



AI – CONSULTING EXAMPLE CASE STUDIES

INTRODUCTION

The determinants of annual growth and achievement for an organisation are the combined results of every collaboration conducted between teams be that strategy formation, policy development, acquisition, joint-venture, process improvement, IT implementation, and any other situation requiring two or more people to coordinate their actions around a shared subject.

Traditionally such collaborations and business objectives have been viewed as distinct, with each requiring a subject-specific method for discussion and goal setting. However, despite these targeted approaches, results often fall beneath key stakeholder expectations. Only 8% of surveyed business leaders agree that their previous collaborations achieved three key performance metrics: on-time, on-budget, and on-benefit.

Conventional methodologies and taught techniques have not resolved this disparity between the goals that groups of leaders set out to achieve and what is actually attained. The process itself is often difficult with teams focussing on the wrong conversations, the right conversations at the wrong time, or using the wrong dialogue method, which ultimately produces less than full endorsement of actions that will lead to a successful business outcome.

Combining concepts from Harvard academic professors and leading Consulting Professionals, Rialto Augmented Intelligence Consulting (AI-C) uses a unique methodology to help a collaborative group translate their vision on a shared business challenge or initiative into valuable, viable and endorsed actions plans. [Leadership teams who engage in AI-C create their plans in a quarter of the time to completion and enjoy superior implementation success compared with conventional team collaborations/focus groups.](#)

The technology that forms part of the AI-C methodology includes an expert system that makes observations and draws accurate conclusions from hundreds of data points captured during a project. This observation engine then suggests appropriate actions and generates a report around the opinions of the group, outlining why the given business change or initiative may succeed or fail.

More than 550 projects have been successfully delivered worldwide including with Fortune 500, FTSE 1000, SMEs and Government and Public Sectors.

THE SITUATION

A professional services organisation was interested in the concept of digitalising their service offerings. However, the practical implications were unclear, and key personnel voiced resistance to the idea.

THE REQUIREMENT

The CEO continually heard from his network of examples of digitalisation and the benefits. Using the methodology of AI-C, a Principal Consultant was asked to facilitate a discussion within the leadership team of the interest in and ability to execute digitalisation of their service offerings.



THE SOLUTION

The seven participants expressed 115 opinions on the topic in a two-hour virtual dialogue, conducted entirely from their desks. The analytics were used to drive a one-day group meeting. There was no pre-ordained decision or a pre-defined outcome. The conversations were to objectively assess if, where, how, why their service offerings could be digitalised in a way that would add value to themselves and their clients. Positive drivers included views such as the positive impact on the brand and the reduction of menial project tasks for their consultants. Issues cited included concerns that consultants would have to learn to use software technology beyond Word, Excel, and PowerPoint and that going digital would mean less time interacting with clients. Some viewed the use of survey tools as being sufficiently digital, while others wanted to find ways to use AI and machine learning.

THE RESULT

The leadership team came to an agreement they should pilot one digitalised service offering as a testbed for their learning. Within the first year of standing up the digitalised service, they sold four projects of medium size to existing and new clients. They have a strong pipeline and are training additional consultants to deliver the service.

Initial concerns such as a reduction in time with clients did transpire, but the quality of client meetings has risen, causing both client and consultant to appreciate the greater efficiency and efficacy.

THE SITUATION

Financial Services is being described as an industry moving from ‘Financial services firms using technology to Technology firms selling financial services.’ One smaller financial services organisation became concerned it would not have the financial and personnel resources to keep up with the large player’s digital innovation.

After reaching out to another CEO about the idea, seventeen CEO’s showed interest in co-funding a common digital platform. A plan and budget assembled, financial and human resources were committed, and co-development started.

THE REQUIREMENT

Within the first year, the collaboration was not performing at an operational level as the founders had expected. Milestones were not met, and some participants were expressing frustration with the program.

One of the CEO’s was familiar with AI-C and hired a management consultant using AI-C to help the collaboration get on track.

THE SOLUTION

The CEO’s participated in a two-hour virtual dialogue around the subject of a successful digital platform collaboration. The topic ranged from the long, medium, and short-term forecasts for technology innovation in financial services to assumptions about customer’s needs and the competition’s action. Internally, fourteen areas were covered, from synchronisation of the collaboration with each firm’s own business and IT strategies to staffing needs and skills sets. The summary was that more had been accomplished than realised. The mutual benefits came in the form of shared knowledge, policy modifications, vendor selections, prototypes, and staff skills development.

There were two primary constraints. First, beyond co-funding a digital platform for common use, the strategy details were light, in terms of the outcomes the platform needed to enable, the choice of path to take. This second constraint was a ‘first’ for the CEO’s – bringing together staff from over a dozen different firms, where each had their own culture, decision-making methods, collaboration styles, and work habits – and getting them to work together efficiently and effectively around a single IT architecture which had to support their individual needs.



THE RESULT

Two half-day and one full-day workshop was held where the CEO’s discussed 23 planning uncertainties, 28 goals and objectives, 15 barriers to success, and identified 76 actions – a combination of changes to existing actions and new actions.

A revised two-year roadmap was approved and funded by the members as in in development.

OPERATIONAL EXCELLENCE OR SERVICE INNOVATION, OR BOTH?
A Chief Procurement Officer refreshes her 3-year strategy.

THE SITUATION

This global manufacturing company was coming to the end of its current three-year procurement strategy and needed to upgrade it for the next three years.

THE REQUIREMENT

With 95 category managers and sourcing team members on all five continents, the CPO wanted a way to accomplish the task without travel costs and inconvenience.

THE SOLUTION

A consulting firm using AI-C was hired to lead the procurement strategy refresh. The process was expected to surface a routine set of ideas that would be discussed and translated into a set of objectives and plans. Strong alignment existed around the function's core role and purpose. However, the alignment analytics highlighted two strategic decisions needing to be taken. One was related to a concern that a round of technology upgrades and related processes changes were insufficiently implemented and stable, where others disagreed and were eager to get on with new initiatives. The other was that many saw the function supporting the business strategy through transactional excellence, whereas others felt the function could drive into providing more value-add, strategic services to the corporation.



THE RESULT

Nine regional leaders of the 95 engaged in the virtual dialogue participated in six virtual, webcam-enabled dialogues, their content selected using the group's virtual dialogue analytics. They established a plan to cement the new IT and procurement process foundations being put in place, then stand up an innovation workstream to experiment with new service offerings.

THE SITUATION

A private equity investment and a new leadership team had put this national services company into the top tier of their industry. However, during a corporate risk assessment, IT is identified as a weak link in the corporate strategy.

A new CIO is hired, chartered to bring the IT function up to par. The new CIO and his 12 senior IT leaders refreshed the corporate IT strategy. Their strategy involved re-balancing the applications portfolio from mostly custom to packaged applications, moving to an agile development methodology, and upgrading the IT organisation's development and maintenance skill sets. Also, undocumented, single point of failure applications are to be retired, and the desktop and server infrastructure upgraded across over 100 locations. Unfortunately, within six months, progress had almost come to a standstill.

THE SOLUTION

The IT leaders conduct a two-hour, anonymous, virtual dialogue around what is required to be a high-performing IT function that will deliver its strategy. Their alignment analytics were critically low for a group less than six months into a strategy they all had a hand in developing.

The analytics identified that three conflicting activities are causing the transformation to stall. 20% annual business growth is demanding IT-enablement and support for an accelerated number of field deployments of fault-intolerant systems. At the same time, IT is trying to source, learn, and re-platform legacy applications to packages. Compounding the change, IT staff with new skills are trying to transition to an Agile, SOA-based architecture. The IT leaders express differing views of the state, progress, and criticality of these three workstreams.

The business cannot wait for the project lead times required to accommodate IT's learning; incident rates are increasing, and the interdependencies between IT activities are causing 'root cause versus symptom' disputes. Over 110 opinions describe a plethora of issues, for which there is full alignment around only 4 and strong misalignment around 31 of the noted problems.

THE RESULT

The analytics were used to identify a sequenced agenda where the 12 IT leaders reconcile their disagreements and design mitigating solutions to the validated issues – their path out of the storm.

THE REQUIREMENT

The CIO is under intense pressure to deliver the essential changes and take IT out of 'red status' in the company's growth plan.



USING CHANGE MANAGEMENT TO RESTORE COMMITMENT TO A FAILED INITIATIVE

Making a transformation project work on the second attempt.

THE SITUATION

A utility company had tried to upgrade its consumer-facing IT platforms and associated billing, service, and maintenance operating processes three years earlier. The program met strong resistance from operational managers and staff. Small, standalone technology swaps had occurred but the core of the change, a new ERP system, never moved from proof of concept into production..

THE REQUIREMENT

The utility decided to take another approach and gain commitment to the changes at the outset of a new, second attempt at the program. They selected a change consulting firm using AI-C's software.



THE SOLUTION

Unlike the first program, an invitation went out to several hundred personnel from field service engineers to back-office accountants to participate in a virtual dialogue about the program. The alignment analytics immediately identified that the need for the change was mostly acknowledged and the consumer and utility benefits. However, over 50 constraints were expressed, anonymously, with 17 having broad concern among the participants. The utility's leaders and program management team identified inaccurate misunderstandings causing resistance and mitigated the issues and concerns of which they had previously been unaware.

THE RESULT

The utility has moved to the new ERP platform.

PROTECTING A CUSTOMER RELATIONSHIP MANAGEMENT STRATEGY

Stopping silo-thinking from compromising a corporate initiative.

THE SITUATION

A products company had revised their customer relationship management strategy in light of changing buying behaviour and a desire to strengthen its 1-to-1 capabilities. A revised CRM system, touching multiple market stakeholders, was a key element in implementing their new go-to-market strategy. Three months into the three-year project, the corporate strategy executive became aware that issues he had raised when the project was being designed had appeared.

THE REQUIREMENT

The IT Director wanted an independent audit of the project to validate the concerns and surface any other issues occurring 'below the waterline.' A management consulting firm using AI-C was hired to run this audit and produce an endorsed go-forward strategy

THE SOLUTION

52 marketing, sales, R&D, and IT leaders, including the executive sponsors and the project implementation team engaged in a two-hour virtual dialogue. The community's overall degree of alignment was inadequate, and surprisingly low, for such an early stage into a new project. Analysis of the key misalignments indicated, for example, that several departments did not agree with the project's business case, based heavily upon projections of customer adoption rates. Several believed the rate of customer adoption was excessively overestimated. This unresolved concern was causing them to privately question the project's viability and priority.

Further, it transpired that the executive sponsors, while supporting the project, had different opinions as to its role in the long-term customer relationship strategy. Unaware of their different beliefs, their functional teams and the project implementation team were receiving different guidance on the scope and content expected in the new CRM technologies.

Compounding a questionable ROI model and non—aligned leaders, representatives from marketing, sales, field services, and customer support services had differing opinions as to the degree to which the project should be a technology swap or a deep functional change in thinking.

In the absence of a defined decision-making protocol, IT was being forced to make business decisions, for which they were then criticised.

THE RESULT

The executive sponsors acknowledged how their incomplete alignment was causing cracks throughout the project team and supporting organisations below them. They used two 2-hour teleconferences to reconcile their differences and set a clear direction for the balance of the project.






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