

**The AI Opportunity Roadmap:** Convert discovery phase into a strategic document that defines the target process, the business case, and the path forward.

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**Instructions:** Use the structure below to summarize your diagnostic findings. This document serves as the formal Green Light to move from strategy to design.

## SECTION 1: THE DIAGNOSTIC

**Client/Project:** InnovateTech Sales Transformation

### 1. Key Business Challenges

*What is breaking in the current state?*

- **Velocity Bottleneck:** The sales proposal process takes weeks to complete, stalling deal momentum and lengthening the sales cycle.
- **Cognitive Drag:** The Sales Support team is burning out on manual, repetitive data aggregation tasks rather than strategic support.
- **Quality Variance:** Lack of standardized templates leads to inconsistent brand messaging and pricing errors, negatively impacting win rates.

### 2. Opportunity Scoring (The CCI-EPOCH Matrix) *Rank pilot candidates.*

CANDIDATE PROCESS	AUTOMATION FIT (Data/Rules)	HUMAN EPOCH (Empathy/Judgment)	STRATEGY
1. Develop Sales Proposals	4 (High)	2 (Low)	<b>AUTOMATE</b> (AI-Absorbed)
2. Manage Lead Nurture	3 (Med)	4 (High)	<b>AUGMENT</b> (Hybrid)
3. Develop Acct Strategy	1 (Low)	5 (High)	<b>ELEVATE</b> (Human-Only)

#### Strategic Rationale:

Develop Sales Proposal is the clear winner. It scores High on Automation Fit due to structured inputs (RFPs), but Low on Human Complementarity for the initial drafting phase. It is safe to automate the First Draft.

## SECTION 2: THE GAP ANALYSIS

### 3. Key Gaps in the "As-Is" Workflow *Why is the current process failing?*

- **Manual Data Aggregation:** Humans are acting as routers, manually copy-pasting data from CRM, SharePoint, and PDFs.
- **Fragmented Knowledge:** No single source of truth for pricing or case studies; highly dependent on tribal knowledge.
- **Reactive Posture:** The process is triggered only *after* an RFP is received. There is no capacity for proactive value definition.

## SECTION 3: THE VALUE PROPOSITION

### 4. The AI-Augmented Future State

*How do we create value?*

ACTION TYPE	THE SOLUTION	THE VALUE METRIC
<b>AUTOMATE</b> (The Engine)	<b>The Proposal Assistant Agent.</b> Implement a custom agent to parse RFPs, retrieve pricing data, and generate a 80% complete first draft in minutes.	<b>Metric: The cognitive dividend</b> Est. <b>70-80% reduction</b> in manual drafting time per proposal.
<b>AMPLIFY</b> (The Upskill)	<b>Real-Time Analysis.</b> Provide the team with tools to instantly compare the RFP against competitor feature sets and suggest value props.	<b>Metric: Performance Amplifier</b> Est. <b>15-25% increase</b> in proposal win rate due to speed and accuracy.
<b>REINVEST</b> (The Alpha)	<b>Strategic Shift.</b> Reallocate the saved hours into human alpha activities: deep client research, relationship building, and negotiation strategy.	<b>Metric: Strategic Impact</b> Accelerated sales cycles and increased average deal size.

## SECTION 4: EXECUTION PLAN

### 5. Immediate Next Steps

This Roadmap validates the business case for the pilot. To execute, we proceed to the following stages:

1. **Workshop 2 (Intelligent Work Design):** We will use the *Deconstruction Protocol* to map the tasks of "Proposal Writing" and design the human-AI handoffs.
2. **Stage 3 (The Build):** We will configure the "Proposal Assistant" agent in a clean room environment using the client's pricing guides.
3. **Stage 4 (Adoption):** We will train the Sales Support team to move from "Writers" to "Editors."

**Governance Note:** This roadmap aligns with the **Tier 1 (Foundational Control)** maturity level. All AI agents will be deployed within the secure *AI Commons* infrastructure to ensure data sovereignty.