

You Need a Strategy. Not an AI Strategy.

Why the fastest-growing companies treat AI as an accelerant, not a direction.



The Problem Every Board Room Is Facing

There is an arms race happening in executive suites, and it has nothing to do with strategy. CEOs are commissioning AI strategies, hiring Chief AI Officers, and standing up AI committees. Boards want AI roadmaps. Consultants are selling AI transformation programs.

Almost none of it is connected to the fundamental strategic question: Where are we going, and what are we willing to say no to in order to get there?

An AI strategy without a business strategy is a technology roadmap with no destination. It is a budget line with no connection to revenue, margin, or competitive advantage.

AI Is a Capability — Not a Direction

Strategy is about choices. Which products to invest in. Which markets to serve. Which capabilities to build, buy, or abandon. AI does not answer these questions. AI accelerates the speed at which you can answer them. That distinction matters enormously.

When AI becomes the strategy rather than serving the strategy, companies end up with impressive pilot programs that never scale, innovation labs disconnected from P&L, and transformation budgets that produce presentations instead of results.

CASE IN POINT: \$800M European Industrial Manufacturer

Situation: The board mandated an "AI strategy" after seeing competitors announce AI initiatives. The CEO engaged a Big 4 firm that produced a 90-page AI transformation roadmap with 14 workstreams. Six months and significant investment later, not one initiative had connected to the company's core strategic challenge: margin erosion in their two largest product lines.

Approach: We stripped it back to fundamentals. What external forces were driving margin pressure? Which product-market combinations still had pricing power? What capabilities — including but not limited to AI — would protect and grow those positions? The leadership team built the answers themselves using structured strategic tools over four intensive sessions.

Result: Within two quarters, the company had exited one underperforming segment, doubled investment in two high-margin niches, and deployed AI specifically to accelerate pricing intelligence in those segments. EBITDA improved 11% within the first year.

What the Best CEOs Are Doing Differently

They are not asking "What is our AI strategy?" They are asking:

- What external forces are reshaping our industry — and what do they mean for our business model?
- Given those forces, where should we focus to win — and what must we stop doing?
- What capabilities do we need — and where does technology (including AI) fit?
- How do we measure progress in quarters, not years?

These are strategy questions. They require rigorous tools, honest dialogue, and the discipline to make trade-offs. AI dramatically improves the quality and speed of information flowing into these decisions. But it cannot replace the decisions themselves.

The Compounding Advantage

Companies that get this right see a compounding effect. Clear strategy focuses AI investments. Focused AI investments produce faster results. Faster results build confidence and capability. Capability creates speed. Speed creates distance from competitors.

After 25 years of working with leadership teams across four continents, we have seen this pattern in every technology cycle — ERP, digital transformation, cloud, and now AI. The winners are never the fastest adopters. They are the ones that connect technology to the clearest strategy.

Technology changes. The need for strategic clarity does not. AI makes good strategy faster. It does not make bad strategy good.

YOUR NEXT MOVE

Ask yourself and your leadership team these questions this week:

- **Do we have a business strategy that AI serves — or an AI strategy looking for a business problem?**
- **Can every member of our leadership team articulate our top 3 strategic priorities without checking a deck?**
- **How much of our technology investment connects directly to our highest-priority product-market bets?**

Start the Conversation

Thinking Dimensions Global works with CEOs of \$300M–\$4B companies to build strategies that connect to P&L outcomes. We facilitate decisions and help leadership teams own execution across four continents.

Schedule a call: tlewko@thinkingdimensions.ca

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Read the book: MOVE: AI-Powered Strategy for a Fast World (Routledge, 2025)

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