

# Cloud strategy and advisory services



# Cloud strategy, readiness and governance

## Strategy and operating model

- **Strategic alignment:** translating business goals into actionable data and AI roadmaps.
- **Value identification:** pinpointing high-impact use cases for data and ai.
- **Readiness assessment:** evaluating current capabilities and identifying gaps
- **Technology blueprinting:** defining the optimal data and AI architecture.
- **Organisational enablement:** preparing your people, processes, and culture for ai adoption

## Governance, risk and compliance

- **Ethical AI principles:** establishing guidelines for responsible and fair AI.
- **Risk management:** identifying and mitigating AI-related risks (bias, privacy, security).
- **Compliance assurance:** navigating evolving regulations **data quality and stewardship:** ensuring reliable, accurate, and secure data for data and ai.
- **Accountability and oversight:** defining roles, responsibilities, and monitoring mechanism.
- **Transparency and explainability:** building trust through understandable data and ai systems.

## Our services

### Data strategy

- Data strategy enablement.
- Current state assessment.
- Future state solution definition.
- Operating model / CoE definition.

### AI strategy

- AI readiness.
- Ai use case definition.
- Ai enablement and planning.
- Operating model / CoE definition.

### Data governance

- Framework and operating model definition.
- Tool selection and implementation.
- Data quality monitoring.
- Master data management strategy.

### AI governance

- Framework and operating model definition.
- Policies and standards.

**Data and AI strategy:** comprehensive plan defining how an organisation will strategically manage and leverage its data assets to build, deploy, and scale AI initiatives, directly aligning with and driving overall business objectives.

**Data governance:** establish trust, availability, and understanding of source data including AI inputs.

**AI governance:** ensure responsible, ethical, and compliant use of AI to manage risks and align with business goals.

## Cloud risk, compliance and control considerations



**Robust  
foundation**



**Promote  
innovation**



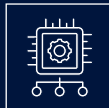
**Sustainable  
growth**



**Responsible  
implementation**

# Cloud and digital strategy definition (governance-led)

RSM's digital team empowers organisations to become data-driven by delivering a targeted strategy for building analytic and AI solutions. Our approach offers a robust framework for defining your strategy aligned to organisational goals and capabilities to support execution of a curated backlog of practical use cases within an operating model.

| Approach                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Business outcomes                                                                                                                                                                                                                                                                                                                                                                                 |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| <b>Current state assessment and discovery:</b><br><br>Establish AI's role in supporting operations in alignment with organisational goals and defined strategy by engaging in cross functional workshops to: <ul style="list-style-type: none"><li>▪ Define an AI Strategy driven by the overall business and data strategy.</li><li>▪ Identify key use cases to support business processes/ goals.</li><li>▪ Define an initial understanding of current state operations, technology and capabilities.</li></ul> | <b>Analytics and AI readiness gap analysis and use case prioritisation:</b> <ul style="list-style-type: none"><li>▪ Translate initial use cases into a clear plan, outlining key questions, source data, and required capabilities.</li><li>▪ Define and outline gaps within current state and desired (Analytics-AI Ready) future state across governance, technology infrastructure, tooling, data architecture and availability, and capabilities.</li><li>▪ Prioritisation of defined use cases based on value, feasibility, and effort.</li></ul> | <b>Future state and roadmap development:</b> <ul style="list-style-type: none"><li>▪ Define a future-state data and AI architecture inclusive of tools and technology.</li><li>▪ Design operating model inclusive of data governance/management framework, processes and policies, and organisational needs to support AI.</li><li>▪ Design a Centre of Excellence (COE) to support analytics, promote data and AI literacy, and adoption within the organisation.</li><li>▪ Develop a detailed plan of prioritised next steps and a strategic roadmap to support prioritised use cases.</li></ul> |  <b>Defined data and analytic foundation</b>                                                                                                                                                                                                                                                                   |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  <b>Improved decision-making through reliable and accessible data</b>                                                                                                                                                                                                                                          |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  <b>Analytics and AI-ready</b>                                                                                                                                                                                                                                                                                 |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Key Deliverables                                                                                                                                                                                                                                                                                                                                                                                  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"><li>▪ AI strategy.</li><li>▪ Current state architecture and data inventory overview.</li><li>▪ Readiness assessment gaps.</li><li>▪ Prioritised use cases.</li><li>▪ Proposed future state data and analytics architecture.</li><li>▪ Operating model and centre of excellence design.</li><li>▪ Strategic analytics roadmap and implementation plan.</li></ul> |  |  |

# Data strategy enablement

RSM's Data and AI Strategy engagements are collaborative, in-depth analysis and partnership designed to understand a clients current data strategy needs and define a future roadmap. RSM works closely with clients to translate goals into a strategic path that enables the data strategy maturity over time.

## Approach

### Current state and discovery:

In depth understanding and analysis of wish list items, goals, and current state architecture.

### Gap analysis and future-state prioritisation:

Define and outline gaps within current state and desired future state and prioritise future state goals and activities with supporting technology, structure, and capabilities.

### Future state and roadmap development:

We will define a future-state architecture, including process and organisational design, and create a phased roadmap with quick wins and long-term strategic goals, all measured by clear KPIs/ OKRs.

## Business outcomes



**Defined data and analytic foundation**



**Improved decision-making through reliable and accessible data.**



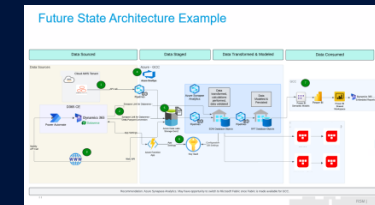
**Data driven culture**

## Key Deliverables

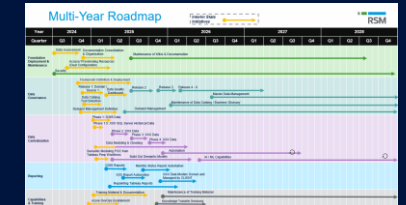
- Data, AI, and analytic maturity scoring.
- Current state architecture and data inventory overview.
- Opportunity and value log.
- Technology and capability gap analysis.
- Future state solution architecture.
- 30/60/90-day immediate action plan.
- Data strategy mission and vision statement.
- Defined metrics (KPIs/ OKRs) to support the mission and vision statements.
- Short- and long-term roadmap (1-5 years).



**Imagine if example**



**Solution architecture**



**Release plan / roadmap**

# Platform and tool selection

RSM helps you select and implement the right data platforms, analytic toolsets, and AI solutions. We use a standardised approach to prioritise your critical requirements, narrowing down vendors and defining a Proof of Concept (POC) for the top two solutions before development and testing. Our experts offer extensive knowledge across various tools to answer your technical questions and compare options.

## Approach

### Requirements gathering:

- Gather and document technical and business requirements.
- Conduct a prioritisation exercise to solidify requirements, facilitate consensus, and weight criteria.

### Tool selection:

- Evaluate up to five (5) vendors based on their alignment to the prioritised requirements.
- Narrow tools to up to two (2) vendors for demo and eventual POC.
- Facilitate demos with vendor teams and organisational stakeholders, guiding discussions through key requirements.

### Future state architecture overview:

- Design of solution architecture inclusive of recommended tool(s).
- Definition of Proof of Concept for recommended tool(s).

## Business outcomes



### Prioritised use cases



### Prioritised tool selection



### Proposed architecture

## Key deliverables

- Prioritised requirements and use cases.
- Comparison and evaluation of a subset of vendors.
- Tool demos.
- POC definition.
- Proposed architecture.

RSM

Document No.

MDM Scoring

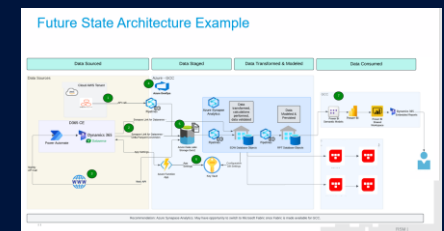
MDM

Priority Scoring

RSM

| Category                | Tool 1 | Tool 2 | Tool 3 | Average Scoring With Priority Weighting |
|-------------------------|--------|--------|--------|-----------------------------------------|
| Technical Functionality | TBD    | TBD    | TBD    | TBD                                     |
| Time to Value           | TBD    | TBD    | TBD    | TBD                                     |
| User Experience         | TBD    | TBD    | TBD    | TBD                                     |
| Cost                    | TBD    | TBD    | TBD    | TBD                                     |
| TOTAL                   | 0      | 0      | 0      | 0.00                                    |

Tool comparison



Proposed architecture

# Analytics strategy

RSM empowers organisations to become data-driven by delivering a targeted analytic strategy. Our approach offers a robust framework for defining your strategy and immediately mobilising efforts through a curated backlog of executable use cases and clear business requirements developed through clear processes and people structures supporting data literacy and adoption.

## Approach

### Current state and readiness analysis:

- Engage key stakeholders to document insights, pain points, challenges, opportunities, and initial analytics requirements and use cases.
- Understand current architecture, processes, data landscape, analytical tools, and readiness within the organisation – i.e., capabilities and data literacy.

### Strategy and use case prioritisation:

- Conduct workshops with leadership to define the analytics vision and identify key use cases and metrics.
- Translate initial use cases into a clear plan, outlining key questions, source data, and required calculations to create a backlog of impactful "game changer" metrics.
- Prioritisation of defined use cases based on value, feasibility, and effort.

### Future state recommendations:

- Define the proposed future state data and analytics architecture inclusive of proposed tools and technologies.
- Design a Centre of Excellence (COE) to support analytics, promote data literacy, and adoption within the organisation.
- Develop a detailed plan of next steps and a strategic roadmap for prioritised analytical releases inclusive of governance and organisational capabilities.

## Business outcomes



**Enhanced data-driven decision making**



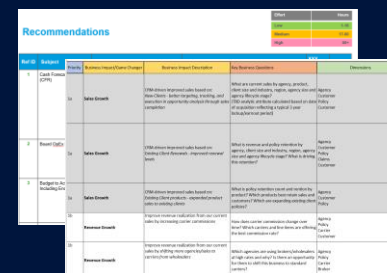
**Optimised resource allocation and investment**



**Strengthened data culture and literacy across the organisation**

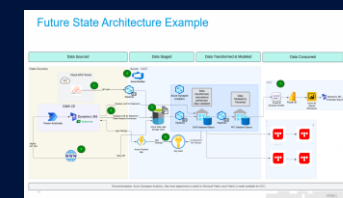
## Key deliverables

- Stakeholder insights and requirements documentation.
- Analytics vision and mission statement.
- Detailed use case backlog.
- Proposed future state data and analytics architecture.
- Strategic analytics roadmap and implementation plan.
- High-level organisational and governance recommendations.

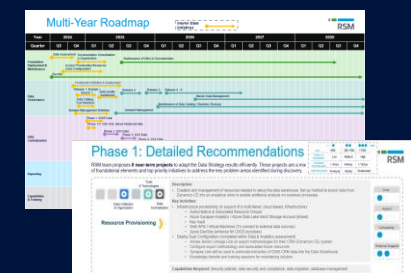


| ID | Name       | Description         | Priority |
|----|------------|---------------------|----------|
| 1  | Use Case 1 | Example description | High     |
| 2  | Use Case 2 | Example description | Medium   |
| 3  | Use Case 3 | Example description | Low      |

Analytics backlog



Solution architecture



Detailed initiative planning

**THE POWER OF BEING UNDERSTOOD**  
AUDIT | TAX | CONSULTING



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