

WHITEPAPER

# CIO View: Business Transformation

2024 Adler Advisors Symposium

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**ADLER  
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A BRIDGEPOINTE COMPANY

# Executive Summary

## Participant’s Key Focus Areas



**Customer Experience**



**Culture & Capabilities**



**Automation: AI vs. Hype**

The focus for the visionary group of CIOs and technology executives participating in the Adler Advisor’s Symposium on September 26th, 2024, in New York City, New York, resoundingly spoke to Business Transformation. Rather than the often and overused moniker “Digital Transformation,” these leaders shared a broader business emphasis beyond technology.

Motivated by business purpose, the participants overwhelming look to understand and use business outcomes as their target and then, to provide technology as the enabler of these goals. The design of their IT organizations are to promote technical innovations and improvements that matter to the business and their customers. The skillsets and engagement of their IT organization clearly plays a critical role in the success of their entire organization as they look forward.

Out of the Symposium’s dialog three themes arose that synthesized their view of what is necessary to create a business competitive future for their organization. The areas brought forward were Customer Experience (CX), Culture & Organizational Capabilities, and Automation (of course, including Artificial Intelligence (AI)).

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# Customer Experience

The ancient phrase “all roads lead to Rome,” could be reinterpreted in a modern sense to “all roads (should) lead to the customer,” when describing the Business Transformation purpose.

The Symposium participants had clear views regarding their company’s customer experience (CX) today and where it needs to go when looking out over the next year or so. There was resounding agreement that the customer is the central reason for why a company can exist and that for the company to thrive, continuing to view the services, processes, technologies, and organizational capabilities through the lens of the customer is critical.

These executives shared that for some of them, today’s CX is tailored to the customer and brings a “visceral and emotional” touch which ties to their brand identity. However, for some, they candidly noted that from the customer’s view, their company response can appear “not fast enough” or interactions with their company can be difficult.

Looking forward the group had a positive position that improvements, particularly around simplified purchasing channels, better access to resources, and a more coordinated cross-effective organization, would bring a more delightful customer experience.

Intimacy with the customer was also a factor in the future-vision, especially through a closer relationship and understanding of customer likes and dislikes. Conversely, one CIO noted that 12-18 months from now he could see reduced human interaction through tools that can “skim off some of the work effort,” a state which can bring benefit to the business and customer alike. Conversely it is at odds with the concept of forming deeper customer connections. A balance between the two will be necessary to gain efficiencies and customer satisfaction equally.

As the discussion was heavy on the digital aspect of customer experience, one CIO of a luxury consumer goods company brought forward that advancing the online and automated experience is at cross purposes for organizations like his, where the joy of the experience for the customer is the physical “touching” of the products and the elegant high-end instore experience. He said that today’s instore experience simply cannot be created virtually. Of course this begged the question of why change? The conundrum, he explained, is market competition. If others are providing online options, so must he.



**“64%**  
of consumers  
expect  
companies  
to respond to  
their inquiries  
in real-time.”  
- Salesforce <sup>1</sup>

# Customer Experience

It should be no surprise that Artificial Intelligence (AI) wove into the conversation about the future state of customer experience. We will dig deeper into AI later in this paper, but two specific elements of AI were brought to light in the customer context.

First, one CIO noted that GenAI Chatbot is one example of an improved CX that his company is beginning to explore today. This same sentiment is being echoed across our industry, with many CIO's dipping their toes in the AI waters with tools such as ChatGPT, Copilot, Gemini, among others.

On the flip side, a cybersecurity executive in the sports industry shared a sobering perspective. He noted that transformation is "two-sided" in that for his organization AI can provide new access to data helpful for player health and safety as well as the well-being of the general public attending sporting events.

The caveat he shared was the importance of training employees to take care with what they input into applications such as ChatGPT, because the data is "no longer theirs." He stated that "AI has made traditional phishing controls obsolete," and a new AI capable defense posture should be incorporated in any CIO's transformation program.



## Transformation Takeaways on Customer Experience

- The customer experience is central to the strategic plans of today's visionary CIOs
- The current customer experience has room for improvement and streamlined processes and access to services are top of mind for these leaders
- The relationship created between company and customer needs to be more personalized for the customer
- Automation will play a part in creating the future-state customer experience, however a balance between intimacy with the customer and security for the data and personal information of all parties must be a part of the transformation program

# Culture & Capabilities



**“If you take care of your employees, they will take care of the clients.”**

**- Richard Branson,  
CEO Virgin Atlantic**

The Symposium participants had a united view that the future strength of their IT business unit, and their organization at large, lays in the hands of leadership and the environment they create for the employees, business partners, and the customers they serve.

It is broadly understood today that a company with engaged employees is more likely to embody a customer-first culture, which in turn can lead to better products and services that drive customer satisfaction and a positive customer experience.

Building on this cultural foundation, organizations achieving a customer-first culture are more likely to retain and grow their customer portfolio. Specifically touching on employees, the executives discussed the lasting impact of the pandemic and the new hybrid work structures. How “we work together and how we come together” was noted by one CIO as an important factor as we look at the future of our organizational success. One leader said she believes “some companies are going to make a choice about workers and where they have to be, and how much hybrid is too much.” The decisions and fallout from those decisions will affect “employee satisfaction or dissatisfaction.”

Another executive stated their belief that the work environment is “going to get better, because we are going to have more accountability from everyone.”

Clearly these CIOs see organizational structures changing. **But how to execute a successful transformation program?**

“Transformation can be a scary thing for an organization. It can eliminate what you’re good at and force you to move to areas where you’re unsure,” stated one of the participants.

Another acknowledged that, “transformation is often a painful process, but it is a process that you have to push forward in order for growth.”

Fear of change in general was cited as a top reason why transformations fail. An organization’s readiness to change (and carry the effort to conclusion) was discussed in depth. Specific “Readiness Factors” were identified by the executives and their collective view paints a workable framework for leaders to consider when initiating uncomfortable yet necessary change.

# Culture & Capabilities

The view of the participants pointed to the need for a clear vision of purpose that is consistently communicated by leadership. This messaging must explain the direction and motivation for change and most importantly, the business outcomes expected.

Along with communication a need for sponsorship at multiple levels was stated. Of course, senior leadership support is an obvious necessary beginning. Beyond strategic support, senior leadership also controls the financial support. Budget commitment for the investment in the People, the Processes, and the Technology of the future-state organization must be a part of the plan. The participants all agreed business sponsorship, including individuals at various levels of responsibility, is needed. The phrase repeated by the symposium executives was that you need, “buy-in, buy-in, buy-in.”

One other area raised in the dialog was that security must receive consideration in a future-state culture. As our security executive pointed out, “Cybersecurity is a business problem, not just an IT problem. It is a everyone’s responsibility.” The advice for CIOs and business leaders in general, is to include the Cyber team early in strategic planning.



## Transformation Takeaways on Readiness Factors

- “Gut-wrenching buy-in” from senior executives and business sponsors is required, if you have “no budget, [you have] no transformation”
- You need to articulate the goals of the business clearly
- Strong and constant communication including the “what’s in it for me” for the employees and for the customers is a must
- The perspective of the employees and their level of engagement with the business must be intentionally sought out and considered programmatically
- Space to experiment and to fail is important, so you can fail forward fast and adjust
- To transform your business, you are going to need people with different skill sets, processes for consistent and repeatable daily functions, and likely different technologies (which ties to needing available budget)
- A big enough existential threat (e.g., market competition, economic, or geographical, etc.), to make people line up for the change. “In other words, a good crisis”

# Automation: AI vs. Hype

It seems as if everyone in every corner is talking about Artificial Intelligence. You simply can't get away from a conversation, article, conference or other medium that doesn't, in some fashion, nod to this "hot" topic today. It in many ways is reminiscent of the frenzy surrounding Cloud technologies a number of years ago, where we were in the vortex of needing to consider Cloud for everything (even if we weren't clear on how it was solving our own company problems). Artificial Intelligence has taken on some of that same edge, even though AI is not new.

The Symposium executives were treated to a Keynote by Rita J. King<sup>2</sup> who brought a unique perspective into this conversation through her framework for [Applied Imagination](#) in solving business problems.

Rita posits that, "[Applied Imagination](#) is thinking differently about problems and thinking differently about why you are making an investment of time and money?" She shared that, "a few years ago, I was working with CIOs and all of a sudden, there was blockchain. Everyone was talking about, blockchain, blockchain, blockchain. And when I would listen to them talk about what they were going to use blockchain for they were actually describing problems they could have solved much more simply in other ways prior to the advent of blockchain. And I think that's also true now with AI."

She explained further, "when you see something in reality, like this chair is here," as she pointed to a chair in the room, "all the things that are familiar to you seem, by default, to be more valuable because you can interact with them, you can see them, you can feel them. Things that are nebulous are very hard to imagine. [Applied Imagination](#) is a way to question your own assumptions about what is valuable and what is simply nebulous. Many of the things that we are dealing with right now are so complex and so nebulous."

When the participants were asked later in the evening about innovations they see on the horizon, no surprise that AI was one of them. But when asked what obstacles are in the way for turning innovations into reality one CIO responded, "I think with AI there is going to be some disillusionment. There's going to be projects that don't go well, so I think there's going to be a bit of a reality check setting in with AI." Another individual said, "Yeah, I think people are going to fall off the hype train."



**"We all live in a Swiss cheese reality full of holes. We're wandering through the Swiss cheese reality and our imagination is filling in these buckets. Sometimes that's great because we have a couple data points thrown at us and we kind of conjure the rest of it. Sometimes it's not so great. It leads to misinformation. It leads to assumptions"**

**- Rita J. King, Founder, Power Pairs**

# Automation: AI vs. Hype

Despite the hype, CIOs have great interest in Artificial Intelligence from the standpoint of streamlining operations. As we discussed when looking at customer experience, AI has had some great uptake in supporting automated self-service functions. Call Center management is a great example. Collating customer sentiment into useable training data for customer service agents does save research gathering time that can be then turned into useful coaching, leading to a better customer experience. On the flip side, I am sure we have all been stuck in the automated operator helpdesk loop, when all we want is a human to answer!

Rita made this related comment: “I believe we should use our tools, and our tools should not use us.”

Many IT leaders have AI on the top of their strategic priority list and are cautiously stepping into the foray. Rita shared her belief that we will have a human centric future, but she understands that the breakneck pace of accelerated technology affects our decisions. She left us with this perspective:

“A skill that is very important for [Applied Imagination](#) is the ability to toggle between the 30,000-foot view and the details. Some people are big idea people, and some people are the granular detail people, but it’s the ability to toggle between the two that’s an act of imagination.”

Certainly, the ability to instantiate [Applied Imagination](#) as a muscle in our own human skillset will help put intentional discipline behind our decision-making process in addressing Artificial Intelligence as a tool to grow our organization or better stated, understand how to answer the question of where and when AI makes sense for our business.



## Transformation Takeaways on Automation

- The ability to toggle between strategy and execution details is needed for smarter decision making
- CIOs realize AI must be featured in their strategic plans, but they are looking beyond the hype in search of real business benefit
- Streamlining operations continues to be a business priority and where AI can assist it is being applied (e.g. GenAI Chatbot, Call Center)
- A human-centric future will need to balance alongside of accelerated technology innovations

# Conclusions

It is well understood that we are in a period of rapid change and the Symposium participants raised this point throughout the discussion. Putting the customer at the center of business purpose is the anchor needed to help inform priorities and direction, especially for the technology organization.

As one of the panelists stated, sometimes you have to know what to “give up” and if the technology initiative isn’t bringing business value, then it doesn’t get the focus. This aligns with the concept of [Applied Imagination](#), as Rita J. King shared. The ability to jump between the strategic view and the detailed view is where smarter decisions can be made.

Organizational change is difficult, and our human sub-conscience will naturally resist the unfamiliar. However, senior leadership that is committed to the success of transformation will ensure the perspective of the employees, partners, and customers is factored into the transformation program. Communication that is consistent as to the why and the how of the change in business direction is critical to its ultimate success.



## Transformation Takeaways from the Symposium

- Transformation is understood to be business-centric, with technology as the supporting enabler
- Customer experience is a central focus for today’s CIOs
- Automation, and the use of Artificial Intelligence, is top of mind as CIOs look to streamline processes and services, but this interest needs to be balanced against real-world business value
- A growth-ready organization foundationally must have an organizational culture that embraces change. This requires buy-in from the senior executives, but also the employees must be engaged and considered throughout the process
- Applied Imagination can help leaders see the path to the best decisions for the business
- Cybersecurity should be built into the strategic plan to ensure that new technologies, such as Artificial Intelligence, are safely woven into the organization’s architecture
- Transparent, consistent, and authentic communication from leadership to employees, partners, and customers is table-stakes for a successful transformation program. Keeping everyone focused on the business purpose and driving to execute the desired business outcomes sets everyone up to win

# About Adler Advisors

Adler Advisors is the nation's leading technology advisory firm who helps business leaders to buy, implement and manage technology solutions with confidence.



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Proven experience to help you evaluate, negotiate, and procure technology from over 200 supplier partners



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Experienced project managers and coordinators to implement your technology and speed time to value for your organization



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**UCaaS**



**Customer Experience**



**Lifecycle Services**



**Managed IT**



**Network Transformation**



**Data Center & Cloud**



**Security**

# About the Speakers



## **The Keynote: Rita J. King**

Rita J. King is a visionary thought leader whose mission is to help individuals, teams, and organizations balance authenticity and flexibility. With extensive experience working with clients from four out of ten of Forbes' most admired companies, she brings a wealth of knowledge across various industries and sectors.

Rita is the creator of the Imagination Age, a groundbreaking framework designed to transition from the Industrial Era to the Intelligence Era. She advocates for viewing AI as Applied Imagination rather than mere artificial intelligence, emphasizing the importance of our relationships with our creations, each other, and ourselves. Her passion lies in empowering leaders and organizations to harness their imagination, creativity, and essential skills to thrive in a complex and uncertain world.

An accomplished author and presenter, Rita has made numerous publications and media appearances, sharing her insights on the Imagination Age. She firmly believes that soft skills cannot be automated, and her work focuses on developing these essential skills to navigate and succeed in today's dynamic environment.



## **Workshop Facilitator & Whitepaper Author: Jessica Carroll**

An evangelist for creating a customer-first culture, Ms. Carroll is the founder of jCX Strategies, a consultancy service with a unique approach to fostering B2B customer-focused programs that drive successful outcomes. Through innovative customer engagement frameworks and a game-changing interactive workshop series, customers uncover measurable business success plans that create team trust, collaboration, and grow revenue.

With over 30 years of experience in leadership roles in the technology industry, Ms. Carroll is a speaker on the topics of customer and employee engagement, team culture, and digital transformation. She has been published in CIOInsight and BizTech magazine, among others, was named a Computer World Premier 100 IT Leader, and was placed on the 2024 CRN Women of the Channel list. She is a contributing author to the book, Digital Transformation Demystified, in which she discusses customer and employee engagement practices.