



How a Financial Services Leader Streamlined AI Ideation with the AlignAI Hub

CASE STUDY



HIGHLIGHTS

- Reduced AI use case evaluation time from 6-8 months to under 30 days, enabling faster decision-making.
- Centralized 450+ backlog ideas and 100+ monthly submissions into a single platform to improve data visibility and eliminate fragmented workflows.
- Increased core team efficiency by up to 10x, replacing manual use case evaluation and approvals.
- Empowered 130 embedded advocates and champions to prioritize ideas effectively, ensuring alignment with organizational goals.
- Aligned initiatives with strategic objectives to meet \$50 million annual savings targets.

CHALLENGES

A leading financial services organization faced significant hurdles in managing its AI initiatives efficiently to keep up with regulation. The current idea collection, review & prioritization process was hindered by manual updates and disjointed workflows between the business teams requesting the solutions and the technical teams developing solutions. Their goal was to identify low risk use cases that have been submitted and streamline the approval process so AI initiatives can be tied to strategic targets and meet at least \$50M per year in quantifiable savings.

They faced several challenges:

- **Volume and Complexity:** Overwhelmed by a backlog of 450+ ideas and 100 new monthly submissions, causing delays in review and prioritization.
- **Inefficient Tools:** Using eight different spreadsheets to organize ideas across departments in the company. Reliance on Excel and SharePoint led to duplicate ideas, outdated files, manual processes, and fragmented information across multiple teams.
- **Stakeholder Frustration:** Dependent teams like Security and Engineering lacked clear workflows, while associates waited 6-8 months for feedback on their submissions.
- **Operational Disconnect:** No centralized visibility into the pipeline made it challenging to align AI initiatives with operational and financial goals.

The company attempted to manage this process manually by relying on Excel tracking and internal meetings, but these efforts quickly proved unsustainable. Stakeholders involved struggled with unclear workflows, while the lack of centralized visibility hindered alignment with operational savings targets. Identifying duplicate efforts, gathering details, and prioritizing ideas took months of back-and-forth communication, causing bottlenecks and delays.

Additionally, the AI Governance committee faced challenges in efficiently reviewing and approving prioritized ideas, leading to frustration across all levels of stakeholders. The organization sought a scalable system that could enhance collaboration, provide real-time visibility, and drive meaningful progress toward their strategic objectives.

SOLUTION

The financial services organization turned to AlignAI and its Use Case Hub to streamline their idea collection, refinement and approval process. To keep up with regulation, the company wanted to ensure new ideas were getting evaluated and improved by the governing team. The AlignAI Hub automated the capture, tracking, and management of ideas, reducing the reliance on manual updates. The platform seamlessly integrated with key applications, ensuring real-time data flow and improving collaboration across teams. Tailored workflows helped eliminate bottlenecks, improve efficiency, and accelerate innovation by providing a structured yet flexible ideation process.

Key features of the AlignAI Hub that addressed the organization's needs included:

AI Use Case Hub

This feature captured AI idea submissions from the intake form and organized them within the AlignAI centralized system. It categorized ideas by AI type, estimated value, and alignment with strategic goals, streamlining prioritization. Automated deduplication and filtering reduced manual effort, enabling the team to focus on advancing high-priority initiatives.

Playbook Studio


This feature provided guided workflows for dependent stakeholders, and oversight committee members, ensuring clarity and consistency in their roles. It also served as a central resource for guidelines and policies, giving stakeholders access to established standards and best practices. By minimizing reliance on meetings and back-and-forth communication, it enhanced collaboration and productivity.

Integrations with Existing Systems

The AlignAI Use Case Hub connected to the existing intake form, Excel, and PowerBI. Intake submissions were automatically captured, Excel data was consolidated, and PowerBI provided advanced reporting. These integrations streamlined operations while maintaining familiarity with existing tools.

IMPLEMENTATION PROCESS

The financial services organization deployed the AlignAI Hub in just eight weeks, integrating their intake forms, Excel backlog, and PowerBI for reporting. The implementation also included customizing workflows, prioritization processes, and role-specific dashboards to match their specific organizational needs.



The main focus was to transform how AI initiatives were managed by improving the intake of AI use case ideas and evaluation, enhancing collaboration across teams, and aligning projects with strategic goals through a centralized system that provided streamlined workflows and visibility into idea progression.

After identifying these priorities, AlignAI consolidated data from the Excel backlog and integrated submissions from intake forms into its platform. Custom workflows and dashboards were developed, starting with a two-week proof of concept and completed within eight weeks.

RESULTS

The implementation of AlignAI Hub yielded significant results for the financial services company:

Efficiency Gains

- AI use case evaluation and prioritization time dropped from 6-8 months to under 30 days.
- The core team significantly reduced manual effort, working up to 10x faster by eliminating Excel tracking, duplicate emails, and redundant spreadsheets.

Scalability

- Enabled the organization to manage over 450 backlog ideas and 100 new submissions each month effectively.
- Centralized idea tracking and improved workflows helped the team handle the growing volume of AI initiatives with ease.
- Processes were structured to scale effectively as the number of submissions increased, ensuring sustainable growth.

Confidence in Strategic Goals

- Centralized tracking and clear prioritization of AI ideas ensured AI initiatives were implemented faster, giving stakeholders confidence in achieving their \$50 million annual savings goal.

Improved Governance

- Delivered end-to-end visibility into AI ideas, replaced fragmented processes with a single source of truth, and streamlined oversight to ensure compliance with internal standards to support new initiatives.
- Ability to fast track low risk use cases so team members avoid the bottlenecks of first in, first out prioritization.

Cross-Team Collaboration

- Streamlined workflows and tailored dashboards empowered 130 stakeholders across business areas to gather the necessary information to ensure timely progression of ideas to the AI oversight committee.

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Before AlignAI, we were using eight different spreadsheets to organize ideas across departments in the company. The AlignAI Hub eliminated fragmented workflows by providing a structured yet flexible ideation processes in weeks instead of 6-8 months, leading to faster implementation of ideas and realization of business value.

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– Director, Ideation & Innovation OpEx

ABOUT ALIGNAI

AlignAI creates an AI hub for enterprises to manage their AI use cases, establish and iterate on AI policies and standards, and manage or catalog their AI solutions, whether they are building or buying them.

The AlignAI Hub empowers organizations to streamline their AI governance, development, and deployment processes, ensuring efficiency, compliance, and innovation.

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