

Creating Your AI Service Roadmap



six different ways



You Will Need ...

To put ONE HOUR of undisturbed time in your diary ... plus ...

- ChatGPT, Claude, Gemini, Copilot or similar
- The supplied spreadsheet with various tabs
- Involve your colleagues

How To Use This Workbook

Following this workbook will give you some inspiration and direction for forming a coherent, company-wide ambition for exploiting AI. Follow the exercises, fill in each of your spreadsheet tabs and save. Then upload the spreadsheet to your favourite AI and run the suggested prompt. More marks for adapting the prompt to be more specific to your business and/or uploading further data sources (safely and compliantly, always ...)

Simple steps to AI maturity ...

FIRST ...

● ————— ●
Read the exercises and open the spreadsheet; this is "self-serve" set of exercises from 6DW's AI Roadmap workshop

NEXT ...


● ————— ●
Reflect on your answers and fill in five or more thoughts for each section. Involve your colleagues. The more input the better.

THEN ...

● ————— ●
Follow instructions on Slide 12 to upload your spreadsheet and run the prompt to generate your initial AI roadmap

FINALLY ...

● ————— ●
Feel free to send your spreadsheet(s) to Six Different Ways (contact details on the final slide).



Exercise #1 – “Heaven”

What do you dream your business could do?

How would you work internally? How would you grow? What would you look like in 3 years from now?

Example Answers: “Heaven”

What do you dream of happening?

Dream Big

We want to be at the forefront of the next big trend

Operational

I'd like to know of any bottlenecks that will delay production

Business Model

I'd like to sell more directly to customers

Control

I wish we more visibility of end-to-end processes

Development

I want to double the number of regular clients we have

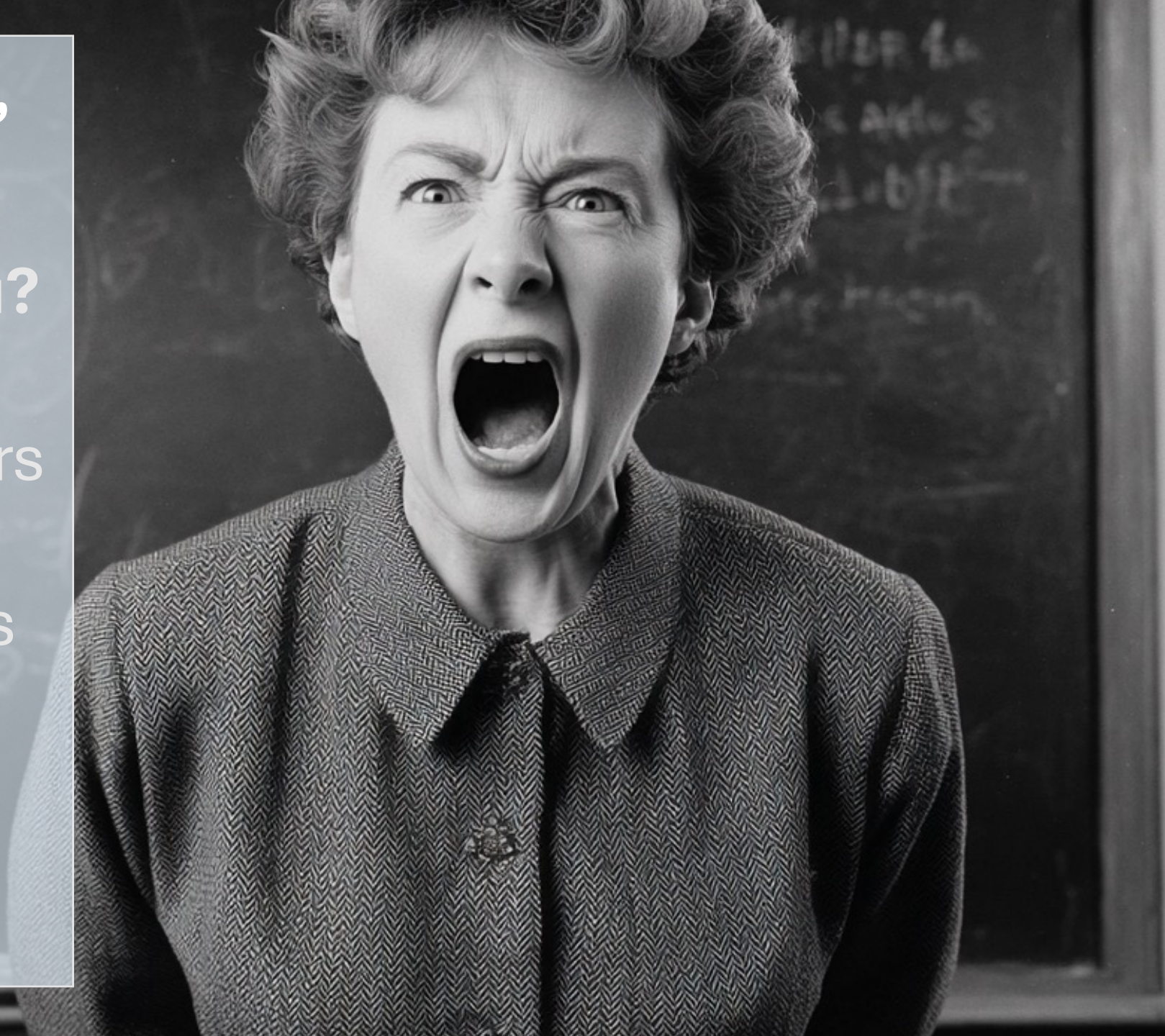
Personal

I'd like to get promoted

Exercise #2 – “Hell”

What frustrates you?

Where are the barriers to what you want to achieve? What keeps you awake at night?



Example Answers: “Hell”

What frustrates you?

Future-Facing

We don't have an AI strategy

Product/Service

We don't know what appeals to any given audience

Competition

We never know what competitors are doing or offering

Organisational

We work in silos so a delay in one department has real consequences

Process

We have no visibility of stock levels or availability when selling

Sales

We don't know what the prospect wants and, when they don't buy, we don't know why

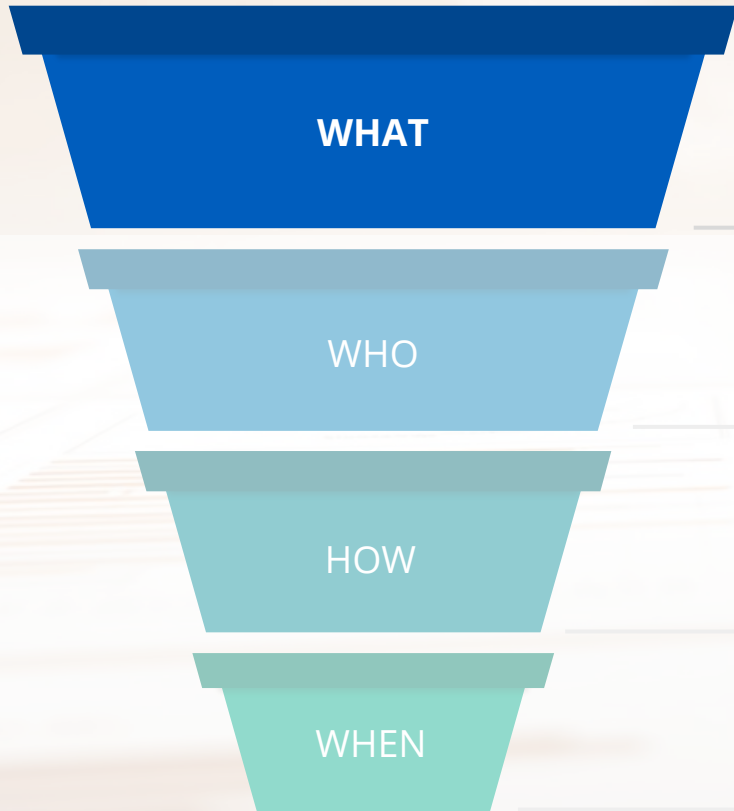
Exercise #3: “Insights”

What do you need to know to support better decisions?

01 If I Knew ...

02 Then I Could ...

03 To Benefit ...



INSIGHT

ACTION

IMPACT

Example Answers: “Insights”

What do people want to know?

Strategy

Where are the unmet needs that we could target?

Planning

Which channels are bringing in the best enquiries and/or the highest sales ... and why?

Day-To-Day

Could better messaging lead to higher conversion?

Realtime

How is my new product being received by my best customers?

Exercise #4: “Data”

What data do you have?



Operational

Project
Marketing
Resource



Financial

Revenue / expense
Assets / liabilities
Reporting



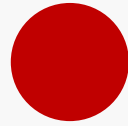
Digital

Website
App
Media



“People”

CRM/Loyalty
Human Resources
Expertise



Open Source

Data
Best practice
White papers



Social

Social media
Reviews
Contact Centre



Supplier/Product

Specifications
Service Records
Training



Research

Surveys/Panels
Paid Research
Trusted Sources



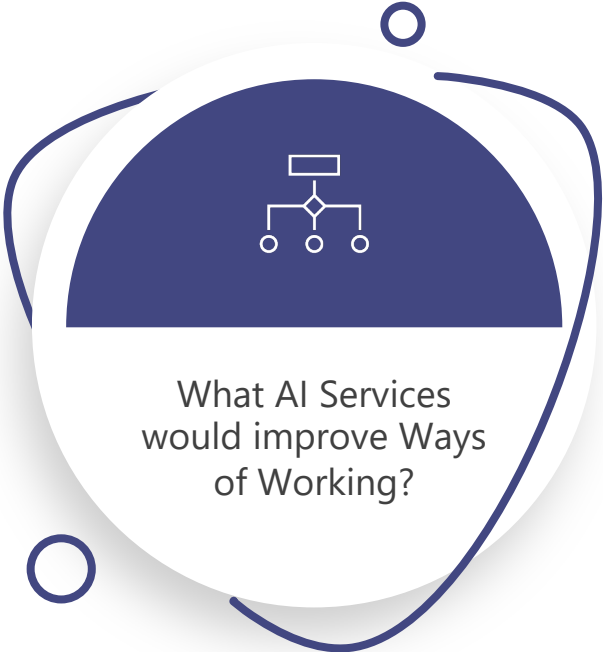
Other

Spreadsheets
Notepads!

Exercise #5: Drive, Deliver, Delight

What are the AI Services that are useful to support internal processes, client delivery and growth conversations?

Internal Processes



A graphic for 'Internal Processes' featuring a dark blue rounded rectangle at the top with the title in white. Below it is a white circle with a dark blue semi-circle at the top. Inside the semi-circle is a white icon of a hierarchical organizational chart. The bottom half of the circle is white and contains the text 'What AI Services would improve Ways of Working?'. The graphic is decorated with blue lines and circles.

What AI Services would improve Ways of Working?

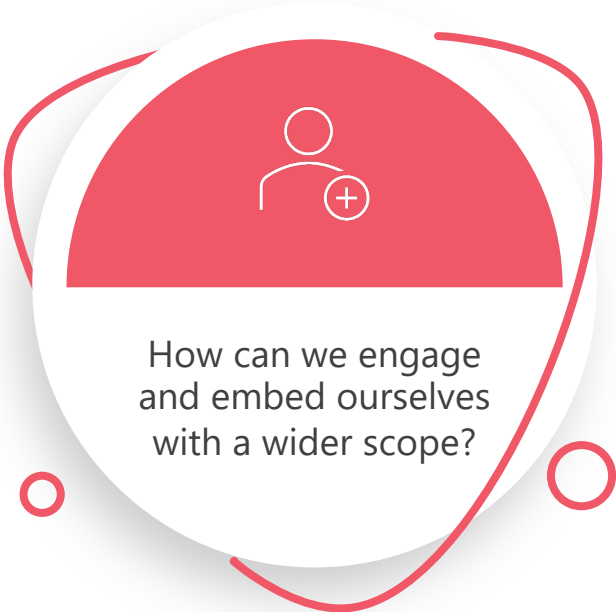
External



A graphic for 'External' featuring an orange rounded rectangle at the top with the title in white. Below it is a white circle with an orange semi-circle at the top. Inside the semi-circle is a white icon of a diamond. The bottom half of the circle is white and contains the text 'How can we better serve our customers?'. The graphic is decorated with orange lines and circles.

How can we better serve our customers?

"Trusted Advisor"



A graphic for '"Trusted Advisor"' featuring a red rounded rectangle at the top with the title in white. Below it is a white circle with a red semi-circle at the top. Inside the semi-circle is a white icon of a person with a plus sign. The bottom half of the circle is white and contains the text 'How can we engage and embed ourselves with a wider scope?'. The graphic is decorated with red lines and circles.

How can we engage and embed ourselves with a wider scope?

Example Answers: “Drive, Deliver, Delight”

What data do you have available?

Internal

We should automate any repetitive, predictable tasks starting with meeting actions

External

I'd like to tailor our messaging to each customer in a way that most appeals to their needs

“Conversations”

I'd like to share trend and market information with our clients

Improving Your AI Roadmap

This process will give you initial inspiration and a good indicator, and can be used across the business

Good

- ✓ Ambitions
- ✓ Constraints
- ✓ Decisions
- ✓ Engagement
- ✓ Inspiration

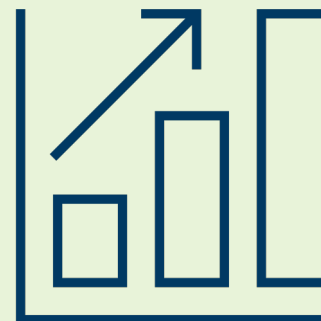


Self-Serve “Road-tested”

to

Great

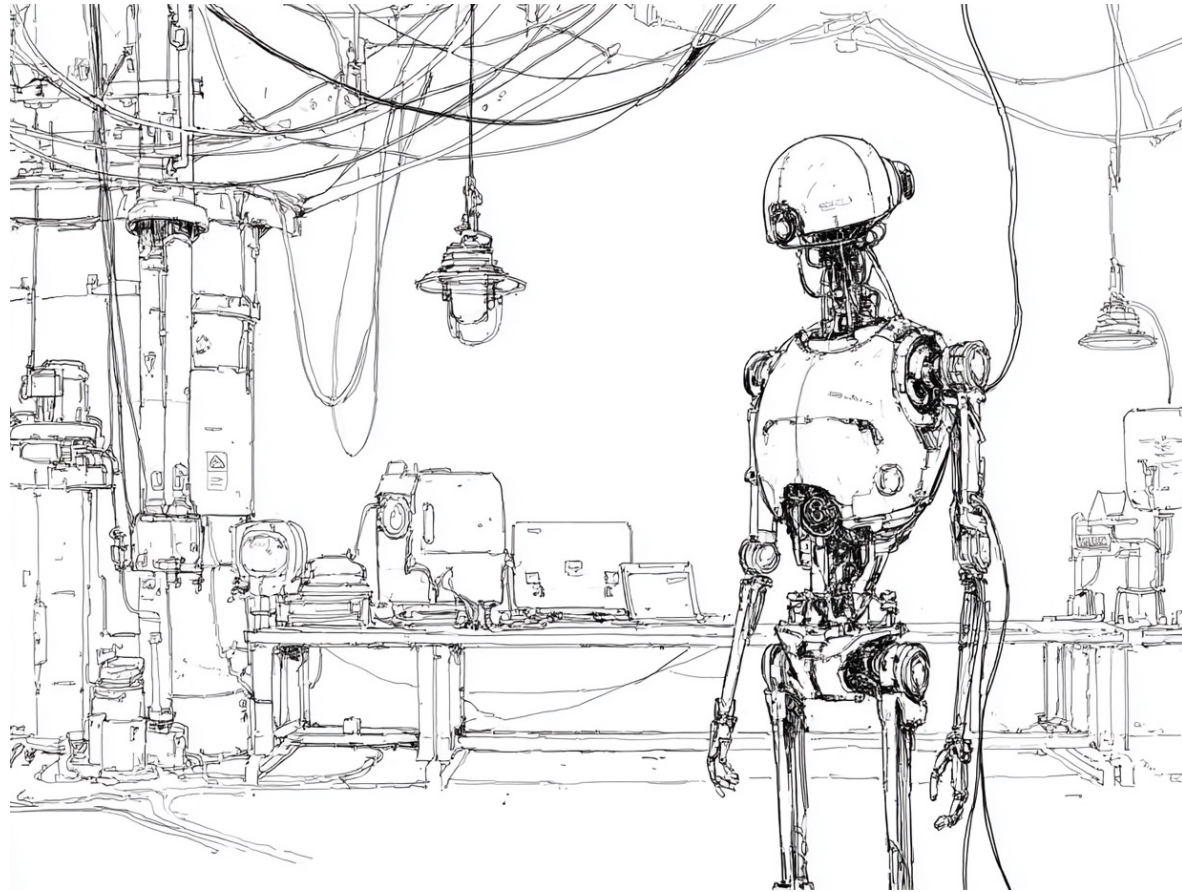
- + More Dimensions
 - + Viability
 - + Best Practice
- + Body Of Knowledge
- + Human Expertise
 - + Sizing
 - + Evidence



Guided Co-Creation

AI Tools Can Help Create Your AI Services

Caution should be applied to externally-facing or production services, but internal services can be built rapidly and provide great value



SUGGESTED PROMPT (Deep Research)

I want to create a shared prompt library. It needs to be simple and easy to implement as a chatbot that I can deploy with instructions suitable for a non-technical person. The idea I have is this; there is a custom copilot that works from a single Excel spreadsheet on a SharePoint site that users can ask for a best practice prompt to complete a task; each line in the spreadsheet holds a prompt, the purpose/outcome, data that is required, a category, who wrote the prompt, and a status (approved/pending). I want the Copilot to be able to do three things 1) when asked for a prompt to complete a particular task, find the exact "best practice" prompt for that task and say whether or not it is approved 2) allow a user to suggest a new "best practice" prompt, gather the information required to add a line to the spreadsheet, add it (marked as "pending") and then email the administrator to notify them that a new line has been added 3) allow users to ask what is best practice in creating a prompt that may or may not exist in the file and be presented with a tutorial on how to write their prompt in an interactive way; once the user agrees that the prompt is useful, it is added to the spreadsheet as a line, again marked as "pending". Could you provide step-by-step guidance to a non-technical person on how to build and deploy this AI service



six different ways



THANK YOU

Contact

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