How to Measure AI ROI: Every CFO's Question

A Finance-First Playbook for Turning AI Spending Into Board-Grade ROI Decisions

For CFOs, VPs of Finance, and Data & Analytics leaders who need auditable outcomes their boards will trust.

Leverage Strategies | February 2026 | By Dan Albasry

SECTION 01

The AI Value Gap: Why CFOs Are Over It

The silence when someone asks "What did it do for revenue?"

It is the first Monday of the quarter. The Chief Data Officer walks into the CFO's office with a slide deck full of adoption metrics: **70% of employees** used the AI chatbot last month, content generation is **up 300%**, and the vendor just released a new model with a bigger context window. The CFO listens politely, then asks the only question that matters: **"What did it do for revenue?"** Silence. That silence is the subject of this entire playbook.

This scene is playing out in thousands of companies right now, and the data behind it is brutal. A 2025 MIT study found that **95% of enterprise AI initiatives fail to deliver measurable financial returns** within six months. Only 5% of integrated AI pilots extracted millions in value. PwC's 2026 Global CEO Survey reports that **56% of CEOs have seen zero ROI** from their AI investments. Gartner predicts that 30% of generative AI projects will be abandoned after proof of concept, and that 40% of agentic AI projects will be canceled by 2028. The industry spent billions on models, tokens, and demos. What it did not spend on was proving the money came back.

BCG CFO Excellence 2025; Forbes CEO Survey 2026; MIT Media Lab 2025

95%

AI initiatives fail to deliver financial returns

56%

CEOs report zero ROI from AI

45%

Executives who can even quantify AI ROI

How AI ROI Is Currently Mis-Measured. The root problem is not that AI does not work. It is that organizations are measuring the wrong things. Model benchmarks (tokens per second, context windows, synthetic test scores) tell you nothing about business impact. Adoption statistics divorced from outcomes prove only that people clicked a button. “Content pieces generated,” “number of prompts,” and “meetings with AI vendors” are activity metrics masquerading as value metrics. **The metric of 2025 was users. The metric of 2026 is auditable outcomes.**

BCG’s Center for CFO Excellence surveyed 280+ finance executives in March 2025 and found the **median reported ROI from AI is just 10%**. Roughly one in five reported ROI of 20% or more. But here is the more damning number: **only 45% of executives can even quantify the ROI** of their AI efforts. More than half are spending on AI and have no reliable way to say whether it worked. IBM’s Institute for Business Value found enterprise-wide AI initiatives achieving ROI of just **5.9%** despite representing 10% of capital investment.

The average ROI benchmark for 2026 is **$3.70 per dollar invested**. Top performers achieve **10-18x returns**. The gap between the median and the top 20% is not about technology. It is about measurement discipline, use-case selection, and financial rigor. That is what this playbook teaches.

MIT Media Lab 2025; BCG CFO Excellence 2025; IBM IBV 2025; PwC CEO Survey 2026; Neomanex 2025

What This Playbook Does Differently. This playbook is not another AI trends report. It is a working document for finance leaders who need to answer three questions: **How much did we spend on AI? What did we get back? Should we spend more?** It provides the frameworks, formulas, templates, and conversation tools to answer those questions with numbers your board will actually believe.

The structure follows a deliberate sequence. First, a shared language for AI value: four pillars, one checklist, one formula. Then what to measure and what to ignore. Then the math: ROI, NPV, IRR, and how to translate “time saved” into actual dollars without double-counting. From there, the full business case lifecycle, from defining a use case, to prototyping it, to quantifying benefits and costs, to comparing options for a board presentation. It closes with an operating model for repeatable ROI and a **90-day sprint** you can start next Monday.

BCG CFO Excellence 2025; Naviant 2025; MIT Media Lab 2025

SECTION 02

A Simple Language for AI Value

Before you can measure AI value, you need a shared taxonomy.

The Four Pillars of AI ROI

Pillar	What It Measures	Benchmark
Efficiency Gains	Cost savings, time savings, productivity, error reduction	40% productivity boost
Revenue Generation	New revenue, retention, conversion, deal win rates	Up to 141% increase in deal wins
Risk Mitigation	Fraud loss, compliance, false positives, penalties	Up to 50% fraud loss reduction
Business Agility	Speed to market, scalability, innovation velocity	10x faster than traditional automation

Neomanex Agentic ROI Matrix 2025; BCG CFO Excellence 2025

The AI Value Checklist

Value Surface	Pillar	Example
Process cost reduction	Efficiency	Automate month-end close, reduce reconciliation
Revenue uplift	Revenue	AI wealth advisors drive 20% gross sales increase (JPMorgan)
Customer experience	Revenue + Agility	AI resolves 2/3 of service chats in 2 min (Klarna)
Employee experience	Efficiency + Agility	GenAI improved 850M catalog data points (Walmart)
Risk reduction	Risk	Predictive AI saves $45M, 50% less downtime (Siemens)
Compliance and ESG	Risk	Route optimization cut 30M miles, 94M lbs CO2 (Walmart)

JPMorgan 2024; Klarna 2024; Walmart 2025; Siemens 2025; Info-Tech 2025

The key insight is that most business cases are under-built. Teams identify one benefit (usually time savings) and stop. Walking the full checklist forces you to find revenue uplift, risk reduction, employee experience improvement, and agility gains. A business case with **four value surfaces** is dramatically harder for a skeptical CFO to reject than one with a single efficiency argument.

Info-Tech Build Your AI Business Case 2025; BCG CFO Excellence 2025

SECTION 03

What to Measure vs. What's Noise

The single most important skill in AI ROI measurement.

Bad Metrics: Activity Disguised as Value

Metric	Why It Feels Important	Why It's Noise
Tokens processed	Big number = big usage	Zero correlation with business outcomes
Adoption rate	People are using it!	Usage without outcomes proves nothing
Content pieces generated	AI is producing output	Volume says nothing about quality or revenue
Model accuracy	Technical excellence	Lab scores don't predict real-world performance
Vendors evaluated	We are thorough	Evaluating vendors is cost, not value

MIT Media Lab 2025; Gartner 2025; Forbes CEO Survey 2026

Board-Ready Metrics by Pillar. Board-ready metrics connect to a financial outcome, compare to a baseline, and can be independently verified.

Efficiency: FTE-equivalent capacity unlocked, not just “time saved” but what that time was redeployed to. Cycle time reduction for material processes. Error rate reduction with before/after comparison.

Revenue: Incremental pipeline attributable to AI-assisted workflows versus a control. Conversion rate lift, average order value, deal win rates comparing AI-assisted to non-assisted reps.

Risk: Reduction in fraud or error dollars. Fewer audit findings and SLA breaches. Compliance adherence improvement against a regulatory baseline.

Agility: Time-to-launch for new products. Experiments per quarter. Time-to-insight: how quickly the organization answers new questions with data.

Neomanex 2025; BCG CFO Excellence 2025; WEF/Cognizant 2024

The MIT Failure Mode Breakdown

Failure Mode	% of Failures	What Went Wrong
No clear ROI definition	37%	No baseline metrics before implementation
Data quality issues	28%	AI trained on dirty data produces unreliable results
Integration complexity	21%	Two-week implementation becomes three months
Change management	14%	The tool works but nobody uses it

MIT Media Lab 2025; Gartner 2025

37% of AI failures happen because nobody defined what success looked like before they started. That is not a technology problem. It is a finance discipline problem.

If your organization cannot state the baseline, the target, and the measurement method before an AI project begins, it should not begin.

SECTION 04

The Math: Turning AI Into a Financial Asset

The exact formulas most AI playbooks skip.

The Master ROI Formula. Every CFO-facing guide converges on the same core formula. It is not complicated, but it requires discipline in how you populate each variable.

ROI (%) = [(Net Benefits - Total Investment) / Total Investment] x 100

Where:
Net Benefits = Revenue uplift + Cost reduction + Avoided costs + Working capital gains
Total Investment = Development + Licenses + Data prep + Integration + Change mgmt + Ongoing ops

The formula is simple. The discipline is in each term. “Net Benefits” is not “what the vendor promised.” It is the sum of four categories, each measured against a pre-implementation baseline, each independently verifiable. “Total Investment” is not just the license fee. It includes data preparation, integration, change management, and ongoing operations. Most business cases **undercount costs by 40-60%** because they treat the subscription fee as the total investment.

Neomanex 2025; BCG CFO Excellence 2025; Info-Tech 2025

Translating “Time Saved” Into Money. “Our AI tool saves each employee 30 minutes a day” is not a financial benefit. It is an input to a calculation that requires two more variables most teams skip.

Gross time saved = Hours saved per user x Number of users
Utilization factor = % of time redeployed to value-creating work (typically 30-60%, NOT 100%)
Productivity value = Gross time saved x Utilization factor x Fully-loaded hourly cost

Example: 100 employees x 2 hrs/week = 200 hrs/week gross. Utilization factor: 40%. Fully-loaded cost: $75/hr. Weekly value: 200 x 0.40 x $75 = **$6,000/week = $312,000/year**.

Productivity gains are being absorbed into the system, not transformed into results. Finance teams use AI to accelerate month-end close, then fill the freed time with other tasks. Time saved with no change in output is latent capacity, not ROI. The utilization factor separates honest calculations from fantasy.

WEF/Cognizant 2024; FourKites 2025; Neomanex 2025

NPV, IRR, and Payback Period

Metric	What It Tells the Board	When to Use It
ROI %	Return relative to investment size	Every business case. Easy to compare.
NPV	Total value created in today's dollars	Multi-year investments. Shows absolute value.
IRR	Effective interest rate of the investment	Comparing AI to other capital options.
Payback Period	How fast it pays for itself	Risk-averse boards. Shorter = lower risk.

BCG CFO Excellence 2025; Info-Tech Sample Business Case 2025

Avoiding Double-Counting. If your AI tool reduces proposal creation time by 60%, you cannot count both “60% time savings” and “increased proposal volume” as separate benefits. The second is a consequence of the first. Follow the benefit chain to its terminal financial outcome and count it there.

Wrong: AI saves 2 hours per proposal ($50K) + AI increases proposal volume 40% ($200K) = $250K. Double-counts because volume increase IS the time savings redeployed.

Right: AI enables 40% more proposals per rep, generating $200K in incremental pipeline. Time savings is the mechanism, not a separate benefit.

Single-point ROI estimates are a red flag. Every business case should present at least two scenarios with clear assumptions. CFOs using **staged investment approaches report 25-40% better ROI** than those who make large upfront bets. Staged investment lets you replace assumptions with data before committing real money. Your business case should include explicit stage gates: what you measure at week 6, the threshold for proceeding, and the kill switch if results fall short.

BCG CFO Excellence 2025; Neomanex 2025

SECTION 05

Use Case First: Defining the Right AI Bet

80% of AI projects never scale beyond a proof of concept.

The Use Case Canvas

Field	What to Document	Why It Matters
Problem Statement	The specific pain, who feels it, how it manifests	Anchors to a real cost or missed revenue
Actor / Persona	Named user with role, behaviors, frustrations	Prevents building for an abstract user
Goal	Measurable outcome the AI should achieve	Creates success criteria for testing
Triggering Event	What initiates the AI workflow	Ensures AI fits actual work rhythm
Normal Course	What happens 80% of the time	Scopes prototype; prevents feature creep
Exceptions	What happens when things deviate	Reveals edge cases that break AI

CompTIA 2025; Info-Tech 2025; MIT Media Lab 2025

Making Personas Real: The JPMorgan Wealth Management Case. JPMorgan Chase's Asset & Wealth Management division provides a textbook example. Their advisors were spending hours manually searching research reports, market data, and client history before each client meeting. The use case: build an AI tool called Coach AI that lets advisors access information using natural language, pulling research, trends, and personalized recommendations in seconds instead of hours.

The persona is a mid-career wealth advisor managing **150 client relationships**. She misses nuances in client conversations because she is scrambling to pull up the right research. She can only prepare deeply for her **top 20 accounts**. She has 30 clients who feel underserved because personalization takes time she does not have.

This specificity made the benefit calculation concrete: if the advisor can access information **95% faster** and prepare for every meeting, not just the top 20, the math writes itself. JPMorgan measured a **20% increase in gross sales** between 2023 and 2024, and projects advisors will **expand client rosters by 50%** over five years.

A use case without a named persona is a technology demo. A use case with a persona whose frustrations you can feel is a business case waiting to be funded. The difference between "advisors need better tools" and "Sarah can only prepare deeply for 20 of her 150 clients" is the difference between a slide and a signed budget.

JPMorgan Chase 2024; Bloomberg TV; AIX Network

SECTION 06

From Idea to Prototype: Proving Value Safely

Prove or disprove an AI use case in weeks, not months.

Klarna's AI Assistant: From Prototype to $39 Million. Klarna's AI customer service assistant provides a compelling prototype-to-production story. The initial concept was straightforward: could an AI handle routine customer service queries (refund status, order tracking, payment issues) at a quality level comparable to human agents? The team built a prototype powered by OpenAI's models, tested it on a subset of customer chats, and measured two things: resolution quality and resolution time.

The prototype results were decisive. The AI handled **two-thirds of all customer service chats** in its first month: **2.3 million conversations**. Resolution time dropped from **11 minutes to under 2 minutes**. Repeat inquiries fell **25%**. Customer satisfaction scores remained on par with human agents.

The investment was **$2-3 million**. The result: **$39 million in cost savings in 2024**, doing the equivalent work of 700 full-time agents. That is the kind of prototype-to-ROI story that funds every subsequent initiative.

A prototype is "good enough" when it demonstrates measurable improvement on the target metric, surfaces real-world edge cases production must handle, and gives you actual data points to populate the ROI formula instead of assumptions.

Klarna 2024; OpenAI Case Study 2024; CX Dive 2025

$2-3M

Klarna's investment

$39M

Annual cost savings

700

FTE-equivalent work replaced

When to Kill the Prototype. If the prototype cannot hit **70% of the target metric** after two iterations, the use case is probably not viable with current technology. If users work around the AI rather than through it, change management cost will eat the ROI. If required data quality does not exist, infrastructure investment may dwarf benefits. These are not failures. They are **successful experiments that prevented bad investments**.

A prototype is good enough when it demonstrates measurable improvement on the target metric, surfaces real-world edge cases that production must handle, and gives you actual data points to populate the ROI formula.

Gartner’s October 2025 analysis revealed a paradox: everyone agrees AI is critical, yet 50% of IT leaders cannot reallocate funds. So 54% focus only on “attainable results.” But 95% of projects fail to deliver, leading to 40% cancellation of advanced AI. The only exit is rigorous upfront measurement design.

MIT Media Lab 2025; BCG CFO Excellence 2025; Gartner 2025

SECTION 07

Quantifying Benefits Before Costs

Benefits first, costs second, comparison third.

Value Surfaces in Practice. Walk through each value surface for every AI use case. Force the question: “Does this initiative create value here? How much?” Most teams stop after one surface.

Process cost reduction: Klarna’s AI assistant handles two-thirds of customer service chats, reducing cost per transaction from $0.32 to $0.19 over two years (a 40% reduction) while maintaining satisfaction scores. Annual savings: $39 million.

Revenue uplift: JPMorgan’s Coach AI helped wealth advisors access information 95% faster, contributing to a 20% increase in gross sales between 2023 and 2024. The bank projects advisors will expand client rosters by 50% over five years.

Customer experience: Medtronic deployed AI agents in healthcare support, saving $6 million in year one by eliminating 36,000 agent hours. Call wait times dropped 37%, misrouted calls fell from 9% to 4%, and satisfaction scores climbed 8%.

Risk reduction: Siemens’ Senseye AI monitors 10,000+ machines at a single automotive site, predicting failures months in advance. Result: $45 million in savings since 2019, 50% downtime reduction, full ROI in under three months.

Compliance and ESG: Walmart’s AI-powered route optimization eliminated 30 million unnecessary delivery miles and avoided 94 million pounds of CO2 emissions, winning the Franz Edelman Award and later commercialized as a SaaS product.

Klarna 2024; JPMorgan 2024; Medtronic 2026; Siemens 2025; Walmart 2025

Benefit Statements That Survive Scrutiny

Weak Statement	Strong Statement
Improved advisor productivity	Advisors access research 95% faster, 20% gross sales increase (JPMorgan)
Better customer service	AI handles 2/3 of chats, resolution 11 min to 2 min, $39M savings (Klarna)
Reduced operational costs	AI predicts failures months ahead, $45M savings, 50% less downtime (Siemens)

JPMorgan 2024; Klarna 2024; Siemens 2025

SECTION 08

Quantifying Risks, Mitigations, and Real Costs

Risks priced as financial exposure, mitigations priced as line items.

Risk Categories and Financial Impact

Risk Category	Example	Typical Exposure
Operational	Incorrect recommendations; process disruption	$50K-$500K
Financial	Cost overruns; hidden data prep costs	40-60% of budget unplanned
Reputational	Inappropriate AI content; biased outputs	$500K-$5M+ brand damage
Security	Data leakage; adversarial attacks	$1M-$10M+ by sensitivity
Regulatory	Non-compliance; audit failures	$100K-$50M by jurisdiction

BCG CFO Excellence 2025; Gartner 2025; Mario Thomas / AWS 2024

Phase-Based Cost Structure. AI project costs break into four phases, each with different drivers. The Business Case Builder separates phases and divides costs into CapEx vs. OpEx and workforce vs. vendor.

Requirements and Design (10-15%): Business analysis, use case documentation, architecture, vendor evaluation. Typically 10-15% of total cost.

Foundation Preparation (20-30%): Data cleaning, pipeline construction, infrastructure, security. Typically 20-30%. Where data problems surface and budgets blow up.

Development and Implementation (30-40%): Model training, integration, UI, testing. Typically 30-40%.

Maintenance and Operations (25-35% of Year 1, recurring): Ongoing monitoring, retraining, support, licenses. Typically 25-35% of Year 1 costs, recurring annually. Almost always left out of initial business cases.

Mitigations add 15-25% to total investment.

Info-Tech Build Your AI Business Case 2025; BCG CFO Excellence 2025

SECTION 09

Comparing Options: AI vs. Headcount vs. Do Nothing

Boards that see one option know they are being sold to.

The Klarna Case: Options Comparison

Dimension	Option A: AI Assistant	Option B: Human Staffing
Solution	OpenAI-powered assistant for routine queries	Maintain ~700 additional support agents
Implementation Cost	$2-3M development and deployment	$0 (existing staffing model)
Annual Operating	AI infrastructure + reduced agent team	~$35M+ (700 agents, global)
Measured Result	$39M savings; 2 min resolution	Baseline: 11 min resolution
Satisfaction	On par with human agents	Historical baseline
Scale	2.3M conversations/month; 23 markets	Constrained by hiring capacity

Klarna 2024; CX Dive 2025; OpenAI Case Study 2024

Building Your Own Option Set. For each option, calculate ROI, NPV, and payback at best and worst case. Present in a single comparison table. Let the board see the full picture.

Option A, AI Solution: Full cost, risk, and benefit modeling across best and worst case.

Option B, Human Alternative: Hiring or outsourcing. Include all personnel costs, ramp-up, ongoing management.

Option C, Do Nothing: Quantify inaction cost: missed revenue, continued errors, competitive risk, turnover.

Option D, Hybrid: Partial AI automation plus targeted hiring. Often the most realistic and board-friendly option.

The power of options comparison is not proving AI is superior. It is showing the board you considered alternatives, modeled uncertainty, and can defend the recommendation under stress. The best outcome is often Option D (the hybrid), and showing that you thought through all four options builds the trust that gets the investment approved.

Info-Tech Sample Business Case 2025; BCG CFO Excellence 2025

SECTION 10

Conversation Tools for CFOs and Data Leaders

The hardest part of AI ROI is not the math. It is the conversation.

AI Investment Scorecard: Value/Priority Matrix

Quadrant	Classification	Action
High Value, Low Cost	Quick Wins	Do now. Credibility builders that fund future initiatives.
High Value, High Cost	Strategic Projects	Invest with stage gates. Build full business case.
Low Value, Low Cost	Small Quick Wins	Do later. Nice-to-haves that build capability.
Low Value, High Cost	Abandon	Kill them. Every dollar here is stolen from Quick Wins.

Info-Tech ROI Map Tool 2025; BCG CFO Excellence 2025

The Sponsor Readiness Scale

Level	Sponsor Behavior	Expected ROI
1. Absent	No identified sponsor; informal requests	Disappointing - Neutral
2. Reactive	Calls for help only when on fire	Neutral - Minimal
3. Engaged	Regular collaboration on defined problems	Minimal - Average
4. Accountable	Owns outcome; co-builds measurement	Good
5. Invested	Proactively seeks AI opportunities, champions funding	Good - Exceptional

Info-Tech ROI Strategy 2025; WEF/Cognizant 2024

How to Run an ROI Workshop. Bring the CFO, data leader, and initiative sponsors together for ninety minutes. Use the AI Investment Scorecard for the Value/Priority Matrix. Use the Sponsor Readiness Scale to assess readiness. Output: one to three prioritized initiatives with clear measurement approaches.

Minutes 0-15: Each initiative sponsor pitches their AI use case (2 min each, max 6)
Minutes 15-40: Plot each case on the Value/Priority Matrix
Minutes 40-55: Assess sponsor readiness for top-quadrant initiatives
Minutes 55-75: CFO identifies 1-3 initiatives to advance
Minutes 75-90: Assign business case owners, set 30-day deadline

BCG CFO Excellence 2025; Info-Tech ROI Map Tool 2025

SECTION 11

Operating Model and Governance for Repeatable ROI

Getting every initiative to show ROI is an operating model achievement.

What BCG's Finance Leaders Do Differently. BCG's study of 280+ finance executives identified four strategies separating the top 20% (ROI 20%+) from the median (ROI ~10%).

Focus on value from the start: Outperformers set financial targets before piloting. They pilot to hit a number, not to learn.

Broader transformation perspective: Embedding AI into broader finance transformation increases success probability by 7 points. Connected use cases, not dozens of unrelated pilots.

Collaborate with IT and vendors: Top performers partner instead of building alone, focusing their effort on measurement and business alignment.

Well-sequenced execution: Double down on what works, cut what does not. Systematic ROI tracking is itself one of their top ten tactics.

BCG Center for CFO Excellence, March 2025

Lightweight AI Governance

Value Metric	Target	Safety Metric	Target
Workflow adoption	>=60% in 90 days	High-severity incidents	Zero in production
Cost per action	Falling monthly	Repair time	< 72 hours
Quality vs. baseline	10-30%+	PII exposure	Zero with proof
Time to resolution	-20% by Q2	Audit log coverage	100% of flows
Revenue influence	Evidence by Q3	Refusal/harm rates	Within bounds

BCG Transforming with AI 2025

Red-Flag Patterns. Four patterns that predict AI project failure:

Vendor-driven: The project exists because of a demo, not a business problem. If you cannot name the problem owner, do not fund it.

No adoption plan: Technology costs but no change management line item. The tool will be built, ignored, and written off.

No kill switch: No threshold for stopping, no stage gates. This is how pilots become zombies, never killed, never delivering value.

Single-pillar value: The case rests on one efficiency metric. If the only benefit is time saved, ask what happens with that time.

WEF/Cognizant 2024; BCG Transforming with AI 2025; Gartner 2025

SECTION 12

A 90-Day AI ROI Sprint for Finance Teams

What do you actually do on Monday morning?

Week 0-2: Frame and Select Use Cases. Run the ROI Workshop from Section 10. Plot every opportunity on the Value/Priority Matrix. Assess readiness with the Sponsor Readiness Scale. By Week 2, select one (just one) high-value use case with a committed initiative sponsor.

Deliverables:

1. Completed AI Investment Scorecard with all candidate initiatives
2. Sponsor Readiness assessment for top-quadrant initiatives
3. Selected use case with named initiative sponsor
4. Draft use case document (Use Case Canvas)
5. Initial benefit hypothesis (pillars, value surfaces, rough magnitude)

Info-Tech ROI Map Tool 2025; BCG CFO Excellence 2025

Week 3-6: Prototype and Measure. Build a quick prototype using the Prototype Sprint Brief. Define persona, map journey, build charter with success criteria, test with real users. Capture baseline metrics before and comparison metrics after. By Week 6: actual performance data, not projections.

Deliverables:

1. Completed Prototype Sprint Brief
2. Working prototype tested with user cohort
3. Baseline and comparison metrics
4. Structured user feedback
5. Go/no-go recommendation

MIT Media Lab 2025; Info-Tech 2025; Naviant 2025

Week 7-10: Build the Business Case. Follow the four-step model: define use case, quantify benefits (all value surfaces), quantify risks and mitigations, quantify costs by phase. Build at least two options with best/worst scenarios. Use prototype data to replace assumptions with measured values.

Deliverables:

1. Completed Business Case Builder (best/worst case)
2. Options comparison: AI vs. headcount vs. do nothing
3. NPV, ROI, payback for each option and scenario
4. Risk register with mitigations and costs
5. Draft executive presentation

Info-Tech Sample Business Case 2025; BCG CFO Excellence 2025

Week 11-13: Present, Decide, and Scale. Refine the executive presentation with CFO input before the board meeting. Build a stakeholder communications plan. Present with full options comparison, prototype data, and the measurement dashboard for post-launch tracking.

If approved, **implement measurement infrastructure first**: dashboards, metric owners, reporting cadence, stage gates. The measurement system makes the second sprint possible.

If your first initiative delivers auditable ROI, your second gets funded without a fight. The 90-day sprint is not just a project plan. It is a template. Run it once, document everything, and use the output as the standard for every AI initiative that follows.

BCG CFO Excellence 2025; Mario Thomas / AWS 2024; Naviant 2025

SECTION 13

Templates, Tools, and How to Use This Playbook

A suite of templates designed to work together.

The Asset Library

Asset	Purpose	When to Use
Use Case Canvas	Document problem, persona, process, constraints	Week 0-2: scoping
Prototype Sprint Brief	Structure prototype development and testing	Week 3-6: testing
Business Case Builder	Full financial model: benefits, costs, risks, NPV	Week 7-10: board-grade case
AI Quick-Size Calculator	Quick 3-year sizing for go/no-go	Pre-sprint: worth prototyping?
AI Investment Scorecard	Value/Priority Matrix for ranking	ROI Workshop in Week 0-2
Board Presentation Template	11-section board presentation	Week 11-13: final presentation

Info-Tech 2025; BCG CFO Excellence 2025; Naviant 2025

The metric of 2025 was users. The metric of 2026 is auditable outcomes. The organizations that make this shift will capture the $3.70-per-dollar average return and the 10-18x returns top performers already achieve.

The playbook is in your hands. The first step is to run the workshop.

$3.70

Average return per dollar invested

10-18x

Top performer returns

90 days

First sprint to auditable ROI

About Leverage Strategies

Leverage Strategies helps finance and data leaders turn AI investments into measurable financial outcomes. We work with CFOs, VPs of Finance, and Chief Data Officers who are tired of AI hype and want practical frameworks for evaluating, measuring, and defending AI ROI.

We produce frameworks, playbooks, and tools that finance teams can use immediately. Every document we publish is built on named companies with specific numbers and actionable templates that work on day one.

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