INTELLIGENT SYSTEMS PRESS™
EXECUTIVE ASSESSMENT SERIES

EA-009: AI Performance & Value Realization Assessment™

Is Your Enterprise Converting AI Investment into Measurable, Sustainable Business Value?

Purpose

A practical executive assessment for evaluating whether AI investments produce measurable business outcomes, operational improvement, responsible adoption, financial discipline, stakeholder value, and sustained enterprise performance.

Educational Executive Self-Assessment | Version 1.0

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About This Assessment

AI value realization is the enterprise discipline of connecting AI investment to measurable outcomes, adoption, operational performance, financial impact, stakeholder benefit, and continuous executive decision-making. This assessment helps leaders determine whether AI is producing sustained enterprise value or merely generating activity, pilots, and technical outputs without verified results.

How to Complete It

1. Rate each statement	Use the 1-5 scale based on current, observable enterprise practice - not future intent, isolated pilots, or vendor assurances.
2. Score each domain	Add the five ratings in each domain. Every domain score ranges from 5 to 25.
3. Calculate the total	Add all eight domain scores. The overall AI performance and value realization score ranges from 40 to 200.
4. Interpret the pattern	Review the total and the distribution. Any domain below 15 represents a material value-realization dependency that may limit benefits, adoption, financial return, accountability, or sustained performance.
5. Select 90-day actions	Choose a limited number of executive actions that strengthen outcome ownership, measurement, adoption, benefit realization, financial discipline, or continuous improvement.

Rating Scale

1 Strongly Disagree	Practice is absent or contradicted by current evidence.
2 Disagree	Practice is inconsistent, informal, or limited to isolated areas.
3 Partly Agree	Practice exists in several areas but is not yet enterprise-wide.
4 Agree	Practice is generally reliable, measured, and consistently applied.
5 Strongly Agree	Practice is integrated, evidence-driven, and continuously improved.

Recommended use: Complete individually first, then compare results as an executive team. Differences in ratings are evidence of outcome, ownership, measurement, adoption, investment, or performance misalignment and should be discussed before averaging scores.

Domain 1: Strategic Outcomes & Value Hypotheses

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

Each AI initiative begins with a clearly defined enterprise problem, target outcome, value hypothesis, accountable business owner, and explanation of why AI is appropriate.					
Expected benefits are stated in measurable terms such as revenue, cost, speed, quality, risk reduction, service improvement, mission impact, or workforce capacity.					
Baseline performance is documented before implementation so leaders can distinguish actual improvement from assumptions, anecdotes, or normal variation.					
Value hypotheses identify affected stakeholders, required behavioral changes, dependencies, risks, and the conditions necessary for benefits to materialize.					
Leadership can explain how the active AI portfolio advances strategic priorities rather than simply increasing the number of AI projects.					

Domain score: ______ / 25

Evidence or observations:

Domain 2: Measurement Architecture & Evidence

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

AI initiatives have a balanced measurement framework covering business outcomes, user outcomes, operational performance, quality, risk, adoption, and cost.					
Metric definitions, formulas, data sources, owners, reporting frequency, and acceptable thresholds are documented and consistently applied.					
Measurement methods distinguish correlation from credible evidence that the AI capability contributed to the reported outcome.					
Dashboards provide decision-relevant trends, comparisons, exceptions, and context rather than isolated technical statistics or vanity metrics.					
Leaders can trace reported AI benefits to reliable source data, validated calculations, and retained evidence suitable for review or challenge.					

Domain score: ______ / 25

Evidence or observations:

Domain 3: Adoption, Utilization & Behavior Change

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

Target users understand the AI capability, its intended use, limitations, responsibilities, escalation paths, and relationship to existing work.					
Adoption plans address workflow redesign, communications, training, incentives, support, access, accessibility, and resistance to change.					
Utilization is measured by meaningful use and completed outcomes rather than logins, licenses issued, demonstrations, or superficial activity.					
User feedback, overrides, workarounds, abandonment, and unintended behaviors are monitored to identify barriers to value realization.					
Business owners are accountable for embedding approved AI capabilities into operating practices while preserving appropriate human judgment and control.					

Domain score: ______ / 25

Evidence or observations:

Domain 4: Operational Performance & Process Improvement

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

AI performance is evaluated within the end-to-end business process, including upstream inputs, downstream handoffs, queues, delays, rework, and exceptions.					
Operational measures show whether AI improves cycle time, throughput, quality, consistency, service levels, capacity, or decision effectiveness.					
Leaders assess whether local AI optimization creates unintended bottlenecks, risk transfer, workload shifts, or performance degradation elsewhere.					
Process changes introduced with AI are documented, controlled, measured, and refined using actual operating evidence.					
Benefits are sustained through clear process ownership, standard work, monitoring, support, and continuous improvement rather than one-time implementation.					

Domain score: ______ / 25

Evidence or observations:

Domain 5: Financial Discipline & Total Economics

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

AI business cases include implementation, data, infrastructure, integration, vendor, security, governance, change, support, monitoring, and retirement costs.					
Actual spending and consumption are compared with approved budgets, expected unit economics, forecast benefits, and alternative investment options.					
Financial analysis considers time to value, benefit timing, uncertainty, recurring cost, scalability, opportunity cost, and cost of control or failure.					
Leaders can identify which AI capabilities are creating positive economic value, which require corrective action, and which should be stopped.					
Funding decisions are updated as evidence changes rather than protected by sunk-cost thinking, executive sponsorship, or enthusiasm for the technology.					

Domain score: ______ / 25

Evidence or observations:

Domain 6: Stakeholder, Customer & Workforce Value

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

AI value is assessed from the perspective of customers, employees, partners, communities, regulators, and other materially affected stakeholders.					
Experience measures capture trust, usability, accessibility, fairness, satisfaction, burden, transparency, and the quality of human-AI interaction.					
Workforce impact is measured across capacity, role clarity, skill development, workload, decision authority, engagement, and unintended displacement of effort.					
Complaints, appeals, exclusions, adverse outcomes, and stakeholder concerns are incorporated into value and performance reviews.					
Leadership balances enterprise benefit with responsible stakeholder outcomes rather than defining success solely through efficiency or financial return.					

Domain score: ______ / 25

Evidence or observations:

Domain 7: Portfolio Governance & Executive Decisions

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

Executives review AI investments through a consistent portfolio process that compares value, performance, risk, cost, adoption, dependencies, and strategic fit.					
Initiatives have explicit thresholds for scaling, redesigning, pausing, consolidating, or retiring based on current evidence.					
Portfolio reporting identifies benefit gaps, duplicate capabilities, shared dependencies, concentration risk, and opportunities to reuse data, platforms, controls, or lessons.					
Business, technology, finance, risk, legal, security, data, and workforce perspectives are represented in material AI investment decisions.					
Executive decisions, assumptions, tradeoffs, actions, owners, and follow-up dates are documented and tracked to closure.					

Domain score: ______ / 25

Evidence or observations:

Domain 8: Benefits Sustainability & Continuous Learning

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree). Base the rating on repeatable enterprise behavior and current evidence.

Realized benefits are reassessed over time to confirm they persist as data, users, processes, markets, models, vendors, and operating conditions change.					
Performance deterioration, rising cost, reduced adoption, control weakness, or changing stakeholder impact triggers timely investigation and corrective action.					
Lessons from successful, underperforming, stopped, and retired AI initiatives are captured and reused across strategy, selection, design, delivery, and governance.					
Value-realization methods are periodically improved using audit findings, measurement limitations, stakeholder feedback, portfolio results, and external developments.					
Leadership routinely reallocates attention and resources toward the AI capabilities with the strongest evidence of sustainable enterprise and stakeholder value.					

Domain score: ______ / 25

Evidence or observations:

Scoring & Value Realization Interpretation

Record each domain score. Treat any domain below 15 as a priority dependency even when the overall score is higher.

1. Strategic Outcomes & Value Hypotheses	____ **/ 25**
2. Measurement Architecture & Evidence	____ **/ 25**
3. Adoption, Utilization & Behavior Change	____ **/ 25**
4. Operational Performance & Process Improvement	____ **/ 25**
5. Financial Discipline & Total Economics	____ **/ 25**
6. Stakeholder, Customer & Workforce Value	____ **/ 25**
7. Portfolio Governance & Executive Decisions	____ **/ 25**
8. Benefits Sustainability & Continuous Learning	____ **/ 25**
Total AI performance and value score	____ **/ 200**

Overall Value Realization Levels

180-200	**Value-Optimized Enterprise**	AI investments consistently produce verified, sustained outcomes through integrated measurement, adoption, financial discipline, stakeholder value, and executive action.
150-179	**Value Aligned**	Strong foundations support measurable outcomes, with targeted gaps in evidence, adoption, economics, stakeholder value, or benefit sustainability.
110-149	**Developing**	Important value practices exist, but outcome definition, measurement, adoption, operational impact, economics, or executive follow-through remains uneven.
70-109	**Fragmented**	AI activity is constrained by weak outcome ownership, inconsistent measures, limited adoption, unclear economics, or disconnected portfolio decisions.
40-69	**Not Ready**	Foundational outcome, measurement, adoption, economic, stakeholder, and benefits-governance mechanisms are insufficient to demonstrate sustainable AI value.

Important: This assessment is a discussion and prioritization tool, not a certification. Value realization should be validated using current baselines, business cases, financial records, adoption data, operational measures, stakeholder evidence, portfolio decisions, and sustained outcome trends.

Executive Reflection & 90-Day Action Plan

Use the scoring pattern to identify the few leadership actions that will most improve measurable outcomes, adoption, economic discipline, stakeholder value, and sustained AI performance.

Value-realization strengths

Which outcome, measurement, adoption, operational, financial, stakeholder, or portfolio practices already produce credible AI value?

Critical constraints

Which weaknesses in baselines, evidence, adoption, workflow integration, economics, stakeholder outcomes, or executive decisions most limit value?

Decisions required from leadership

What investment, prioritization, scaling, adoption, measurement, operating-model, corrective-action, or retirement decisions cannot be delegated?

90-Day Priority Actions

Executive commitment: We will review progress by __________________ and reassess affected domains using current outcome and value evidence.

Continue Your AI Value Realization Journey

AI creates sustainable enterprise value when strategy, Process Intelligence, outcome ownership, measurement, adoption, operational improvement, financial discipline, stakeholder impact, governance, and continuous learning operate as one connected management system.

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