



AI Transformation Playbook

Expert-led Capability Program for Enterprise AI Adoption
in PE-Backed Portfolio Companies

3 Months Workshop | Implementation Sprints

Designed for CEOs, CIOs, CTOs, Functional Heads and Digital
Transformation Leaders responsible for embedding AI into day-to-day
operations, improving productivity, and creating sustainable competitive
advantage.

AI Transformation Playbook

A Dedicated, Expert-Led Program for Portfolio Companies Building Enterprise AI Capability

For Operating Partners supporting digital transformation initiatives across their portfolio companies—helping leadership teams move beyond experimentation to organization-wide adoption, measurable productivity gains, and scalable AI governance.

Our Signature Program

Built around your company's AI roadmap—not generic prompt engineering.

Every workshop uses your actual business processes, functions and workflows to identify high-impact AI opportunities.

Faculty who've implemented AI transformations.

Sessions are led by former CIOs, CTOs, Digital Transformation Leaders, AI Product Leaders and practitioners who have deployed enterprise AI—not trainers teaching tools.

Designed for business adoption—not technology demonstrations.

Every module ends with implementation plans, business cases and measurable adoption metrics.

Function-first approach.

Different teams require different AI capabilities.

Sales, Finance. HR. Operations.

Manufacturing. Procurement.

Each receives a tailored learning path.

Governance from Day One.

Responsible AI.

Data privacy. Security.

Compliance.

Change management.

Built into every engagement.

Powered by India's Largest Expert Network.

Access AI practitioners, CIOs, Digital Leaders, Industry Specialists and Functional Experts from Infollion's expert ecosystem.

At a Glance

Format	Expert-led workshops + implementation coaching
Duration	12 weeks
Cadence	Weekly 3–4 hour sessions
Delivery	Virtual / Onsite / Hybrid
Structure	4 core modules + functional tracks (+1 Month/ track)
Pre-Program	AI Maturity Assessment + Use Case Discovery
Post-Program	AI Roadmap, Governance Framework & Adoption Dashboard

Designed for:

CEOs leading enterprise transformation CIOs / CTOs

Digital Transformation Leaders, Functional Heads

AI Champions Business Excellence Teams

Core Modules

Module 1: AI Opportunity Discovery & Strategy

Identifying where AI creates the greatest business value across the enterprise—prioritizing initiatives that align with the portfolio company's Value Creation Plan.

1. AI Landscape & Emerging Enterprise Use Cases
2. AI Readiness Assessment & Capability Benchmarking
3. Opportunity Mapping Across Business Functions
4. Prioritizing High-Impact / Low-Effort AI Initiatives
5. Building an Enterprise AI Transformation Roadmap

Module 2: Enterprise AI Foundations

Building the technical and governance foundation required to deploy AI responsibly, securely and at scale across the organization.

1. Understanding LLMs, AI Agents & Enterprise AI Platforms
2. Prompt Engineering for Business Leaders
3. AI Data Readiness & Knowledge Management
4. Responsible AI, Security & Governance
5. Selecting the Right AI Technology Stack

Module 3: AI Transformation Execution

Moving from pilot projects to organization-wide adoption through structured implementation, change management and measurable business outcomes.

1. AI Program Management & Implementation Frameworks
2. Designing AI-Enabled Business Workflows
3. Building an AI Centre of Excellence (CoE)
4. Driving User Adoption & Change Management
5. Measuring Productivity, ROI & Business Impact

Module 4: Executive AI Coaching

Supporting senior leaders as they embed AI into strategic decision-making, operating models and long-term competitive advantage.

1. AI Investment Prioritization & Capital Allocation
2. Executive Decision-Making in the AI Era
3. Vendor Evaluation & Build vs Buy Decisions
4. AI Governance for Leadership Teams
5. 1-on-1 Coaching on the Company's AI Roadmap

Elective Modules – 1 Month Each

Functional Track A: Commercial AI & Customer Growth

Applying AI to accelerate revenue growth, improve commercial productivity and strengthen customer engagement.

1. AI-Powered Sales Assistants & Proposal Generation
2. Pricing Intelligence & Revenue Optimization
3. CRM Copilots & Customer Insights
4. Marketing Automation & Campaign Personalization

Functional Track B: Operations & Manufacturing AI

Leveraging AI to improve operational efficiency, reduce costs and enhance manufacturing performance.

1. Predictive Maintenance
2. Computer Vision for Quality Inspection
3. Production Planning & Scheduling
4. AI for Supply Chain Optimization

Functional Track C: Finance & Corporate Functions AI

Improving financial planning, reporting and decision-making through intelligent automation.

1. FP&A Automation
2. AI for Board Reporting & MIS
3. Treasury & Cash Flow Forecasting
4. Working Capital Analytics

Functional Track D: Enterprise Productivity & Knowledge Management

Embedding AI into everyday work to improve collaboration, knowledge access and employee productivity.

1. Enterprise Knowledge Assistants
2. HR & Recruitment AI
3. Policy & SOP Assistants
4. Meeting Intelligence & Documentation Automation

Executive AI Immersion (Elective)

- Enterprise AI Innovation Labs
- AI Product & Platform Demonstrations
- Digital Factory Visits
- CIO & Digital Leader Roundtables