

# McMillanAI

## Successfully Delivering AI Solutions

Online Executive Training Program

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### Jeff McMillan

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**Self-Paced · Enterprise-Licensed · 35 Modules · 8+ Hours of Content**

### PROGRAM OVERVIEW

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Successfully Delivering AI Solutions is a comprehensive, self-paced online training program for business leaders who need to understand, evaluate, deploy, and govern AI — without requiring a technical background.

The program is structured in two components: the Core Course — eight modules covering every dimension of AI leadership (~2.5 hours) — and a Companion Library of 26 specialized modules spanning Architecture, Leadership, By-Role, and the AI for Financial Advisors Edition (~15 minutes each). Together they deliver a complete AI fluency system that organizations can deploy broadly, efficiently, and on their own schedule.

*This is not a technical course. It is an executive calibration system — built to give decision-makers the knowledge they need to engage confidently in AI strategy, governance, and investment discussions.*

### Who This Program Is For

No technical background required. This program is designed for:

- C-Suite executives making AI investment decisions
- Business unit leaders responsible for AI adoption
- Technology managers overseeing AI implementation
- Board members and investors evaluating AI strategy
- Anyone responsible for AI governance or organizational transformation
- Functional leaders in Finance, Legal, HR, Marketing, Sales, Risk, Compliance, and Audit who want role-relevant AI fluency

THE CORE COURSE · 8 MODULES · ~2.5 HOURS

## The Complete AI Leadership Curriculum

Eight practitioner-built modules covering every dimension of AI a business leader needs to understand, evaluate, and act on. Each module builds on the last — by Module 8, participants have a complete, integrated picture of the AI landscape.

MODULE 1 · ~15 MINUTES

### AI Foundations

#### 1 AI Foundations *Understanding the Technology*

- What AI is (and isn't) — from definitions to domains
- History of AI: from symbolic systems to transformers
- How large language models work: attention, context windows, and reasoning
- Machine learning fundamentals with real-world examples
- Augmented decision making: combining human judgment with AI
- Strengths and limitations every leader needs to understand

#### By the end of Module 1, participants will:

- Have a clear mental model of how modern AI systems work
- Understand the difference between AI domains, models, and applications
- Be able to separate AI reality from hype with confidence

MODULE 2 · ~15 MINUTES

### GenAI Capabilities

#### 2 GenAI Capabilities *What AI Can Do For Your Business*

- The six core capabilities: search, summarize, analyze, generate, translate, transcribe
- 40+ practical use cases across business functions
- Multimodal AI: vision, audio, video, and cross-modal integration
- Retrieval-Augmented Generation (RAG) for enterprise accuracy
- The art of prompting: getting quality outputs consistently
- Common misconceptions and how to avoid them

#### By the end of Module 2, participants will:

- Understand the full capability landscape of modern generative AI
- Be able to map AI capabilities to concrete opportunities in their own business
- Have a working knowledge of prompting techniques they can apply immediately

MODULE 3 · ~15 MINUTES

### AI Strategy & Development

### 3 AI Strategy & Development *From Idea to Production*

- Linking AI initiatives to business strategy and ROI
- The GenAI development lifecycle: scope → build → deploy
- Building evaluation frameworks that catch problems early
- Lessons learned from hundreds of production deployments

#### By the end of Module 3, participants will:

- Have a repeatable framework for connecting AI to strategy and measuring ROI
- Understand the full development lifecycle from concept to production
- Know how to build evaluation frameworks that catch problems before they scale

### MODULE 4 · ~15 MINUTES

## Agentic AI

### 4 Agentic AI *The Next Frontier*

- What agents are and how they differ from chatbots
- Levels of autonomy: assisted → semi-autonomous → autonomous
- How agents will orchestrate organizational functions
- Challenges, risks, and best practices for deploying agents

#### By the end of Module 4, participants will:

- Know what agentic AI is and how to think about it for their organization
- Understand the risk and governance implications of more autonomous AI
- Be able to evaluate agentic AI opportunities with appropriate skepticism

### MODULE 5 · ~15 MINUTES

## Building AI Use Cases

### 5 Building AI Use Cases *From Ideas to Reality*

- Build foundations first: infrastructure, training, sandboxes
- Best use cases come from real workflows, not invented scenarios
- Business cases must anchor to cost, revenue, or risk reduction
- Prioritization frameworks for competing initiatives

#### By the end of Module 5, participants will:

- Have a repeatable framework for identifying and prioritizing AI use cases
- Know how to build a business case anchored to real, measurable outcomes
- Understand what needs to be true before committing to a build

MODULE 6 · ~15 MINUTES

## Data, Content & Quality

### 6 Data, Content & Quality *The Fuel That Powers AI*

- Data is the fuel that powers AI — bad inputs mean bad outputs
- AI amplifies poor data quality — it does not fix it
- Assessing data readiness before you build, not after
- Content strategy for knowledge-intensive AI applications

**By the end of Module 6, participants will:**

- Understand why data quality is the most under-appreciated risk in AI
- Know how to assess data readiness before committing to a project
- Be able to ask the right questions about data in any AI initiative

MODULE 7 · ~15 MINUTES

## Governing GenAI

### 7 Governing GenAI *Balancing Innovation & Control*

- The six components of GenAI risk management
- Finding the middle ground: control versus innovation
- Building a hybrid operating model (central + business units)
- Responsible AI principles and sequencing: Year 1 → Year 3+

**By the end of Module 7, participants will:**

- Have a blueprint for governance that enables speed without sacrificing control
- Understand how to structure an AI operating model that scales
- Know the six components of GenAI risk and how to manage each one

MODULE 8 · ~15 MINUTES

## Organizational Transformation

### 8 Organizational Transformation *Bringing Your People Along*

- Addressing employee fears about AI honestly
- Jobs vs. tasks: what actually changes
- Building trust through transparency and guardrails
- Change management strategies for sustainable AI adoption

**By the end of Module 8, participants will:**

- Know how to lead organizational change that builds trust, not fear
- Understand the jobs-vs-tasks distinction and how to communicate it
- Be fully prepared to apply everything across their organization

## Deep-Dive Tracks for Specialized Audiences

The Companion Library extends the core curriculum into specialized areas. Each module is a standalone ~15-minute session — designed to be assigned selectively based on role, seniority, or organizational priority. Organizations can deploy the full library or curate specific tracks for specific teams.

### ARCHITECTURE TRACK · 4 MODULES

#### Enterprise AI Infrastructure for Leaders

Designed for technology leaders, senior executives, and anyone responsible for AI infrastructure decisions. These modules explain the stack underneath the tools — where most of the consequential decisions actually get made.

**A.1 Enterprise AI Architecture** *The six-layer infrastructure framework every AI program depends on*

**A.2 Data Privacy & AI** *What leaders need to know about privacy risk in enterprise AI deployment*

**A.3 AI Vendor Evaluation** *How to evaluate AI vendors, platforms, and models without getting captured by demos*

**A.4 Vibe Coding & AI-Assisted Development** *What the rise of AI-generated code means for technical and non-technical leaders*

### LEADERSHIP TRACK · 3 MODULES

#### Governance & Oversight for Boards and Executives

Purpose-built for boards of directors, C-suite executives, and senior leaders who need to govern AI at the organizational level. These modules cover the questions leaders are accountable for — without requiring technical depth.

**L.1 AI & the Board** *What boards need to know, ask, and govern in the age of AI*

**L.2 AI for CEOs** *Strategic priorities, organizational questions, and leadership posture for the CEO*

**L.3 AI & Ethics in Practice** *Moving from principles to policy — how organizations build ethical AI in practice*

### BY-ROLE TRACK · 9 MODULES

#### Role-Specific AI Fluency Across the Organization

Each module delivers targeted AI education for a specific function — grounded in that role's actual workflows, risk exposures, and decision-making responsibilities. Assign individual modules to specific teams, or deploy the full track organization-wide.

**R.1 AI for Finance** *Use cases, risks, and decision frameworks for finance professionals*

**R.2 AI for Marketing** *How AI is reshaping content, targeting, and customer engagement*

**R.3 AI for Technologists** *The changing role of technologists in an AI-first organization*

**R.4 AI for Administrators** *Practical AI tools and workflows for administrative professionals*

**R.5 AI for Risk & Compliance** *Managing AI risk within existing compliance frameworks*

**R.6 AI for Auditors** *How AI changes the audit landscape — as a tool and as a subject of review*

**R.7 AI for Lawyers** *Legal implications, risk exposure, and opportunities for legal professionals*

**R.8 AI for HR** *Talent strategy, workforce planning, and employee experience in an AI organization*

**R.9 AI for Sales** *How AI augments the sales process, from prospecting to close*

## PROGRAM OUTCOMES

<p><b>— Strategic Clarity</b> A clear framework for prioritizing AI investments and linking them to business outcomes.</p>	<p><b>— Practical Knowledge</b> The vocabulary, mental models, and frameworks to engage AI decisions with confidence.</p>
<p><b>— Governance Blueprint</b> A balanced approach to AI governance that enables innovation while managing risk.</p>	<p><b>— Role-Specific Fluency</b> Each function trained on the AI issues most relevant to their work — not a one-size-fits-all overview.</p>
<p><b>— Leadership Alignment</b> Shared language and shared priorities across executive, board, and functional leadership.</p>	<p><b>— Vendor &amp; Investment Readiness</b> Confidence engaging in vendor evaluations, capital allocation, and AI investment discussions.</p>

## ENTERPRISE LICENSING & PRICING

This program is available exclusively through enterprise license. There is no individual enrollment. Organizations license the program for internal deployment across their leadership and high-impact teams.

SEATS LICENSED	PER SEAT
50 (minimum)	\$997
Up to 250	\$750
Up to 1,000	\$500
Up to 5,000	\$350
Up to 10,000	\$250
Up to 25,000	\$175
Up to 50,000	\$125
Up to 100,000	\$100
100,000+	Custom — Contact Us

### Pricing scales with organizational reach.

At \$997 per seat for up to 50 leaders, the entry tier is priced as a premium executive education investment — well below the cost of in-person alternatives but purpose-built for decision-makers. Volume breaks reward organizations that deploy broadly, with per-seat costs declining to \$100 at the 100,000-seat level.

<b>Enterprise License</b>	12-month agreement covering up to 50 leaders — full access to the core course and companion library
<b>Distribution Rights</b>	Internal distribution to licensed employees with no per-seat streaming fees
<b>Renewal</b>	Annual renewal with updated content as the curriculum expands

#### ADDITIONAL NO-COST OFFERINGS FOR SEAT LICENSES ABOVE 5,000

- 8-hour live leadership AI training session with Jeff McMillan
- 2-hour board briefing with Jeff McMillan

*Annual renewal with updated content as the curriculum expands. Organizations that license the online program as part of a Strategy & Assessment engagement receive it included.*

#### FORMAT

Self-paced online

#### CONTENT

8+ hours · 35 modules

#### LICENSE

12-month enterprise agreement

## ABOUT THE INSTRUCTOR

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### Jeff McMillan

Jeff McMillan brings 30 years of practical data, analytics, and AI experience to this program. As the former Head of Firmwide Artificial Intelligence at Morgan Stanley, he led AI strategy, governance, and enterprise deployment across a global financial institution — designing and rolling out AI platforms used by tens of thousands of employees.

Earlier, as Chief Analytics & Data Officer for Morgan Stanley Wealth Management, Jeff designed and deployed the industry's first real-time "Next Best Action" decisioning engine for financial advisors — a system that changed how the firm served clients at scale.

Jeff currently teaches AI strategy at Columbia University's MBA program and serves as a strategic AI advisor to boards, CEOs, and investors across industries. His approach is grounded in direct operating experience — having personally overseen the deployment of hundreds of GenAI use cases from concept through production.

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