

Applied AI Transformation & Enterprise PMO

Case Study: In-House AI Integration, Buy-vs-Build Governance & Value Capture

EXECUTIVE SUMMARY: ENTERPRISE AI ADOPTION

How Valtree embedded product leaders led the enterprise-wide AI transformation for a global financial institution, establishing AI governance, buy-vs-build matrices, and deploying bespoke internal productivity assistants.

1. STRATEGIC ENGAGEMENT CONTEXT

A Fortune 100 financial services firm experienced fragmented, uncoordinated AI experiments across global business units. Unregulated shadow AI usage posed compliance risks, while overlapping vendor purchases resulted in tens of millions in redundant licensing costs.

2. CORE INTERVENTIONS & AREAS OF EXCELLENCE

- Enterprise AI Governance Framework:** Formulated risk-based triage models evaluating all AI initiatives against privacy, regulatory compliance, and security vectors.
- Buy vs. Build Decision Matrix:** Established standardized architectural criteria to determine when to procure third-party solutions versus building proprietary internal agents.
- Internal AI Assistant Deployment:** Led product management for an enterprise-wide internal conversational assistant, securely connected to proprietary document stores.

\$18M

ANNUAL COST SAVINGS

45,000+

ACTIVE INTERNAL USERS

100%

DATA LEAKAGE PREVENTION

3. ORGANIZATIONAL MATURITY MATRIX

Pillar	Ad-Hoc State (Pre-Intervention)	Managed Enterprise State
Vendor Procurement	Decentralized team purchases	Centralized AI Steering Committee approval
Data Privacy	Unfiltered public API calls	Private tenant routing with PII redaction
ROI Attribution	Anecdotal / Unmeasured	Automated productivity & unit cost tracking