



AI Strategy Thesis

Strategy should make the next decision easier, not create a longer list of technologies.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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AT A GLANCE

Strategy should make the next decision easier, not create a longer list of technologies.

Most AI strategies fail because they begin with tools and end with a list. This thesis argues for the opposite: start with a business question, make the work visible, choose a small number of opportunities against honest criteria, and sequence them as tests that teach the organization something. It sets out four stages (Frame, Map, Choose, Sequence), the outputs of each, a diagnostic you can run in an afternoon, and a first-quarter plan. It is a point of view, not a template, and it says plainly when you should not build a strategy yet.

WHO IT IS FOR Executives, owners and senior managers who need to move from broad AI interest to a focused set of decisions, use cases and next steps.

TIME TO USE 50 minutes to read; one leadership workshop to apply

What you will have at the end

- A one-page problem statement your leadership team actually agrees on
- A prioritized opportunity map with named owners and decision boundaries
- A first test with a baseline, a measure and a date to decide what happens next
- A clear view of what to leave alone for now

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THE POINT OF VIEW

Strategy is a way of making decisions easier

01



An AI strategy is useful when it shortens the next decision. If it only lengthens the list of things to look at, it is a catalog, not a strategy.

We hold a simple view. AI is a set of capabilities that can change how specific work gets done. It is not a destination, and it is not a category of purchase. A strategy for it should therefore describe which work you intend to change, why that matters to the business, who is responsible, and how you will find out whether it worked. Everything else is detail that can be decided later.



This matters because the pressure to act is real and mostly unfocused. Boards ask what the plan is. Staff are already experimenting on their own. Vendors arrive with demonstrations. In that environment the easy response is to assemble a long document that mentions every possibility. The harder and better response is a short set of choices that a manager can use on a Tuesday afternoon when someone asks for budget.

We also believe strategy is partly a learning exercise. Nobody can know in advance which use cases will pay off in their own organization, because the answer depends on local data, habits, customers and people. So a good strategy plans for learning: it chooses first tests that are small enough to run safely and meaningful enough to teach something, and it states in advance how the organization will decide what changes next.



- Strategy starts with a business question, not a technology
- Priorities are chosen, which means other things are declined on purpose
- Every priority has a named owner and a decision boundary
- The first move is a test with evidence attached, not a commitment to a platform
- The strategy is reviewed on a schedule and is allowed to change



A USEFUL TEST

Hand the strategy to a manager who was not in the room. Ask them whether a request for a new AI tool next week would be easier or harder to answer. If the answer is unclear, the strategy is not finished.

WORKING QUESTION

If a colleague asked you tomorrow whether to approve a new AI tool, what would your current strategy let you say in one sentence?

COMMON FAILURES

What most organizations get wrong

02



The usual mistakes are not technical. They are about sequence, ownership and honesty about what is known.

The first mistake is starting from the tool. A team sees an impressive demonstration, a pilot is approved, and only afterward does anyone ask which business problem it solves. The pilot then needs a problem, so one is found, often the one that happens to fit the tool. The result is a strategy shaped by whatever was bought first.

The second mistake is treating strategy as a ranking exercise done in a single meeting. Leaders list fifty ideas, score them quickly, and take the top five. The scoring feels rigorous but rests on guesses, because nobody has mapped the underlying work. An idea that scores high on value may depend on information that does not exist in usable form, or on a team that has no capacity to change.



The third mistake is confusing activity with direction. Many organizations are already using AI in scattered ways. That energy is valuable, but without shared limits it creates uneven risk and duplicated effort. A strategy that ignores existing use will be ignored by the people doing it. A strategy that only celebrates it will not guide anyone.

FAILURE PATTERN	WHAT IT LOOKS LIKE	WHAT IT COSTS
Tool first	A purchase or pilot precedes any problem statement	Effort spent fitting problems to a product
Ranking by guesswork	A long scored list with no mapping of the work	Priorities that collapse on contact with reality
No owner	Everyone agrees, nobody drives	Decisions stall and momentum fades
No limits	No statement of where AI will not be used	Uneven risk and avoidable incidents
No evidence plan	Success is described as adoption activity	No way to scale or stop with confidence
Strategy as document	A deck is produced and filed	Nothing changes on Monday

ILLUSTRATIVE EXAMPLE

A mid-sized services firm (illustrative, not a real client) approves three pilots in one quarter. None has a baseline. At review, each team reports that people liked the tool. Nobody can say whether work got faster, better or cheaper, so nothing is scaled and nothing is stopped.

WORKING QUESTION

Which of these six patterns would a candid colleague say describes your organization today?

THE METHOD

Four stages: Frame, Map, Choose, Sequence

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The method is deliberately short. Each stage produces something specific, and each can be done by a small group in days, not months.

The four stages build on each other. Frame establishes the business question and the limits of the decision. Map makes the relevant work, friction, information and people visible. Choose compares opportunities against criteria that include value, feasibility, ownership, information and responsible-use conditions. Sequence defines the first test, the evidence that matters, and the rhythm of review.

You can run the stages with a single leadership team over several weeks, or compress them into a focused set of workshops. The elapsed time matters less than the discipline of finishing each stage with its output written down. Skipping a stage almost always shows up later as a disagreement that should have been settled earlier.

STAGE	CORE QUESTION	MAIN OUTPUT
1. Frame	What business question are we answering, and what is out of scope?	A one-page problem statement and decision boundaries
2. Map	Where does the work happen, and what gets in the way?	A shared map of workflows, friction, information and people
3. Choose	Which opportunities deserve effort first, and why?	A short list with scores, owners and conditions
4. Sequence	What is the first test and how will we decide next?	A test charter, evidence plan and review dates

The method does not assume you will buy anything. In some organizations the best result of a strategy exercise is a decision to improve a process first, to train people, or to wait. The point is that the choice is made deliberately, with the reasons recorded, rather than by default.

WORKING QUESTION

Which stage would your organization most like to skip, and what does that tell you?



STAGE 1: FRAME

Frame the business question and its limits

04



Before any option is compared, leaders need one shared sentence about what they are trying to change and what they are not.

Framing sounds obvious and is routinely skipped. Ask five leaders what AI is for in their business and you will often hear five answers: cost reduction, customer experience, staff productivity, competitive defense, and simply not being left behind. All are legitimate. They lead to different priorities, and unspoken disagreement here is the most common cause of later stalls.



01 Gather the questions

Ask each leader to write, privately, the one business outcome they most want AI to influence and the one thing they most fear. Collect them without discussion.

02 Find the overlap

Read them aloud. Group similar answers and note where leaders genuinely differ. Differences are useful data, not problems to smooth over.

03 Write the problem statement

Draft a single page: the business question, why it matters now, the outcomes that would count as progress, and the time horizon.

04 Set the limits

State where you will move carefully or not at all, such as certain data, decisions or customer interactions. Name who can change those limits.



05 Agree the decision rights

Record who decides what: who approves tools, who approves spend, who signs off on use with sensitive information.



What the output looks like

- A problem statement of no more than one page, written in plain language
- Two to four outcomes expressed in terms the business already measures
- A short list of limits, with reasons, and a named owner for exceptions
- A decision-rights table that fits on one slide
- A list of open disagreements, each with someone assigned to resolve it

COMMON MISTAKE

Writing the problem statement as a technology goal, such as adopt generative AI across the business. A good statement names a business result, for example shorten the time it takes to respond to a customer request without lowering quality.

WORKING QUESTION

Can every member of your leadership team state the business question in their own words, and would the answers match?



STAGE 2: MAP

Map the work, the friction and the information

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Opportunities are found in the detail of how work actually happens, not in lists of what AI can do.

Mapping means making the relevant work visible. You are looking for places where people spend time on repetitive drafting, searching, summarizing, checking or reformatting, where decisions wait for information, or where quality varies because know-how sits in a few heads. These are the places where AI assistance is plausible. They are also the places where the information AI would need either exists or does not.

Map with the people who do the work, not only the people who manage it. Managers tend to describe the process as designed. Practitioners describe the process as lived, including workarounds, informal checks and the tools they already use. The gap between the two is often where the best opportunity, and the largest risk, sits.

01 Pick the areas

Choose three to five parts of the business that connect to the problem statement. Do not map the whole company.

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02 Walk the workflow

For each area, sit with two or three practitioners and trace one real piece of work from start to finish.

03 Mark the friction

Note where time is lost, where errors occur, where people wait and where judgment is genuinely required.

04 Record the information

List what information each step needs, where it lives, how current it is and who may see it.

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05 Note the people

Capture who is affected, how they feel about change and what they would need to work differently.

MAP ELEMENT	QUESTION TO ASK	WHY IT MATTERS
Workflow	What are the steps, and who does each?	Shows where assistance could fit
Friction	Where does time or quality leak?	Points to the value at stake
Information	What is needed, and is it usable?	Often the real limit on feasibility
People	Who is affected and how?	Predicts adoption and resistance
Current AI use	What is already happening informally?	Reveals demand and hidden risk

ILLUSTRATIVE EXAMPLE

A finance team (illustrative) discovers that month-end commentary takes two days because analysts reformat figures and rewrite similar explanations. The friction is real. The map also shows source data sits in three spreadsheets with no owner, which becomes a condition for any pilot.

WORKING QUESTION

Which piece of work in your organization could you trace from start to finish this week by sitting with the people who do it?

STAGE 3: CHOOSE

Choose by value, feasibility, ownership, information and care

06



Choosing means saying yes to a few things and no to the rest, using criteria you can explain to the people affected.

With a map in hand, you will have a list of candidate opportunities. The task now is to compare them honestly. We use five lenses. Value asks how much the outcome matters to the business problem you framed. Feasibility asks whether the work and the technology are a plausible match. Ownership asks whether someone with authority wants this and will drive it. Information asks whether the needed material is accessible, current and permitted. Responsible-use conditions ask what must be true for it to be safe.

Scoring is useful only as a conversation aid. A simple scale from low to high on each lens is enough. The numbers matter less than the reasons written beside them, because the reasons expose assumptions. When two leaders disagree on feasibility, the useful next step is usually to find out, not to average their scores.

LENS	WHAT TO ASK	WARNING SIGN
Value	If this works, which business measure moves?	Benefit described only as innovation
Feasibility	Is the task one AI assistance can plausibly support?	Task depends on judgment no one can describe
Ownership	Who will drive this and give it time?	Sponsor with no day-to-day owner
Information	Is the data usable, current and allowed?	Sources are scattered, stale or restricted
Responsible use	What review, limits and escalation apply?	No one can say what a bad outcome looks like



Decision rules we use

- Do not choose an opportunity that has no owner, however attractive the value
- Prefer opportunities where a wrong output is caught before it reaches a customer or a decision



- Treat missing information as a task to complete first, not a reason to proceed anyway
- Choose no more than two or three priorities at once, and one if capacity is thin
- Write down what was declined and what would change the decision


COMMON MISTAKE

Choosing on value alone. High-value ideas with weak information or no owner are the most expensive to start and the most common to abandon.

WORKING QUESTION

What is the one opportunity on your list that everyone likes but nobody has volunteered to own?


STAGE 4: SEQUENCE

Sequence the first test and the learning that follows

07



A sequence turns a choice into a dated plan with evidence attached, so the next decision is made on facts.

Sequencing begins with the first test. It should be small enough to run safely, close enough to real work to teach something, and specific enough that you can tell whether it helped. Resist the temptation to start with the largest opportunity. A contained first test builds the habits, such as baselining, review and honest reporting, that make later efforts faster.

01 Define the test

Name the user group, the task, the boundary and the outcome. One paragraph should be enough.

02 Take a baseline

Measure the current state before anything changes: time taken, error rate, volume or a quality rating, whichever the business already tracks.



03 Choose the evidence

Agree in advance what result would justify extending, changing or stopping. Write it down before the test starts.

04 Set the cadence

Schedule short reviews, for example every two weeks, and a decision meeting at the end.

05 Plan the learning

Decide how findings will reach other teams, and which later opportunities depend on the result.

SEQUENCE ELEMENT	PURPOSE	OWNER
Test charter	Defines scope, users, limits and outcome	Business owner
Baseline	Gives a fair comparison point	Business owner with analyst support
Evidence plan	Fixes what counts as success before the test	Sponsor
Review cadence	Keeps learning visible and decisions timely	Sponsor
Next-decision date	Prevents drift	Leadership team

Sequencing also includes what you will do in parallel. Most organizations benefit from running a light readiness check and some role-based training alongside the first test, because people and information conditions often decide the result. Strategy does not own those workstreams, but it should know they exist and who is responsible.

WORKING QUESTION

What result, written down today, would make you stop the first test, and what result would make you extend it?

Diagnostics and Roles

Diagnostics and ownership: where are you, and who drives

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A short self-check shows which stage needs attention. A clear set of roles keeps the work from becoming everyone's side project.

The diagnostic below is a conversation tool for a leadership team. Answer each line yes, partly or no, then discuss the lines where people disagree. Our free assessment at halden.company/assessments scores five dimensions for AI strategy: direction, use cases, ownership, investment and evidence. The checklist mirrors those dimensions so you can compare impressions with a structured result.

Strategy self-check

- Leaders can state what AI is for in the business, in one sentence, and the answers agree
- There is a written statement of where AI will not be used or will be used carefully
- Candidate use cases come to decision-makers through a known route
- Use cases are compared on criteria, not enthusiasm
- Each priority has a named executive sponsor and a day-to-day owner
- Leaders review AI progress and risks on a fixed schedule
- Funding includes protected time for people to learn and test
- There is a rule for stopping, pausing or scaling an initiative
- Baselines exist for the work AI is meant to improve
- Results are shared and used in later decisions

ROLE	RESPONSIBILITY	TYPICAL HOLDER
Executive sponsor	Owns the business question, removes obstacles, funds protected time	A member of the leadership team
Strategy lead	Runs the four stages, keeps the artifacts current	Operations, strategy or transformation lead
Use case owner	Drives one priority and reports evidence	Manager of the affected team

ROLE	RESPONSIBILITY	TYPICAL HOLDER
Information steward	Confirms what data is usable andData, IT or knowledge lead permitted	
Risk and people voice	Raises responsible-use and changelegal, compliance, HR or equivalent concerns early	



In small organizations one person may hold several roles. That is fine, provided each role is named. The failure to avoid is a sponsor who endorses the work in meetings and has no time to unblock it, or an owner who has responsibility but no authority over the workflow.

READING THE RESULT

Mostly no on the first three lines points to Frame. Mostly no on the middle lines points to Choose and ownership. Mostly no on the last three points to Sequence and evidence. Mixed answers usually mean the problem statement is not shared.



WORKING QUESTION

Which two lines in the self-check would your leaders answer differently, and what does that disagreement hide?

MEASURING PROGRESS

Measure whether the strategy is working

09



Measure decisions and learning as well as results, because early on the strategy's value is in how well the organization chooses.



Strategy is hard to measure directly, so measure what it should change. Early indicators concern decision quality: how quickly requests are answered, how many initiatives have owners and baselines, and how often decisions are recorded with reasons. Later indicators concern outcomes: whether the business measures named in the problem statement have moved, and whether the movement can reasonably be linked to the work.

INDICATOR	WHAT IT TELLS YOU	HOW TO COLLECT
Priorities with owner and baseline	Whether choices are real	Review the opportunity register monthly
Time to decide on a request	Whether the strategy shortens decisions	Log request and decision dates
Tests with written success criteria	Whether evidence is planned	Check charters before launch
Decisions recorded with reasons	Whether learning accumulates	Sample the decision log quarterly
Business measure movement	Whether outcomes are improving	Compare to the baseline at review
Items declined on purpose	Whether focus holds	Count entries in the declined list

Be careful with adoption numbers. Usage counts are easy to collect and easy to misread. A tool used daily may be producing little value, and a tool used weekly may be saving real time on a critical task. Pair any usage figure with a measure of the work itself. Where you cannot measure precisely, a consistent rating by the people doing the work is better than no measure.

Review the strategy itself on a calendar, not when it is convenient. A quarterly review is a reasonable default. Ask what was learned, what has changed in the business or the technology, which assumptions failed, and what should now be added to the declined list or taken off it.

WORKING QUESTION

Which business measure, already tracked today, would you expect your first AI priority to move?

RISKS AND TRADE-OFFS

Risks, trade-offs and when not to build a strategy yet

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A strategy has costs. Knowing them, and knowing when to do something simpler, is part of doing it well.

The main trade-off is speed against alignment. A short framing exercise slows the first purchase by days or weeks. In return it avoids months of rework. Where an organization is under real pressure to act, the compromise is to run a very small, low-risk test in parallel with framing, on the explicit understanding that it is a test and not a commitment.



A second trade-off is focus against coverage. Choosing two priorities means leaving other teams without support, which can cause frustration and unsanctioned use. Counter this with a light common baseline for everyone, such as a short note on what information may go where and who to ask, while the priorities are pursued in depth.

- Over-engineering: a heavy strategy process for a company of ten people wastes the effort it should save
- False precision: scores and forecasts presented with more confidence than the evidence allows
- Strategy drift: a good document that nobody reviews becomes a historical record within a year
- Hidden dependencies: a priority that relies on a data or system project nobody has scheduled
- Regulatory and contractual obligations: these vary by sector and region, so check current requirements and take professional advice for your situation



WHEN NOT TO BUILD A STRATEGY YET

If leaders cannot yet agree what problem they are solving, run a Frame workshop only. If a single, clear, low-risk need exists, run a contained test and write the strategy afterward from what you learn. If basic information handling is unclear, do readiness work first.



WORKING QUESTION



What is the smallest version of this work that would still change a decision you face this quarter?

WORKING WITH HALDEN

How Halden works with teams



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We help leadership teams run these four stages and leave with decisions, not a deck. Whether you need us at all is a fair question.

Halden & Company is an AI advisory and implementation partner. Our tagline is helping businesses make AI work for them, and for strategy that means facilitating the conversation, bringing structure and outside perspective, and writing the outputs with you so they belong to your team. We do not start from a tool or a preferred vendor.

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- We can facilitate the Frame and Map stages with your leadership team and practitioners
 - We help you score and compare opportunities and record the reasoning
 - We help design the first test, including baseline and evidence plan
 - We will tell you if the better next step is readiness, training or simply waiting
 - You keep the artifacts, and a capable internal lead can run later cycles without us

Many teams can do much of this alone, using this document as a guide. If you want an outside view, the free assessments at halden.company/assessments score five dimensions for AI strategy and give a starting picture in minutes. If you would like to talk through your situation, you can reach us at halden.company/contact. There is no obligation, and an honest answer may be that you do not need us yet.



WORKING QUESTION

What would you want an outside party to challenge in your current thinking, and who would you trust to do it?



30 / 60 / 90

A first quarter that produces evidence

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A first quarter that ends with a framed question, a short list of owned priorities and one running test with evidence.

First 30 days: ground it

- Run the Frame stage with leadership and write the one-page problem statement
- Agree limits and decision rights, and name the executive sponsor
- Take a quick inventory of AI use already happening in teams
- Complete the strategy self-check and note disagreements

**Days 31 to 60: test it**

- Map three to five areas of work with practitioners, including information and people
- Score candidate opportunities on the five lenses and record reasons
- Choose one to three priorities and name a day-to-day owner for each
- Write the declined list with conditions for revisiting

Days 61 to 90: decide

- Write the test charter, baseline and evidence plan for the first priority
- Start the test with a fixed review cadence
- Hold the first quarterly strategy review and update the plan
- Share findings with the wider organization



GLOSSARY

Terms used in this publication

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TERM	MEANING
Problem statement	A one-page description of the business question, why it matters now and which outcomes count as progress.
Decision boundary	A stated limit on what may be decided, by whom, and where AI will not be used or will be used with care.
Use case	A specific task, performed by a defined group of people, where AI assistance might help.
Opportunity map	A shared view of work, friction, information and people used to find and compare use cases.
Baseline	A measurement of the current state taken before a change, so results can be compared fairly.
Business owner	The person accountable for a use case and its results, usually the manager of the affected team.
Executive sponsor	A leader who owns the business question, funds protected time and removes obstacles.
Pilot or test	A contained trial of a change with defined users, limits, evidence and a decision date.
Declined list	A record of opportunities deliberately not pursued, with the reasons and what would change the decision.
Responsible-use conditions	The review steps, limits and escalation routes that must be in place before an AI-assisted task is used.
Evidence plan	An agreement, written before a test starts, on what results would justify extending, changing or stopping.



A note on use

This publication is a public orientation resource, not legal, technical, financial or professional advice. Adapt it to your people, information, workflows and obligations, and check current tool terms, regulations and risks before acting.

TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

