



AI ROI ACCELERATION SPRINT

[Client Name]

AI ROI Acceleration Sprint

Delivering Board-Ready Business Case in 2-10 Days

PREPARED BY

Clarity Forge Ventures

ENGAGEMENT

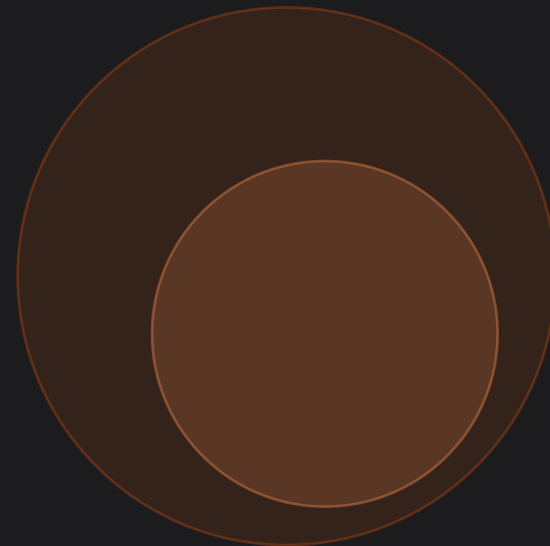
Strategy Sprint | Phase 0

DATE

Month 20XX

CLASSIFICATION

Confidential



340%

5-Year ROI

NPV \$18.7M | IRR 41% | Payback 22 mo

\$25.4M

Total Value Created

Revenue + Savings (5yr)

\$18.7M

NPV

Discount rate 10%

22 Mo

Payback Period

From go-live

28%

Productivity Gain

Across targeted functions

KEY WINS AT A GLANCE

- Cost take-out of \$12.3M over 5 years via intelligent automation of Ops & Finance back-office
- Revenue uplift of \$8.4M through AI-driven cross-sell/upsell and faster product time-to-market
- Workforce productivity +28% | Reduction in manual effort ~620 FTE-hours/week
- Board-ready investment thesis ready in 10–14 days with full sensitivity & scenario analysis

"AI-led transformation can unlock \$25–30M in enterprise value by 2029 — the question is velocity, not viability."

Enabling ABC Enterprise Transformation — Strategic Goals & Key Challenges

STRATEGIC GOALS

- Develop New Markets — digital customer segments & API-led distribution
- Reduce Operating Costs — automate fragmented processes & eliminate rework
- Accelerate New Product Introductions — shorten dev cycle by 40%+

KEY CHALLENGES

- Fragmented data & siloed order management blocks real-time decisioning
- Manual, non-scalable processes inflate cost-to-serve & delay time-to-market
- Scattered component libraries & instruction debt slow product launches
- Supplier-component risk without integrated analytics & smart WMS

2026 INDUSTRY CONTEXT

- 75% of enterprise value creation by 2027 tied to AI-enabled ops (Gartner)
- BFSI & High-Tech AI adoption accelerating: 3× ROI vs digital-only plays
- Cloud-native architecture now table-stakes — laggards face 2× higher TCO
- Regulatory & ESG pressures demand audit-grade data lineage by 2027

Sprint Hypothesis: Addressing these challenges through AI unlocks \$13.9M in identifiable business benefit over 5 years (conservative base case)

5 High-Impact AI/Cloud Hypotheses Linked to Measurable Business Outcomes

H1	Intelligent Order & Inventory Management ↓ Order errors 65% ↓ Inventory cost 22% ↑ Fill rate to 98.5%	\$4.2M Benefit
H2	AI-Powered Customer Experience & Cross-Sell ↑ Revenue per customer 18% ↑ NPS +22 pts ↓ Churn 30%	\$3.8M Benefit
H3	Finance & Operations Back-Office Automation ↓ Cost-to-serve 34% ↓ Close cycle 5 days FTE redeployment	\$5.1M Benefit
H4	Smart Product Development Acceleration ↓ TTM 40% ↑ Launch success rate 25% ↓ Rework cost 50%	\$6.4M Benefit
H5	Cloud-Native Architecture & Data Platform ↓ IT infra cost 28% ↑ Data availability 99.9% ↓ TCO 3yr	Enabler / \$3.2M

Combined Hypotheses Value: \$22.7M gross benefit | Net of implementation costs: ~\$18.7M NPV

TRANSFORMATION ROADMAP — PHASED AI/CLOUD JOURNEY

**PHASE 1
FOUNDATION** Months 0–6

**PHASE 2
SCALE** Months 7–18

**PHASE 3
OPTIMISE** Months 19–36

QUICK WINS

- Deploy AI order management & smart inventory pilot
- Launch Finance automation POC (AP, GL close)
- Cloud foundation: data lake + API gateway

- Scale order intelligence to all channels
- AI cross-sell engine go-live (top 3 segments)
- Supplier risk analytics + smart WMS phase 1

- Autonomous ops: self-healing workflows
- Predictive revenue management platform
- Full cloud-native migration & decommission legacy

MILESTONES

- ROI sprint complete + board case approved
- First \$2M cost savings realized
- Data platform certified & governed

- \$8M cumulative benefit
- NPS +15 pts | Churn ↓ 20%
- AI model ops (MLOps) framework live

- Full \$25.4M benefit realized
- AI embedded in 80%+ of core processes
- Ongoing value assurance KPI dashboard

CUMULATIVE VALUE RAMP (\$M)



DETAILED ROI MODEL — 5-YEAR FINANCIAL PROJECTION

CATEGORY	METRIC	Y1 (\$M)	Y2 (\$M)	Y3 (\$M)	Y4 (\$M)	Y5 (\$M)	5YR TOTAL
REVENUE	AI Cross-sell / Upsell	0.8	1.4	1.9	2.1	2.2	8.4
REVENUE	Faster Product Launch	0.3	1.1	2.0	2.5	2.7	8.6
COST SAVE	Finance Automation	0.6	1.2	1.5	1.6	1.6	6.5
COST SAVE	Ops & Supply Chain AI	0.4	0.8	1.1	1.2	1.2	4.7
COST SAVE	IT/Infra Rationalisation	0.2	0.4	0.5	0.6	0.6	2.3
PRODUCTV.	FTE Redeployment Value	0.2	0.4	0.5	0.6	0.7	2.4
INVEST	Total Implementation Cost	(3.2)	(1.8)	(0.8)	(0.4)	(0.2)	(6.4)
NET	Annual Net Cash Flow	(0.7)	3.5	6.7	8.2	8.8	\$25.4M

41%

IRR — Internal Rate of Return

\$18.7M

NPV — @ 10% discount rate

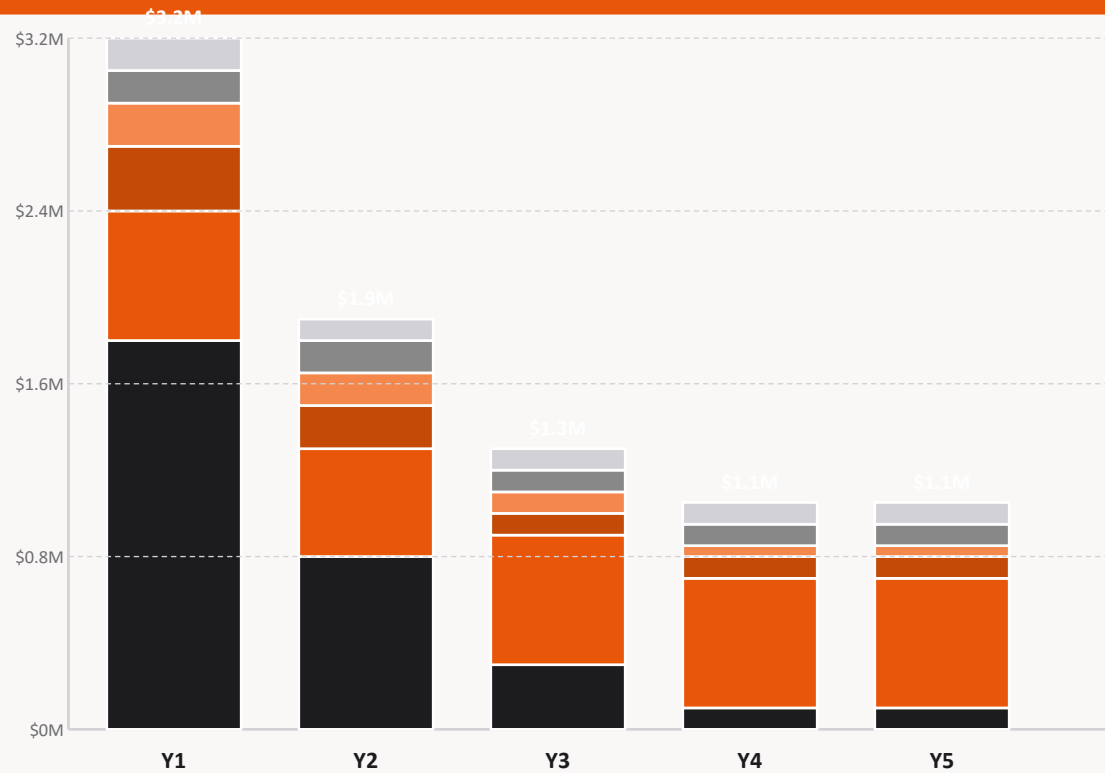
22 Mo

Payback — Break-even month

340%

5-Yr ROI — Net of all costs

TOTAL COST OF OWNERSHIP — 5-YEAR TCO BREAKDOWN

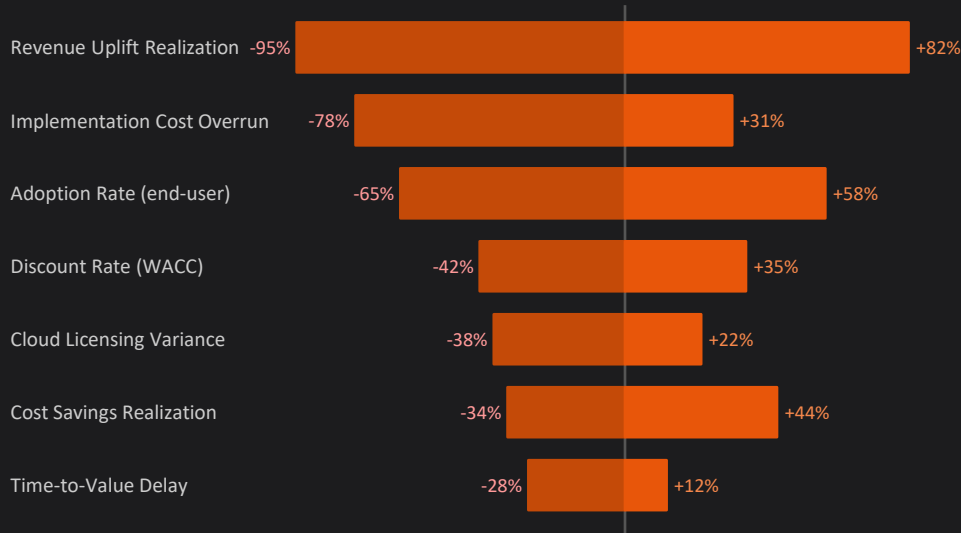


- Implementation & SI
- Training & Change Mgmt
- Cloud Licensing (SaaS/PaaS)
- Maintenance & Support
- Data & Integration
- Governance & Compliance

COST CATEGORY	5-YR TOTAL	% OF TOTAL
Implementation & SI	\$3.1M	48%
Cloud Licensing	\$2.9M	45%
Data & Integration	\$0.8M	12%
Training & Change	\$0.55M	9%
Maintenance & Governance	\$1.0M	16%
TOTAL 5-YR TCO	\$6.4M	100%

ROI SENSITIVITY ANALYSIS — TORNADO & SCENARIO MODELLING

TORNADO CHART — Key Variables Impact on 5-Yr ROI BASE: 340%



SCENARIO ANALYSIS

METRIC	CONSERVATIVE	BASE CASE	OPTIMISTIC
5-Yr ROI	185%	340%	490%
NPV	\$8.2M	\$18.7M	\$31.4M
IRR	22%	41%	63%
Payback	34 Mo	22 Mo	14 Mo
Total Benefit	\$13.4M	\$25.4M	\$38.1M
Adoption Rate	55%	75%	92%
Cost Var.	+20%	±0%	-15%

KEY INSIGHT: Even in Conservative scenario (55% adoption, +20% cost overrun) the business case delivers positive NPV of \$8.2M. ROI is ROBUST.

KPI DASHBOARD & MEASUREMENT FRAMEWORK

LEADING INDICATOR		LAGGING INDICATOR			
TYPE	DOMAIN	KPI / METRIC	TARGET	TRACKING METHOD	OWNER
▶	Revenue	AI Cross-sell Conversion Rate	≥ 12%	CRM Analytics Dashboard	Chief Revenue Officer
▶	Revenue	New Product Time-to-Market (days)	↓ 40%	Product Lifecycle System	CPO / Product Head
▶	Operations	Order Error Rate	≤ 0.5%	ERP / Smart Order Mgmt	COO / Supply Chain
▶	Operations	Supplier Risk Score (AI Index)	< 2.0	AI Risk Dashboard	Procurement Lead
■	Finance	Finance Close Cycle Time (days)	≤ 3 days	Finance Analytics BI	CFO / Controller
■	Finance	Cost-to-Serve per Transaction	↓ 34%	Activity-Based Costing Tool	CFO / Finance Ops
■	People	AI Adoption Rate (% active users)	≥ 75% Y2	Usage Analytics / Pulse	CHRO / Change Lead
■	People	FTE Hours Freed (weekly)	≥ 620 hrs	Workforce Analytics	COO / HR Analytics
■	Technology	System Uptime / Availability	99.9%	Cloud Monitoring (Ops)	CTO / Platform Eng
■	Technology	Data Quality Score (AI models)	≥ 95%	DataOps / Model Registry	CDO / Data Eng



NEXT STEPS & DECISION SUPPORT FRAMEWORK

30 DAYS

SPRINT & VALIDATE

- Kick off AI ROI Sprint (Week 1–2)
- Validate hypotheses with live data
- Conduct stakeholder alignment sessions
- Finalise board-ready business case
- Deliver ROI model + TCO + sensitivity

60 DAYS

DECIDE & MOBILISE

- Board / ExCo investment approval
- Select SI & technology partners
- Establish programme governance
- Finalise Phase 1 scope & budget
- Launch change management planning

90 DAYS

EXECUTE & REALISE

- Phase 1 programme kick-off
- Cloud foundation & data lake sprint
- AI order management pilot (live)
- First KPI baseline measurements
- First value realisation checkpoint

RECOMMENDED INVESTMENT DECISION FRAMEWORK

STEP 1

Approve Sprint Budget (\$95K)

Fund 10–14 day ROI sprint to produce board-grade business case

STEP 2

Review & Challenge Business Case

CFO + CTO stress-test assumptions with Clarity Forge team

STEP 3

Board Submission (Day 30)

Full investment proposal with NPV, IRR, TCO, and sensitivity pack

STEP 4

Green-Light Phase 1 (\$3.2M)

Approve 6-month foundation programme — first \$2M value by month 12

CALL TO ACTION: Approve the AI ROI Sprint today — 14 days to a board-ready business case. Let's capture this opportunity together.