

CASE STUDY

Enterprise AI Readiness & Opportunity Assessment



Challenge

A financial services organization wanted to understand how artificial intelligence could be purposefully applied across its enterprise but lacked a clear framework for readiness, governance, and prioritization. Leaders faced uncertainty around regulatory compliance, data quality, and alignment to business strategy. Without a structured assessment, the organization risked fragmented adoption, misaligned investments, and missed opportunities to scale AI responsibly.



Solution

SEI partnered with business and technology leaders to design and lead an enterprise-wide AI readiness assessment. The engagement was grounded in four core pillars: process optimization, technology enablement, data modernization, and regulatory compliance. Together, we:

- Conducted executive interviews, stakeholder workshops, and benchmarking exercises to assess maturity against an AI Empowerment Curve
- Identified critical data quality and governance gaps through artifact reviews and cleanup efforts
- Developed a prioritized portfolio of AI use cases, sequenced by business value and implementation feasibility
- Defined an operating model and governance framework, including roles, intake processes, and policy considerations for responsible adoption



Results

The assessment provided the organization with a clear and actionable roadmap for enterprise AI.

- Leadership gained visibility into current-state gaps and strengths via a detailed benchmarking report
- Priority use cases were sequenced into near-term pilots and long-term initiatives aligned with business goals
- Draft governance structures and policy frameworks laid the foundation for secure, compliant, and scalable implementation
- Most importantly, the work created executive alignment and momentum, transforming uncertainty into a shared, strategic path forward