

# The AI Value Playbook

How to make AI work in the real world



Lisa Weaver-Lambert

⟨packt⟩

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# Introduction



## Lisa Weaver-Lambert

### PROFILE

Author of The AI Value Playbook: How to Make AI Work in the Real World

Advisory Board Member at Lumenalta, software development company

Microsoft and Accenture.

Private Equity for Montagu, and in Apollo and Advent backed portfolio companies.

Executive leadership positions in public and privately held B2B and B2C companies across multiple sectors and international markets.

### EXPERIENCE

Business strategy and digital transformation of companies of different maturity levels to drive profitable growth by leveraging technology, data and AI.

Highly respected advisor in investment community for technology and data.

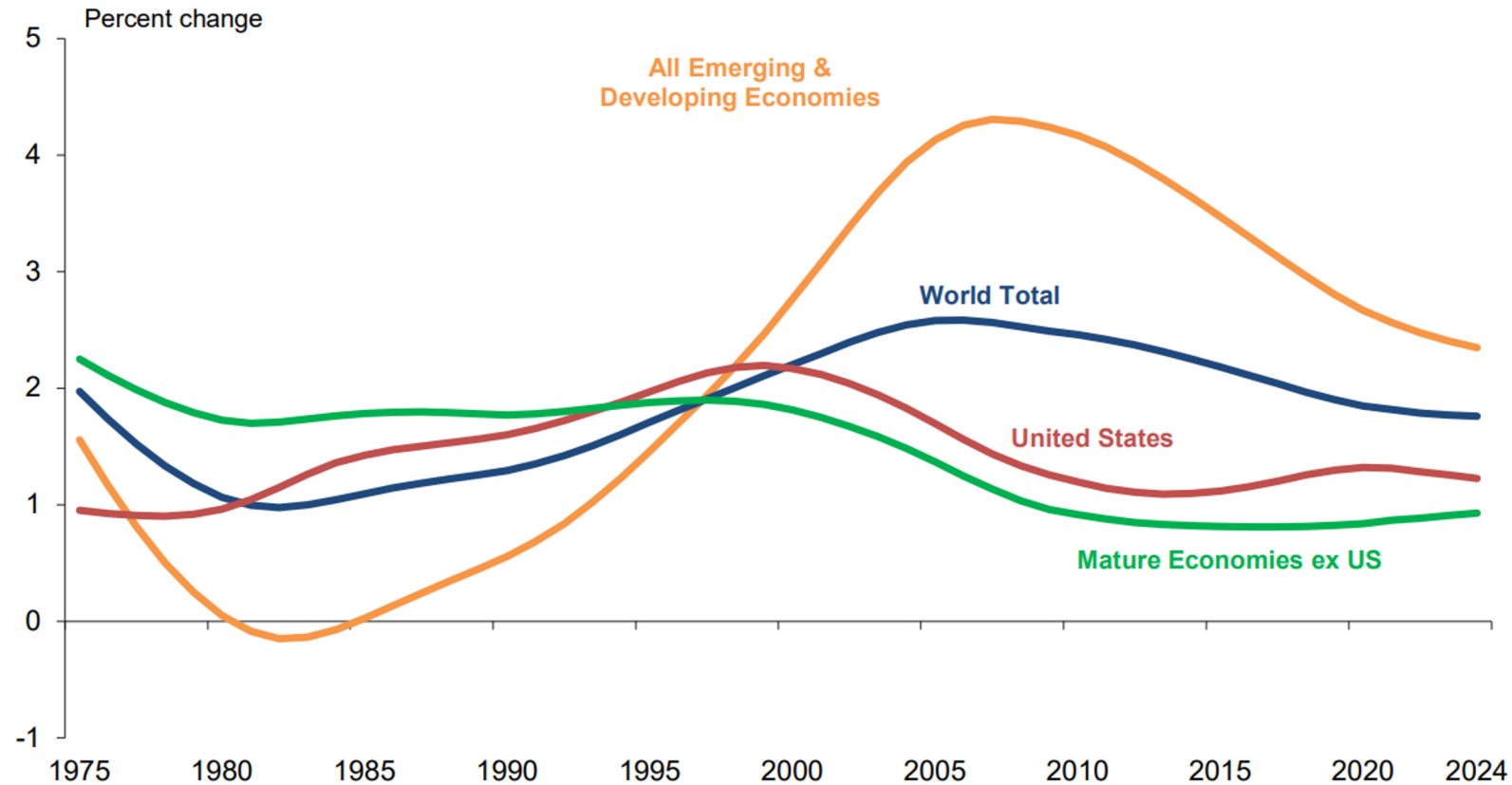
Co-host of the Private Equity Technology Podcast and Advisory Board Member of PE International Operators Forum. Published contributor to the Financial Times.

# What we are going to cover

- The Productivity Promise
- Crossing The Scalability and Impact Gap
- The AI Paradox
- Use Cases
- The AI Value Playbook

# The Productivity Promise

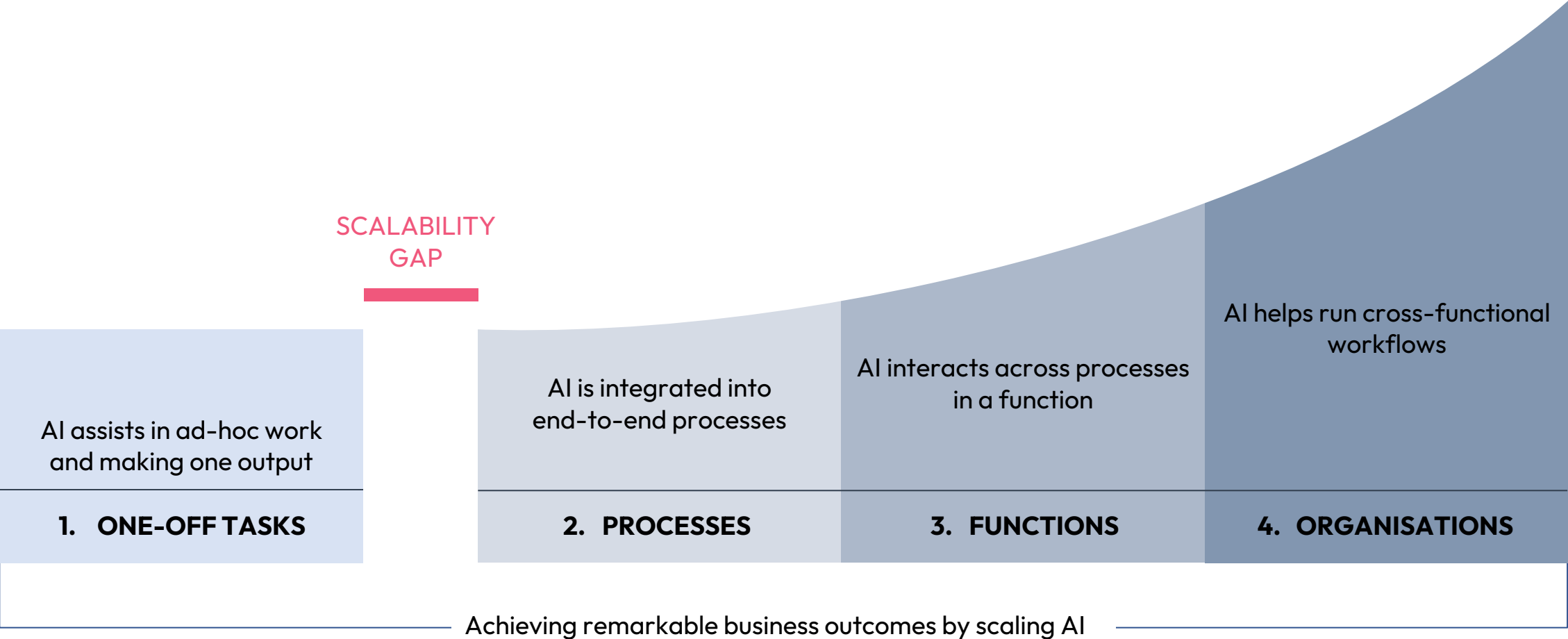
CHART 1A: Trend growth of GDP per Person Employed using HP filter, Major Regions, 1975-2024



Source: *The Conference Board Total Economy Database™* May 2024.

Notes: Trend growth rates are obtained using HP filter, assuming  $\lambda=100$ .

# Crossing The Scalability and Impact Gap



# The AI Paradox

## Traditional Companies

Applications with Embedded AI

RPA, Task Automation +  
AI/ML Models & Copilots

## AI Native

Cloud-Based Data Platforms  
Agentic Automation Platforms

GPT/Agents on LLMs

# Otter.ai

## Leading AI meeting and sales productivity platform

- [Vision: make all voice data searchable](#)
- PLG (Product-Led Growth) approach
- Built AI speech model meeting assistant reaching \$100 million in ARR with a team of less than 200 employees (> \$500K revenue per employee)
- Sales Agent enables closing more deals with real-time guidance
- SDR Agent scales lead generation and shortens sales cycles through autonomous product demos

“We’re not just talking about the future of AI; we’re building it, moving beyond theoretical discussions and delivering everyday tools that are already impacting over 25 million Otter users worldwide.”

Sam Liang, CEO



# Deepdub

Tailoring content for culture, preferences and personal identity

- [Thousands of hours of content that need localisation](#)
- Simplified customer operations
- Human-in-the-loop (HITL) approach
- Personalised customer experiences

“There’s this huge push for self-identity – it’s like everyone wants things tailor-made for their own culture, preferences, and personal identity”

Oz Krakowski, Chief Business Development Officer



## Deepdub’s local workflows

Hybrid	Automated (Deepdub GO)
High quality, human-led, AI-assisted	Low cost, super fast, automated AI-based, human-assisted
Designed to support dubbing for feature films and episodic scripted content	Designed to support dubbing for factual and non-scripted content
	Designed to support FAST channels



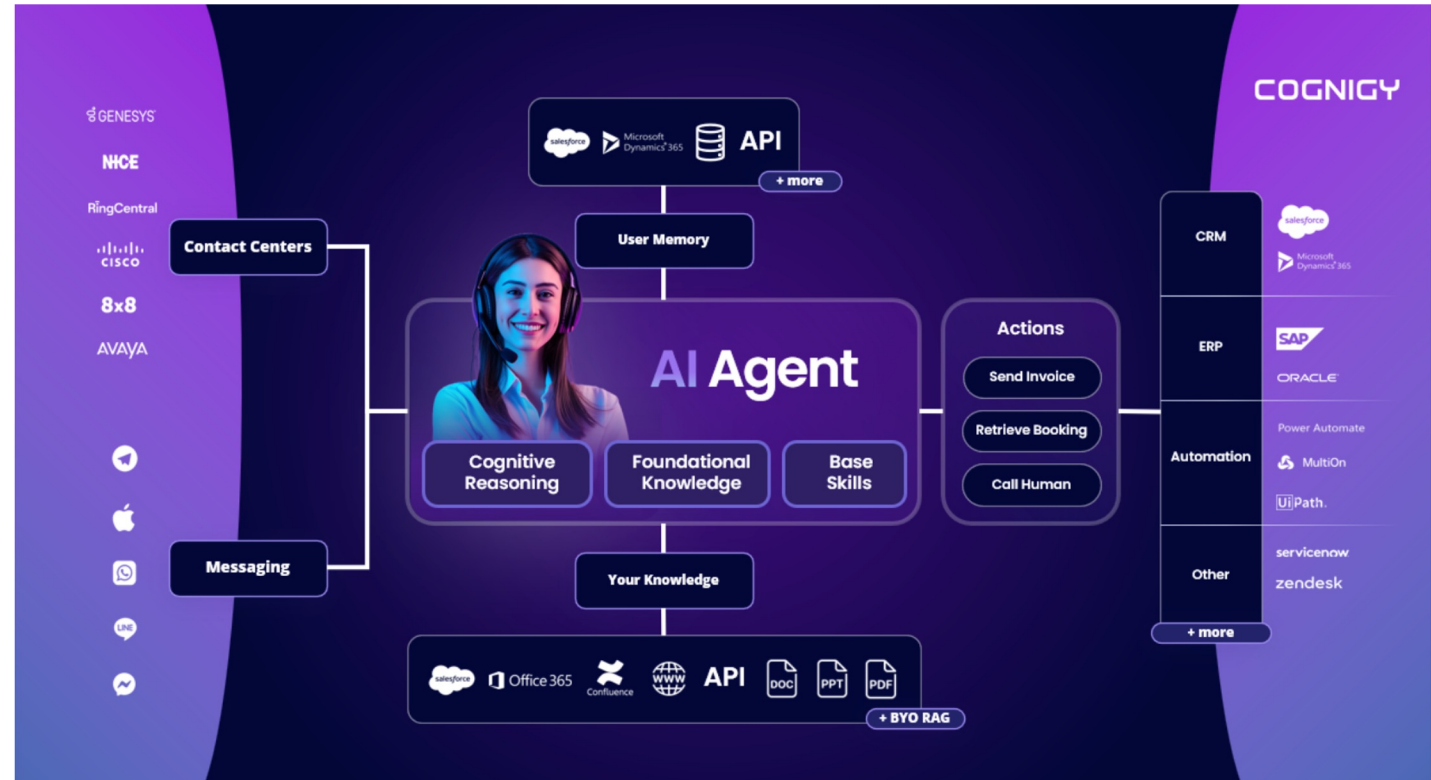
# Cognigy

Efficient and cost effective customer service

- Fast and dynamic customer experience blending the consistency of AIL solutions with human touch
- Seamlessly embedded into customer processes
- Reduced cost to serve
- Increased revenue by upselling
- Highly scalable, managing hundreds of concurrently

“There is no magic bullet. Implementing AI solutions in customer service still requires careful planning, development, time, and, crucially, human involvement...Looking ahead it's reasonable to predict that most customer service interactions will be handled by AI systems.”

Philipp Heltewig Co-Founder and CEO at Cognigy



# Vectara

## LLMs and RAG Enable Hyper- Personalised Knowledge Retrieval

- [Efficiency in learning and training](#)
- Dive deeper with inline citations
- Get links straight to an answer's sources in real-time
- Ability to work with ever-growing repository of data (over 9,000 pages of text, 5,000 images and more than 4,000 video clips).

“Generative AI is transformative because, for the first time in history, we have AI systems that can interpret human language as we do, which is unprecedented”

Amr Awadallah, Founder and CEO

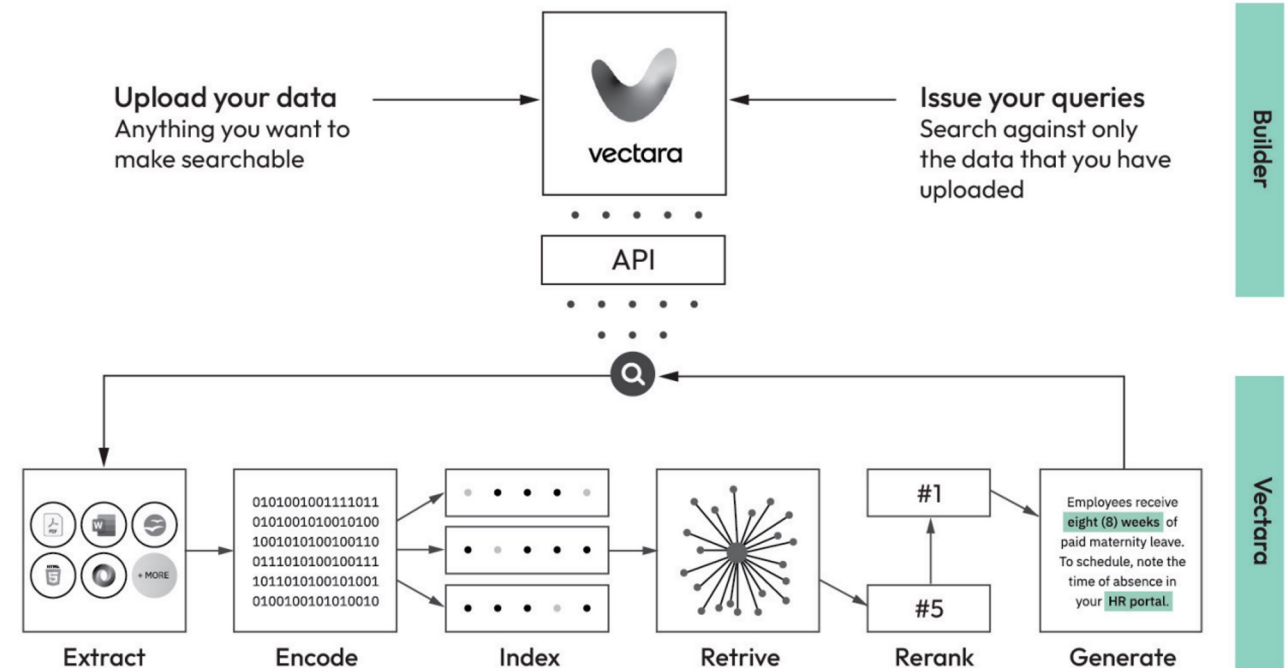
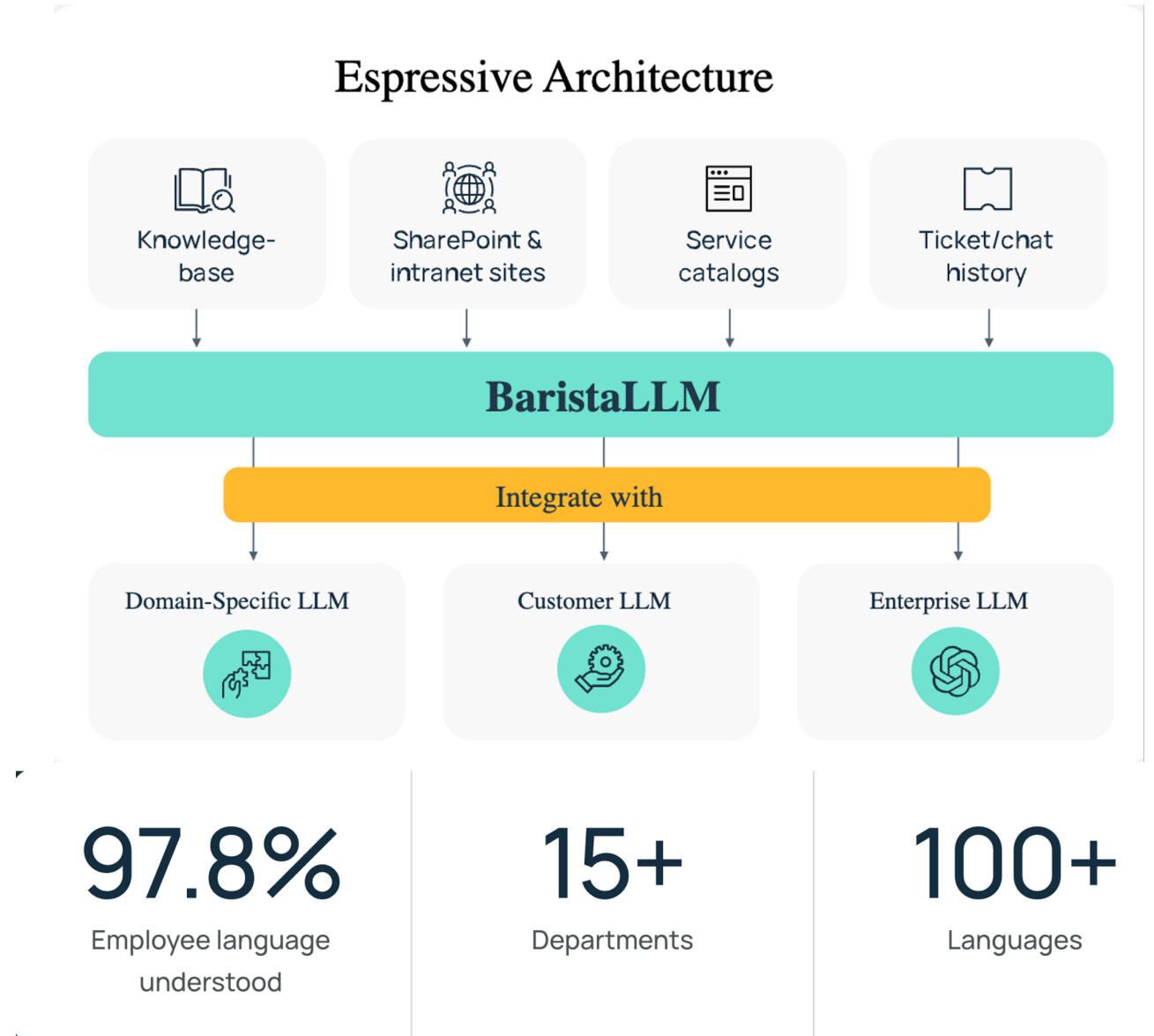


Figure 26.2 – Vectara’s end-to-end platform for retrieval, reranking, encoding, and generation

# Espressive

## AI-Powered Virtual Agent Augments Service Efficiency

- [Barista/GPT optimises IT service support](#)
- DXC: The virtual agent, EVA, was able to achieve 81% ticket deflection within a month of going live.
- Handles over 23,000 employee interactions globally every month, reducing the number of phone calls to the IT service desk by 36%.



(Getty/iStock)

# Lightricks

## Multimodal LLMs Redefine Software Development and Customer Innovation

- [LTX Studio, the AI Visual Storytelling Platform](#)
- Increased speed and agility of internal processes, with 65% of customer emails now answered using AI.
- Improved performance marketing and increased Return on Ad Spend (ROAS) targets.
- Campaign achieved substantial engagement, with 350,000-character bundles
- Created and a 25% increase in app installs.
- Enhanced brand reputation with 15.6 billion PR campaign impressions.



# Health Insurance

## Minimising Customer Churn

- AI solution covered over 95% of the business and could accurately identify 80% of customers likely to churn in the forthcoming 12 months.
- 8x performance improvement over the previous regression-based solution and yielded tens of millions in additional revenue over the period.
- Model streamlined multiple internal processes and enabled targeted, cost-effective retention campaigns based on finely segmented churn risk scoring.
- Unlocked additional use cases like predicting Customer Lifetime Value (CLV) and personalized pricing based on risk.

POLICY OR PRODUCT FACTORS	CUSTOMER PROFILE FACTORS	DEPENDENT RELATED FACTORS	CLAIM AND COMPLAINT FACTORS	TIME SERIES
Number of products sold to customer	Age	Number of dependents (partners, children, and so on)	Invoices and items generated	Time-stamp of claims and customer support
Current premiums and excess	Gender		Amount claimed	
Historical premium changes	Premium relative to other customers (deciles)	Claims made by dependents – value	Details of claims	Sequence
Levels of discounting	Location (address)	Claims made by dependents – details	Number of claims	
Free premium periods offered	Household status	Claims made by dependents – count	Timeframe of claims processing	
Policy renewal timeframe			Number of days in payments delay	
Next payment timeframe			Number of customer experience issues (for example, complaints)	

Table 31.1 – Categories integrated to enrich the dataset



# Media & Entertainment

## Enhancing Marketing Strategies Through the Power of LLMs

- AI-assisted approach provided rich audience insights in just 20 hours at less than 5% of the usual budget
- Tailored positioning strategies incorporating messaging, venue design, and event format to resonate with each fan subgroup.
- Increased ROI

“Every stage demands human decision-making, following certain results and abandoning others. It’s a collaborative process with hours of iteration, discussion, and debate.”

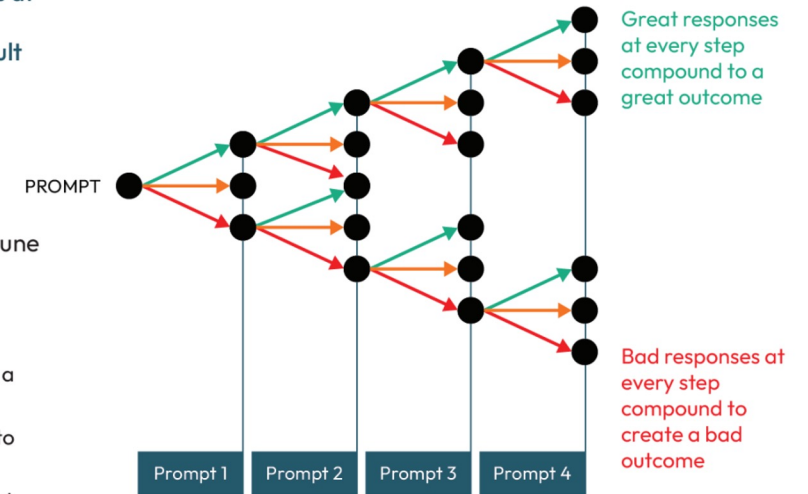
David Boyle, Director at advisory firm Audience Strategies

Ensuring great responses at every step makes a big difference to the end result

Every prompt creates a branch

Try multiple branches, prune ones that aren't great

- Most AI uses should be a multi-step process
- Every prompt generates a new branch (response)
- Try alternative prompts to create great branches
- Prune (edit) branches that aren't great



Example four-step process

Figure 32.2 –Improving prompts in a step-by-step manner to achieve more effective outcomes (Source: Prompt.mba)

# A Framework for Driving Value

Strategic Alignment and Target Application	Technical Capability	Operating Model	AI Adoption and Managing Change
Strategic	Technical	Implementation	Adoption

# Strategic

Strategic

Technical

Implementation

Adoption

## Align leadership and strategy

Clear business case

Well defined AI strategy

Purposeful AI deployment

Align incentives to the appropriate individuals

Shift ownership to beneficiaries

Play the long game

## Pinpoint value and prioritise

Understand how AI disruption could impact your industry and existing business model.

Focus on priority challenges

Work with both data and domain experts

Formulate and prioritise hypotheses

Roadmap for implementation

Develop a minimum viable product (MVP)



# Technical

Strategic   **Technical**   Implementation   Adoption

## Access current capability and quick wins

Establish baseline of data quality, security, and technical capabilities

Plan risk mitigation and targeted investments

3-year tech roadmap with priorities for next 6-9 months

Ecosystem of AI specialist partners

## Enable scalable, efficient development

Cloud based infrastructure

Shared services for AI development

Architectural standardisation

## Establish a robust data foundation

Build data architecture capabilities

Establish data management and governance

Implement data security and access controls

## Consider solution design integrity

Analyse user workflows

Ensure that AI technology decisions are both commercially viable and customer centric

Prioritise integrating AI into high-value processes

Preserve technical modularity

Avoid over-engineering a model

Iterative and user/customer-led approach

Design authority

## Prioritise testing throughout lifecycle

Integrate human oversight, Human-in-the-Loop (HITL)

Rigorous internal testing process, “dogfooding”

Establish DataOps

## Optimise performance post-launch

Gather and analyse customer feedback

Metrics-driven approach

## Design trustworthy AI systems

Ensure AI solutions consider core principles for ethical AI

# Implementation

## Establish a team with diverse skills

Specialist engineers with domain and tech expertise

Multidisciplinary teams

Hub-and-spoke operating model

AI technical skills in business

Bridge people (business architects)

UX expertise

Hybrid workforce

## Prioritise diverse sourcing and practical assessments

Diversify hiring strategies

Seek out motivated technical developers

Practical assessments

Nurture and retain talent

AI expertise within your board

# Adoption

## Secure early wins and drive user adoption

Start in functional areas

Involve users from the start

Frame AI projects as iterative experiments

## Manage change through effective communication and training

Harness storytelling and alignment

Address the last stage of an AI solution first

Build trust and guide the organisation with patience, humility, and strategic quick wins

Invest in continual learning and upskilling

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## Thank You

