

Combined Reference

AI Opportunity Evaluation Pack — Full Provenance

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This document reproduces every detail from the AI Opportunity Evaluation Pack with inline provenance tags. Each fact is marked as one of:

- **SOURCED** — directly from a file on the Cloudcore website, with the file path noted
- **INFERRED** — a reasonable conclusion drawn from sourced material, but not explicitly stated
- **INVENTED** — created for the brief; plausible and non-contradictory, but not in the repo

Executive Stakeholder Positions

Marcell Ziemann, Chief Executive Officer

Detail	Status	Source / Reasoning
Preferred initiative: customer support chatbot	INFERRED	Backstory emphasises customer experience as top strategic priority (marcell_ziemann_ceo.md) but does not name a single preferred initiative
Customer experience is most urgent strategic priority	SOURCED	marcell_ziemann_ceo.md — strategic priorities section
September 2024 breach damaged client trust	SOURCED	marcell_ziemann_ceo.md, data_breach_overview.md
NPS dropped from 45 to 28	SOURCED	lisa_chen_cmo.md
Cites 70-85% AI project failure rate	SOURCED	marcell_ziemann_ceo.md
Will not commit capital without evidence-based plan	SOURCED	Same file
Board wants AI positioning	SOURCED	Same file
Lost enterprise deals to competitors with AI messaging	SOURCED	Same file
Quotable statement (“I’d rather be six months behind...”)	INVENTED	Written to match his established voice: cautious, breach-conscious, strategic
Tension with Sophia (speed vs governance)	SOURCED	Established across both backstories (marcell_ziemann_ceo.md, sophia_martines_ciso.md)

Mark Gonzalez, Chief Technology Officer

Detail	Status	Source / Reasoning
Preferred initiative: predictive maintenance	INFERRED	Backstory says “maybe predictive maintenance” as starting point (<code>mark_gonzalez_cto.md</code>)
Infrastructure telemetry via Prometheus and Grafana	SOURCED	<code>mark_gonzalez_cto.md</code>
Data pipeline partially in place for this use case	INFERRED	Prometheus/Grafana confirmed; “partially in place” is editorial framing
AI readiness: Infrastructure 3-4/5, Data 2/5, Talent 1/5, Governance 1/5	SOURCED	<code>mark_gonzalez_cto.md</code>
6-12 months before meaningful AI results	SOURCED	Same file
Zero data scientists or ML engineers	SOURCED	Same file
Quotable statement (“We have zero data scientists...”)	INVENTED	Combines sourced facts into a fabricated direct quote matching his honest, pragmatic voice
Tension with Aisha (build vs buy)	INFERRED	Both backstories establish the dynamic (<code>mark_gonzalez_cto.md</code> wants to build capability; <code>aisha_rahman_cfo.md</code> asks for ROI and faster results) but neither explicitly frames it as build vs buy
ML engineer salary \$180-250K AUD	SOURCED	<code>karen_lee_hr_manager.md</code>

Sarah Thompson, Chief Operating Officer

Detail	Status	Source / Reasoning
Preferred initiative: churn prediction	INFERRED	Backstory lists “customer health scoring and churn prediction” as potential (<code>sarah_thompson_coo.md</code>)
Churn rose to 8% annually	SOURCED	<code>sarah_thompson_coo.md</code>

Detail	Status	Source / Reasoning
Customer satisfaction 82% (target 85%)	SOURCED	Same file
First-call resolution 68%	SOURCED	Same file
Support team of 8 people	SOURCED	Same file
Team anxious about AI replacing roles	SOURCED	Same file
Wants augmentation not headcount reduction	SOURCED	Same file
Insists on gradual rollout with human oversight	SOURCED	Same file
Quotable statement (“Every customer we lose...”)	INVENTED	Written to match her customer-first, team-protective voice
Tension with CEO/CTO on efficiency vs staff	INFERRED	Sarah’s backstory emphasises “automation should support people, not replace them”; Marcell and Mark discuss efficiency gains

Aisha Rahman, Chief Financial Officer

Detail	Status	Source / Reasoning
Preferred initiative: lead scoring	INFERRED	Backstory says she’d see value “if it helped us win enterprise deals”; lead scoring has lowest complexity in the intro brief table
Customer acquisition cost \$2,400	SOURCED	<code>lisa_chen_cmo.md</code>
Operating margin ~15%	SOURCED	<code>aisha_rahman_cfo.md</code>
Board expects profitability in 2 years	SOURCED	Same file
Breach cost ~\$3.5M first year	SOURCED	<code>data_breach_overview.md</code>

Detail	Status	Source / Reasoning
No dedicated AI budget	SOURCED	aisha_rahman_cfo.md
Will not approve spending without business case	SOURCED	Same file
Quotable statement (“‘Competitors are doing AI’ is not an ROI calculation...”)	INVENTED	Paraphrases and extends a sourced position from her backstory into a fabricated direct quote
Favours vendor solutions over in-house build	INFERRED	Backstory emphasises ROI, cost control, and scepticism of expensive hires; “buy” preference is editorial framing

Sophia Martines, Chief Information Security Officer

Detail	Status	Source / Reasoning
Preferred initiative: automated security threat detection	INFERRED	Backstory says AI could help with “threat detection, anomaly detection, automated response” (sophia_martines_ciso.md)
Security team of 8	SOURCED	Same file
40+ vendor integrations	SOURCED	Same file
500-800 daily alerts	SOURCED	docs/policies/ (incident response implementation notes)
No AI governance framework	SOURCED	sophia_martines_ciso.md, mark_gonzalez_cto.md
No AI-specific security review process	SOURCED	sophia_martines_ciso.md
Quotable statement (“We just spent \$3.5 million learning...”)	INVENTED	Combines sourced breach cost with her established governance-first voice
Sharpest disagreement on executive team (with Marcell)	INFERRED	Both backstories establish the tension; “sharpest” is editorial characterisation

Financial Context

Company Financials Table

Figure	Value	Status	Source
Annual revenue	~\$45M	SOURCED	marcell_ziemann_ceo.md, aisha_rahman_cfo.md
YoY growth	~25%	SOURCED	Same files
Operating margin	~15%	SOURCED	aisha_rahman_cfo.md
Series A+B funding	~\$20M	SOURCED	Same file
Breach cost (year 1)	~\$3.5M	SOURCED	data_breach_overview.md
Board profitability target	2 years	SOURCED	aisha_rahman_cfo.md

Revenue by Client Sector

Sector	Share	Status	Reasoning
Professional Services	30%	INVENTED	SMEs are confirmed primary market; no percentage exists
Healthcare	25%	INVENTED	Emphasised as important and compliance-heavy; no figure exists
Finance	20%	INVENTED	Key sector per backstories; no figure exists
Education	15%	INVENTED	Mentioned; “price-sensitive” per marketing backstory
Other	10%	INVENTED	Catch-all for sectors mentioned in passing

Note: `data/cloudcore-sales-data.csv` contains industry fields (Education, Manufacturing, Healthcare, Retail, Finance, Technology) at the transaction level, but no company-level revenue attribution by sector exists.

Operating Budget Allocation

Category	Share	Status	Source
IT/Technology	~40%	SOURCED	aisha_rahman_cfo.md
Sales/Marketing	~25%	SOURCED	Same file
Security (of IT)	~12% (from 8%)	SOURCED	Same file
Remaining	~35%	SOURCED	Same file (described as "R&D, operations, G&A")

Staffing Overview

Team	Count	Status	Source
Total	47	SOURCED	marcell_ziemann_ceo.md, cloudcore_company_overview.md
Perth / Sydney	35 / 12	SOURCED	karen_lee_hr_manager.md
Infrastructure	12	SOURCED	mark_gonzalez_cto.md
Support	8	SOURCED	sarah_thompson_coo.md
Tier 1/2/3 split	5/2/1	INVENTED	Repo confirms tiered model and 8 total; split is fabricated
Security	8	SOURCED	sophia_martines_ciso.md
Development	7 (1+6)	SOURCED	michael_thompson_lead_software_dev
Data	2	SOURCED	jamal_al_sayed_data_analyst.md
Marketing	4	SOURCED	lisa_chen_cmo.md
Compliance	2	SOURCED	emily_chen_head_of_compliance.md

Proposed AI Investment

Detail	Status	Reasoning
\$250,000 initial allocation	INVENTED	Handoff suggested \$200-300K; midpoint chosen; no figure in repo
Must cover vendor licensing, hire, data prep, governance, training	INFERRED	Reasonable scope given backstory descriptions of gaps
CFO indicated upper boundary without board approval	INVENTED	Consistent with her ROI-focused position but not stated

Preliminary Opportunity Assessments

All six assessments (data readiness, stakeholder support, ethical risk flags) were **INVENTED** for the brief. They draw on sourced material as follows:

Opportunity	Key Sourced Inputs	What Was Invented
Customer support chatbot	Support ticket history 3-4 years (Jamal); support team anxiety (Sarah); CISO data concerns (Sophia)	Data readiness rating of “Medium”; specific ethical risk flags
Predictive maintenance	Prometheus/Grafana telemetry confirmed (Mark); no ML pipeline (Mark); lower data sensitivity	Data readiness rating of “Medium-High”; characterisation of ethical risk as limited
Intelligent resource allocation	Data fragmented across systems (Jamal); moderate executive interest	All assessment details
Lead scoring	HubSpot CRM exists (Tom); lead tracking is basic (inferred); \$2,400 CAC (Lisa)	Data readiness rating; bias risk flags
Security threat detection	Splunk SIEM confirmed (Mark); 500-800 alerts (policy docs); breach as training data (logs); CISO support	Data readiness rating of “Medium-High”; false positive and explainability risks
Churn prediction	CRM/billing/support silos (Jamal); 2-person data team; COO support (Sarah); CFO sees revenue protection value	Data readiness rating of “Medium”; self-fulfilling prophecy risk

Executive Tensions Summary

Tension	Status	Source
Speed vs governance (CEO vs CISO)	SOURCED	Both backstories establish this dynamic
Build vs buy (CTO vs CFO)	INFERRED	Individual positions sourced; the framing as “build vs buy” is editorial

Tension	Status	Source
Efficiency vs staff protection (CEO/CTO vs COO)	INFERRED	Individual positions sourced; the framing is editorial
“Not dysfunctional; legitimate trade-offs”	INVENTED	Editorial characterisation

Cross-References

Reference	Status
Chatbot profiles at cloudcore.eduserver.au/chatbots/	SOURCED — real pages
Security docs at cloudcore.eduserver.au/docs/	SOURCED — real pages
Data files at cloudcore.eduserver.au/data/	SOURCED — real pages

This reference document is for instructor use. It combines sourced facts and invented details into a single annotated view of the AI Opportunity Evaluation Pack.