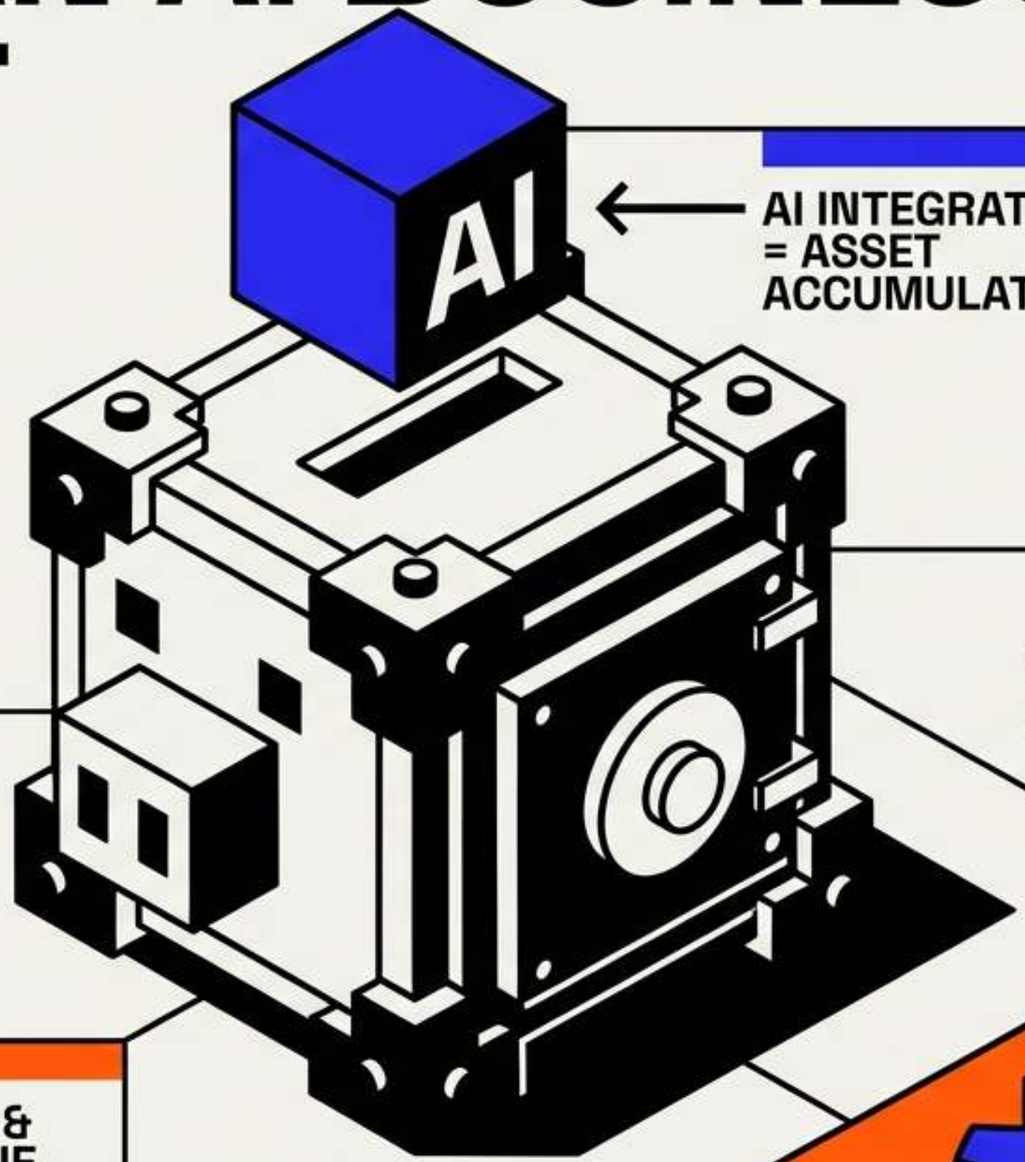
BUILDING AN AI BUSINESS CASE THAT THAT FINANCE WILL APPROVE



AI INTEGRATION = ASSET ACCUMULATION

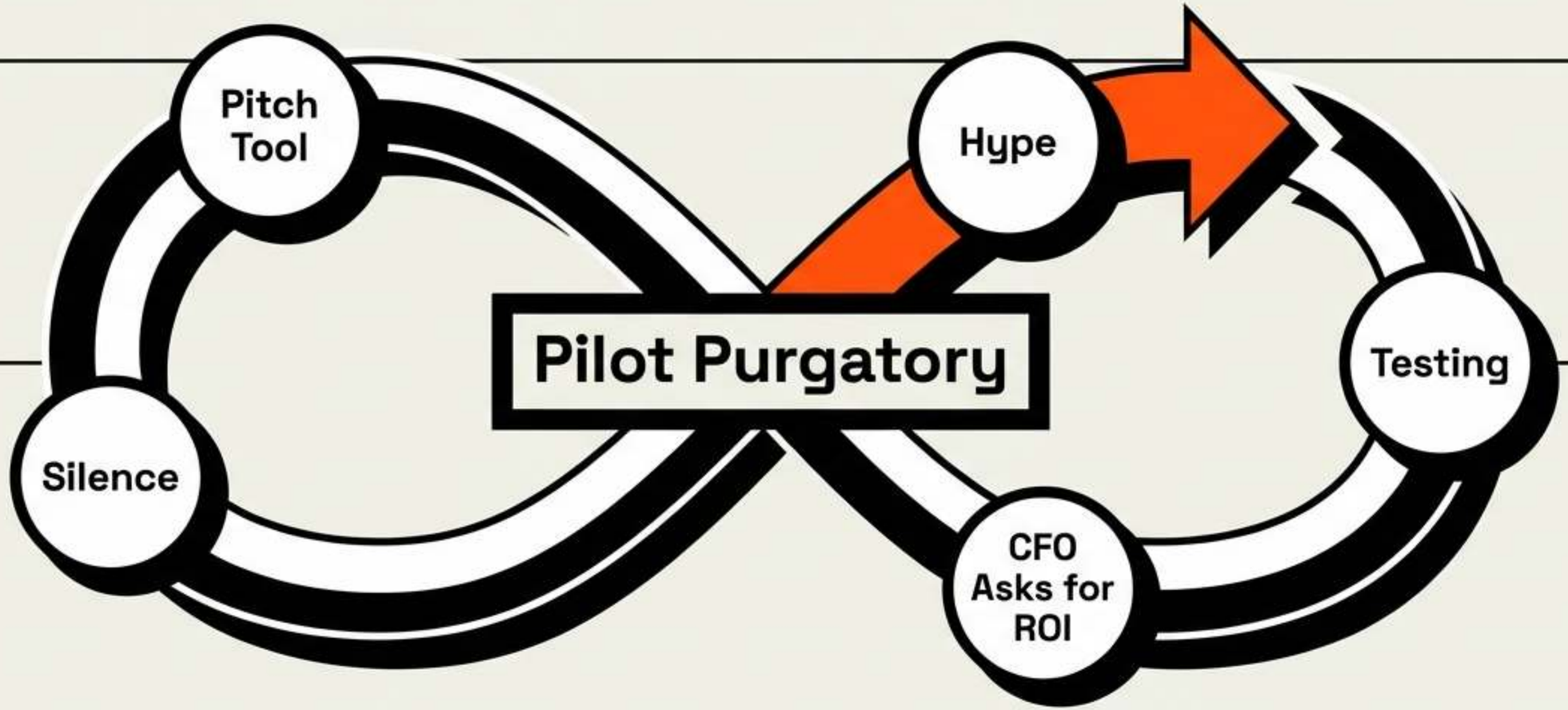
OPTIMIZE EFFICIENCY & REDUCE RISK

PROJECTED ROI & STRATEGIC VALUE

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Welcome to Pilot Purgatory

You are excited about AI. But without a financial case, your project is trapped in Limbo. Executives know the potential, but CFOs need numbers, not hype.



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Stop Pitching Magic. Start Pitching Math.

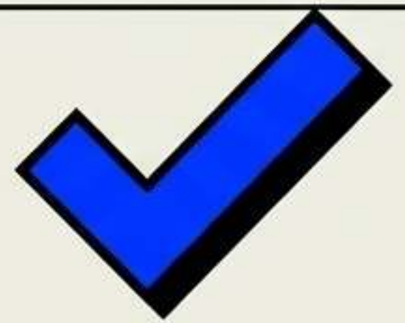
AI proposals fail when they lack financial rigor. To secure funding, translate technological potential into business reality.

The Tech Pitch



- Relies on generic industry statistics
- Leans heavily on enthusiasm and hype
- Pitches cool tools without quantifying impact

The Finance Pitch

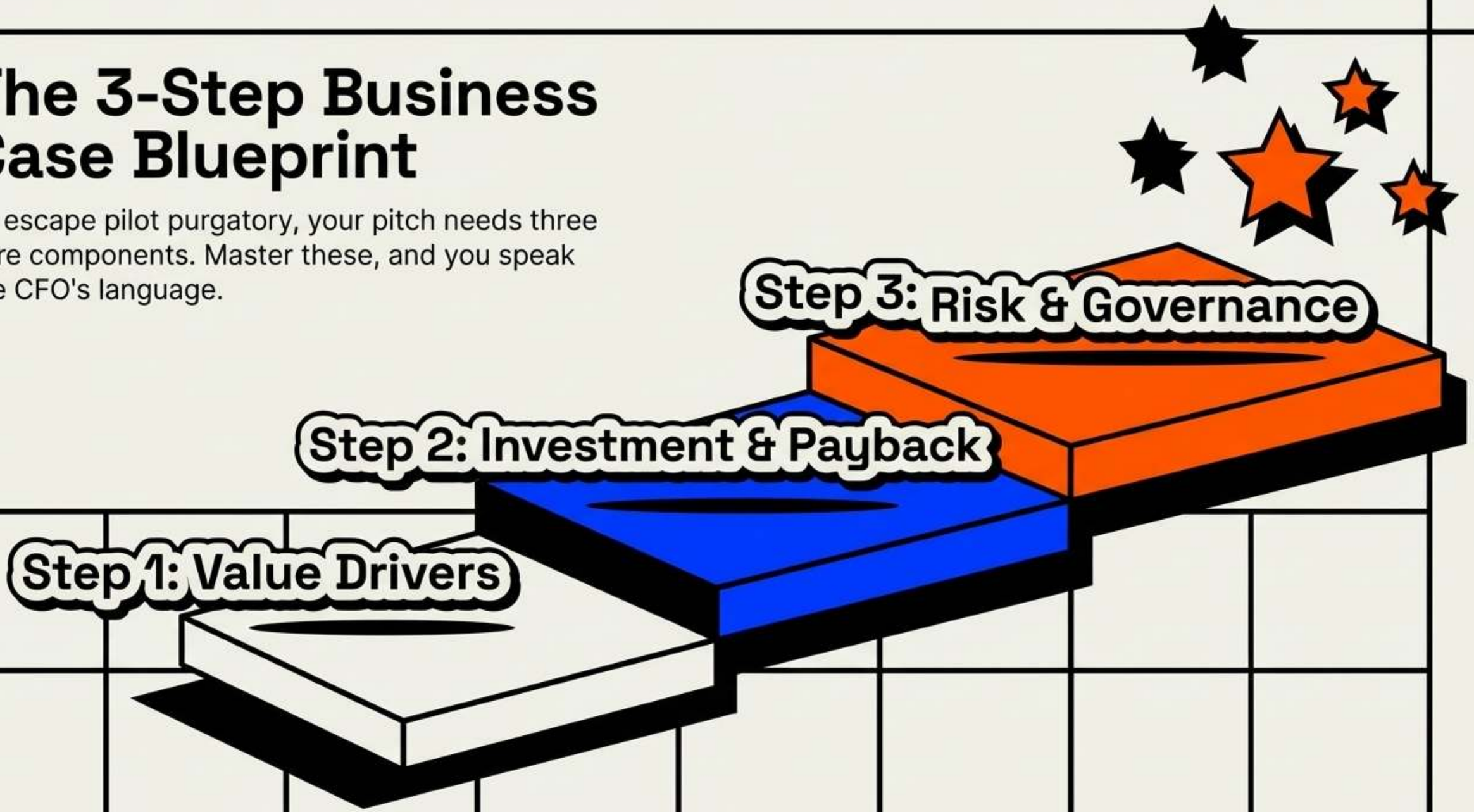


- Presents concrete ROI models
- Targets clear EBITDA growth
- Aligns with strategic business objectives

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The 3-Step Business Case Blueprint

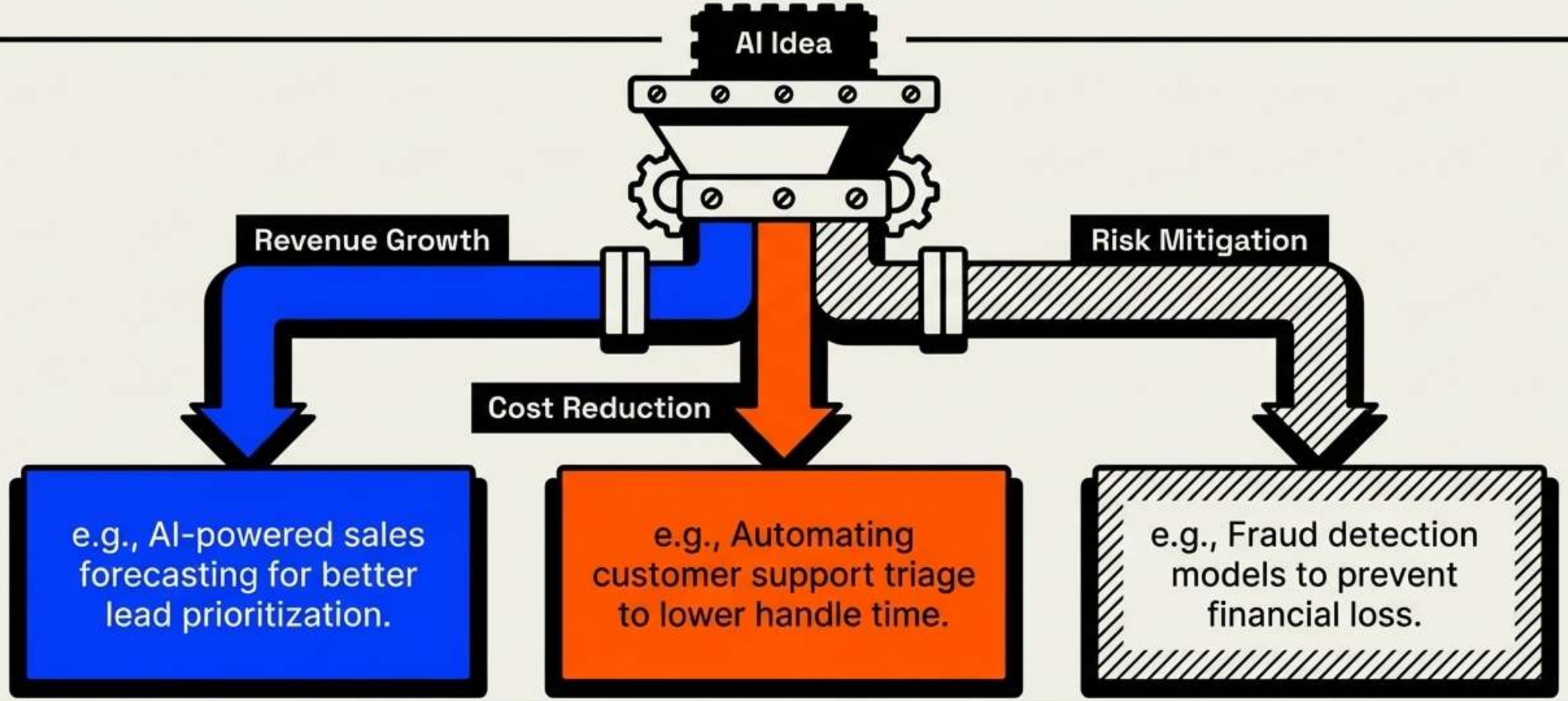
To escape pilot purgatory, your pitch needs three core components. Master these, and you speak the CFO's language.



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Step 1: Pinpoint How AI Actually Makes or Saves Money

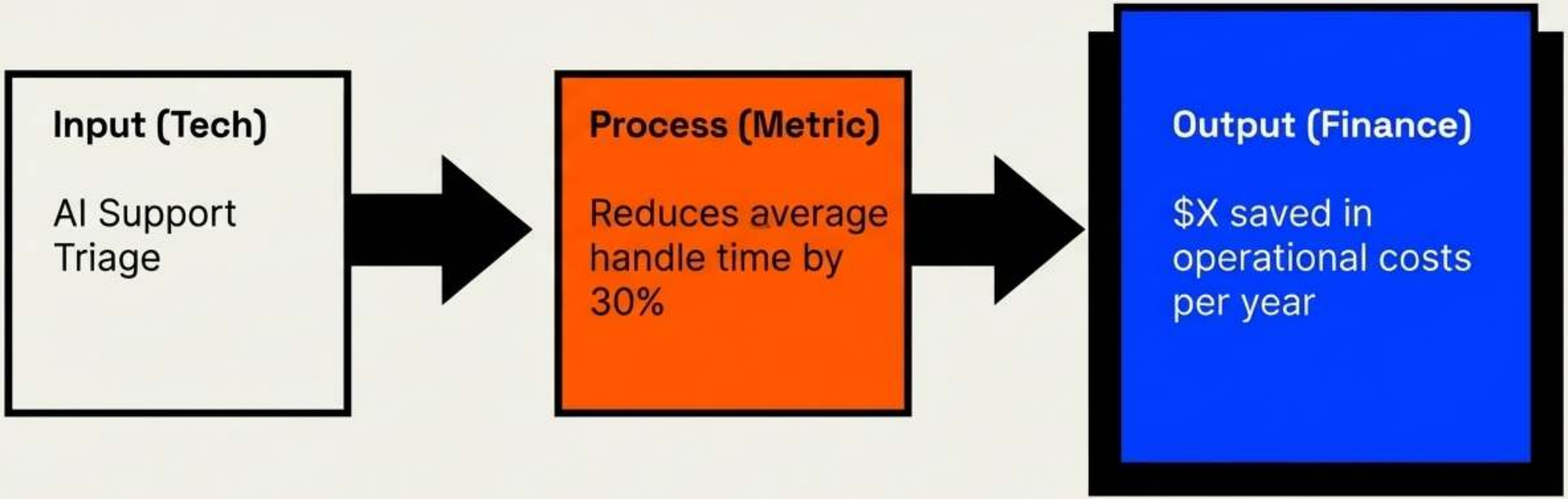
Start with the value drivers. Identify specifically how your AI initiative contributes to the bottom line before talking about the technology.



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Translate AI Capabilities into Direct Dollar Impact

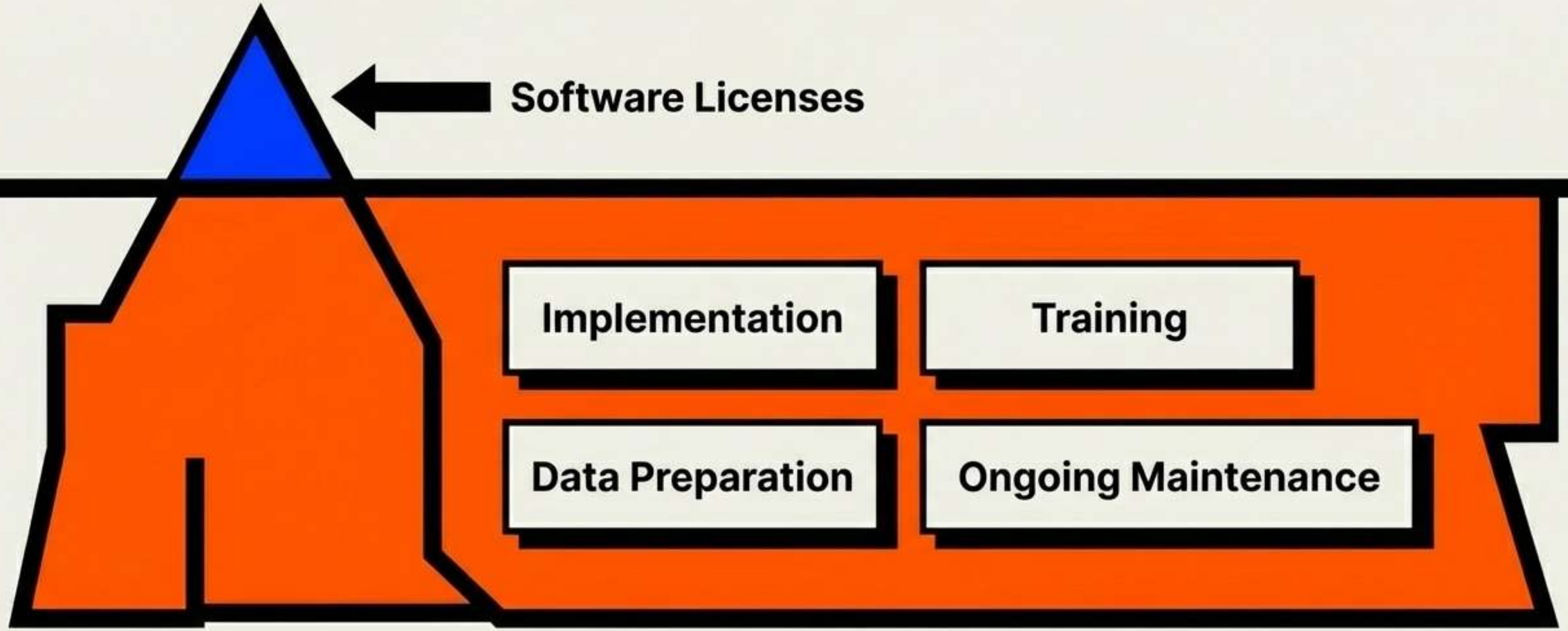
Finance teams need to see the mechanical link between the tool and the bank account. Wherever possible, use this transformation formula.



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Step 2: Uncover the Total Cost of Ownership

Detail the true cost of your initiative. If you only quote the software license, finance will reject your proposal for lacking rigor.

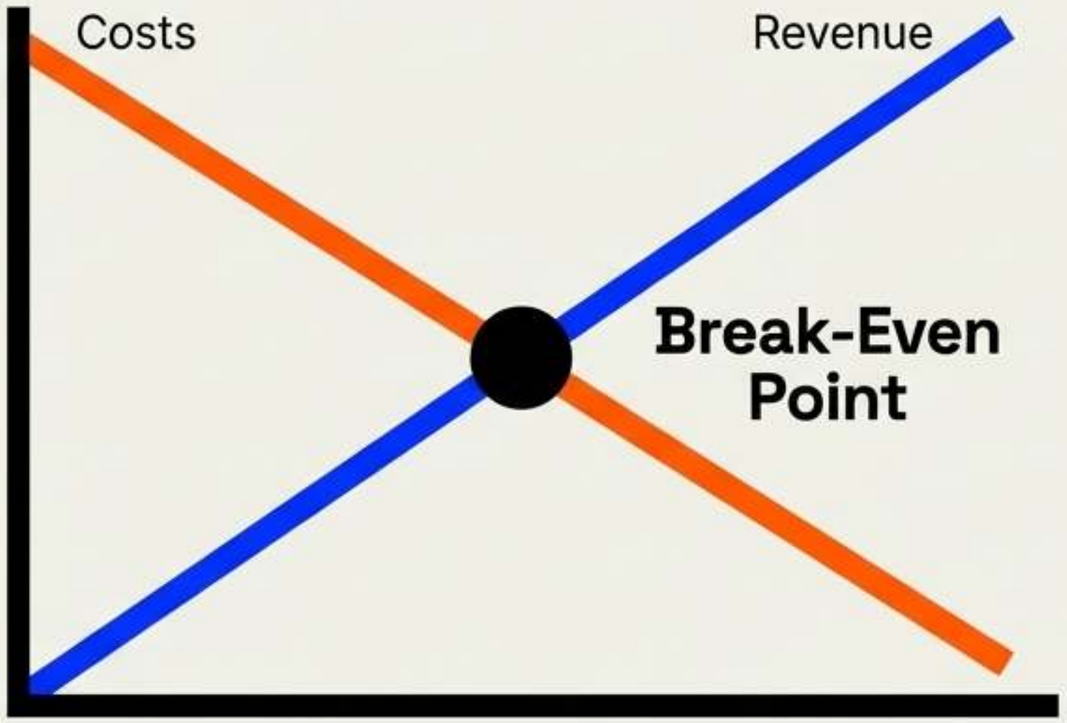


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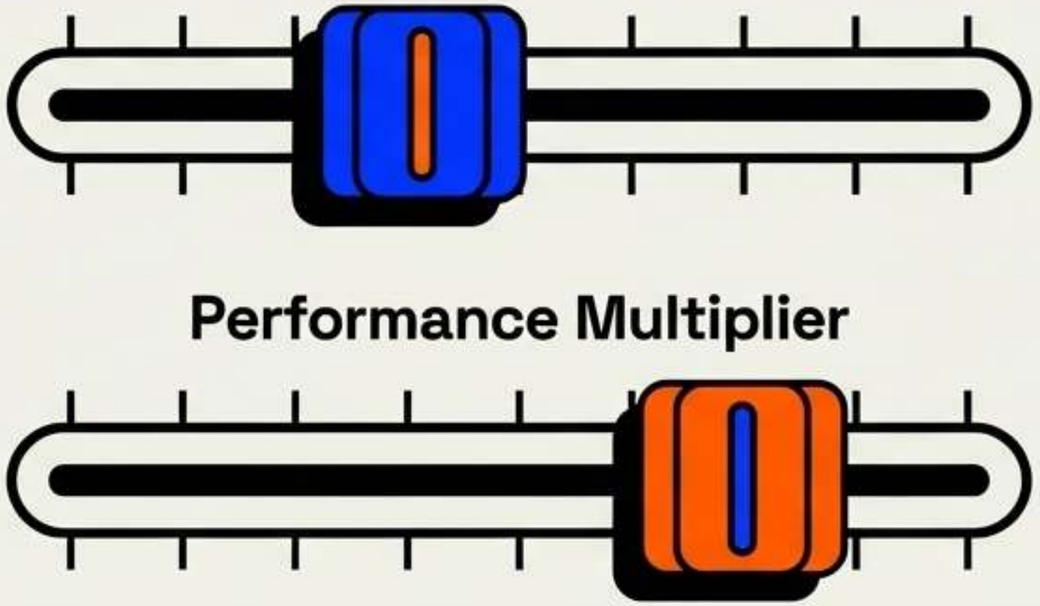
Model the Payback and Show Your Work

Model the payback period using conservative assumptions. Detail the break-even point and run sensitivity analyses.

The Break-Even Cross



Sensitivity Analysis



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Step 3: De-Risk the Implementation and Prove Governance

Compliance teams will **raise red flags** if **regulatory** obligations are **ignored**. Finance wants to know what could go wrong—and how you'll stop it.



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Hazard Warning: Unrealistic Assumptions Kill Pitches

Even the best business case falls apart with bad inputs. Be prepared to update your financial models as new data comes in.







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The Complete AI Business Case Architecture

Start with the problem, move to the solution, then address concerns directly.
A credible case requires all three pillars to interlock.



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Speak the Language of Finance

Transform AI from a nice-to-have into an investment they can confidently back.

[AI Excitement] + [Financial Rigor] = Funded Reality

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