CASE STUDY — AI GOVERNANCE & STRATEGY

Building the AI Governance Council

How SaaS Business Advisors designed and stood up a cross-functional AI Governance Council — giving a SaaS company the structure, accountability, and operating model needed to scale AI responsibly across the enterprise.

THE PROBLEM

AI without governance isn't a strategy, it's a liability. As organizations accelerate their AI investments, many find themselves in the same position: a growing collection of tools and experiments with no unified oversight, no accountability for outcomes, and no way to know whether any of it is actually working.

For one $2B SaaS company, the symptoms were clear. Teams were building AI tools without documented goals. Successful pilots weren't making it to production. There was no consistent process for evaluating new requests, no framework for measuring ROI, and duplicate tools were multiplying across departments. Speed without structure had become the norm — and without intervention, the AI program was at risk of stalling entirely.

The Gap	What was missing
No documented value	Teams were building AI tools without clear goals, outcomes, or success metrics to justify the investment.
Tinkering without scale	Experiments stayed experiments. There was no path from pilot to production to measurable business impact.
No ROI tracking	AI spend was growing but the business lacked a framework to measure whether it was actually paying off.
Duplicate tools	Similar GPTs and AI tools were being built in parallel by different teams, creating confusion and wasted spend.
No framework	Without clear direction, roles, or process, the AI transformation was stuck — unable to move at the speed the business needed.

THE SOLUTION: AN AI GOVERNANCE COUNCIL

SaaS Business Advisors was engaged to design and stand up an AI Governance Council — a cross-functional body with the authority, structure, and operating model to bring order to the organization's AI program. The mandate was clear: build a foundation that allows the company to move fast and focus on the right things, without sacrificing compliance, accountability, or strategic alignment.

> ***"AI is moving fast — the challenge isn't adoption, it's orchestration. Speed without strategy is chaos. The Governance Council ensures we move fast and focus on the right things."***

The council was designed to be cross-functional by intent — not just IT, not just the business, but a deliberate combination of perspectives that ensures every AI initiative is evaluated from the angles that matter: business value, technical feasibility, financial prudence, legal exposure, data quality, and ethical responsibility. Each member brings a critical lens. Together, they make better decisions faster.

THE CHARTER: THREE MANDATES

The Governance Council was chartered around three core mandates that define its scope and authority across every AI initiative in the organization.

Strategic Oversight

Intake and prioritize all AI initiatives. Define evaluation and approval criteria. Decide when to build, buy, or enhance.

Outcome Accountability

Ensure each initiative has a clear business case, ROI model, and KPI tracking. Guide funding allocation and resource support.

Guardrails & Structure

Govern ethical use, data compliance, and integration with enterprise systems. Deliver clear success guidelines and protect the organization.

THE GOVERNANCE STRUCTURE

The council operates through a three-tier structure that provides strategic oversight at the executive level, operational coordination at the program level, and tactical execution at the workstream level. Each tier has clear accountability and defined interfaces with the others.

Level	Focus	Responsibilities
Executive Level	**Strategic Oversight**	Approves funding, reviews quarterly AI portfolio, ROI, and KPIs. Ensures AI aligns with long-term business strategy. Reports to the board.

Program Level	**Governance & Operational Control**	Owns the AI roadmap, governance framework, and AI Cockpit. Manages cross-functional coordination, communications protocol, and reporting.
Workstream Level	**Implementation & Monitoring**	Develops agents, drives adoption, partners on change management and training, monitors performance, and drives continuous improvement.

Supporting the three tiers are five dedicated support functions: Data Governance, Legal & Compliance, Onboarding & Enablement, Platform Architecture, and Risk Management. These functions provide the specialized expertise that complex AI programs require, without creating bottlenecks in the decision-making process.

THE GUIDING PRINCIPLES

SaaS Business Advisors established six guiding principles that govern how the council operates and how AI initiatives are evaluated. These principles are not aspirational — they are embedded in every process, every meeting, and every funding decision the council makes.

Clarity before creation

Define value and outcomes before building. Measure success and link delivery to business value.

Streamline the tech stack

Avoid redundancy. Consolidate tools, choose the best fit, and focus on data and content integrity.

Clear roles and accountability

Define responsibilities for each phase. Foster accountability and regularly review successes and failures.

KPIs first, investment second

Track meaningful KPIs and ROI from the start. Commit to business outcomes before committing a budget.

Follow the AI Factory

Use a consistent process: Ideation → Prototype → Validation → Scaling → Monitoring.

Operationalize success

Turn experiments into practical tools. Validate, integrate, assign ownership, and commit to measurable outcomes.

THE OPERATING CADENCE

One of the most important design decisions in standing up the council was establishing a meeting cadence that keeps AI moving without creating bureaucratic drag. SaaS Business Advisors designed a five-meeting rhythm that serves different audiences at different altitudes — from weekly operational intake reviews to quarterly board updates.

Meeting	Frequency	Purpose

AI Submissions Review	**Weekly**	Evaluate intake requests, categorize, disposition, and prioritize new AI submissions.
Data Council	**Bi-Weekly**	Review data governance, architecture, platform and integration management.
Governance Council	**Monthly**	Strategic prioritization, backlog grooming, and cross-functional planning.
ELT Update	**Quarterly**	ROI review, AI strategy and roadmap. Adjust strategy and prepare for board.
Board Update	**Quarterly**	Executive readout on program outcomes, ROI, and the strategic AI roadmap.

Each meeting has a defined owner, purpose, and outcome. Pre-wire materials are distributed two to three days in advance. Meeting outputs — approved use cases, risk logs, budget notes, council decisions, and assigned follow-up owners — are documented and archived in the AI Governance workspace after every session.

THE INTAKE PROCESS & DEVELOPMENT LIFECYCLE

Every AI initiative enters the organization through a structured intake process. Submitters open a standardized request in the company's project management system, defining the business problem, the type of request (new AI software, new custom build, or AI capability enhancement to an existing system), the expected ROI type, and how success will be measured.

The council reviews every submission against five evaluation criteria: strategic alignment, expected ROI, technical feasibility, data availability, and resource readiness. Each criterion is scored from zero to five. The scores are aggregated and plotted on a prioritization matrix that makes the decision transparent and defensible, regardless of which business unit submitted the request.

Approved initiatives move through a defined development lifecycle: Ideation → Approval → Requirements & Design → Build → System Test → User Testing → Deploy → Monitor. At each phase, business sign-off is required before the next phase begins — ensuring accountability at every step and protecting the organization from scope drift or misaligned outcomes.

ROI TRACKING & REPORTING

The council measures every AI initiative against a consistent framework of topline and bottomline ROI metrics. Reporting isn't just about tracking completion — it's about demonstrating impact. Every initiative is tied to at least one of four value streams.

Category	ROI Type	What it measures
Topline	Increase Revenue	Direct growth in top-line sales or income attributable to the AI investment.
Bottomline	Productivity	Doing more with the same or fewer resources — measured by time saved or tasks automated.
Bottomline	Headcount Management	Reduction or avoidance of labor costs through automation, consolidation, or operational shift.
Bottomline	Software Reduction	Elimination or consolidation of tools, reduction in licenses, or reuse of platforms.

Performance is tracked through a centralized AI Performance Dashboard that gives business, IT, and finance stakeholders a real-time view of how each initiative is performing against its defined success metrics. Time saved, ROI realization, user adoption, and model accuracy are tracked with targets, actuals, and deltas — so the organization always knows where value is being delivered and where it isn't.

THE TAKEAWAY

AI governance isn't about slowing down. It's about building the infrastructure that allows the organization to move faster — with confidence, accountability, and a clear line of sight from investment to outcome. SaaS Business Advisors designed and stood up an AI Governance Council that treats AI as a corporate strategy and a competitive differentiator, not an IT experiment. The result is a program that is purposeful, secure, and sustainable — one that can scale as the technology evolves and the business grows.

AI Governance · **AI Council** · **AI Strategy** · **ROI Tracking** · **Intake Process** · **Cross-functional Leadership** · **Enterprise AI** · **Change Management**