

AI Transformation Canvas

by Shiftum





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Designed For:

Designed by:

Date:

Version:

Key problem to solve



Strategic Context
Why now?



AI Strategic intent



*Capability we are building
(not a project)*

Data



Technologies



Project team



Competences



Business Value



Ownership & Accountability



Decision Owner:

Economic Owner:

Project costs



Expected impact



End User Persona



Risk Owner:

Executive Sponsor:

Key risks & constrains



Key metrics:





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Key problem to solve

Purpose: shift thinking from delivery to capability.



Strategic Context Why now?

Purpose: prevent decision deferral.



AI Strategic intent



Capability we are building
(not a project)

Purpose: define the business problem, not the symptom.

Data



- What data assets already exist that are critical for this use case?
- Who owns the data?
- How complete, current, and consistent is the data?
- What data gaps could limit success?
- What risks exist around data quality or access?

Technologies



- Which technology decisions are critical, and which are secondary?
- Are we building, buying, or partnering?
- What architectural, security, or integration constraints apply?
- How do we avoid vendor lock-in?
- Which technology decisions are hard to reverse?

Project team



Competences



Business Value



- What financial value will this generate (cost, revenue, time)?
- How will it impact quality, brand, or customer experience?
- What strategic optionality does this unlock?
- What will be most compelling for the CFO and CEO?
- Which value dimension matters most in year one?

Ownership & Accountability



Decision Owner:

- Who has the final authority to decide?
- Who carries the consequences of a wrong decision?

Economic Owner:

- Who has this in their P&L?
- Who will defend ROI at board level?

Risk Owner:

- Who is accountable if AI fails, breaches compliance, or harms the brand?
- Who can stop or roll back the solution?

Executive Sponsor:

- Who ensures cross-functional delivery?
- Who removes organizational blockers?

Project costs



- What are the one-off vs recurring costs?
- What are the main cost drivers?
- Which costs are hidden or likely underestimated?
- How do costs evolve at scale?
- Which costs are unavoidable?

Expected impact



- When will we see the first measurable impact?
- Which outcomes are high-confidence, and which are aspirational?
- Which decisions depend on achieving this impact?
- What does success look like after 12 months?

End User Persona



- Who will actually use this solution on a daily basis?
- What is their primary pain point today?
- What must change for them to adopt it willingly?
- What is the risk of low adoption?
- What will the user consider a clear success?

Key risks & constrains



- Which risks are most concerning for the board?
- What could slow down or block progress?
- Which risks are technical, and which are organizational?
- What trade-offs are acceptable, and which are not?
- What would trigger a pause or change of direction?

Key metrics:



- How will we know it works after 3 months?
- Which metrics reflect business value, not just usage?
- Which KPIs belong on the executive dashboard?
- Which metrics will determine scale-up or stop?



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Use Case details:



AI Architecture Decision



AI Governance



Operating model



Metrics per project phase



Risks and mitigations





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Use Case details:



- What exact business process is in scope?
- What content / decisions / actions will AI support or automate?
- Which markets, languages, or user groups are included?
- What is explicitly out of scope?
- How does this use case connect to the strategic intent defined by leadership?

AI Architecture Decision



- Which AI approach is appropriate for this use case (RAG, fine-tuning, hybrid)?
- Which foundation model strategy are we using (open, closed, hybrid)?
- Where does context and memory come from?
- How is the solution integrated into existing systems?
- Which architectural decisions are hard to reverse?

AI Governance



- Who owns the model and prompts?
- Who approves AI outputs, and under what conditions?
- Where is human-in-the-loop mandatory?
- How are model changes, updates, and incidents governed?
- Who has the authority to pause or roll back the solution?

Operating model



- Who uses the solution daily?
- Who is responsible for maintenance and monitoring?
- Who updates prompts, rules, or knowledge bases?
- What is the support and escalation model?
- How is the solution operated at scale across markets or teams?

Metrics per project phase



Pilot:

- Does the solution meet quality expectations?
- Do users trust and accept the outputs?

Rollout:

- Is adoption increasing as expected?
- Are processes actually changing?

Run:

- Are we delivering measurable business value?
- Is performance stable and predictable?

Risks and mitigations



- What are the top technical risks?
- What are the key organizational or adoption risks?
- What are the data and compliance risks?
- How will each risk be detected early?
- What is the fallback or mitigation plan for each risk?