

CIO Think Tank Roadmap Report:

Information management in the age of AI

33 CIOs and CTOs share use cases, challenges, and insights

Getting the data right, for the right use cases

The importance and value of data has never been clearer. But given the rapid evolution of AI and related technologies and their infusion into business, the best ways to manage and use that data have rarely been more challenging or vital.

In three CIO Think Tank roundtables, held from June through August of 2025, IT leaders spanning diverse industries, from financial services to higher ed, health care, manufacturing, and retail, shared successes and speedbumps in managing the data that feeds AI initiatives across a wide swath of use cases.

The roundtables were facilitated by John Gallant, enterprise consulting director at Foundry, along with Amy Machado from industry research firm IDC, CIO editorial leader Amy Bennett, and Sandy Ono, CMO of partner OpenText.

Challenged by data quality and sovereignty issues? Wrestling with staffing, skills, and education concerns? Searching for ways to reduce AI risks? Read on for ideas from the front lines.



WHAT IS CIO THINK TANK?

CIO Think Tank is a unique collaboration showcasing the ideas and expertise of top IT executives, IDC analysts, Foundry editors, and our exclusive vendor partner. Our goal is to explore and shape the future of the IT function and emerging technologies. OpenText is Foundry's partner on this Information Management edition of CIO Think Tank.

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TABLE OF CONTENTS

2

Introduction

3

Keeping up with AI: The governance rules are changing

4

Laying the information management groundwork

4 Data quality and data silos

6 Identifying roles, skills, and talent

7 Getting what you need from vendors

8

Strategies for persistent challenges

8 Prioritizing use cases

9 Mitigating security and other risks

10 Handling data sovereignty requirements

10 Managing business expectations

11

More AI use cases and lessons learned

11 Productivity, automation, and efficiency

13 Enhanced customer service and CX

13 Specialized industry applications

14 AI agents: the future (that's happening now)

15

Panelists and thanks

Keeping up with AI: The governance rules are changing

AI use is advancing at warp speed, even as enterprise technology leaders wrestle with foundational questions, starting with whether existing data governance policies still hold up.

Some CIO Think Tank participants emphasized that they do. "It's just another opportunity to say all the existing policies and procedures still apply," said one CIO. Others argued that, while the goals of governance still apply, the manner in which AI uses data necessitates fresh thinking and updated policies. "The business outcomes that you want might be the same, but if you were operating from a very different point of view and things worked differently, then you're not going to succeed" with a business-as-usual approach said IDC's Amy Machado.

Among the challenges facing AI builders is how to set the right business expectations. "The AI model life cycle is not like the application life cycle," said Jamil Badrudeen, VP AI and Financial Engineering at financial giant State Street. Applications are put into production once the code works correctly; AI models "have to be tested and trained in every environment where they'll be deployed," he said. Data scientists and users aren't aligned on when an AI model is "ready" to start production use.

Further, the workforce needs new skills; models need new infrastructure. Line-of-business leaders are excited about AI but remain blasé about investing in data cleanup. AI risks aren't fully understood.

AI and tech leaders at the forefront of these efforts have tested numerous strategies for addressing the questions, challenges, and opportunities. But it's still early days for AI, and what works at one company may not play at another. Context matters, and the think tank panelists – whose AI projects range from summarizing medical documents to evaluating environmental data from NASA's Mars Rover – offered plenty of variability, uncertainty, and disagreement.

Even the easy cliché "It all starts with getting your data right" isn't universally applicable. Some companies have undertaken a major data infrastructure and governance overhaul before wading into AI; others report cherry-picking their best data to use as their AI starting points, and still other CIOs recommend diving in and using the AI itself to surface problematic data.

This Roadmap Report rounds up many of the panelists' key ideas, offering CIOs new possibilities for moving their own work forward at the pace of...well, at the pace of AI.

Business initiatives in 2025

 38%

Monetizing company data

 35%

Meeting compliance requirements

 35%

Improving the customer experience

Technology initiatives in 2025

 42%

Machine learning/AI

 34%

Security/risk management

 31%

Data/business analytics

SOURCE: [Foundry's State of the CIO Survey 2025](#)

Laying the information management groundwork

Good data makes for good AI. Success factor number one “is really data intelligence, that data quality – the data cataloging, the lineage, the master data, the metadata – it really all comes down to the data that is driving these systems,” IDC’s Machado said. However, while the basics of information management still apply – generally – panelists noted that AI adds a number of new twists.

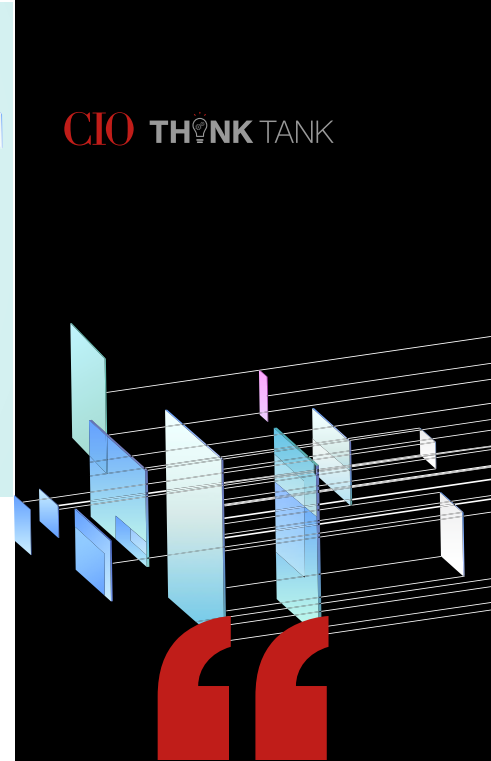
i. Data quality and data silos

Companies that started cleaning up their data earlier have an advantage, and several panelists described more advanced AI applications as a result.

“A few years ago, we had siloed data stores spread across data centers. Customers had to use different applications to fulfill processes end to end,” said Lokesh Daddala, CTO of the non-profit NBME (National Board of Medical Examiners), which develops and manages assessments of student physicians. Daddala said the company created “a holistic data strategy” to ingest, refine, and curate data from numerous sources into a unified data lake. Today this serves as the basis for building custom machine learning models, largely using AWS SageMaker tools, he said. Similarly, at EoS Fitness, a national fitness brand with more than 160 exercise and fitness facilities open or planned in the US, CIO Aaron Gette consolidated multiple data lakes to create a unified data fabric, which can now feed development of AI models.

No question, however, data quality remains a foundational challenge for AI at many organizations, large and small. “The data hygiene thing is really big for me, because I’m discovering how much data I have that is just unusable right now,” said Kevin Rhode, CIO of District Medical Group, voicing sentiments shared by a number of panelists.

“We’ve got data all over the place, and it’s inconsistent, so plugging core data management holes, providing consistent quality and representation of information is incredibly important.” said Gary Pikul, CTO at worldwide executive search and leadership consulting company Boyden.



This isn’t magical.
If you’re wanting to put [AI] into play, **you need to have good data** to back it up.”

– Tom Thompson
Eastern Arizona College

In part, these data gaps and inconsistencies stem from many organizations' historical reluctance to invest in data cleanup.

"We started to require that everybody clean up their data sets [for AI], and there's zero appetite for that – no one's interested in sorting through archival data and figuring out what your schema was, you know, 15 years ago," said David Chun, CIO of Montclair State University in New Jersey.

Nevertheless, CIO Think Tank participants offered several strategies to let companies take early steps in AI, running parallel to data quality initiatives rather than waiting for a full cleanup.

For example, some companies have pockets of data that work well for specific use cases. That's an excellent starting place while data hygiene efforts are underway elsewhere. "We started off with 'Where do we have the data? Where can we get the best results without having to waste a lot of time on all the data engineering tasks required to make it acceptable for use in an AI project?'" said Andrew Scott, formerly chief digital officer at construction engineering company Black & Veatch. As the company builds large-scale projects – data centers, solar fields, and more – Black & Veatch monitors worker safety data closely. That data has been the foundation of early AI initiatives, along with AI forecasting projects using reliable financial data.

Another strategy is to lean on current vendors, who may be able to help identify and remediate "raw, redundant, or conflicting" data in specific systems or repositories, according to IDC's Machado.

Several CIOs expressed confidence that AI itself can spot problems with data and in some cases, even help address underlying process issues as an AI project progresses. This provides another incentive to move ahead with selective AI initiatives before completing a "boil the ocean" organization-wide data cleanup.

"I think that in certain areas you can say, let's use the AI to discover how big is your gap in terms of data," said Patick Chew, vice president, Artificial Intelligence and Data Science at global transportation provider AIT Worldwide Logistics.

"AI is very good about isolating discrepancies for you," agreed Montclair State's Chun. "Where two departments have conflicting policies, they were surfaced while we were implementing the [AI] solution. The lesson for me was that it's okay if the data is not perfect, it's siloed, and there are conflicts – those will surface as you implement these products. And then AI is intelligent enough to know that those are problems."

The **data hygiene** thing is really big for me, because I'm discovering how much **data I have that is just unusable right now.**"

– Kevin Rhode, CIO
District Medical Group

One way AI may help is by automating the application of new metadata to make disjointed data useful for AI applications, said Sandy Ono of OpenText. "Automation of the actual information management itself would then further enable your automation efforts across the organization."

Lastly, panelists agreed that data ownership issues must be addressed along with any technical concerns. Battles over territory are a familiar problem in large organizations. "Everybody has come to realize that if the organization doesn't want to share the data, AI will fail," said Badrudeen.

Assigning clear accountability for AI outcomes is a key strategy, "Who's the data owner for that financial domain, that operational domain, and sales domain? Your AI success is going to be pegged to that data," said Chew. "As soon as you tag people who are accountable for the data, then there are no excuses for that AI to hallucinate. You own the data; you have to fix the quality related to that."

The way AI work is organized in the enterprise is also part of the solution – or part of the problem, as we'll explore next.

ii. Identifying roles, skills, and talent

Organizational structure makes a difference in overcoming territorialism and in delivering results that matter most to the business.

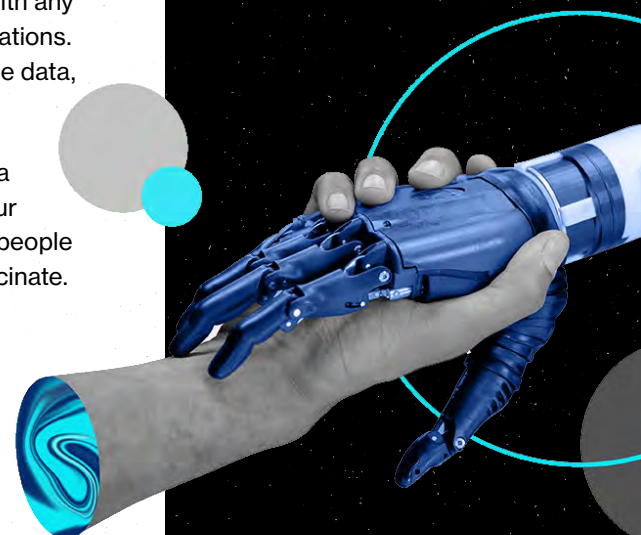
Fundamentally, AI efforts must be embedded with the rest of the company and work closely with the data organization, rather than operating as a separate AI unit, which can lead to "a complete disaster," argued Badrudeen. "AI requires an enormous amount of clean data, so that requires a cohesive strategy between data and AI. That's why you see a lot of 'Chief AI and Data' roles created, because people have realized it has to coexist. It cannot sit separately."

Structure is just one part of the equation, of course. Panelists across industries agreed that hiring and developing AI talent are both tough jobs.

It's not purely a question of technical chops. "Storytelling as a means to create disciplined excitement for how to use AI with integrity...requires a data analyst combined with a liberal arts person," said Andrea Ballinger, CIO of Oregon State University. Ballinger noted the advantage of her university setting, which produces a stream of new skilled workers. "But when I go to the marketplace looking for [experienced talent], it's hard to find. We're competing against a lot of folks."

Beyond the need for data scientists and engineers, panelists stressed that the general workforce needs new education and skills to get the most from AI. To Ballinger's point about "disciplined enthusiasm," fear of missing out can lead workers to "independently dip their toe in the water, which becomes a big risk," said Boyden's Pikul.

"My challenge is bringing people up to speed and having proper governance to make sure people are using tools in the right way – ethical and responsible – while handling sensitive data," agreed James Hu, CIO of the Maryland Military Department.



AI efforts must be **embedded** with the rest of the company and **work closely with the data organization**, rather than operating as a separate AI unit.

To that end, panelists noted that "responsible AI" frameworks, such as the NeMo toolset developed by NVIDIA, can help organizations create both useful guidelines and technical guardrails to support AI usage. State Street, for example, has developed an internal capability they call "RAG (retrieval augmented generation) as a service" to help protect employees from accidentally connecting to unapproved external knowledge bases via public large language models (LLMs).



iii. Getting what you need from vendors

Every software as a service (SaaS) or software supplier is rushing pell-mell to add AI functionality and the panelists are relying on vendor partnerships to varying degrees for their AI initiatives.

CIOs at a few large organizations indicated that they aren't particularly reliant on vendors, having sufficient in-house resources to develop the capabilities they need. Those were the exception rather than the rule. Most panelists reported that vendor partnerships are a part of the work, and the degree and nature of that vendor involvement is based on organizational resources, data quality, and the maturity of AI efforts.

At real estate investment advisory company Waterton, for example, CIO Doug Pearce said his team "will initially lean on vendors while we grow our own expertise in-house. We don't have the in-house knowledge and skill set today to do some of this, so we're really having to rely more on vendor solutions."

Scot Burdette, global division CIO, measurement and analytics at ABB, a 145-year-old global manufacturer based in Zurich, Switzerland, took it a step further. "What would help me the most is when a provider or supplier can help bring structure and help me understand the steps we need to take. Here's the path we're going to follow, and here's the benefit between each step as we build this out. So, for me, it's really about structure," he said. "The type of reporting that you need to drive to and the data acquisition processes...help me understand all the components of the recipe to put together."

FIRST's Gildersleeve, noting the increasing overlap between platforms, said she'd find value in "guidance as to why we would use one tool over another" for any particular use case.

Of course, given the level of AI competition among providers of all sorts, unbiased tool recommendations may prove hard to find. "I would like vendors to learn about our pain points and what problems we have before pushing products – which usually are either not mature or not filling what we need," said Neda Parnian, VP of Innovation and Digital Transformation at Summit Interconnect, an advanced technology manufacturing company.

Parnian described it like this: "Instead of software as a service, they're offering 'hype as a service!'"



**The whole industry
is moving so fast.**

It's hard to keep up
with vendors and all
the **new features
getting introduced.**

Sometimes our end
users find out about
new features before
we do."

– Deb Gildersleeve, CIO
FIRST

Strategies for persistent challenges

Across the three CIO Think Tank discussions, four common challenges stuck out: choosing which use cases to start with; addressing AI's various risks, which aren't fully understood; handling data sovereignty requirements; and arriving at shared expectations about how AI models are developed and deployed.

i. Prioritizing use cases

At most companies, there is enthusiasm for getting started with AI – almost too much. Black & Veatch "did some 'AI ambition workshops' and collected something like 450 different use cases," said Scott. "We have to find a better way of bringing this down and make it palatable for the business."

Some panelists approached this task through workshops, others through organization-wide surveys, and still others via advisory teams or governance panels. Gathering use cases is not a problem. Prioritizing them is.

As noted earlier, use cases for which solid data already exists can get started quicker. Over time, one-offs can contribute to product and data sprawl; eventually most organizations will need to get to a more consistent single data foundation, said Ono. "When you have larger projects that cross multiple functions of your company, you need your systems of record and your single source of information to be somewhere. So, it's this delicate balance" she said. "I need everything on a single platform to really get the value out of AI. But then I also have many business counterparts that say, 'May I just buy this little application that does this little thing for me?'" Practical governance may involve finding this balance of centralization efforts and "spot-use cases" that do provide value.

Even so, several panelists said the proverbial low-hanging fruit didn't provide enough value in return. CIO editor Amy Bennett characterized these organizations' new approach as "getting to the greatest value quickly" instead.

At Montclair State, Chun said that despite great early enthusiasm for LLM uses in education, the reasoning capabilities scored only 50% to 60% on usefulness metrics.



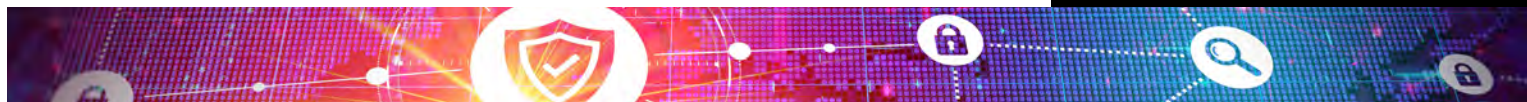
When you have **larger projects** that cross **multiple functions** of your company, you need your **systems** of record and your single source of information to be somewhere.”

– Sandy Ono, CMO
OpenText

"Traction," as he described it, arrived when the team switched their focus to partnering with tech startups, applying more cutting-edge technologies to more ambitious problems.

In a similar vein, at NBME, Daddala said his group worked with functional teams and "identified four or five use cases where we could gain the maximum benefits using AI," rather than making simplicity or data quality the top criteria.

A last consideration: prioritize AI uses that "feel native to or improve on" key work processes, said IDC's Machado. "In the end, your core business remains the same. So, think about solutions that feel like they're native to the workflow, as opposed to feeling like, 'Oh, here's some other thing I have to deal with now,'" she said.



ii. Mitigating security and other risks

AI's new risks aren't limited to hallucinations. Other issues include data poisoning, fragmented security data, inadvertent exposure of sensitive data, and agents going rogue.

Even within a single vendor's offerings, said Richard Zhu, CIO of the State of Tennessee's Mental Health and Substance Abuse Services (MHSAS) department, "there's a big issue of information management." Working with Microsoft's AI assistant Copilot in the context of a Microsoft environment, Zhu said, "we struggled with sensitivity tags – how to tag each email and decide whether it's for public consumption or needs to be secured."

In terms of solutions and strategies, Eddie Tsai, Information Security Officer at Apple Bank, emphasized starting with a comprehensive risk assessment, with data access a key consideration. "We're doing AI gap analysis – what type of potential data [applications or agents] can have access to. We want to make sure that it's all well contained within a sensitive environment."

AI tools may help in wrangling security information, but that path isn't clear yet. Alan Shen, cybersecurity leader at Los Angeles County Development Authority (LACDA), noted "When you have a lot of disparate platforms, the challenge stems from how we can allow platforms to give us something meaningful when we want to look at a meaningful 1,000 bits of data versus a million bits." Shen said the company wants AI that can filter information according to LACDA's own risk appetite – "even agentic AI is not quite applicable at this point," he said.

Other panelists added strategies such as limiting RAG to internal information sources, establishing gateways specifically for AI tools and data flows, and ensuring AI decision-making and actions are transparent, with clear audit trails.

Given these issues, companies heavy on sensitive information may choose to follow mid-Atlantic regional bank TowneBank's example and tilt the scale more toward strong governance versus cutting-edge innovation. As the company explores new AI offerings, "we're more judging the guardrails than we are judging the idea itself," said Denys Diaz, TowneBank's CIO. "AI is dangerous, but so is driving, and we all do it. You cannot really learn about it until you get in and play with it."



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– Eddie Tsai
Information Security Officer
Apple Bank

iii. Handling data sovereignty requirements

For multinational companies, sovereignty issues loom large, given the variety of legal requirements for data storage and governance around the world.

As AIT's Patrick Chew said, this concern will only be exacerbated as AI agents proliferate, communicating and acting across traditional organizational boundaries. An orchestrating agent may call on many other agents to execute a task. "How we string them together should be transparent regardless of where our data is," said Chew, while noting that he doesn't yet have clarity on how that will be accomplished.

Even within the US, different state laws create concerns. Some of EōS Fitness's AI tools use biometric markers, and other types of member information also may be subject to healthcare data protection laws, said Gette, which differ from Texas to California, for example.

To help maintain compliance, EōS Fitness's data fabric includes different layers that help manage which data is available to different AI models. Nevertheless, both Gette and Chew expressed the desire for AI, data, and SaaS vendors to help with effective and efficient regulatory compliance. Ono likewise noted that OpenText customers have been asking for this kind of assistance: "Sovereign cloud, sovereign AI – we hear it from large-scale and small-scale customers as well. It's becoming the crux of being able to trust AI models, and it's not an easy one to crack," she said.

iv. Managing business expectations

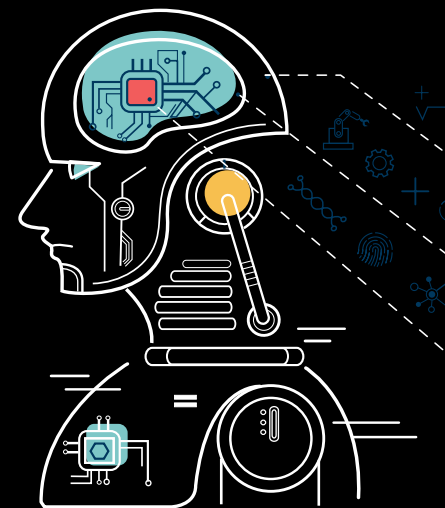
Calculating the ROI of AI per se isn't necessarily a problem. Panelists largely seem to have a handle on that, with standard methods applying.

Scott said Black & Veatch applies "traditional ROI calculation: How much time are you saving, how much money are you making, how many errors are you reducing?" Or as Lockton VP of Strategic Initiatives Raji Kumar put it, "money saved is still money made." At Lockton, which describes itself as the world's largest independent insurance brokerage, Kumar said, "we are looking at capacity planning as an ROI" – if agents can answer questions more efficiently, that creates the ability for them to interact with more clients and offer a higher-touch experience.

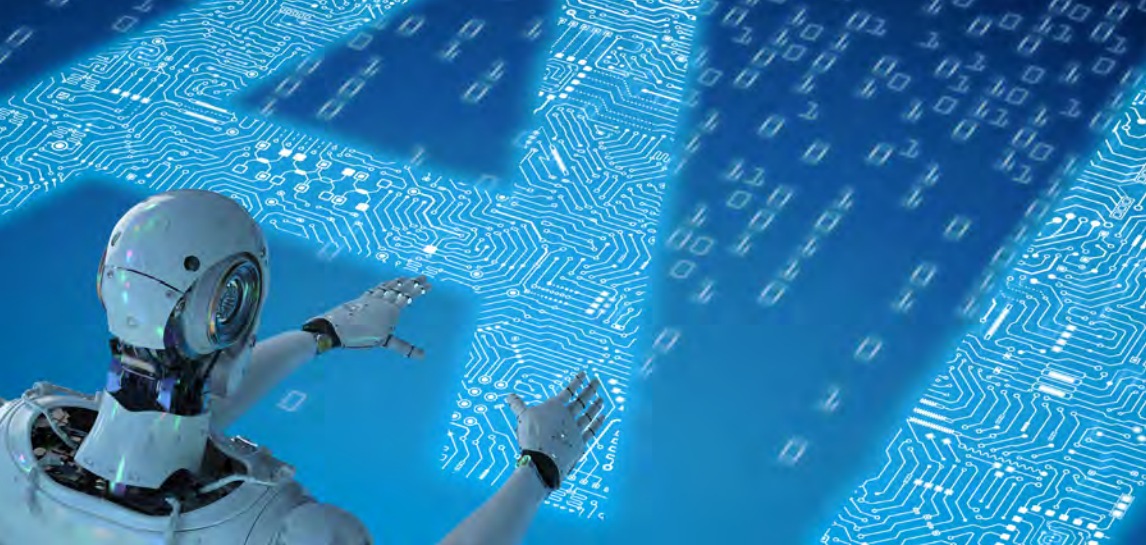
The first wave of returns then points the way for the next projects and purchases, said FIRST's Gildersleeve. The company uses ROI tests on pilots or small-scale projects "as a way to point us to our first bigger investments, making sure what we purchase will have some ROI right out of the gate."

What's more difficult is setting appropriate expectations for AI projects, not only in terms of ROI but also the process for getting there. AI differs in key ways from traditional tech implementations, said State Street's Badrudeen.

"The way the software life cycle works is completely different than a model life cycle. With software, I can write a deterministic rule, and then I deploy. I know it's going to work in production. But AI models need training in every environment where they deploy," he said. Data scientists need to run tests, review results, and experiment iteratively with training and values – while "dealing with 15-year-old data governance rules that are not created for the AI life cycle."



What's more **difficult** is setting **appropriate expectations** for AI projects, not only in terms of **ROI** but also the **process** for getting there.



More AI use cases and lessons learned

According to Foundry's research, **internal process automation** – currently in use by 69% of State of the CIO survey respondents – is a more prevalent use of AI compared to customer-facing applications, at 62%. But it's close, and both types of usage are off to the races.

This rapid uptake in a variety of settings was reflected in CIO Think Tank discussions. Indeed, moderators reflected that the pace and sophistication of AI use cases seemed to increase even from the first panel, held in June, to the final discussion just two months later.

i. Productivity, automation, and efficiency

In **Arizona**, the City of Avondale is rolling out Enterprise ChatGPT across the organization with established guidelines and policies, said Jeff Scheetz, Avondale's CIO, along with training on how to use the tool.

FIRST, the marketing agency, has taken a democratic approach to finding productivity-enhancing uses. The company created an AI task force to conduct systematic testing throughout the company, said Gildersleeve. "We started with surveying the organization and getting feedback on what people might be using and areas where they thought AI could help them, then grabbing three or four tools at a time and doing some testing."

Increasing developer productivity is one common usage of AI; at NBME, Daddala said, use of Microsoft Copilot together with some low- and no-code tools has improved productivity by around 30%.

Similarly, document and content processing with generative AI is particularly common; several panelists reported time savings or increased throughput of around 30% for completing tasks in this area. Within that arena, CIOs described several different tasks benefitting from AI.

30%

improved productivity by using Microsoft Copilot together with some **low- and no-code tools** at NBME.

AUTOMATED INDEXING, SEARCH, AND SUMMARY OF DOCUMENTS

The Nebraska Judicial Branch is working with a third-party vendor to use AI to process courtroom audio recordings – recording, adding timestamps, and integrating with transcription services, while monitoring the audio in real-time with AI features and functionality, said CIO Sanaz Ahmadi.

"One of our proof-of-concepts right now is being able to take thousands of pages of charts and distill that into a five, six-page face sheet that our physicians can review before they go in and talk to a patient," said Bob Hartmann, CIO of Hospice of the Valley, a not-for-profit organization that serves roughly 40,000 patients at a given time.

ANALYSIS AND PROCESSING OF CONTRACTS

JAMS, a US company that offers dispute resolution services for civil litigation, is using AI to help case managers process documents for arbitration cases, said CIO William Zauner. "As a contract comes in for arbitration, anywhere from 50 pages to 200 pages, we're using AI to help expedite that process and find the information in those documents that would normally have to be rooted out by our case managers."

Because the data involved is often highly sensitive, Zauner said the company "jumped on AI early," starting with policy and procedure development to ensure necessary privacy, security, and accuracy were prioritized.

JAMS is also using AI in marketing and HR applications, he said.

INFORMATION RETRIEVAL AND SUMMARIZATION FROM INTERNAL SOURCES

At Citigroup, "AI is exposed to all our employees," said Darren Paffenroth, VP of Operations. For example, "we've got AI helping with workflows, comparing documents, pulling information out of our vast resources, and summarizing those documents," he said. Most of AI's work is focused on internal processes, he said, with the exception of externally focused chatbots – which can serve as another risk mitigation strategy.

Paffenroth characterized Citigroup's AI initiatives as a natural outgrowth of earlier work in robotic process automation.

Pat Quint, CIO at Duravant, which makes packaging and processing equipment, also reported developing internal retrieval augmented generation (RAG) models for internal data and assets – but in this case, to help field service technicians on site at customer locations find relevant maintenance or repair information.



AI is exposed to all our employees. We've got AI helping with **workflows, comparing documents, pulling **information** out of our vast resources, and **summarizing** those documents."**

– Darren Paffenroth
VP of Operations
Citigroup



ii. Enhanced customer service and CX

Daddala said that **improved customer experience (CX) is a top strategic focus** for all of NBME and therefore the key goal of its AI uses. Many of the potential gains in internal efficiency will arise naturally from the effort to prioritize the customer, he said.

Pearce said Waterton is already implementing AI property management agents. "If you reach out to one of our properties for information, it'll be an AI agent answering your questions via SMS, email, voice, et cetera." When the AI agent gets a question or request it can't address, it will pass that work over to a human.

Similarly, Six Flags is looking at LLMs to create "smart agents" to help guests plan visits to the company's 42 amusement park locations, said Jeff Slone, corporate VP IT Operations and Security. "Every location has their own guest services [operating procedures], databases, information about which rides kids can ride, what rides will be open, when's the water park open," he said. "This should be low-hanging fruit for any internally based LLM."

iii. Specialized industry applications

Numerous panelists also offered examples of AI already at work on more specialized tasks. Examples included:

INDUSTRIAL AUTOMATION EQUIPMENT, FROM CRUISE SHIPS TO MARS

ABB uses AI to analyze and improve the health and operating environment of equipment it produces – which can be found in settings from Norwegian Cruise Line ships to NASA's Mars Rover, said Burdette.

A COMPANIONSHIP CHATBOT FOR SENIOR HEALTHCARE

RiverSpring Living, a senior living and home care provider in New York state, worked with an AI startup to create a chatbot for elder care. The chatbot offers conversation for older patients who live alone, which helps combat loneliness and improve overall mental health. Patients are informed very clearly that the chatbot isn't a human companion. Even so, a clinical trial in late 2024 "found significant reductions in depression and isolation – equaling that from medication," said David Finkelstein, CIO. RiverSpring Living's project has been written up in medical journals as well as the *Wall Street Journal*.

EXECUTIVE SEARCH ASSISTANCE

At Boyden, AI helps with a wide variety of tasks. "We have AI-enabled search tools for business development, production of pitch decks, analysis of candidate profiles, and position profiles that are audio or video," said Pikul.

EMPLOYEE TRAINING, ANOMALY DETECTION, AND MORE IN FINANCE

Lockton is "developing avatar-based training tools and claims processing, said Kumar. "The company has just rolled out a new AI resource group across all of Lockton globally" focused on improving client experience and employee productivity through various AI tools and platforms.



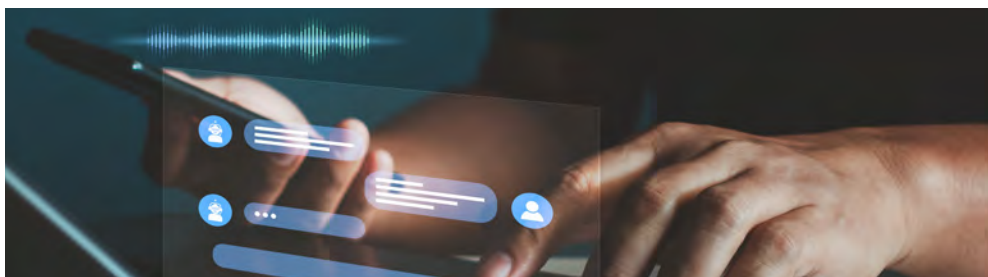
RiverSpring Living, worked with an AI startup to create a **chatbot for elder care**. The chatbot offers conversation for older patients who live alone, which helps **combat loneliness** and **improve overall mental health**.

Kumar also said the company is "looking at millions of rows of information for fraud, waste, and abuse detection through agentic AI techniques."

At State Street, Badrudeen said that AI-based, probabilistic anomaly detection is layered on top of existing rule-based detection, resulting in a 30% improvement in performance. "These probabilistic machine learning models are capable of finding patterns which cannot be done using specific rules," he noted. Trying to codify everything into deterministic rules results in too many false positives.

FITNESS APPLICATIONS

At EōS Fitness, personal training customers can use an application called Genius, co-branded by EōS and German company EGYM, to design and track their own workouts on connected equipment, said Gette. Genius involves a generative AI system that incorporates the user's health information and training goals along with workout heatmaps and other information.



vii. AI agents: the future (that's happening now)

Even as some organizations are just working out governance kinks or piloting generative AI projects, the next generation of AI agents is already in motion at a number of CIO Think Tank companies. Agentic AI is characterized by its ability to act autonomously, taking a user-assigned goal and selecting the most effective tasks to achieve it.

Gette said EōS Fitness "started our journey with an AI chatbot solution called Yellow AI" which had some uses for both fitness and retail operations and which has been in place for about 18 months. The company is already looking at agentic solutions as possible replacements for that generative product.

Indeed, for some organizations, agentic AI – moving from summarizing to doing, as OpenText's Ono said – is where the real ROI for AI has started to crystalize.

Chun reported current deployment of multiple AI agents at Montclair State. "We have one called Maya that's solving engaging our students at the undergraduate level. We have Jordan that's interacting with the graduate students." Another, dubbed Aurora, is under development to help address adult learning.

These agents increase student engagement and support them in executing tasks from the enrollment process through graduation. The agent names are not trivial, but important, Chun said: "If you want to get a lot of engagement, give your agents names."



We have one [AI agent] called **Maya** that's solving **engaging** our students at the undergraduate level. We have **Jordan** that's **interacting** with the graduate students. If you want to get a lot of **engagement, give your agents names.**"

– David Chun, CIO
Montclair State

Panelists

Foundry and OpenText thank all of our panelists for sharing their challenges and insights:

FOUNDRY



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