from improved decision-making?
- What customer experience issues are impacting retention or satisfaction?
- Which compliance or risk management challenges are most pressing?
- What would a 10% improvement in [specific area] mean financially?

Stakeholder Mapping

- Who will be most affected by AI implementations in each department?
- Which leaders have shown interest in or resistance to technology innovation?
- Who controls budgets relevant to AI implementation?
- Whose support is essential for successful change management?
- Which departments have the most to gain from AI initiatives?
- Who should be involved in early pilots to build internal advocacy?

Objectives Planning Table:

[illegible]

3. Use Case Development & Prioritisation

How to analyse use cases

- **Cross-Functional Workshops**
 - Conduct ideation sessions with diverse teams.
 - Use design thinking approaches to identify pain points.
 - Apply an AI capability framework or assessment to business challenges.
 - Document potential use cases with business owners.
- **Customer Journey Mapping**
 - Analyse customer touchpoints and experience gaps.
 - Identify areas where AI could enhance customer experience.
 - Prioritise customer pain points that AI could address.
 - Assess potential impact on customer satisfaction and loyalty.
- **Operational Process Analysis**
 - Document key operational processes and workflows.
 - Identify inefficiencies and bottlenecks.
 - Evaluate automation opportunities.
 - Assess the impact of process improvements on overall operations.

Use Case Evaluation Framework:

Impact Assessment Matrix	• Develop criteria for evaluating business impact (revenue, cost, experience). • Create a scoring methodology for prioritising use cases. • Assess strategic alignment with business objectives. • Evaluate potential ROI and timeframe for benefits realisation.
Feasibility Analysis	• Assess the technical feasibility of potential use cases. • Evaluate data requirements and availability. • Determine resource needs and constraints. • Identify dependencies and prerequisites.
Risk Evaluation	• Assess implementation risks for each use case. • Evaluate potential ethical implications and reputational risks. • Identify regulatory and compliance considerations. • Document mitigation strategies for high-risk areas.

Use Case Prioritisation

Portfolio Development

- Plot potential use cases on the impact vs. feasibility matrix.
- Categorise into short-term, medium-term, and long-term opportunities.
- Balance portfolio across different business functions.
- Ensure a mix of quick wins and strategic initiatives.



Resource Allocation Planning

- Estimate resource requirements for prioritised use cases.
- Identify required expertise and potential external support.
- Develop preliminary budgets and timelines.
- Create a high-level implementation roadmap.

Success Metrics Definition

- Define clear KPIs for each prioritised use case.
- Establish baseline measurements for comparison.
- Document expected outcomes and benefits.

Use Case Discovery - Critical Questions

Cross-Functional Workshops

- What repetitive, time-consuming tasks do your teams perform regularly?
- Where do you see the most significant bottlenecks in your workflows?
- What types of decisions require excessive manual analysis?
- Which processes involve large volumes of data that humans struggle to process?
- What insights would transform your decision-making if they were available?
- What predictions would be most valuable to your area of the business?

Customer Journey Mapping

- At which touchpoints do customers experience the most friction?
- Where do we see the highest rates of customer abandonment?
- Which customer interactions require the most time from our staff?
- What customer data are we collecting but not effectively utilising?
- Which customer segments are most valuable but least well-served?
- What personalisation opportunities could significantly impact satisfaction?

Operational Process Analysis

- Which processes have the highest error rates or rework requirements?
- Where do we see significant variation in performance or outcomes?
- Which workflows involve multiple hand-offs between teams or systems?
- What operational decisions rely heavily on experience or intuition rather than data?
- Which areas have high volumes of structured data that aren't being fully utilised?
- Where do we lack visibility into process performance or outcomes?



Impact Assessment

- How will this AI use case directly impact our strategic objectives?
- What is the estimated financial impact (revenue increase, cost savings)?
- How many employee hours could be redirected to higher-value work?
- What is the potential impact on customer satisfaction or retention?
- How might this use case create competitive differentiation?
- What follow-on benefits might emerge beyond the primary objective?

Feasibility Analysis

- Do we have sufficient quality data to support this use case?
- What technical capabilities or infrastructure will we need?
- How complex is the integration with existing systems?
- What skills or expertise will be required for implementation?
- How long would it take to develop a minimum viable product?
- What are the dependencies on other systems or initiatives?

Risk Evaluation

- What could go wrong with this implementation?
- Are there ethical considerations or potential biases to address?
- What regulatory compliance issues might impact this use case?
- How might stakeholders or customers react to this AI application?
- What is our fallback if the AI solution doesn't perform as expected?
- What data privacy or security risks need mitigation?

Use Case Template:

Use Case Name	
Description	
Business Goal	
Required Data	
Expected Impact	
Needed Skills	
Estimated Effort	

4. Roadmap & Timeline Planning

Key Questions:



- Which use cases are implemented in which quarter?
- What are the critical milestones (POC, rollout, training)?
- Who is responsible at each stage?

Roadmap Timeline Table:

Phase / Time	Q1	Q2	Q3	Q4
Action 1				
Action 2				
Action 3				

Roles & Responsibilities:

Role	Person / Team	Responsibility

5. Tracking & Continuous Improvement

Key Questions:



- How will we track AI progress and value?
- What metrics define success?
- How often do we review the roadmap?

KPI Tracking Table:

KPI Name	Target Value	Current Status	Update Frequency	Owner

Note



- This roadmap is a living document. Adjust it based on new insights, learnings, and AI developments.
- Pair it with your AI Maturity Assessment results to track progress over time.
- Use it in strategy meetings, innovation workshops, and executive updates.
- Adjust the roadmap, add new use cases, and update team skills.
- Conduct Quarterly Review Meetings.

Use Case Detail Table:

Title	
Description	
Goal	
Required Data	
Effort	
Business Value	

Prioritisation Matrix (Impact vs. Effort):

High Effort / Low Impact Low Potential: Avoid	High Effort / High Impact Medium Potential: Try to reduce the effort
Low Effort / Low Impact Medium Impact: Try to reframe the use case to increase impact	Low Effort / High Impact High Potential: High Business Value and Quick Wins

6. Enablement & Communication

Skill-Gap Analysis Table:

Skill Area	Current Level	Target Level	Action Needed

Internal Communication Plan:

Message / Topic	Target Audience	Channel	Frequency / Timing