UNLOCK REAL BUSINESS VALUE WITH AI: BEYOND THE HYPE

A joint perspective from Prelude Solutions and CBTS

AI has moved quickly from experimentation to executive priority, but many organizations are struggling to translate AI interest into measurable business outcomes. The challenge isn't access to tools. It's clarity around where AI fits, what it can realistically deliver, and what must be in place before deployment. Successful AI initiatives start with business fundamentals, not hype.

The AI Readiness Foundation - Three areas that must be aligned to drive real results.

1 Business Readiness

AI delivers the most value when applied to repetitive, time-consuming, or resource-heavy work that already exists.

Strong starting points include:

- Intake, triage, and routing of requests or communications.
- Knowledge discovery across policies, documents, and historical content.
- Drafting and summarization workflows.
- Data-driven decision support where consistency and context matter.

The goal is not to "AI everything," but to target workflows where AI can reduce effort while preserving control.

2 Data Readiness

Many organizations discover that their data is not unusable, but it is not yet ready to support reliable AI outcomes.

Key considerations:

- Structured data (tables, databases, spreadsheets) is often closer to AI-ready.
- Unstructured data (documents, emails, PDFs) holds significant value but requires preparation and context.
- Reliable AI depends on processed and enriched data layers, not raw information.

Data readiness is not about fixing everything. It is about preparing the right data for the right business use cases.

3 Security, Governance, and Guardrails

AI introduces new access patterns to data and systems, making governance and permissions foundational, not optional.

Core guardrails include:

- Role-based access and least-privilege permissions.
- Sensitivity labeling, tagging, and redaction of data.
- Clear policies defining what AI tools can and cannot access.
- Alignment with recognized frameworks (ex. NIST, AI Risk Mgmt Framework).
- Emerging controls, including AI-specific security and monitoring approaches.

According to the PwC 2026 Global CEO Survey: 56% of CEOs (out of 4,454) have realized neither an increase in revenue nor a decrease in cost related to their AI investments.

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CHOOSING THE RIGHT AI APPROACH

Not every problem needs an agent, and not every solution should be built in-house. The right AI approach comes from aligning the use case with your data readiness, governance model, and risk tolerance, ensuring value without over-engineering or unnecessary risk.

Assistant AI vs. Agentic AI

AI assistants enhance human productivity, while agentic AI is designed to carry out structured tasks across systems. Choosing the right model depends on control, complexity, and risk.

AI Assistants Are Well-Suited For:

- Drafting, summarization, and knowledge retrieval.
- Productivity acceleration within existing platforms.
- Use cases that require continuous human oversight.
- Low-risk, task-specific use cases with clear user intent.

Agentic AI May Be Appropriate When:

- Workflows span multiple systems and steps.
- Decisions or actions follow predictable rules.
- Human-in-the-loop review is built into the process.
- Data foundations and security controls are mature.

Build vs. Buy

Deciding whether to build or buy AI capabilities is a critical step in scaling AI effectively. The right choice depends on where value is created, within existing platforms or across integrated systems, and balancing speed, control, and long-term ROI.

Buying AI Makes Sense When:

- AI exists within platforms you already use.
- The use case stays within one system.
- Speed and lower risk matter most.
- Vendor manages maintenance and governance.

Building AI Makes Sense When:

- Data and workflows span multiple systems.
- Custom logic or orchestration is required.
- AI creates competitive advantage.
- Data and security foundations are mature.

Not sure where to start—or how to scale safely? Prelude Solutions and CBTS help organizations assess AI readiness, align use cases to business goals, and design a practical roadmap for secure, sustainable AI adoption. Let's start with a conversation.

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