

# AI DATA READINESS ASSESSMENT

## MAIN ASPECTS TO ENSURE EFFECTIVENESS

### BUSINESS OVERVIEW

#### Key Revenue Goals & Firmographics:

Outline short and long-term revenue targets, company size, structure, divisions, and geographic presence to align AI objectives with strategic goals.

### OBJECTIVES

#### Strategics Goals

Identify Louisa's role in generating new revenues, enhancing fund returns, enhancing client service, and/or saving time and costs across a unit.

### CURRENT STATE OF AFFAIRS

#### Workflow and Technology Audit:

The workflows employees use for cross-selling, deal origination, prospecting new clients, crowd-sourcing solutions, ideas, new joiners productivity, and innovation.

### PROPOSAL

#### AI Use Cases & Roadmap

Suggest specific AI applications and a phased deployment plan, for revenue generating use cases, analysis for predictive and automations.

### RISK & MITIGATION

#### Compliance, Data, and Resources

Address regulatory compliance, and outline resource and budget constraints, proposing solutions for each.

### RECOMMENDATIONS

#### Action Plan

Present a concise 30-60-90 day action plan with estimated costs and success metrics to measure AI initiative impacts on efficiency, customer satisfaction, and revenue growth.