



# FGFOA AI Session

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# Ensuring your business transforms and has the culture and capability to sustain it

## Business Transformation

- 🚀 Project & Change Management
- 🚀 Process Improvement / OpEx
- 🚀 Digital Transformation
- 🚀 Core Systems Conversions / Implementations
- 🚀 Strategic Planning
- 🚀 Mergers & Acquisitions
- 🚀 Hybrid / Remote Work Optimization
- 🚀 Work Time Reduction

## Culture & Capability

- 🚀 Leadership Development
- 🚀 Employee Engagement
- 🚀 Team Performance
- 🚀 Executive Coaching
- 🚀 Talent Management Strategy
- 🚀 Succession Planning
- 🚀 Competency Frameworks
- 🚀 Behavioral Profiling Tools (Hogan, CODE, Gallup, etc.)



Curium has been trusted to deliver people-first transformation programs for growing organizations around the globe including:





# Agenda

- Check In
- AI Insights
- AI Break Out Session
- Commitments





# **Check In:**

## **How are you feeling on a scale of 1-5**



**1 = really  
struggling**

**5 = couldn't  
be better!**



# Where's Your AI Confidence Level Today?

**What best describes your organization's current approach to AI?**

- A. No formal strategy yet
- B. Exploring use cases and pilots
- C. Implementing AI in specific areas
- D. Scaling AI across departments
- E. Avoiding AI due to risk or uncertainty

**What's your biggest driver for exploring AI?**

- A. Operational efficiency
- B. Enhancing client experience
- C. Regulatory compliance
- D. Competitive advantage
- E. Curiosity and innovation

# Myths

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AI is an IT project

You need perfect data before  
you can use AI

AI will create errors, humans  
are more reliable



# Practical Value

## Vendor Onboarding & Management

### Problem:

Manual onboarding = weeks of delays, missing docs, frustrated vendors.

### Solution:

Guided registration via chat/voice  
Real-time doc validation  
24/7 support & Q&A  
Auto exception handling  
Status notifications  
Impact: 50% faster onboarding

## Invoice Processing & Reconciliation

### Problem:

AP teams waste hours matching invoices to POs; errors cause duplicate payments & delayed close.

### Solution:

Auto-read invoices (PDF/email/images)  
Intelligent data extraction  
PO & receipt matching  
Exception reports  
ERP integration  
Impact: 80% faster processing

## Customer & Vendor Risk Profiling

### Problem:

Risk checks across disconnected systems = missed connections & slow due diligence.

### Solution:

Cross-system relationship mapping  
Payment pattern analysis  
Credit & health indicators  
News/public record monitoring  
Evidence-linked summaries  
Impact: Complete risk picture in minutes



# Breakouts



**What use cases  
or value have  
you got so far?**



**What are you  
doing already?**



**What risks have  
you seen?**

**What is stopping  
you?**



What are your  
findings?

# Blockers to Success



## Blockers to Success

Data Quality, Availability & Infrastructure

Talent & Data Literacy

Culture & Mindset Resistance

Trust in AI Outputs

Integration Complexity

Regulatory, Compliance & Security Risks

ROI Pressure & Investment Challenges

Tool Overload & Decision Fatigue

## CLOSING POLL

**What kind of support would help you move from curious to capable?**

- A. Executive education or training
- B. Clearer regulatory guidance
- C. Peer collaboration and case studies
- D. Vendor partnerships and tools
- E. Internal culture shift and leadership buy-in



# Summary

**AI Confidence**

**Myths?**

**What is the practical value?**

**What were your findings?**

**How can you overcome the hurdles?**

**What is the one thing you will do  
tomorrow?**



Know you need to get on the AI bandwagon but not sure where to start?

## Unlock Your Team's AI Potential with Confidence

Curium's **AI Health Check**, powered by our proven **CODE framework**, is designed to assess your organization's ability to adopt and integrate AI successfully. Whether you're exploring AI for the first time or looking to scale existing solutions, this tailored assessment provides clear insights, actionable recommendations, and a structured roadmap for success.

### Immediate Benefits:

- ✓ Clear insights into cultural, technological, and leadership readiness for AI adoption
- ✓ Data-backed insights into strengths and challenges that will help or hinder your AI journey.
- ✓ Actionable steps to align your people, processes, and systems
- ✓ Expert support to help you maintain momentum and turn insights into action.

### Which Enables You To:

- ✓ Make informed decisions about where to focus time, energy, and resources
- ✓ Align leadership around key priorities
- ✓ Plan improvements and future strategy based on reliable evidence
- ✓ Target investments in AI tools, systems, people, and processes
- ✓ Mobilize effective solutions with confidence



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## What to Expect:

### AI Health Check:



#### 1. Setting the Stage: Aligning Stakeholders & Framing AI Ambitions

Our human-centered approach begins by establishing a clear framework for your AI journey. We engage key stakeholders to define your organization's AI ambitions and align on desired outcomes. A tailored communications plan ensures employees are informed, engaged, and see AI as an opportunity — not a threat.



#### 2. Gathering Rich Insights: Data Collection & Analysis

Our practical data gathering puts your people at the center of the change through direct conversations with leaders, focused surveys, interactive group sessions, and real-world observations. This balanced approach ensures we understand your organization's current mindset, skill levels, and technical maturity for AI adoption.



#### 3. Building Team Alignment: Strategy Alignment Workshop

Our tailored workshop builds understanding, excitement, and alignment around AI. Using our **CODE framework**, we foster honest dialogue, clarify misconceptions, and provide a shared language for discussion. This ensures your teams are aligned, informed, and equipped to support AI adoption.



#### 4. Understanding the Full Picture: Diagnosis & Playback

We translate complex insights into clear, actionable guidance. A custom **AI Health Check Report** highlights strengths, gaps, and risks across key areas like data infrastructure, leadership engagement, and AI adoption. These are shared in a facilitated Playback Session to align stakeholders and drive buy-in.



#### 5. Moving to Action: Prioritization & Next Steps

In this collaborative session, we turn insights into a clear action plan. Together, we'll prioritize key initiatives, governance, leadership alignment, or skill development. You'll leave with a roadmap, actionable next steps, and optional follow-up support. We can also recommend trusted AI implementation partners if needed.

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## AI Health Check

Stage 0 Agree SoW Mobilization Prep	Stage 1 Setting the Stage	Stage 2 Gathering Rich Insights	Stage 3* Building Team Alignment	Stage 4 Understanding the Full Picture	Stage 5 Moving to Action
 <b>Scope</b> With sponsor, agree on the scope of the Health Check and who needs to be involved	 <b>Comms &amp; Logistics</b> Communicate the what and the why. Schedule leader lunts and focus groups.   <b>Desktop Analysis</b> Review of documents related to the Culture, Strategy and Technology practices   <b>Design</b> Design lunl, focus group, and survey questions based on Desktop Analysis	 <b>Ionls</b> Conduct Ionls and document findings   <b>Focus Groups</b> Conduct focus groups and document findings   <b>Survey</b> Distribute survey and compile findings for analysis	 <b>Strategy Alignment Workshop</b> Amplify team synergy with a shared language and shared beliefs about the role of AI in organizational and personal success.  <small>*While recommend to take place digitally, in-person process, this can be scheduled according to availability for those involved.</small>	 <b>Playback Design</b> Synthesize all findings, compile observations and build playback pack, including recommendations   <b>Playback</b> Review key Health Check outputs with sponsor and leadership team, including observations, analysis, and recommendations	 <b>Alignment &amp; Action Workshop</b> Work with sponsor and leadership team to evaluate the findings, prioritize initiatives, and create an implementation plan.

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# THANK YOU!

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