From AI curiosity to ROI

A practical blueprint for implementing AI without the complexity or guesswork

Introduction

The AI dilemma — and the opportunity

Mid-market business leaders are under pressure. Artificial intelligence (AI) is dominating boardroom conversations and industry headlines. You're being told AI can save time, reduce costs and unlock growth. And yet, you're also hearing that it's expensive, complicated and risky.

Everyone wants that "five seconds to save thousands" AI moment. And yes — those moments are real. But they only come when you're solving the right problem, in the right way. And that starts with something less flashy but far more powerful: strategy.

At Wipfli, we believe AI shouldn't feel overwhelming. With the right framework, you can move fast, stay focused and see results without overspending or overcommitting. That's why we created the DRIVE framework: A repeatable path that connects innovation with execution.

Wipfli's tenets of AI success:

- Rapid path to measurable business value: Deliver early wins with clear guardrails.

- Investment in our clients before the engagement: AI is only worth doing if it's the right fit.

- AI success starts with your digital strategy.

The DRIVE framework helps mid-market businesses move from exploration to execution in five practical stages:

1. **D** Define
2. **R** Refine
3. **I** Imagine
4. **V** Validate
5. **E** Execute
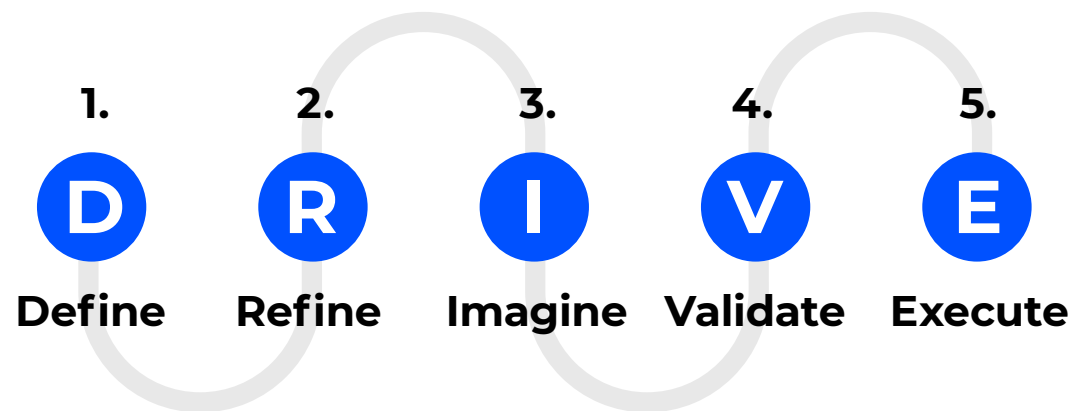
The DRIVE framework is designed to deliver clarity and progress at every turn — whether you're just starting out or ready to pilot. We'll break it down in the pages ahead.

The DRIVE framework

Success with AI doesn't start with technology. It starts with intention — and a clear path to test and evolve that intention into results. The DRIVE framework gives leaders a roadmap to move from concept to pilot with confidence.

The 5 stages of **DRIVE**

1. **D** Define

- Every AI initiative begins with clarity. What business challenge are you trying to solve? Who are the stakeholders? What outcomes matter most?

- This stage is about aligning leadership, surfacing assumptions and confirming that AI is a fit — not just a fad.

2. **R** Refine

- Next, zoom in. Which ideas are worth pursuing? What's technically feasible and financially sensible?

- Here, Wipfli helps clients weigh priorities, evaluate data health and map readiness against potential use cases.

3. **I** Imagine

- You'll explore platform options, define success criteria and decide whether the best path is a proof of concept, a full prototype or an adaptation of an existing solution.

4. **V** Validate

- Now it's time to prototype possibilities. Design sprints bring the most promising ideas to life and test them against real-world constraints.

- By measuring results with actual business data and workflows, you gain confidence in your direction — or clarity on where to pivot.

5. **E** Execute

- Finally, the pilot phase. This controlled rollout tests the full solution with real users and secure infrastructure.

- If successful, you're ready to scale. If not, you have the data and insight to adjust without having wasted time or budget.

How leaders avoid the trap of overbuilding or underthinking

Without structure, AI projects often swing between two extremes:

- **Overbuilding:** Investing heavily in unvalidated platforms or tools
- **Underthinking:** Launching quick pilots without understanding the business value scope to a targeted data prototype that could prove value quickly

The DRIVE framework offers a balanced approach. You move quickly, but with clarity. You test ideas at the right scale. And you avoid throwing money at problems that aren't yet defined.

Each phase is intentionally designed to answer the question: What do we need to know before moving forward? That question is your guardrail. It protects your budget and sharpens your strategy.

Real-world scenario:

A mid-market manufacturer had already invested more than $1 million with multiple consulting firms to unify inventory data after an acquisition — but 12 months later, they were still stuck.

How the DRIVE framework changed the outcome:

- **Define:** We clarified the core problem, which was that incomplete and inconsistent inventory data was triggering costly supply chain penalties.

- **Refine:** Rather than tackling the full integration at once, we narrowed scope to a targeted data prototype that could prove value quickly.

- **Imagine:** Our team designed a proof of concept that would test key data flows and surface actionable insights.

- **Validate:** Once the analysis was complete, within six weeks, the prototype revealed over $500,000 in avoidable penalties and pinpointed where the breakdowns were occurring.

- **Execute:** With those insights, the client took immediate action with a major vendor — reversing penalties and strengthening the relationship — and set the stage for a broader rollout with confidence.

> **Lesson:**
>
> By moving through DRIVE, the client avoided more wasted time and spend, gained quick wins and created a clear path to scale.

Strategy doesn't slow you down — it's what lets you move fast without backtracking.

Choosing your path to AI value

AI solutions don't have to start with custom builds. In fact, many of the most effective projects begin with existing tools configured in smarter ways. The key is choosing the implementation approach that fits your needs — not someone else's platform agenda.

Four common paths to value:

- **Deployment:** Applying out-of-the-box consumer-grade AI tools (e.g., Microsoft Copilot 365) to specific business needs.
- **Configuration:** Aligning AI agent toolkits with departmental data, security and business processes (e.g., Copilot Studio)
- **Development:** Developing custom AI solutions to transform an organization's processes (e.g., Azure AI Foundry)
- **Adaptation:** Improving and expanding existing AI solutions to meet evolving requirements.

While any path can apply at different scales, we often see these patterns:

- **Consumer AI —** Often implemented out-of-the-box for quick wins
- **Departmental AI —** Often configured to align with business processes and data
- **Enterprise AI —** Often adapted or developed to meet complex organization-wide needs

Your AI solution doesn't need to be sophisticated to be strategic. What matters is fit — and how quickly you can deploy with confidence.

Governance and agility: The unspoken differentiators

In the race to operationalize AI, most of the attention goes to the visible elements — models, tools and talent.

But what often makes or breaks a program isn't the tech itself. It's the infrastructure around it: the clarity, coordination and cadence that guide how it all comes together.

These aren't just project hygiene practices. They're strategic enablers — the quiet levers — that distinguish high-performing AI programs from those that stall. At Wipfli, that includes building AI frameworks, acceptable use policies and enterprise risk analyses into our process from the start, so they never become stumbling blocks along the way.

Here's how these levers work — and where they show up in DRIVE:

- **Program management** provides the connective tissue across phases, helping to ensure consistency, accountability and momentum (anchored in Execute to keep delivery on track).

- **Change management** gets people ready — not just for the solution, but for the shift in mindset and workflow it demands (critical in Validate and Execute to drive adoption).

- **Methodology flexibility** allows teams to flex between agile and waterfall based on context, so delivery aligns with business rhythm, not rigid frameworks (enabling Refine and Imagine to adapt to what's learned).

- **Data governance** protects the security, quality and accessibility of the data feeding your AI — because dirty, disconnected data undermines results before they start (woven into Define and Refine to help ensure a solid foundation).

Wipfli's recommended approach integrates these levers from day one — not as an afterthought, but as a core driver of sustainable outcomes.

And critically, every phase of our DRIVE framework is anchored by clear service deliverables, structured stage gates and built-in risk and compliance alignment. This deliberate transparency equips stakeholders to move forward with confidence, pivot with precision and align around shared definitions of success.

Why it matters:
Without these levers — especially strong data governance to help ensure data security, quality and accessibility — even the most promising AI initiative can lose momentum, misalign stakeholders or face avoidable compliance risks.

Why strategy is the secret to AI ROI

Tech moves fast. But alignment moves everything.

AI doesn't have to be overwhelming. In fact, when strategy leads the way, it becomes one of the most energizing and clarifying initiatives a business can take on. The DRIVE framework is more than a process — it's a leadership discipline.

You don't need to be perfect to begin. You just need:

- **A clear goal**
- **A smart starting point**
- **A partner that helps you scale with purpose**

The organizations gaining the most value from AI aren't necessarily the ones with the largest budgets or most advanced tools. They're the ones with strong leadership alignment, a focused purpose and a flexible framework for progress.

At this stage in your AI journey, the most important question isn't, "Are we ready?" It's, "What do we want to achieve — and what's the best way to start?"

The DRIVE framework is designed to help you answer that question — not just with ideas, but with actions.

Want to explore where AI fits into your business?

Contact us about getting our AI rapid assessment.