AI and business intelligence
The future of business

An overview of the market trends, and Portera capability.

" 'ChatGPT' has raised the interest in all things AI. It has raised the willingness to invest, but it's also raised the pressure to deliver."

*Chris Howard, Gartner Distinguished Analyst, 2024 Top 10 Tech Trends, Keynote speech.*

The challenge for Change Management

The only constant is change, and whilst change is crucial for business fitness and adaptation to ever-changing situations, management of change is typically a weakness for most enterprise organizations.

At the heart of any transformation journey is people. A structural problem of Change Management is that the people leading transformation programs underestimate the human disruption of change – or worse, they estimate it accurately but consider it a 'cost of doing transformation business'.

There is a better way, where change is accurately assessed, and effectively managed.
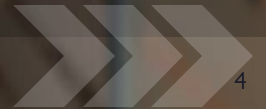
Too many organizations think they are doing effective Change programs

Standard implementation

- Involved at adoption stage – not an inception

- Largely responsible for administering and communicating the change
  - Administering the capturing of playbooks, case studies, and 'success stories'
  - Communicating the program, status of change, and success stories

- Lean (low) budget

Common issues

- Mis-alignment between Product and Business teams – lack of pre-sell and insufficient shared buy-in

- Adaptation of the technology (as the problem) rather than fixing the processes / people problems

- Global and local teams not working effectively together

- Insufficient feedback mechanisms or change control

- Key advocates not involved

- Adoption underperforms

- Crisis/breakdown at go/no go stage

- Innovation is 'launched and left'

It is by identifying the underlying causes that we are able to understand the key role change management plays, and how to valorise and prove its contribution to business success.

	Cost centre	Separate function	Blocker rather than enabler	Involved too late
Don't	Change Management is often 'managed' into the role of the Product Owner or Scrum master. It shouldn't be.	Change Management often reports into a different functional lead.. This makes it easier to overlook / more effortful to involve.	Alignment, gathering feedback, and building a shared vision does not get in the way of innovation. It is key to successful adoption.	Change management is often brought in when there is an adoption problem. This is far too late.
Do	See Change Management as a specific function with a dedicated budget – but linked to success outcomes that drive the business case.	Integrate Change Management into the IM/IT function.	Build in the ability to incorporate input from across the teams, so that CM is less about imposing change, instead it's changing together.	Insurance is the only thing you can't buy when you need it. And last-minute Change Management is a close second. Be proactive. Track progress. And prove incremental outcomes.

Effective change management is part of the solution to commercial underperformance.

"Business outcomes improve by between 7% and 36% as a result of effective change management programs."

Portera performance study, 2022.

"70% of transformation programs fail to achieve their goals, largely due to employee resistance and lack of managerial support."

McKinsey & Company

# Tackling this challenge
head on

Effective Change Management drives employee satisfaction, reduces staff attrition rates, and crucially increases solution adoption.

All three have direct business benefits that can be tracked, reported, and proven.

AI – applied responsibly - is the gamechanger.
It promises to bring data & analytics, predictive power, personalization and customization, new user interfaces, automation of processes, and new means of content generation through Natural Language Processing and Large Language Models.

Doug Killick,   Partner, Business & Strategy
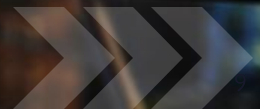
Three dimensions where AI will fundamentally present opportunities and challenges to Change Management.

Talent & Skills

- Transforming processes, outcomes, and roles – creating new and changing/impacting many
- Making people central to the transformation, not fearful of it
- Training programme / upskilling

Customer + employee experience

- Enable a one-size tech solution that allows you to please all the people all the time – as the experience is totally customised
- This is true for customers as well as employees (and suppliers)
- Move from creation to curation

Platforms, data, and application modernisation

- Pivot to business models to unlock monetised potential across the ecosystem
- Overhaul legacy platforms and applications where before there 'wasn't the business case'
- Grow proprietary data
- Use natural language to unlock insights

Talent & Skills

Customer + employee experience

Platforms, data, and application modernisation

CONTEXT

AI has increasingly been a part of business operation – from supply chain through to commercial and administrative roles, but recent growth in Generative AI has turbocharged the anticipation – both positive and negative – of the impact on AI on talent and skills within organisations.

There is no avoidance option – the entire business needs to see AI as disruptive change and adopt a holistic change management strategy to manage and maximise its potential, whilst mitigating the downsides and risks.

OPPORTUNITIES

89% of CEOs believe AI will drive new roles and capabilities within their organization.

- Training and coaching – connecting e.g. LLMs to internal resources and data allows for in-house super-training on policies, procedures, contracts etc.

- Transforming processes, outcomes, and roles. Removing manual processes, accelerating outcomes.

- Recruitment: talent acquisition, profiling, and selection.

CHALLENGES

80% of business leaders see explainability, ethics, bias, or trust as a major concern on the road to generative AI adoption.

- Managing privacy concerns.

- Ensuring people are central to the transformation, not fearful of it.

- Training programme / upskilling in the absence of a mature ecosystem (people, processes, and platforms).

Talent & Skills	Customer + employee experience	Platforms, data, and application modernisation

CONTEXT

It used to hold true that "you can't be all things to everyone". AI has the potential to do just that. With hyper-personalisation, data driven automation, and generative user-interface and content potential, it really has the potential to explode value creation through effective customer and employee experience.

In the context of Change Management, it has the potential to allow managers to understand, communicate, and impact change programmes in a way that just recently seemed impossible.

OPPORTUNITIES

62% of executives say AI will disrupt how their organization designs experiences.

- User journey enhancement – obliterating friction in the process.
- Boost productivity and staff satisfaction with immediate support, advice, training, and guidance
- Improve performance with conversational AI, hybrid cloud platforms, intelligent workflows, and agile ways of working
- Create new growth paths with human-centric experiences and redefine roles for generative AI. Start with HR

CHALLENGES

More than half of CEOs (56%) say they don't have a process in place to review generative AI output and resolve issues.

- Many disciplines disrupted by AI were typically considered an art, rather than a science e.g. user experience design, UI design, customer sentiment analysis, the creative process. AI will change that and cause significant concern in the short term.
- Ethical considerations will be central with the commercial temptation to be to fully automate huge swathes of business operations and processes. This is a challenge for leadership, and shareholders.

Talent & Skills

Customer + employee experience

Platforms, data, and application modernisation

CONTEXT

AI platforms are offering unprecedented access to processing power, data, and system-based outputs. This means that existing challenges can be tackled in completely new ways, transforming the business case for e.g. legacy system replacement, and inventing new data models and entire business models.

In the context of change management, this power, potential, and uncertainty, presents a new form of opportunity/risk for business operation and transformation. It is important to embark on the right programmes with the right approach.

OPPORTUNITIES

Over 90% of CEOs expect to participate in platform-based business models, up from 46% in 2018.

- The versatility of AI allows traditional/legacy organisations to operate in a more agile/start up way
- Application modernisation should trigger a virtuous circle of productivity growth, improved data quality, better decision making, and improved business outcomes.
- Platform-as-a-business-model should be part of all business value proposition exploration.
- Proprietary data represents both a key challenge, but also a huge commercial opportunity.

CHALLENGES

More than half (56%) say they don't have a process in place to review generative AI output and resolve issues.

- With the potential for AI to bridge –and close – the gap between business and IT, internal power struggles may ensure between the owners of business strategy, and the technical, data, and platform solutions that are in developed.
- Data quality and access present key challenges, which will impact outcomes in the near-term, risking a loss of confidence in the strategy or solution being developed. Managing this 'trough of disillusionment' is critical to sustaining AI initiatives.

Success strategies

Change management is a crucial process for organizations to adapt to new situations, technologies, or strategies. Implementing successful change requires careful planning and consideration of a number of key factors.
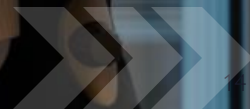
Success strategies for Change Management in an AI world

| 1 | Establish a north star | Start with the total business outcome that is to be achieved. Formulate the business solution, and plan across people, processes, and platforms. Set clear objectives and results – making these SMART. |

| 2 | Business case | The key enabler of a well-funded change program is having sufficient investment and executive oversight. For that to happen, the case must be established and aligned across the executive leadership.. |

| 3 | Change enablers | Outside of just technology, define the enablers of change – again across people, processes and platforms. Ensure a comprehensive plan is in place with an end to end cycle of change management. Act locally, and globally. |

| 4 | Track, measure, prove | Track business and technology OKRs to ensure adoption and platform activity is as required/expected. Include staff satisfaction and staff loyalty/retention measures to additionally prove the business case. Do, repeat, repeat. |

| 5 | Maintain (leadership) involvement | Ensure continuous feedback on all sides. This is critical to managing the trough of disillusionment. Refer to the north star to guide conflict resolution, and keep leadership's active engagement through the process. |

| 6 | Build (and repeat) the momentum | Leverage tech and data – like Large Language Models or Generative AI to turbocharge the team outputs and positive story generation. |

15

Success stories

Client success stories are a key way to learn
and get inspired as to what is possible.

16

Client case 1

Supporting a global B2B business drive high adoption across Salesforce Service Cloud and CRM

Why this started?

In the wake of the Covid 19 global pandemic, a multinational product company needed to speed up its existing technology roadmap to drive urgent onboarding and adoption to its Service Cloud and CRM instances on Salesforce.

Solution developed

Stakeholders within markets had to manage the evolution of their role amidst a highly volatile company context. It required a compelling positive narrative to support the change, and a by-persona by-market roll out program to drive hearts and minds.

Outcome achieved

Adoption rates of markets with Change Support are performing significantly higher than markets onboarded before the acceleration program. We remain engaged with this business today, across their CRM, Service, and Data streams.

Solution we provided

Portera Land: We adapted our Change Model to create a client-specific Land program, ensuring market onboarding, migration, launch and post go-live support.

It involved direct market consulting, weekly change support, training, guide creation, process documentation, and internal communication.

p28 to learn about Portera LAND

Processes:
Complaints management, lead generation, sales cycle

Platform:
Salesforce Service and CRM cloud

People:
Sales, Customer Service, Operations, Quality, Marketing

Client case 2

Turnaround plan for a business struggling with declining sales and an out-moded engagement model.

Why this started?

Our client remains the market leader, but was suffering from a short-term and rapid decline in sales. Existing leadership were unsure of what to do, and required a rapid turnaround in performance from its sales initiatives. .

Solution developed

Internal teams needed belief in taking the leap to a new strategy. There wasn't the time to delay, and so having clear stakeholder management across the entire organization was critical to successfully initiating and implementing a change program. Advanced AI data modelling and predictive insights were used to improve performance

Outcome achieved

Within 5 months we designed and delivered a change program that is now their #1 engagement strategy. All levels of the organization are on board, and it has become a global best practice in both execution and technology transformation.

Solution we provided

Portera Impact: We developed a new business solution to achieve a clear commercial outcome. It required comprehensive North Star creation, and end-to-end change management to ensure business case, development, implementation, and adoption of the new technology.

The platform is running, active across all of their marketing activities. It is the largest customer touchpoint, responsible for driving +50% business engagement, and +4% market share.

We are running proof of values using advanced data modelling, and genAI content creation.

Processes:

Lead generation, customer engagement, marketing automation

Platform:

Custom solution built on Azure

People:

Sales, Customer Service, Operations, Marketing

Client case 3

Supporting a global CPG business to transform customer engagement through data and tech.

Why this started?

As part of its digital transformation agenda, this client required a partner that has both deep technical understanding but also the business acumen to translate business outcomes into technology requirements.

Solution developed

Each market considers its situation as unique, so finding the right way to balance local specificity with global consistency was the core challenge, which managing an effective transformation and roll out program.

Outcome achieved

Launch and adoption rates are on time and ahead of target. Markets are providing consistently positive feedback on the program, with internal teams at global and local level happy with the continuous smooth onboarding of new markets.

Solution we provided

Portera Run: We operate a continuous cycle of market onboarding to run mode.

We are acting as proxy PO/PM, coaching markets on the North Star, process evolution, in-practice tool usage, right through to post go-live support, and platform ramp up.

salesforce

Processes:

Lead generation, marketing automation

Platform:

Salesforce CRM cloud

People:

Sales, Customer Service, Operations, Marketing

AI

Client case 4

Launch a conversational AI to share knowledge internally

Why this started?

ChatGPT exploded in 2023, and all organizations – large and small – are experimenting with use cases. .Our client wanted to jump straight to enterprise use cases for this emerging technology and solve the classic problem of 'not knowing what we know'.

Solution developed

Our team of expert AI engineers, prompt engineers, data engineers, and AI solution architects built a closed instance traditional document search product with a conversational AI layer on top.

Outcome achieved

The solution is capable of reasoning all of their internal documents relating to this use case. Instead of a standard 'sharepoint' search results page listing hundreds of file references, the AI generates complete answers to questions based on the most relevant content available.

Solution we provided

Portera Impact: We embraced a 'open kitchen' approach, working together with client teams and IM to co-create the solution in their environment. Data privacy and security is of paramount importance, and so privacy by design principles were followed.

Additionally, as concerns remain around hallucinations, all results involve document/source referencing, allowing users to validate the results by jumping straight to the key reference material.

Processes:
Agile innovation.

Platform:
Azure Open AI services, Chat GPT 3.5 and 4,
Azure Cognitive services

People:
Customer services, Regulatory and Legal, Compliance.

p28 to learn about Portera IMPACT

AI

Client case 5

Support team co-pilot

Why this started?

Support teams are often outsourced, suffer from high staff churn, and require constant training. Without this, standards can slip – and in worst case scenarios, illegal or dangerous advice can be given out. Our client, in the healthcare space, was at risk of just this situation.

Solution developed

We used historical helpdesk questions and answers to create an internal co-pilot for their support team. Non-customer facing, this internal system replaced static training and manual information searching, replacing it with AI drafts from previous answers. Based on key indications, it introduced a certainty indicator (high-medium-low).

Outcome achieved

The solution has reduced training times by over 60%, and increased team efficiency by 32%. Answers are better, quicker, and more accurate. Moving forwards, the ambition is to make this a global platform, taking in best practices from across the world.

Solution we provided

Portera Impact: We used a private instance of Azure Open AI, incorporating historical data, providing both data cleaning pipelines, alongside data-anonymisation.

Prompt engineering was used to refine the learning model. Natural language processing UI was implemented behind single sign on to ensure only existing and approved staff members could access the platform.

Processes:
Agile innovation.

Platform:
Azure Open AI services, Chat GPT 3.5 and 4,
Azure Cognitive services

People:
Customer services, Regulatory and Legal, Compliance.

Key take-aways

Change management improves business outcomes, and helps transformations land more impactfully, and quicker.

But much like doing a gym workout, it is easy to think that change management is being effectively done. In reality, it is often under-funded, non-core, and initiated too late. With effective leadership, and by leveraging innovation through AI, the potential for change management to tangibly impact business is here, and now.

Do's	Don'ts
• Build the business case	• Don't see CM as a bolt on – it is core to the process
• Track and prove the impact, repeatedly, through the project	• Don't replace Change Managers with GenAi bots – the technology is not ready.
• Ensure leadership is managed throughout the project – especially if AI is being used	• Ethically, use AI to enhance the productivity of Change Managers, and the efficacy of change programmes.
• Operate project end-to-end: across the full time horizon and across all stakeholders.	

Successful Change Management isn't about 'just' aligning senior stakeholders and sending out 'positive spin' through internal comms.

It has to be a genuine attempt to listen, involve, and adapt to change – working together to an aligned north star… throughout the entire project.

Mudita Khanna, Change Manager, Portera.

Introducing…

We are a consultancy focused on driving business performance through effective use of data, technology and strategy.

Headquartered in Amsterdam, NL, we service global businesses across 3 continents.

ENTERPRISE GROWTH ENABLERS

We grow by (y)our *successes*, not just by our *name*

- Founded in 2014, HQ'ed in Amsterdam
- M-Shaped people across a broad range of functions and expertise
- Fastest growing company in The Netherlands
- Balancing on-site and off-site capabilities
- Offices in the UK, Istanbul and Philippines.

Thinking Partner

Cloud Transformation

Integrated Digital Experiences & AI

Data & Decision Management

Systems Integration, IT Department Expansion & Nearshoring

Managed Services & Turn-Key Delivery Solutions

Some of our successes
In the past decade

1. From Ground-Up Cloud Platform
Ongoing for > 5 years

2. B2B E-Commerce
Ongoing for > 3 years

3. Global Digital Architecture
Ongoing for > 8 years

4. Application, Data and Cloud Operations
Ongoing for > 4 years

5. Data Centre of Excellence
Ongoing for > 3 years

6. Customer Engagement Platform
Ongoing for > 7 years

Worldwide scale, local agility

● Clients
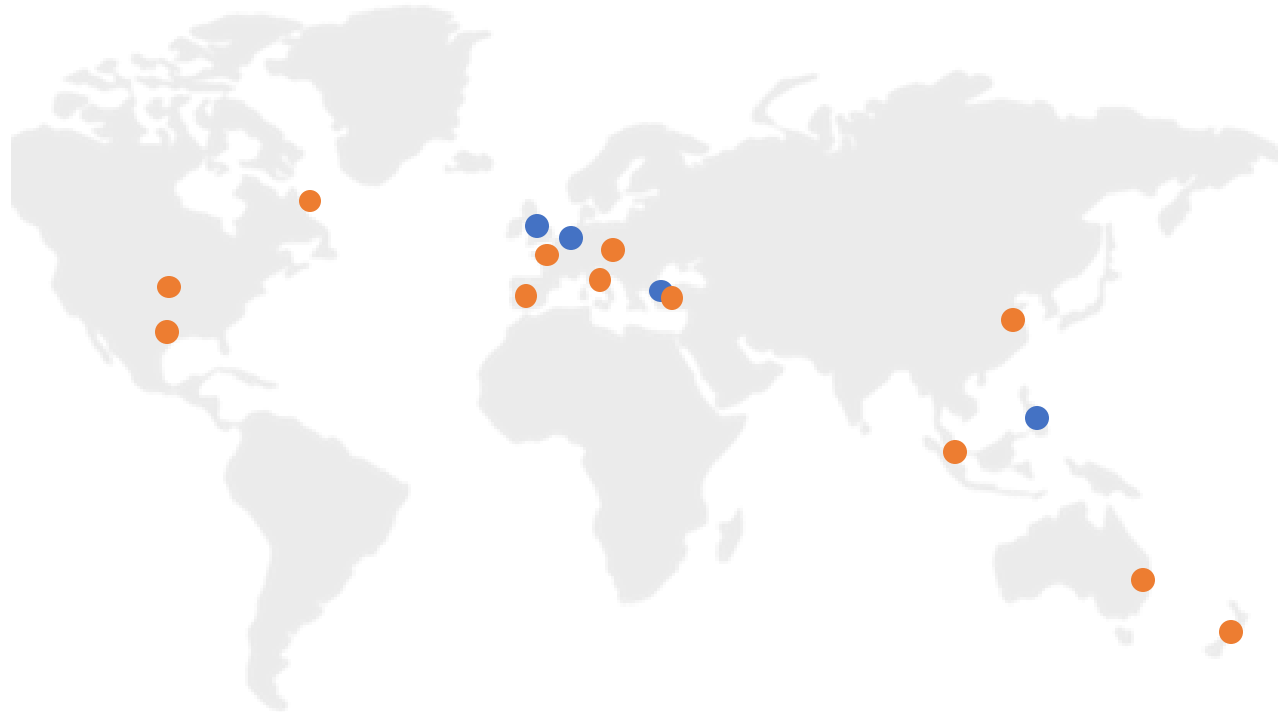● Offices

Some of our global successes
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5. Data Centre of Excellence
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6. Customer Engagement Platform
Ongoing for > 7 years

Portera Change Management process

A standardised process with **proven track record**

1	2	3	4	5
ALIGN	**DEFINE**	**TRANSITION**	**LAUNCH**	**SUSTAIN & SCALE**

ALIGN
- › Align on the why
- › Audit & Readiness Assessment
- › Gap Analysis & Adoption Roadmap
- › Measurement Framework
- › Governance and RACI setting
- › Identification of Change Champions

DEFINE
- › Advocates and detractors strategy
- › Tools preparation – guides, tutorials, use cases etc.
- › In-progress redesign
- › Support, mechanism – clear pre, during and post phases
- › Ongoing tracking and reporting framework established

TRANSITION
- › Deploy support mechanism
- › Oversee total-party comms and engagement
- › Constant positive comms
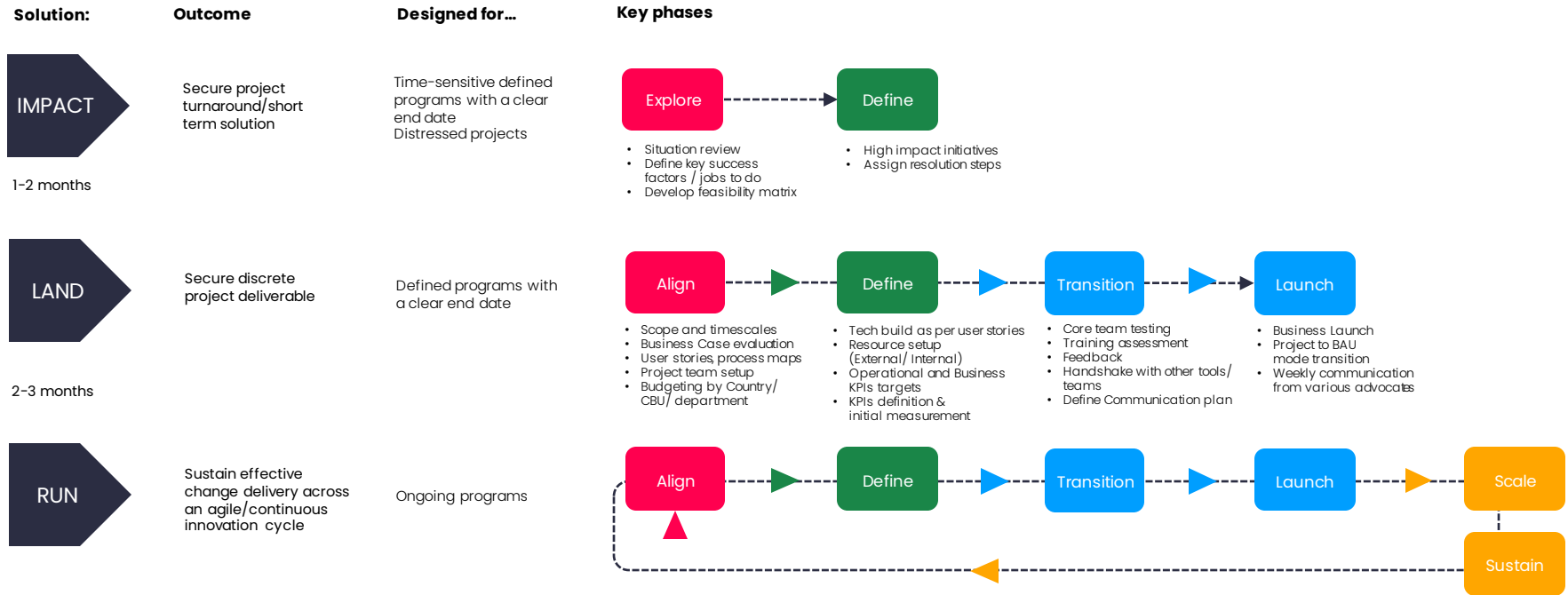- › Create short-term wins

LAUNCH
- › Hypercare
- › Targeted interventions with corrective actions
- › Constant positive comms
- › Adoption reporting
- › Early recognition

SUSTAIN & SCALE
- › Impact measurement and communication
- › Rewards and recognition
- › Sustained positive communication
- › Next wave onboarding

Portera: Client services to deliver tangible outcomes

Solution: **Outcome** **Designed for…** **Key phases**

IMPACT

Secure project turnaround/short term solution

Time-sensitive defined programs with a clear end date
Distressed projects

1-2 months

Explore	Define

- Situation review
- Define key success factors / jobs to do
- Develop feasibility matrix

- High impact initiatives
- Assign resolution steps

LAND

Secure discrete project deliverable

Defined programs with a clear end date

2-3 months

Align	Define	Transition	Launch

- Scope and timescales
- Business Case evaluation
- User stories, process maps
- Project team setup
- Budgeting by Country/ CBU/ department

- Tech build as per user stories
- Resource setup (External/ Internal)
- Operational and Business KPIs targets
- KPIs definition & initial measurement

- Core team testing
- Training assessment
- Feedback
- Handshake with other tools/ teams
- Define Communication plan

- Business Launch
- Project to BAU mode transition
- Weekly communication from various advocates

RUN

Sustain effective change delivery across an agile/continuous innovation cycle

Ongoing programs

Align	Define	Transition	Launch	Scale

Sustain

Want to talk?

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