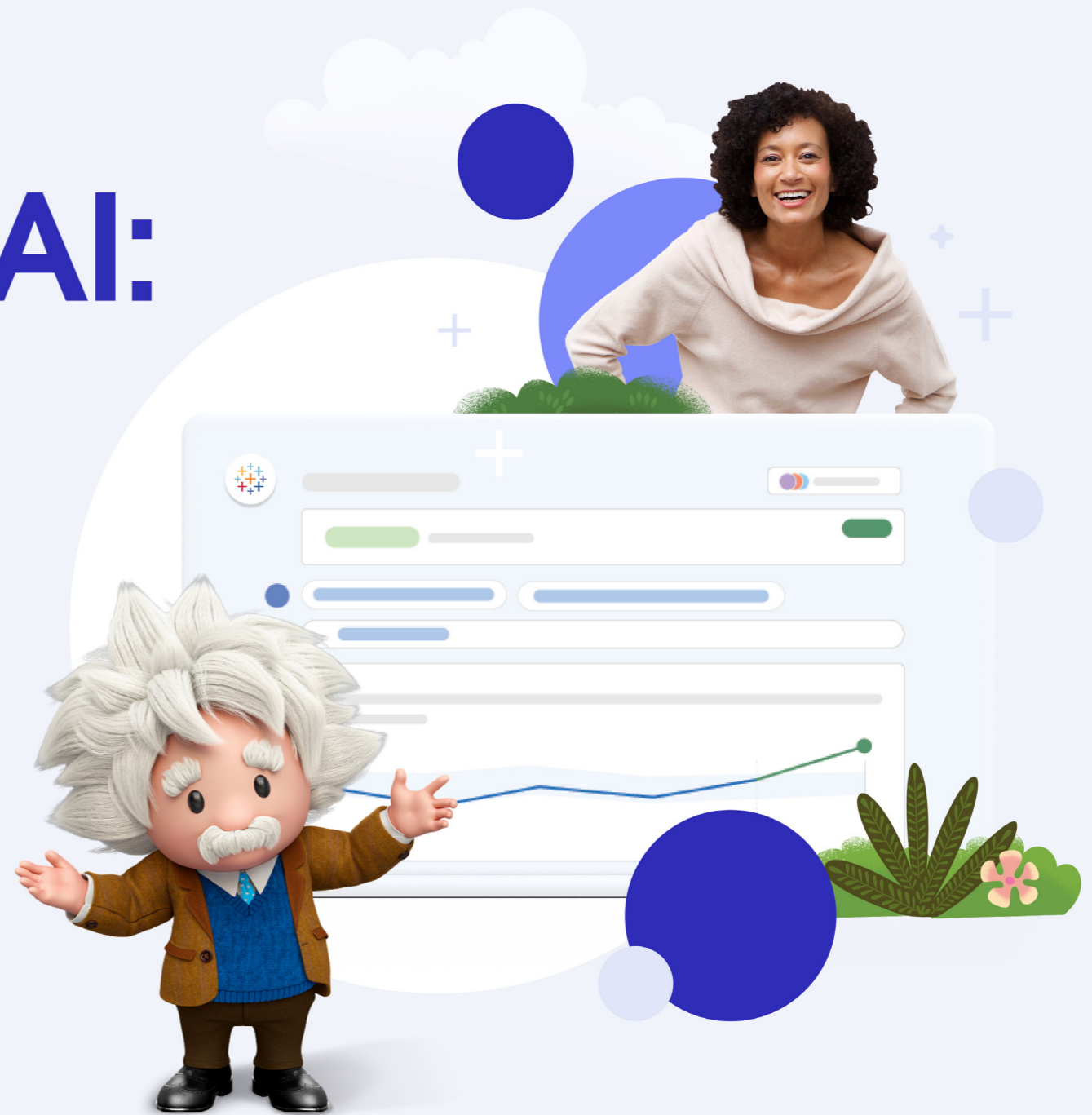


Get ready for AI: What data leaders need to know



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Introduction

Welcome to the future of business

Get Ready for AI is for analytics and data leaders who are interested in positioning themselves for AI success. From strategy to governance, you'll learn what's top-of-mind with other thought leaders, and see what actions you can take to be a more effective leader in a rapidly changing technology and business environment.

This ebook introduces four topics that are essential for data leaders beginning their AI journey:

- Identifying what projects are the best fit for AI
- Creating an effective strategy
- Principles of AI governance
- Building a winning team

CHECKPOINT

Is your data ready for AI?

AI is only as good as the data that powers it. Before embarking on any AI effort, ensure that your data is trusted, connected and unified.

SEE HOW



Data is at the center of any AI initiative, and organizations that are leading the way are focused on ensuring their data sources are *current, authoritative, and complete*. From talent, to strategy, to infrastructure, organizations that are prioritizing data across every business unit are ready to ride the AI wave—and positioning themselves for a significant competitive advantage over their peers.

So how should you and your team begin getting your data ready for “prime time”? Start with:

- Cleaning up your data: remove duplicates, mislablings, incorrect formats, and outliers.
- Connecting your data sources: create a “single source of truth”, so marketing, sales, service, and commerce data is unified and accessible.

Let's do this!

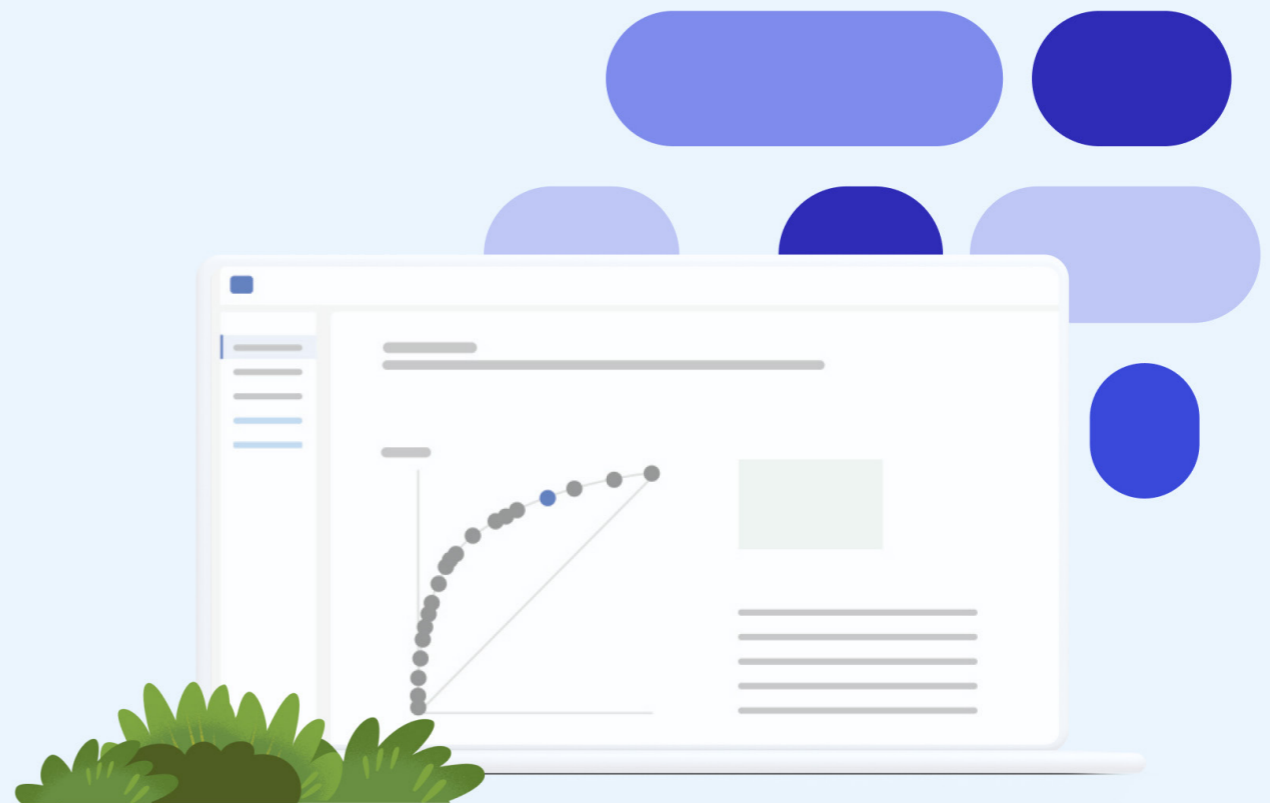
As with any digital transformation, success depends on an enterprise-wide commitment. Data leaders are in a unique position to help guide their organizations through this transition, and achieve the benefits that AI can deliver. *For more perspectives on the role data leaders should play in AI transformation, [read our interview](#) with members from the [Data Leadership Collaborative](#).*

CHAPTER 01

Return on (AI) investment

“ You need to be able to be clear-eyed about the potential but be able then to come down to the use cases. What are the functions? What are the tasks? What are the jobs to be done?”

CHITRANG DAVE
DATA LEADERSHIP COLLABORATIVE



CHAPTER 01

Do your homework to find high-impact opportunities for AI

Digital transformation—whether it’s migrating to the cloud, or deploying enterprise CRM—is all about driving results and improving productivity. AI is no different. According to a [survey of analytics and IT leaders](#), the benefits of adopting AI include faster business decision-making, operational efficiencies, more time to focus on valuable work, automated workflows, and improved customer experience.

But for AI to achieve all of these benefits—and more—you need to identify the projects that will achieve the highest returns. Not every use case is suitable for an AI solution, and [determining where you should deploy AI](#) is both an art and a science. It begins with a deep understanding of what you are trying to accomplish, and consider potential challenges. From that starting point, here are the questions you should ask:

- ✓ **Data assessment:** Is your data trusted, connected, and accessible?
- ✓ **Domain expertise:** Have you engaged with AI experts who know your industry?
- ✓ **Feasibility analysis and proof of concept projects:** Are the problems you’re trying to solve a fit for AI?
- ✓ **Competitor analysis and market research:** What are the trends? Are you aware of what your competition is doing with AI?
- ✓ **ROI assessment:** Have you factored in cost savings, revenue increase, and customer satisfaction?
- ✓ **Risk assessment:** Have you identified the potential ethical, data privacy, compliance, and bias concerns?
- ✓ **Impact, scale, and iteration:** Are you prioritizing the most lucrative, scalable opportunities, and reviewing your plans regularly?



According to Gartner

By 2026

organizations that develop trustworthy, purpose-driven AI will see over 75% of AI innovations succeed, compared to 40% among those that don’t.

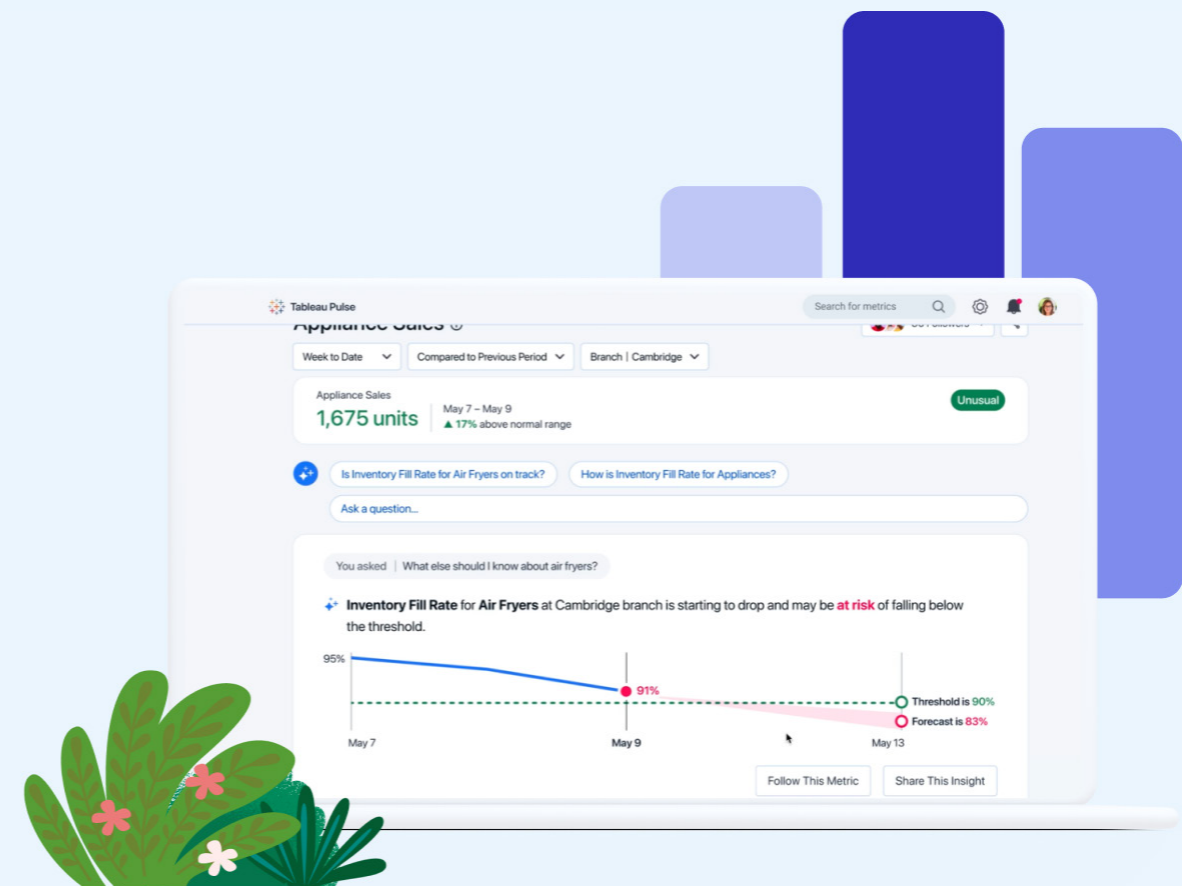
Source: [Data and Analytics Trends to Keep on Your Radar](#)

CHAPTER 02

Ready, set...strategy!

“ You don't have to sell people on the potential. What you do have to sell people on is how do we go about it.”

DEEP SRIVASTAV
DATA LEADERSHIP COLLABORATIVE



7 steps to forming an effective AI strategy

Strategy is where it all begins. A strong AI strategy helps everyone in your organization understand the vision, the purpose, the short and long-term goals, and what it will take to get there. Your AI strategy should be data-driven, with measurable objectives and KPIs, allowing teams to collaborate with minimal friction. Like any strategic initiative, it starts with trusted data.

- 1 Get your data ready**
Assess its quality, quantity, and accessibility, and identify gaps.
- 2 Define business goals**
Determine where AI can add the most value and establish KPIs.
- 3 Identify and prioritize use cases**
Create a balance of short and long term projects.
- 4 Establish data governance policies**
Address privacy, security, regulatory compliance, ethical use, and bias mitigation.
- 5 Check your technology stack**
Identify tool, platform, and resource gaps. Address scalability, integration, and ease of deployment.
- 6 Emphasize continuous improvement**
Ask for feedback from stakeholders, ensure you have the right people, and use data to guide decisions.
- 7 Start small**
To avoid potential costly pitfalls, begin with a low-risk pilot project.



Did you know?

79%
of companies

have already experienced significant
cost reductions through their
AI implementation.

Source: [McKinsey Global Survey: The State of AI in 2021](#)

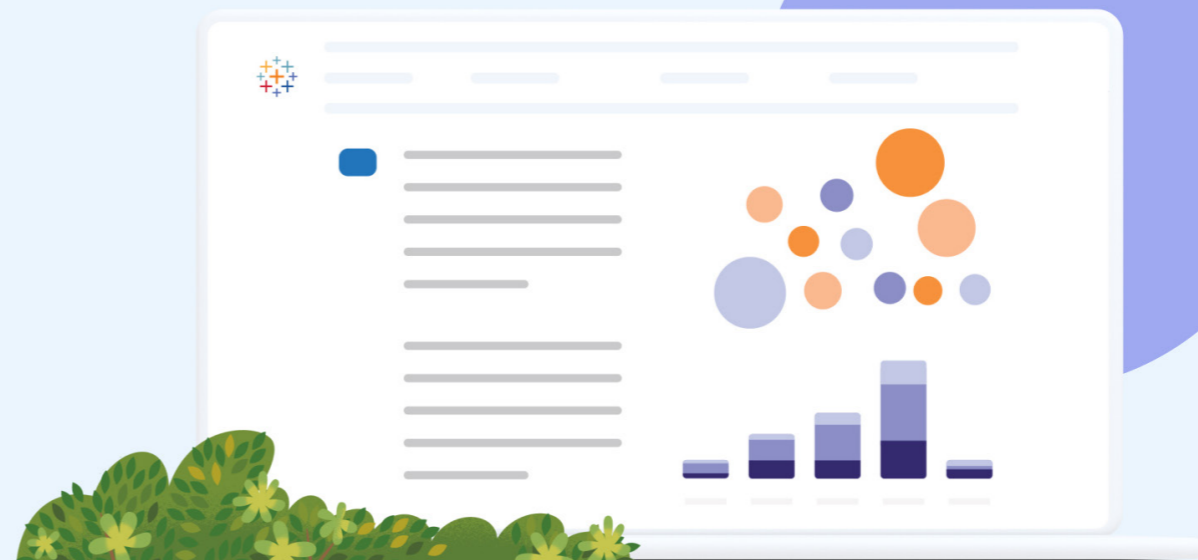


CHAPTER 03

Governance at a glance

“ The changes that are happening with AI are too big to only funnel through the data team and are too profound in order to wait for governance and other data infrastructure projects to be ready before you start more widespread implementation. The business units are going to move. It’s better to be part of the change than to try to be a silo outside of it and lose your relevance to the business.”

SOLOMON KAHN
DATA LEADERSHIP COLLABORATIVE



CHAPTER 03

Know what's required for good governance

In business, technology is often adopted before the rules of the road are established. But rapidly evolving technologies like AI require governance to ensure that there are ethical standards, consistency, and accountability for every initiative. Governance matters, and future-ready organizations are positioning themselves for AI success by establishing frameworks that can scale and grow with their AI initiatives. A basic AI governance framework includes:

- ✓ **Risk assessment** to address technical failures, model drift, and privacy and security.
- ✓ **Alignment with business objectives**, so projects are directly tied to strategic goals.
- ✓ **Resource optimization** to ensure that time, money, and human capital are deployed efficiently.
- ✓ **Stakeholder communication**, so transparency and trust are foundational to every project.
- ✓ **Regulatory compliance** to ensure all relevant laws, regulations, and industry standards are followed.
- ✓ **Change management guidelines** to address any modifications to workflows, roles, and processes that may require training and adaptation.
- ✓ **Employee guidelines** to establish policies for accepted use of AI technology.



The governance gap

65%
of CEOs

say more work needs to be done to address social, ethical, and criminal risks related to AI.

Source: [Ernst and Young CEO Outlook Global Report](#)



CHAPTER 03

Stealth AI has entered the chat

When employees use AI without management approval, it can be risky business. Here are five steps that will help your organization control non-sanctioned use of AI tools—otherwise known as ‘stealth AI’.

- ✓ **Assess** what tools, processes, and what data might be involved.
- ✓ **Ask** employees why they need the tools.
- ✓ **Review** data security and privacy guidelines with employees.
- ✓ **Establish a centralized** approval process to encourage transparency.
- ✓ **Provide** sanctioned alternatives, and regularly review new technologies to understand trends.



Goal versus reality

68%
of business

leaders said that their employees should require permission to use AI tools, instead of using them at will.

Source: [CFO.com](https://www.cfo.com)

70%
of employees

using ChatGPT and other tools aren't telling their bosses.

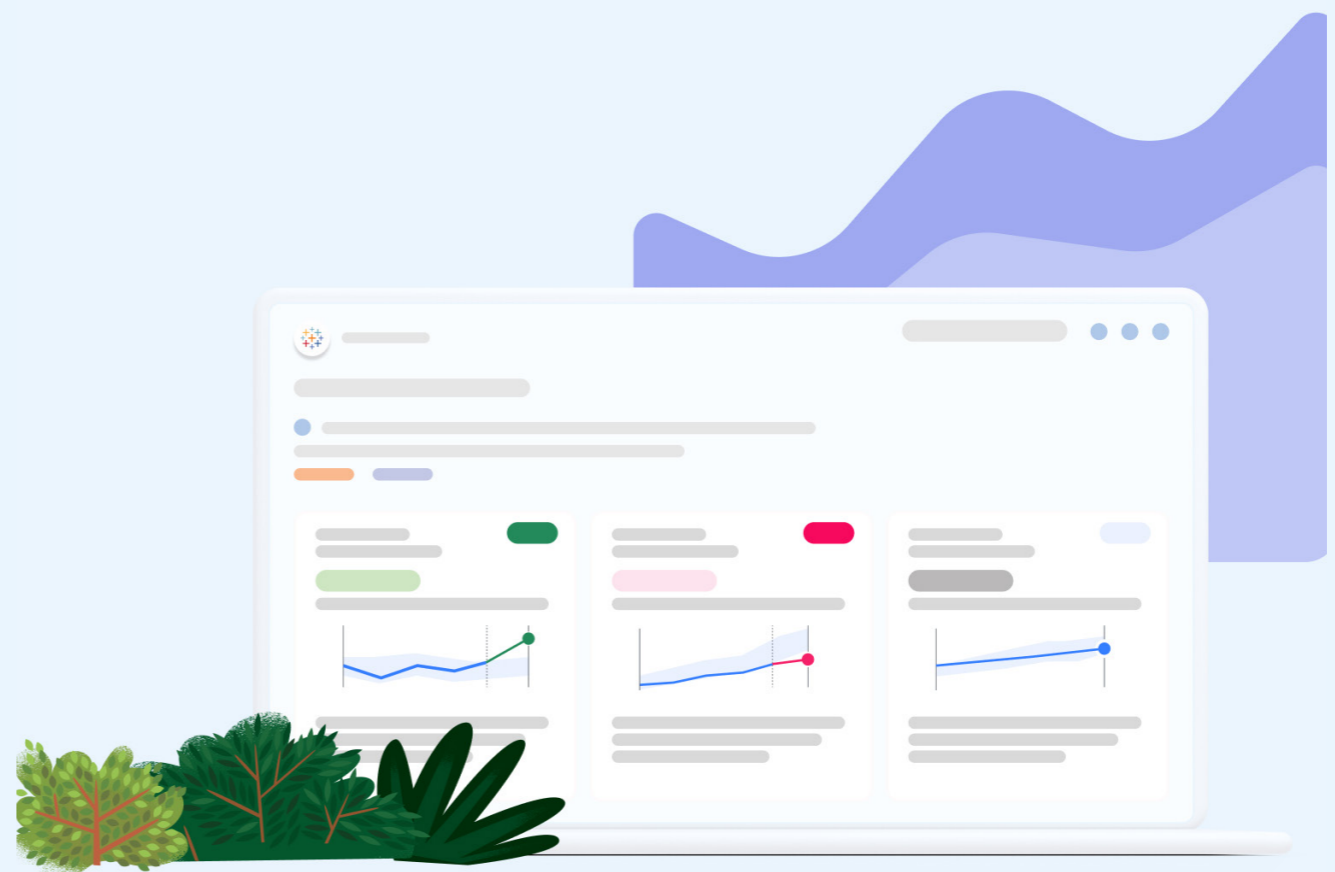
Source: [Business Today](https://www.business.com)

CHAPTER 04

AI success is a team sport

“ I think most business leaders have a good sense of what the key jobs are inside their organizations. Of those key jobs, what are the good candidates for AI? I think it's important for any executive—data or not—to understand what they are and plan accordingly.”

SOLOMON KAHN
DATA LEADERSHIP COLLABORATIVE



CHAPTER 04

Adjusting to a changing workplace

The modern workplace is experiencing a sea change. AI will replace nearly 85 million jobs by 2025, but nearly 97 million jobs related to AI will be created, according to estimates given by the World Economic Forum in its [Future of Jobs Report](#). In this new world, work will be redefined, and new roles will reflect a division of labor between “humans, machines, and algorithms.” At the same time, AI creates opportunities for organizations to re-imagine existing roles, devise upskilling opportunities, and design new roles to fit evolving needs.

The right people for the job

Data leaders need to assess what jobs should or could benefit from AI. To do that, you’ll need a thorough understanding of the tasks, skills, and strategic direction of the organization, and a [change management process](#) that can scale as your AI initiatives grow. To determine what jobs are needed:

- ✓ **Conduct a workforce analysis:** Identify all the jobs in your organization, including specific tasks and responsibilities.
- ✓ **Evaluate the tasks within each role:** Note which tasks are repetitive, rule-based, and data-driven—these are potential candidates for automation.
- ✓ **Assess how each role aligns with your strategic goals:** [Identify tasks that can be enhanced or expedited with AI.](#)
- ✓ **Map skills required for each job:** Determine what roles can be augmented or replaced with AI tools.
- ✓ **Calculate the ROI of implementing AI:** Compare costs of adding or reducing staff with potential benefits.

By the numbers



67%

of global business leaders

are considering using generative AI, but roughly the same number of IT leaders say their employees don’t have the skills to use it.

Source: Salesforce; [New Study Reveals Only 1 in 10 Global Workers Have In-Demand AI Skills](#)

Build your AI dream team

From engineers to analysts, it takes a village of very specialized people to implement AI. Your team will vary based on the complexity and scope of the project, as well as your budget and overall strategic objectives. Below are just some of the roles needed to develop and implement your AI initiatives. All AI teams work closely together, and collaborate throughout the lifecycle of your project from inception to ongoing maintenance.

Project manager

- Oversees entire initiative
- Sets timelines and manages resources
- Communicates with stakeholders
- Ensures results align with budget, schedule, goals

Software engineer

- Develops infrastructure and systems necessary to integrate AI models into applications
- Creates software to connect AI models with user interface, databases, and other application components

Data scientist

- Analyzes and prepares data for AI models
- Transforms raw data into formats for training and testing machine learning models
- Applies statistical methods to extract data insights

Domain expert

- Applies deep understanding of subject matter to help interpret results and ensure AI solution tracks with real-world requirements

Machine learning engineer

- Builds, trains, and deploys machine learning models
- Works closely with data scientists to translate data insights into working algorithms
- Fine tunes models and implements them



Conclusion

Riding the AI wave

Is AI a disruptor to business as usual? Absolutely—and that’s a good thing. This new generation of user-friendly AI technologies—looking at you, generative AI—has evolved far beyond the hype cycle phase. From applications that use simple prompts to create hyper-relevant, personalized offers for your prospects, to automated chatbots that solve complex customer support issues, it’s an AI-powered new world—and data leaders are in the right place to drive the transformation. The journey starts with the steps we’ve outlined in this ebook:

- Cleaning and connecting your data
- Selecting projects that will reap the greatest rewards
- Setting your strategic priorities
- Creating effective governance
- Building the right teams

It all begins with data

Data is the engine that will drive every AI initiative, yet recent research indicates 33% of business leaders can’t extract insights from their data. If your organization doesn’t have a comprehensive data strategy, it’s time to adopt one. To find out how you can improve how your organization uses data to drive impact, read The Data Culture Playbook, and take the free Tableau Blueprint assessment.



AI FOMO?

77%
of business

leaders already feel they are missing out on generative AI.

88%
of marketing

leaders are concerned their companies are falling behind.

Source: Generative AI in IT, Salesforce, March 2023



Explore more

Ready to do more with AI? The following resources are a good place to start.

Blogs

- [Salesforce Execs Weigh In: What is Generative AI?](#)
- [5 Questions About AI Your Business Should Ask Before Diving In](#)
- [Designing Personalized User Experiences with Data and AI? Keep This in Mind](#)
- [7 Easy Ways You Can Skill Up for AI](#)
- [IT Buyer Blog](#)

Video

- [AI Strategy 101: Everything You Need to Know About AI+Data+CRM](#)

Video

- [How to Accelerate Productivity with Trusted AI](#)

Trailhead

- [Get Started with Artificial Intelligence](#)
 - [Artificial Intelligence Fundamentals](#)
 - [Turn Data into Models](#)
 - [Understand the Need for Neural Networks](#)

Connect with your peers from the Data Leadership Collaborative. Get to know Tableau GPT!

Blog

- [How Tableau GPT and Tableau Pulse are Reimagining the Data Experience](#)

Demos

- [Tableau GPT and Tableau Pulse](#)
- [Data Cloud for Tableau](#)

Learn more about what's top-of-mind with your peers and connect with the [Data Leadership Collaborative!](#)





Salesforce is the customer company. We make cloud-based software designed to help businesses connect to customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service. Customer 360, our complete suite of products, unites your sales, service, marketing, commerce, and IT teams with a single, shared view of customer information, so that your company can become a customer company, too.

A Salesforce Company, Tableau helps people see and understand data. As the world's leading analytics platform, Tableau offers visual analytics with powerful AI, data management and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions.

For more information, please visit www.tableau.com.