

How to Make the Case for AI Investment

A guide for professionals ready to bring AI capability to their team

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You've seen what AI can do. You're ready to go deeper. But getting buy-in requires more than enthusiasm. It requires a case your leadership can act on. Here's how to build it.

1. BEFORE YOU ASK: GET YOUR MINDSET RIGHT

- **Think win-win-win.** This needs to work for the business, your team, and you. Frame it that way.
- **Know the real question.** Your leader is asking 'Is this worth our time and budget right now?' Answer that.
- **Talk to peers who've done it.** Find someone who got AI investment approved. Learn what worked.
- **Identify the right decision maker.** Your manager, VP of Ops, business unit leader, or whoever controls discretionary budget.

2. BUILD YOUR CASE: SPEAK THEIR LANGUAGE

- **Lead with the problem, not the technology.** Start with what's costing time, money, or quality today.
- **Quantify it.** 'Our team spends 12 hours/week on manual reporting' hits harder than 'AI could help us.'
- **Show what changes.** Faster decisions, reduced rework, better preparation, freed-up capacity. Be specific.
- **Name the risk of waiting.** Competitors are investing. The capability gap widens every quarter.
- **Start focused, not wide.** 'An 8-week sprint with one team' is far easier to approve than a company-wide rollout.

3. OBJECTIONS YOU'LL HEAR (AND HOW TO RESPOND)

"It's not in the budget."

This isn't a platform purchase. It's a capability investment with a fixed scope and timeline. Ask what budget line professional development or operational improvement falls under. A focused engagement costs a fraction of most technology rollouts.

"We already have an internal expert handling AI."

That's a great start. But one person can't scale across every function. External advisory brings cross-industry frameworks and dedicated focus. It makes your internal expert more effective, not less.

"The ROI is unclear."

That's exactly why a focused 8-week sprint makes sense. We define metrics upfront, measure what changed, and you have real data to decide on next steps. Not projections, actual results.

"We don't have time or capacity to train people."

This isn't classroom training that pulls people away from work. It's built around their actual tasks. They learn by doing their real work faster. The time investment pays back within the first few sessions.

"AI training could be risky or destabilizing."

Unguided AI adoption is what's risky. Structured advisory establishes guardrails, teaches responsible use, and gives leadership visibility into how AI is being applied. It reduces risk.

4. START THE CONVERSATION (NOT THE PITCH)

- **Don't make the ask over email.** Use email to set up a meeting. Keep it short and curiosity-driven.
"I attended a session on AI for [your function] and saw something that could save us real time. I'd love 10 minutes to share what I learned. When works this week?"
- **Bring one concrete example.** Before/after: 'This report took 3 hours. With AI, it took 20 minutes.'
- **Expect a conversation, not a decision.** Your goal is the next step, not a signature.

5. FOLLOW UP: PERSISTENCE WITHOUT PRESSURE

- **If they say yes:** Send a follow-up confirming next steps. Make it easy for them to act.
- **If they say maybe:** Share one resource. Give them time. Circle back next quarter with a specific ask.
- **If they say no:** Thank them. Ask what would need to change. Stay in the conversation.
- **Remember:** Budget cycles shift. A 'no' today is often a 'not yet.' Keep showing up.

What Happens Next

Most teams see the shift within the first few sessions. Faster preparation, sharper decisions, less time lost to manual work. The engagement pays for itself in freed-up capacity before it's over.

If you're ready to bring this to your team, I'm happy to talk it through. I can also join a call with your decision-maker if that helps move the conversation forward.

Schedule a conversation: cherylthompson.net

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