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COURSE BROCHURE

# AI Roadmap Phasing and Investment Gates Training Course

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# AI Roadmap Phasing and Investment Gates Training Course

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AI Roadmap Phasing and Investment Gates is a 1-week training course for CIOs, transformation directors and PMO leads, producing a Phased AI Roadmap and Gate Charter. Boards now approve AI spending in instalments and expect each release of funds to rest on evidence of maturity, data readiness and measured uptake rather than on ambition alone. Jupiter Prime Training offers AI Roadmap Phasing and Investment Gates to leaders who sequence AI initiatives and defend each funding decision.

## Why AI Roadmap Phasing and Investment Gates Matter Now

Three pressures shape the subject. Finance committees want staged commitments with clear stop points instead of open-ended technology budgets. Business units compete for scarce data engineers and platform capacity. Oversight bodies expect risk checks to happen before scale, not after. An organisation that phases its roadmap well releases funds where evidence is strongest and retires weak ideas early; one that does not spreads money thinly and stalls. The course draws on the NIST AI Risk Management Framework AI RMF and the ISO/IEC 42001 AI management system standard.

## Who Gains Most from AI Roadmap Phasing and Investment Gates

- Technology executives accountable for the AI platform, data estate and architecture sequence
- Transformation directors who own the change portfolio and its benefit targets
- Portfolio and PMO leads who run gate reviews and track milestones
- Finance business partners who model funding tranches and payback
- Risk and assurance heads who set checkpoints before each scale-up

An executive steering group gains most when its CIO, transformation director and PMO lead attend together.

## AI Roadmap Phasing and Investment Gates Capabilities

Participants turn AI ideas into horizons, tranches and gate criteria.

- Assess AI maturity across data, platform, skills and controls to set the starting horizon — CIOs
- Build and score a use-case backlog by value, feasibility and dependency — transformation directors
- Sequence data and platform foundations ahead of the initiatives that rely on them — enterprise architects
- Design stage gates with entry evidence, exit criteria and stop rules — PMO leads
- Calculate funding tranches and milestone payments for each wave — finance partners
- Specify uptake and benefit metrics that release or withhold the next tranche — steering committees

## Key AI Roadmap Phasing and Investment Gates Terms

- Maturity baseline — a scored snapshot of data, platform, skills and controls used to decide what the roadmap can attempt first.
- Use-case backlog — a ranked list of candidate AI initiatives with value, feasibility and dependency scores.
- Investment gate — a decision point where evidence is reviewed before funds for the next phase are released.
- Funding tranche — a portion of the AI budget released only when a gate is passed.
- Foundation dependency — a data, platform or skills capability that must exist before a use case can proceed.
- Kill criterion — a predefined condition under which an initiative is stopped and its funds redirected.

## AI Roadmap Phasing and Investment Gates Day by Day

### Day 1: Ambition, Maturity and Starting Horizons

- AI Maturity Assessment Model — Setting the Baseline Across Data, Platform and Skills
- Ambition Statements and Strategic Themes — Linking AI to Enterprise Priorities
- Three-Horizon Framing — Separating Quick Wins From Capability Bets
- Funding Committee Expectations — Shaping Staged Commitment Instead of Lump Sums
- Stakeholder Map for the Roadmap — Identifying Sponsors and Capacity Holders

### Day 2: Backlog Scoring and Foundation Sequencing

- Use-Case Intake Templates — Capturing Value, Feasibility and Data Needs
- Weighted Scoring Matrices — Ranking the Backlog With Agreed Criteria
- Dependency Mapping — Ordering Data Products, Platforms and Skills Builds
- Capacity Constraint Analysis — Matching Waves to Engineering Availability
- Wave Design — Grouping Initiatives Into Coherent Release Phases

### Day 3: Gates, Tranches and Milestones

- Stage-Gate Architecture — Defining Entry Evidence and Exit Criteria
- Funding Tranche Modelling — Releasing Budget Against Passed Gates
- Kill Criteria and Stop Rules — Redirecting Funds From Weak Initiatives
- Milestone Roadmap Charts — Communicating Sequence to Executives
- Option Value Thinking — Deciding When to Defer or Accelerate a Wave

### Day 4: Checkpoints and Uptake Measures

- NIST AI RMF and ISO/IEC 42001 Checkpoints — Placing Risk Reviews Before Scale
- Gate Evidence Packs — Assembling Proof for Each Decision Meeting
- Uptake and Usage Metrics — Measuring Real Use by Front-Line Staff
- Benefit Tracking Dashboards — Comparing Forecast and Realised Returns
- Roadmap Re-Planning Cadence — Adjusting Waves After Each Gate

## Day 5: Practising the Phased AI Roadmap and Gate Charter

- Utility Network Case — Applying Maturity Baseline and Dependency Mapping
- Retail Lender Case — Scoring a Backlog and Designing Waves
- Logistics Operator Case — Rehearsing a Gate Meeting With Kill Criteria
- Tranche Schedule Draft — Aligning Milestones With Finance Calendars
- Phased AI Roadmap and Gate Charter — Presenting Horizons, Gates and Metrics for Endorsement

## Applying AI Roadmap Phasing and Investment Gates After the Course

- Score the current AI backlog with a weighted matrix and map each initiative's foundation dependencies.
- Draft entry evidence, exit criteria and a kill criterion for the next gate and agree them with the finance partner.

## AI Roadmap Phasing and Investment Gates Questions FAQ

### What are AI roadmap phasing and investment gates, and why do they matter now?

They are the practice of ordering AI initiatives into waves and releasing funds only when evidence passes defined gates. Boards now expect staged commitment, so leaders must show why each phase deserves money.

### Which roles gain most from AI roadmap phasing and investment gates?

CIOs, transformation directors, PMO leads, finance business partners and risk heads who sequence and fund AI work gain most.

### How do AI roadmap phasing and investment gates differ from an enterprise AI strategy course?

The focus is sequencing and staged funding decisions rather than setting vision or choosing markets.

### What do you bring back from AI roadmap phasing and investment gates?

You bring back a maturity baseline, a scored backlog, a dependency map, gate criteria and a tranche schedule for your own AI portfolio.

## AI Roadmap Phasing and Investment Gates: The Way Forward

The Phased AI Roadmap and Gate Charter first informs which wave receives its opening tranche and what evidence the next gate requires. CIOs and PMO leads use it to run gate meetings, while finance partners use it to schedule releases. After the first gate, revisit dependency assumptions, uptake figures and kill criteria before committing the following wave.