



FREE PREVIEW

# The AI Journey & the Role of the Data Office

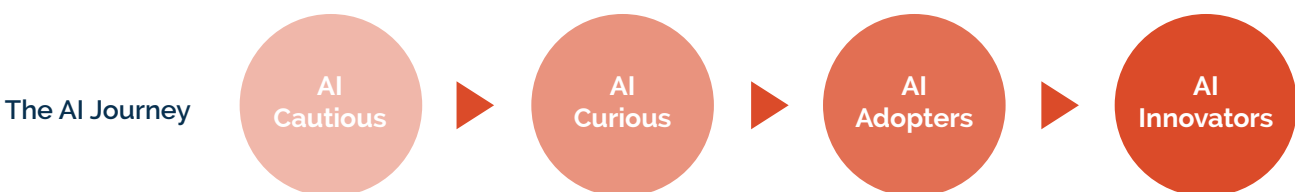
## Executive Summary

Artificial Intelligence has moved from conceptual interest to a Board-level imperative. Our research shows a distinct gap in prioritization between market participants: 48% of buy-side firms now categorize AI as a top Board Priority, compared to 36% of sell-side institutions.

Based on A-Team Research's deep-dive study of buy-side and sell-side institutions, this report shows that while investment is surging, a "strategy gap" remains: only 12% of firms have currently implemented a fully codified, enterprise-wide AI strategy. This research identifies the path forward for the Office of the CDO as it transitions into the role of the Chief Data & AI Officer (CDAO).

## The 4 Stages of the AI Journey: A Diagnostic Framework

Where does your firm sit today?



- 1. AI Cautious:** Minimal experimentation; focus is on risk mitigation, data privacy, and "locking down" public LLMs to prevent data leakage.
- 2. AI Curious:** Individual teams are using desktop productivity tools (summarization, coding assistants). Use cases are fragmented and ROI is difficult to track.
- 3. AI Adopters:** Established AI governance and secure "sandboxes." Firms at this stage are deploying specific use cases in high-value areas like ESG scoring and trade surveillance.
- 4. AI Innovators:** AI is integrated into the core data architecture. These firms have moved beyond "efficiency" and are using Agentic AI for revenue generation and autonomous decision support.

## The Structural Shift: From CDO to CDAO

One of the most significant findings in this report is the evolution of the leadership mandate. The role of the Chief Data Officer (CDO) is being fundamentally redefined.

- **The Evolution:** Institutions are transitioning toward the Chief Data & AI Officer (CDAO) role.
- **The Mandate:** This is not merely a title change; it represents a shift from "Data Protection and Governance" to "AI-Ready Data Exploitation."
- **The Strategy Gap:** Despite the surge in spend, only 12% of firms currently possess a fully codified, enterprise-wide AI strategy.

## The Three Pillars of AI Value

The full report categorizes institutional AI deployment into three distinct value streams. The summary below highlights the strategic focus:

- **Efficiency & Productivity:** Reducing the manual "drudge work" of data cleansing and/or meeting summarization.
- **Growth & Alpha:** Using AI for advanced asset allocation, sentiment analysis, and ESG signal generation.
- **Control & Governance:** Automating trade surveillance, KYC/AML, and model risk management

The full report features 9 deep-dive case studies across 3 value streams—Efficiency, Growth, and Control—detailing real-world ROI from Front-office Alpha generation to Back-office automation.

## Strategic Gaps: Why Institutions are Stalling (The Scaling Paradox)

While the vision for AI is clear, the execution is meeting significant friction. The full report provides the underlying data and peer-benchmarks for these four critical "Scaling Gaps":

- **The Data Readiness Tax:** We identify the #1 technical hurdle currently slowing down nearly 30% of the market—and why budget alone isn't solving it.
- **The Governance Exposure:** Why buy-side firms currently face double the exposure of their sell-side peers regarding established AI policies.
- **The Talent Wall:** The specific reason nearly a third of the sell-side identifies "Skills" as a blocker equal to the difficulty of data preparation itself.
- **Pilot Purgatory:** The specific "Production Barrier" that is keeping 25% of the industry stuck in the Proof-of-Concept phase.

## What's Inside the Full 33-Page Research Report?

The full subscription provides the specific evidence and strategic frameworks missing from this summary, including:

- **9 Detailed Case Studies:** Real-world implementations including "The Digital Employee" at a major US Bank and "Automating ESG Sentiment Analysis."
- **Budgetary Alignment:** Analysis of whether current investment matches the expectations for Data Office delivery.
- **The CDAO Roadmap:** Practical steps for evolving the data office to meet the demands of enterprise AI.
- **Sector Analysis:** Full charts with comparative insights into how Buy-Side vs. Sell-Side priorities are diverging in 2026.

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