Digital, Data and AI Strategy 2025-2028

Contents

Introduction

[Our Focus on Economic Transformation](#) **sets out the long-term direction Scottish Enterprise is taking to drive transformation in Scotland's economy, helping to deliver the Scottish Government's National Strategy for Economic Transformation (NSET).**

Our strategic ambition is to drive innovation, internationalisation and investment in Scotland while building a fair, green and growing economy. We'll create high-value jobs, boost productivity and unlock wealth for all of Scotland.

The way in which Scottish Enterprise operates is changing. These changes will help us to enable businesses to innovate and scale to transform the economy.

In addition to adopting a missions-based approach, we are:

- Finding new ways to apply data, insights and our experience to work with customers and partners, stimulating new opportunities for our economy

- Working to become an easier organisation to engage with; streamlining processes; delivering with pace and agility

- Working more efficiently and effectively to increase our impact within an environment of public finance pressure

This strategy is central to our transformation. Alongside our People, and Finance strategies, the Digital, Data and AI strategy provides a strong foundation to deliver these priorities and set the pace for our longer-term ambitions.

The strategy is for everyone in Scottish Enterprise, and successful delivery depends on us all.

We believe our approach will unlock the potential of every one of our colleagues to best deliver our aim of transforming Scotland's economy.

This Digital, Data and AI Strategy sets out our strategic aims for 2025-28. It also highlights how we'll operate differently to deliver the strategy.

The strategy is ambitious but, by prioritising, we'll be able to deliver it within our known resource and financial frameworks. The strategy is supported by ongoing monitoring, review and detailed action planning processes to make sure it remains relevant and fit for purpose.
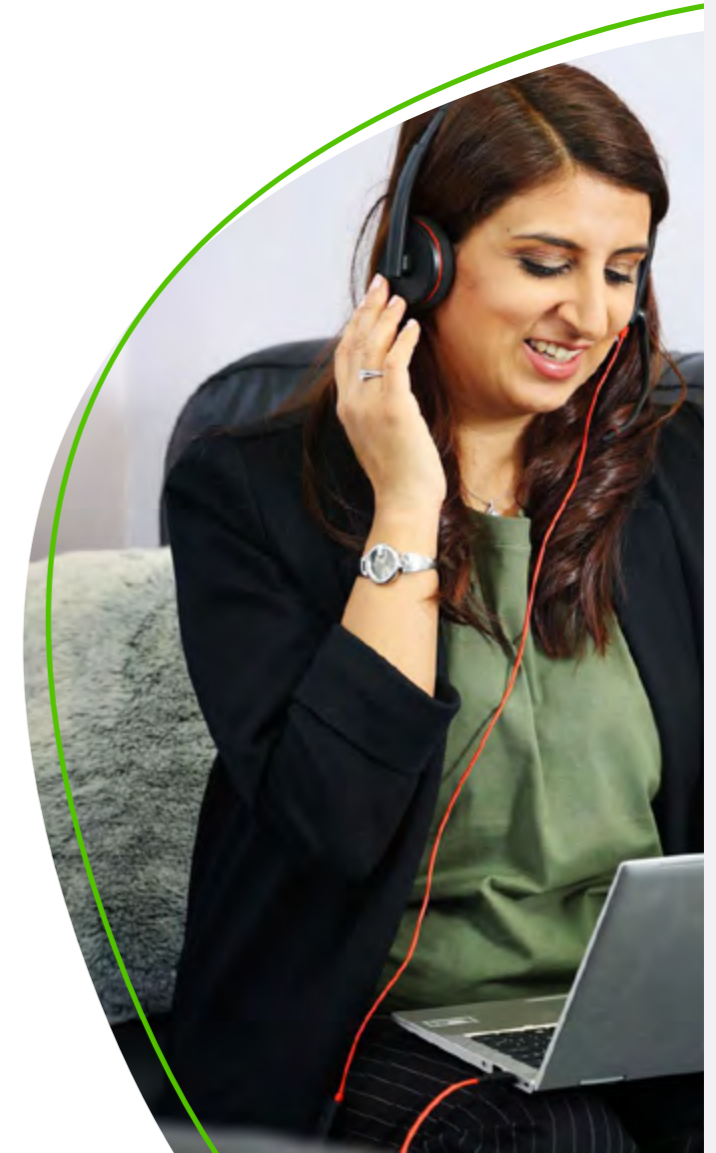
Our approach

In developing this strategy, we've carried out significant research to learn from best practice. Reflecting on the experience of recent years (summarised in the SWOT, page 6) – we've engaged extensively with colleagues, our leadership and the Board to strengthen understanding and buy-in around our digital, data and AI ambitions.

This strategy must be owned and delivered by all of us for it to be successful. This will mean changes to how we all work, coming together to deliver the transformation we need.
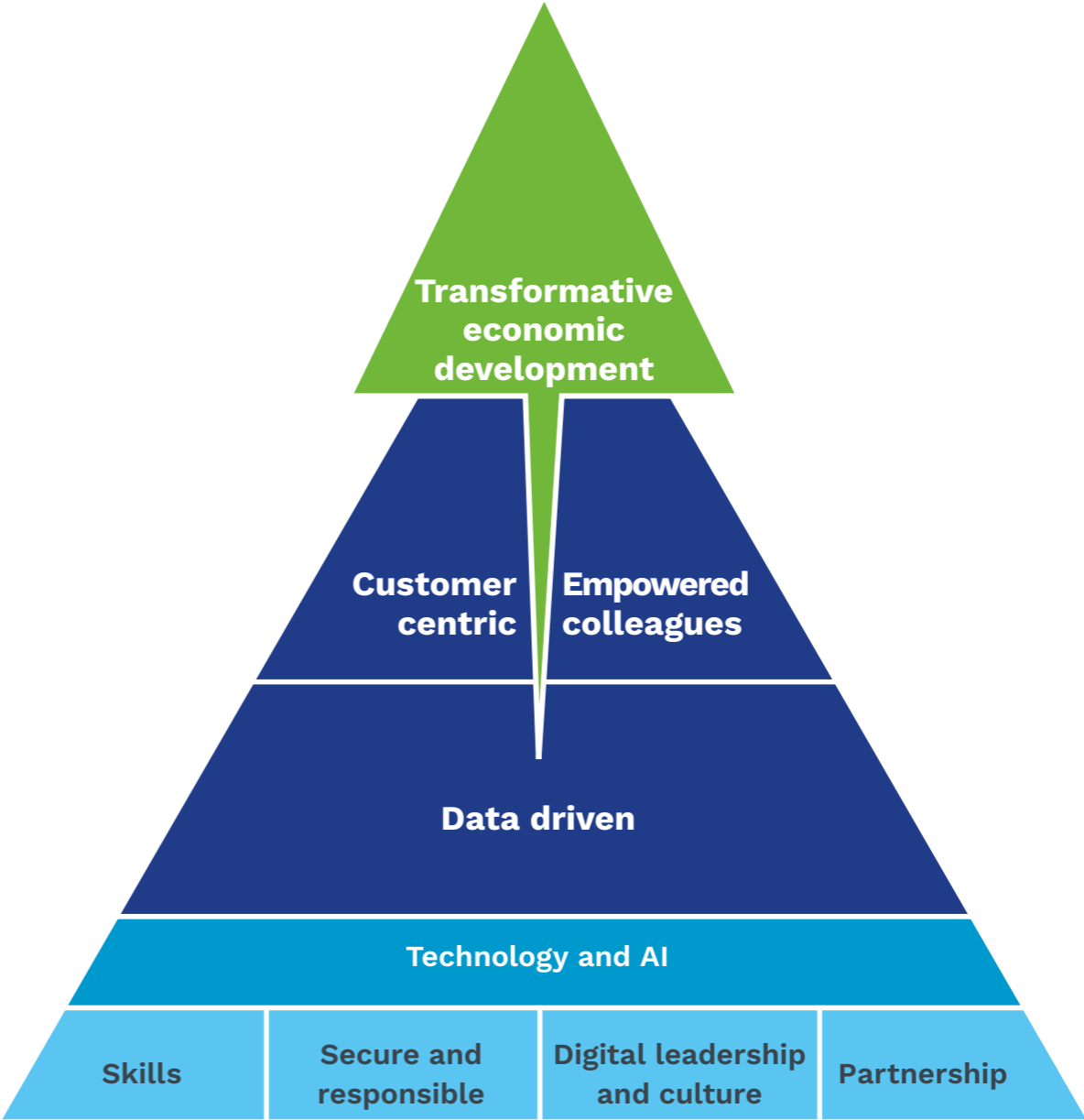
We're building on solid foundations. This new strategy builds on our previous digital strategies. We'll build on the first phase of our Data Foundations work, for example, and our digital and data principles remain important in guiding how we design and deliver activities within the wider context of the Digital Scotland Service Standard.

With these foundations, we can start delivering results right away, including ambitious 'lighthouse' challenges that will let us innovate quickly.

Our vision and values

To deliver a transformational role in Scotland's economy we will be ambitious, impactful and dynamic in how we work across digital, data and AI:

- **Data driven:** by prioritising our data journey we'll enable decisions and generate insights which allow us to best deliver our role in Scotland's economy

- **Customer centric:** our customers, regardless of where they are on their growth journey, will have access to critical tools, support and resources to allow them to innovate and scale

- **Empowered colleagues:** by working together to deliver our digital ambitions this will create efficiencies and unlock our potential

Transformative economic development

Customer centric

Empowered colleagues

Data driven

Technology and AI

Skills

Secure and responsible

Digital leadership and culture

Partnership

SWOT

Strengths

Creative, skilled, enthusiastic, experienced, and resilient colleagues who want to put the customer at the centre

In-house technical expertise and delivery with a mix of the skills we need

Strong foundations including full use of cloud computing

New website design system - consistent, scalable, designed for a reduction in CO_2e

Efficiency, scale and security of EIS partnership

Weaknesses

"Digital" and its potential is not well understood, along with varying levels of digital and data literacy

Inconsistent or ineffective business processes

Disparate, over-customised, legacy or unsupported systems, lacking overarching roadmaps

Inconsistent digital experiences for our customers

Data quality and integrity issues, including manual processes, collecting unnecessary data, keeping data longer than necessary, and creating duplicate data

Opportunities

Productivity and innovation gains through use of automation and AI

Further cost-optimisation and rationalisation of systems in use

Further digitisation of services, with customer ability to self-serve

More sharing of knowledge and approaches across partnerships such as BSP and EIS

Better define the role of DDIT in digital leadership, alongside clarity with the business responsibility for products and services

Increase organisational digital and data literacy to unlock full potential

Threats

Sustainability and the carbon impact of current and emerging technologies

Skills availability - specialist skills and the growing need for strong digital and data skills across the whole organisation

Cyber security

Data and AI risks – compliance, usage, quality, culture, management and governance

Reputational risk if we cannot keep up with new digital behaviours and customer expectations of public services

Strategic pillars

1. Data driven

By prioritising our data journey, we'll unlock the decisions and insights that allow us to best deliver our role in Scotland's economy:

- **Quality data:** we'll work together to uphold high standards of data quality and integrity, ensuring we have the best available information, accessible across the globe

- **Core data:** our most important data is defined and all colleagues capture it in consistent, shared systems, ensuring SE is working with the best available data

- **Innovate:** we'll undertake rapid innovation 'lighthouse' challenges to unlock opportunities by creating space to learn, trialling new techniques and technologies, and delivering advanced tools

- **Headline Goal:** By increasing our organisational data maturity score to 4+ (currently 3.1) we'll show confidence in collecting, managing and using data, reducing risk and maximising the value we bring to the economy of Scotland

2. Customer centric

Our customers, regardless of where they are on their growth journey, have access to critical tools, support and resources to allow them to innovate and scale:

- **CRM redesign:** we'll work together to deliver a simple, straightforward and easy-to-use customer relationship management (CRM) system which will be central to all our ways of working and add value to our customers and users

- **Digital accounts and services:** we'll create online accounts to allow customers greater control and transparency of their interactions with us, as well as easier access to our services and new digital tools

- **Personalised:** by using enhanced insights and knowledge around customer behaviours and needs, we'll improve connectivity, personalise and target content and services

- **Headline Goal:** By targeting a customer satisfaction rate of consistently 80%+ we'll ensure customers are able to successfully engage with us, gaining quick and easy access to our services

3. Empowered colleagues

We work together to deliver our digital ambitions bringing efficiencies and unlocking our potential:

- **Streamlined:** enabled by digital skills and structures, teams work together to simplify and unify our critical processes to streamline our ways of working

- **Simplified:** the technology we use every day is simplified, modern and efficient, allowing our colleagues to deliver for Scotland's economy

- **Inclusive:** all colleagues understand and champion our digital ambitions, and are equipped to deliver them

- **Headline Goal:** Colleagues have 25% more capacity to deliver missions as we have digitised and streamlined main processes and tools and modernised key systems/applications leading to a better daily work experience

What the future will feel like

	1. Data driven	**2. Customer Centric**	**3. Empowered Colleagues**
Targeted: Intensive engagements Targeted, bespoke, interventions driven by new insights, modelling, and simulation	"New tools and accurate data sources allow us to identify and model transformational opportunities central to our mission goals."	"SE identified areas for us to bring our capabilities together to deliver opportunities for Scotland's economy."	"We make fast, confident decisions and take more informed risks." "The propositions I build are targeted on the opportunities most likely to drive big impacts."
Customer-led: On-demand engagements Engagement with specialists. Interactive digital relationships	"I'm never asked for the same info twice; as a customer, I trust how my data is used." "I used to think collecting data was a burden. Now I appreciate it's critical to help SE be the best it can be. I trust the data we have".	"I get the right level of contact as and when I need it. Time spent talking to SE adds real value and insight to my business." "I know before I start if a project or application is right for me. My time is never wasted."	"We know which customers to focus on and when, increasing the value of our personal interactions." "We can tailor and personalise services quickly and at scale."
Access: Volume engagements Slick self-service, insights and tools	"We use customer behaviour insights to continuously evolve and improve our services."	"There are no barriers. I can easily explore services and tools available to me and get instant answers to quick questions, any time."	"Our light touch processes have created capacity to add value to critical customer interactions."

Digital, Data and AI Strategy 2025–2028

1. Data driven

To transform Scotland's economy, we need to focus on the right opportunities and deliver effectively while understanding the impact of our work. Data is key to achieving this.

A clearer view of the data available to us will allow us to sequence, direct and prioritise resources to make fast and confident decisions. We'll use internal and external data sources, drawing on experience, networks and know-how, together with working alongside the Business Support Partnership (BSP) and other partners.

Data quality and integrity issues are holding us back from achieving the true potential of the data available to us. With inconsistent data standards and processes across the organisation we have different formats and siloed storage, which stops us from having a complete picture of our customers and their potential contributions to economic development.

Identifying and linking our most important data sets will allow us to form a holistic view of our customers and bring new insights. We'll also ensure colleagues are clear on their role in data collection and retention.

Better quality data will drive efficiencies in how we work as an organisation. Currently, colleagues' time is spent collating and analysing data from different locations rather than benefitting from the insight such data could bring to our interactions with customers.

To exploit new technologies and techniques such as machine learning or generative AI that build upon better data, we'll establish a model of 'lighthouse' challenges. They'll combine technical and business domain skills in a protected environment with time and resources. This will help us to learn, grow skills and deliver new tools and capabilities.

By implementing standards, governance, education and process optimisation in all areas of information management, we'll truly exploit the benefits of techniques such as data science and artificial intelligence. This will unlock our ambition to predict outcomes across the economy and the ability to take bolder, educated risks.

The big benefit - data is the key ingredient that will help us understand our customers, the impact of our activities, and what we should focus on to transform Scotland's economy.

"Data will help me be well informed so I can make fast, confident decisions, take bolder, educated risks, and direct resources where they'll have the most impact."

Leader

Data driven goals

Quality data - we'll work together to uphold high standards of data quality and integrity, ensuring we have the best available information, accessible across the globe:

- Adoption of organisational data standards, championed by leaders, supported by data stewards, and upheld by all

- Colleagues are accountable and responsible for the data that they create, use, maintain and retain

- The data maturity of our organisation increases, building our confidence and reducing our risks

Core data - our most important data is defined and all colleagues capture it in consistent, shared systems, ensuring SE is working with the best available data:

- 'Minimum data set' for customer data defined and adopted across the organisation, using Customer 360 to integrate financial and non-financial support information

- Ability to combine and link our most important data sets to provide the fullest possible picture of the Scottish economy and our impact

- Principal reporting defined and agreed, shared through automated reports and dashboards

Innovate - we'll undertake rapid innovation 'lighthouse' challenges to unlock opportunities by creating space to learn, trialling new techniques and technologies, and delivering advanced tools

- Beginning with the most compelling business case we'll start our journey of testing and learning – combining our knowledge and experience with new tools including generative AI

- We'll create short-life, cross-functional project teams of colleagues with technical and domain skills, giving them time and space to experiment and deliver

"My team will spend less time collating information and producing reports, and more time doing interesting, value-added work."

People Manager

"The information I access will be consistent, comprehensive and reliable."
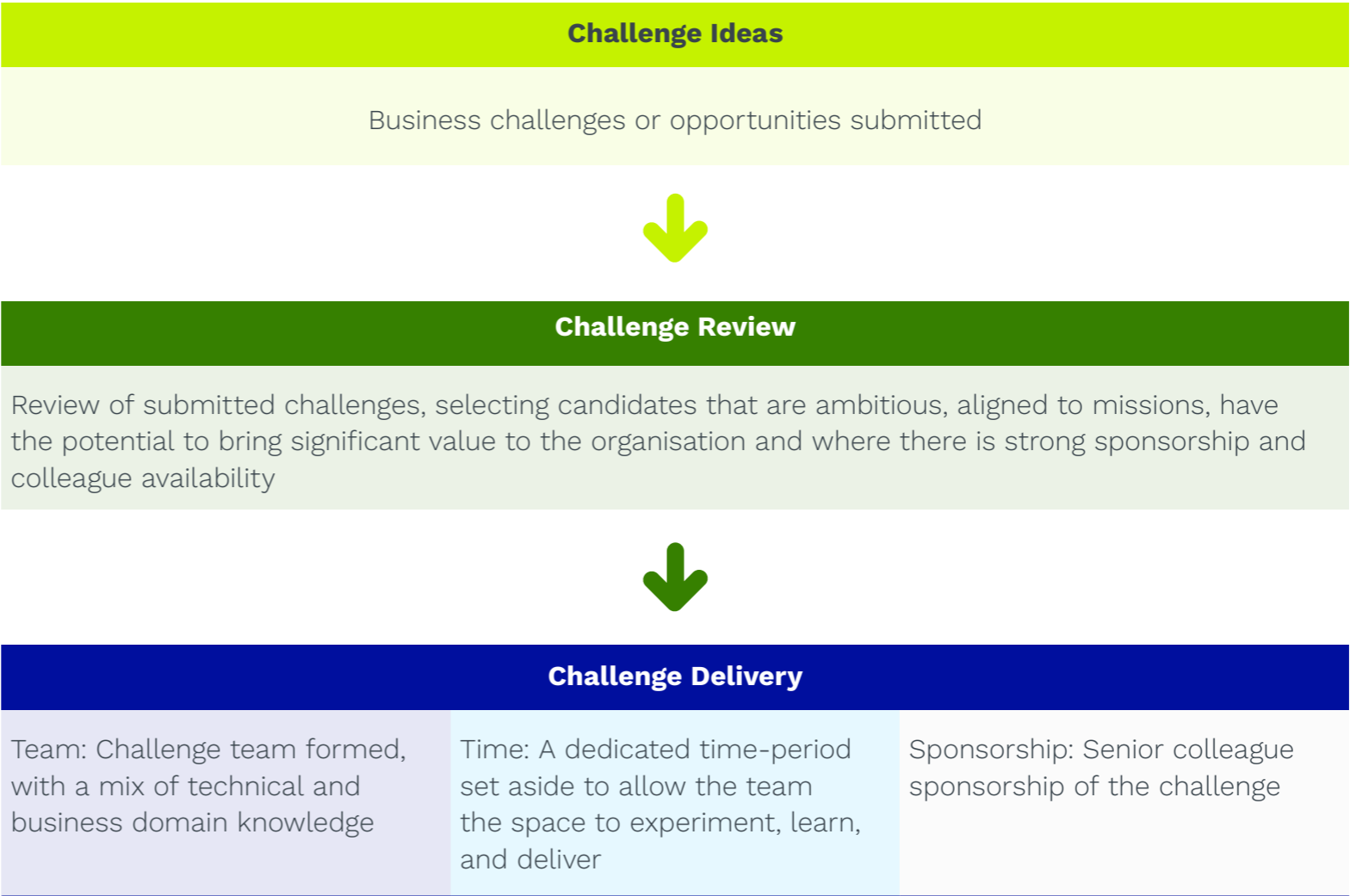
Colleague

The lighthouse approach

It can be difficult to make the leap from our current approaches and ways of working, to more ambitious and advanced techniques. Making this leap will challenge our knowledge, skills and data. It also requires time, space and expertise. We'll run a trial 'lighthouse' programme so that we can make these gains in a protected environment.

'Lighthouse' challenges will be submitted using our knowledge of current difficulties and opportunities, while also considering the state of the art and what other organisations are achieving. We'll review the challenges. The most promising ones will be provided with a small technical team that can work alongside our business domain experts in a protected project.

Working in this way will ensure that colleagues have the time to dedicate fully to these projects, not distracted by day-to-day work. Sponsorship from senior colleagues will ensure that the time is provided to undertake innovative work, learning and delivering.

In addition to internal expertise, external partners can be sought that can bring additional skills and knowledge to the teams and projects.

Challenge Ideas

Business challenges or opportunities submitted

⬇

Challenge Review

Review of submitted challenges, selecting candidates that are ambitious, aligned to missions, have the potential to bring significant value to the organisation and where there is strong sponsorship and colleague availability

⬇

Challenge Delivery

Team: Challenge team formed, with a mix of technical and business domain knowledge	Time: A dedicated time-period set aside to allow the team the space to experiment, learn, and deliver	Sponsorship: Senior colleague sponsorship of the challenge

2. Customer centric

To achieve our aims for Scotland's economy, we'll need to collaborate with ambitious businesses and better connect them to opportunities. By focusing on customer experience, we'll transform how we work with businesses, taking into account the broader Business Support Partnership.

Aligning with the ambitions of the future Customer Engagement Strategy, we'll use modern digital approaches to ensure Scottish Enterprise is easy to work with. This will reduce customer pain points, like repetitive requests for information, and confusion when we've offered competing funds with different levels of intervention and fund lengths.

Our strong data foundations will help us to find and proactively support the companies that'll make the biggest difference to the Scottish economy.

Our online SE Account will ensure that customers are never asked for the same information multiple times. This is because all the information will be captured centrally and reused. Our digital online grant system will be the single place for applications and appraisals.

Streamlined customer journeys within Scottish Enterprise and across the BSP will enable faster, transparent decisions for customers. Providing self-serve and digitally-enabled personalised business support and signposting will free up colleagues' time so they can focus on value-add activities like personal interactions with customers.

Acting on insights from customer feedback will allow us to continually improve our processes and tailor our products and services to better meet customer needs.

"Streamlining standard interactions will mean we spend less time on process and have more time to focus on working intensively with the most ambitious companies - increasing how customers value our interactions and making our interventions more impactful."

Colleague

Customer centric goals

CRM redesign - we'll work together to deliver a simple, straightforward and easy-to-use customer relationship management (CRM) system which will be central to all our ways of working and add value to our customers and users:

- CRM redesigned, based on clear and simplified business processes to streamline the customer journey

- Use of AI and process automation to speed up interactions and remove duplicate and non-value-add tasks for colleagues

- Provide a core and reliable dataset which can be easily accessed and analysed (in combination with core data work)

- Seamless link to the online SE Account – allowing collaboration between colleagues and customers in a secure space

The big benefit - Self-serve and digitally enabled processes will streamline standard interactions, ensuring customers get the best possible experience, and freeing us up to work with customers where we'll make the biggest difference.

Digital accounts and services - we'll create online accounts to allow customers greater control and transparency of their interactions with us, as well as easier access to our services and new digital tools:

- Providing a platform to expand our digital services to customers in line with the future Customer Engagement Strategy

- Adopting a 'tell us once' approach where the customer owns their own data and provides information in a central place, shared with colleagues where they need to use it

- Deliver tools including various self-serve assessments and a chatbot to allow customers to quickly access the information they need, and how/when to engage with our expertise

Personalised - by using enhanced insights and knowledge around customer behaviours and needs, we'll improve connectivity, personalise and target content and services:

- Ability to target product/service information segmented by customer insight

- Mission teams, account managers and specialists can use customer insight to identify and shape appropriate responses to the most impactful economic opportunities

- Multi-agency joint data via Master Customer Record supporting planning and targeting with a greater degree of success and efficient use of funding

"We have the insights we need to direct resources where they'll have the biggest impact, and continually improve and develop our service offering."

Leader

Overview of CRM redesign

**Dynamics
CRM System**

CRM modules

| **Single App (complex)** | → | **Enquiry management** | **Managing accounts** | **Due dilligence** | **Customer feedback** | **Others** |

From:

- Complex business processes
- Poor data quality and integrity
- 10 year+ old heavily coded system
- Not all colleagues have a licence

To:

- Streamlined, clear and simple processes
- Easy capturing and reporting on high quality meaningful data
- Using a modern low-code, app based approach for each functional area
- All colleagues able to access the CRM

Some of the benefits:

- Simplification and ease of use - users quickly accessing the parts of the system relevant to their role
- Colleague time savings due to process automation
- Improved quality/accuracy of data available – aiding decision making at multiple levels
- Significant cost savings in licencing and ongoing maintenance costs

3. Empowered colleagues

To allow us to focus our activities on businesses most likely to impact Scotland's future economy, we need to work more efficiently and effectively.

Bringing together our ambitions across data, systems, digital tools and ways of working, we can prioritise innovative solutions to build a more connected organisation.

Our history of using different, over-customised, legacy or unsupported technology systems has previously held us back from working more effectively. Providing a simplified roadmap for our core digital tools and technology (such as HR and finance applications), replacing legacy systems, consolidating where possible and aligning or sharing with partners will enable efficient ways of working.

As well as replacing systems – we'll prioritise the optimisation of business processes, removing duplicate and differing processes, and focusing on the areas of biggest impact and savings. We'll also automate any possible steps to help colleagues improve efficiency and prioritise missions delivery.

Aligning with the People Strategy, we'll focus on developing digital and data literacy with an agile learning mindset. This will empower colleagues to be more impactful and dynamic by making full use of available tools, contributing their passion and ideas, and improving their ways of working.

Our colleagues are creative, highly skilled, enthusiastic and experienced. This strategy will allow them to develop solutions to their own team challenges through a combination of personal skills and curiosity, appropriate guardrails, enabling technology and the efficiencies created by optimised processes.

"Working optimally, we'll be fleet of foot, quicker to respond to new opportunities and challenges, and better placed to direct resource towards innovation and value-add activity."

Leader

The big benefit - The way we work will be more efficient, streamlined and connected, freeing us up to do more value-added work, and unlocking our potential for continuous improvement.

Empowered colleagues goals

Streamlined - enabled by digital skills and structures, teams work together to simplify and unify our critical processes to streamline our ways of working:

- Documenting our most critical business processes, agreeing process owners, and then beginning a programme to streamline and automate/digitise we'll create efficiencies and allow colleagues to focus on the most value-add activities

- Using Microsoft Power Platform we'll provide teams with the tools to develop solutions to their challenges/opportunities within a protective and supportive framework

Simplified - the technology we use every day is simplified, modern and efficient, allowing our colleagues to deliver for Scotland's economy:

- Creation of a multi-year technology roadmap across SE covering our core application and system replacements, upgrades, consolidation and retirements

- We'll work with our partners including EIS to ensure decisions support Public Sector Reform (PSR) ambitions

- We'll continue to optimise Microsoft 365, - using this platform as our 'go to' toolbox - simplifying and retiring outdated capabilities and adopting emergent features

Inclusive - all colleagues understand and champion our digital ambitions, and are equipped to deliver them:

- Leaders will articulate and champion our digital vision, model digital behaviours, and support impactful digital initiatives

- We'll encourage a culture of digital curiosity where we take personal responsibility for digital learning, consistently work in alignment with our digital goals, and proactively explore digital opportunities

- We'll foster opportunities for agile learning, knowledge and skills sharing, including communities of practice and champion networks

"My team will be empowered, with the digital skills to creatively improve ways of working and deliver to their full potential."

People Manager

"Digital will be a source of confidence, not frustration, with better connected systems, streamlined processes, and less repetition."

Colleague

Underpinning capabilities

We are: **Secure**

Protecting the data of our customers and colleagues will always be an imperative. The constantly evolving threats related to cyber security and the need for strong data governance are therefore key to all elements of our work:

- Continuing to deliver the 2023-26 Cyber Security Strategy and action plan to ensure Scottish Enterprise remains as secure as we can be by creating a robust cyber security framework and increasing our maturity

- Activity to develop our management of information and safe use of personal data will be guided by the Information Governance Roadmap

- The newly formed Data Governance and Security Group will ensure alignment of all actions with partners, including EIS, and will be used to help with security governance

We are: **Responsible**

Approaching digital, data and AI through the lenses of trust, ethics, inclusivity and sustainability, aligned with our digital principles, ensuring colleagues also understand the risks and pitfalls of AI and other digital technologies:

- Transparent in disclosing where AI is used and accountable for outputs

- Understanding how we embed inclusion and equality in our use of data, and take steps to use it to drive greater fairness

- Thoughtful and judicious in how we apply digital and AI - focusing on where it adds value and supports the delivery of organisational objectives

- Continuing to track and significantly reduce Scope 3 carbon emissions associated with our technology use, aligned with SE's corporate net zero target

- Considering circular economy to reduce consumption of materials or inputs (for example specifying refurbishment/remanufacturing in sustainable procurement of new hardware)

- Creating inclusive digital environments and practices that empower people to be their best

We have: **Skills**

We have an opportunity to further develop our levels of organisational digital and data literacy to unlock our full potential. We'll align with the objectives of the People Strategy around future skills and workforce planning to ensure skill gaps are identified and development plans created as necessary.

The specialist depth and availability of resource required from within our DDIT directorate will continue to be reviewed and will have a significant impact on 3-year prioritisation, as well as investment required.

We have: **Leadership and culture**

As this is a strategy for all of Scottish Enterprise, digital leadership is needed across the organisation. Leaders will model from the top, articulate the vision, empower teams, reward what we want to see and face into challenges and difficult decisions. Leaders will be enabled by guidance from DDIT alongside focused development plans.

With HR's role as culture guardian, we'll align with the delivery plan for the People Strategy and the outputs of the Target Operating Model (TOM). Together we'll develop a culture of digital curiosity, personal responsibility and shared learning alongside an agile mindset.

We work: **In partnership**

Scottish Enterprise is not an island – we work closely with partners to achieve the best possible outcomes for our customers. Any work undertaken as part of this strategy will align to the aims of the Business Support Partnership. For example, all changes to data processes and standards will complement work undertaken as part of the Master Customer Record (MCR).

The wider landscape of public sector reform will be used as a framework for this strategy. We'll learn from best practice and reuse from other organisations as widely as possible.

The EIS partnership will be further strengthened by delivering the outputs of the 2024 EIS strategic review. There's an opportunity to further exploit the partnership and align more, for example around policies, processes, risks, and job descriptions. This level of alignment will pave the way for more shared services and systems.

Opportunities to develop or implement more shared systems should be explored, with an understanding that this will require process standardisation across partners to create maximum benefit.

Execution and governance

The strategy is sponsored from the organisation by the Chief Executive Officer and through the Executive Leadership Team. Delivery will be supported by action plans aligned to each theme that define clear objectives and measures of success. The action plans will be living documents, with measures and progress updated through corporate reporting. Each deliverable will have defined ownership, accountability and responsibility:

- The strategy will be implemented in line with principles and guardrails and SE's corporate governance and assurance frameworks. A robust approach to strategic planning, development of appropriate architecture and technical roadmaps will underpin delivery

- We will leverage the knowledge and capabilities of the wider ecosystem, engaging partners and suppliers to enhance our capabilities and accelerate delivery. For example, EIS, enterprise and skills agencies and Microsoft

- For each major initiative (such as CRM redesign, major new systems) there will be a business case outlining resource requirements and a cost/benefit analysis, a list of anticipated outcomes, a change management plan, and key performance indicators that can be used to track and demonstrate the success of the initiative

Ongoing governance

Key elements include:

- **Executive oversight** – SE Executive Leadership Team (ELT)
- **Responsibility for monitoring delivery** – Digital Steering Group (DSG)
- **Technical governance** – Digital Architecture Board (DAB)
- **Change management** – Overseen by the Change Delivery Board (CDB)

Resource requirements

- **Staffing:** DDIT contains a strong mix of the different capabilities required to deliver end to end projects of business and digital transformation

- **Savings:** By implementing this strategy, we'll save both time and resources, which can be reinvested into our economic development efforts. These savings will come from increased efficiency among colleagues due to improved and standardised processes, as well as replacing expensive Dynamics CRM licences with more affordable Power Platform licences

- **Additional costs:** There will be the need for additional resources to pay for transitional costs as old and new approaches overlap, and for investment into modern corporate applications

Our approach to AI

Artificial Intelligence is a rapidly evolving area. We all use AI tools daily, not always knowingly. As with many technologies, AI can bring significant benefits but can also create new challenges.

We'll take a responsible approach to our use of AI. We'll adopt sector best practice, such as the 'Scottish Government Artificial intelligence strategy: trustworthy, ethical and inclusive' and capture all our AI projects on the new mandatory Scottish AI Register.

We'll play our role in the Scottish Government's AI strategy to help Scotland become a leader in the development and use of AI by ensuring we:

- Support and enable the adoption of AI to achieve our National Outcomes

- Encourage working together to accelerate AI activity

- Set a clear direction of travel that aligns AI with other strategic initiatives

AI is already demonstrating value in a growing number of cases across the public sector to reduce cost and improve user experience. We have a growing community of practice, and colleagues experimenting with where AI can add value – for example using AI to organise and analyse workshop information; rapidly generating tailored content; or developing new, creative ways to engage customers. By continuing to evolve our approach to AI, there's an opportunity to deliver even more ambitious, dynamic and impactful outcomes.

- **We'll be transparent** where we use AI, how we use AI, why we use AI, and how we have assured our use of AI. We know that concerns include the **environmental impact of AI**, ethical and security issues, and how AI can support and amplify existing bias.

- **We'll keep people at the heart of AI**, using the technology as a tool to support and elevate our work. We'll focus on AI where it will allow us to unlock new value, while amplifying our human strengths and empowering our people to do what they do best.

- We'll continue **to evolve our AI policy** to ensure these approaches are baked-in to our work.

- We'll encourage **an environment of experimentation**, with **guardrails** that ensure we work within our AI Principles. We'll seek to balance the risks related with using AI against those of lost opportunity in not exploiting it.

Where we will use AI

Supporting us

- Adopting AI productivity tools (to help with time consuming tasks such as capturing minutes of meetings)

- Automation of routine tasks (such as data collection and reporting)

- Use of generative AI for draft content

Making us more efficient

- Supporting decision-making processes (such as assessing eligibility criteria)

- Automated conversations (a website chatbot)

- Machine learning algorithms to scan databases and surface opportunities (looking at company profiles, patent filings or news articles)

Giving us new capabilities

- Training AI models (for example, to evaluate startup and scaling companies based on certain criteria)

- Predictive analysis to support more targeted and effective investments (pinpointing companies or areas with high growth potential)

- Analysing volumes of economic data to identify trends (AI and researchers come together to produce analysis more rapidly)

Summary

This strategy is **ambitious**, but we need to **truly embrace digital, data and AI** to achieve the best possible outcomes for the Scottish economy. By becoming data driven, customer centric and empowering all colleagues we'll enable the most impactful decisions and support for our customers and maximise the potential in our ways of working.

All colleagues must commit to being curious in their ways of working, adopting a culture of continuous improvement and seeking innovative solutions to problems. Working within clear guardrails and with an increased skillset, we can all maximise our use of digital, data and AI by adhering to **quality standards**, streamlining the customer experience and optimising business processes.

By working together and aligning with the other enabling strategies (People Strategy, Finance Strategy), we can use digital, data and AI to become a modern, dynamic organisation. We'll lead the rest of the public sector in Scotland by example, always sharing best practice with our partners.

This strategy is an overarching framework which will be accompanied by **robust action plans** for each of the three pillars. The action plans will be living documents, regularly reviewed, and each deliverable will have defined ownership, accountability and responsibility from across the organisation.

While there is much foundational work to do, we are ambitious and aim to build a mindset of innovation with lighthouse projects starting immediately.

All photos
- Scottish Enterprise colleagues

Our journey: Data driven

2025 Strengthening our foundations and testing our ambition

2026+ Accelerating our delivery, growing in confidence

Our SE **core data definitions, storage and reporting** approach is agreed and championed, with adoption of a **'Complete Account Record'** (minimum data set) – ensuring we can effectively report on our data and be able to identify the same company across different systems and data sets.

Data quality standards agreed, trained and mandated across SE.

'One data' project, creating a single source of truth for SE's must-have data.

'Customer 360' dashboard where, for the first time, colleagues will be able to view both financial and non-financial support provided to a company in one place.

Information Management standards strengthened and mandated across SE driving quality practice.

Protected **'lighthouse' challenges** to drive innovation and test use of emergent technology and advanced techniques.

Combined, integrated **core data** with partner/other data adds depth to insights and reporting.

Our **quality data** allows us to take advantage of machine learning to tackle our challenges in new ways.

Seamless **information** retention, storage and collaboration.

High degree of **colleague confidence** in data.

Digital modelling and predictive analytics used widely allowing us to take educated risks and achieve maximum impact for Scotland's economy.

Key decisions are **evidenced by data**.

Setting the pace for innovative, ambitious digital projects across the Public Sector.

Above average **data maturity**, baselined against the UK public sector.

Standard reporting done at the touch of a button or **automatically generated**.

Our journey: Customer centric

2025 Strengthening our foundations and testing our ambition

2026+ Accelerating our delivery, growing in confidence

End-to-end customer engagement journey mapped to enable prioritisation and delivery roadmap of **CRM redesign**.

Analysis, design and delivery of the **initial CRM redesign module** (Lead Generation).

All **Grants** managed online, with **single sign on** enabled to ensure a streamlined journey for customers between the Online Grants System and SE Account platform.

Online **SE Account** broadened to all relationship managed customers – allowing customer-led interactions, and further insight into use and impact of our products and services.

CRM redesign complete - Power Platform now supports a suite of user modules which are fully integrated with our SE Account platform.

SE chatbot launched – speeding up transactional activities and providing 24/7 Q&A service functionality.

Improved information architecture and brand cohesion across **our websites**.

We can generate **personalised info/content** for customers based on their interests.

Our services are **embedded in delivery of the Business Support Partnership** so customer journeys flow seamlessly between agencies, allowing us to benefit from **Master Customer Record**.

Digitally enabled **customer journeys** move through broad services for all, one-to-many, and into tailored one-to-one relationships for the most transformative opportunities.

Our **personalised** approach allows us to target specific sectors and take a more definite approach to delivering our mission challenges.

Our journey: Empowered colleagues

| 2025 Strengthening our foundations and testing our ambition | 2026+ Accelerating our delivery, growing in confidence |

Development of a **Business Process Management Framework** – identifying and embedding skills in process champions to map and optimise critical business processes, creating efficiencies and driving a culture of innovation.

Microsoft Power Platform skills and development programme launched to develop digital/automation solutions to challenges.

SE systems roadmap - plan to optimise and simplify our SE systems and tools complete, agreed and underway.

Copilot for M365 pilot with wider rollout if successful.

Programme of **digital upskilling activities** including AI, digital skills self-assessments and identification of digital champions.

Continual optimisation of SE systems and tools including rollout of Windows 11, Microsoft SharePoint review and Monday.com benefits realisation.

Quality of system connections improved due to adoption of an **API strategy**.

Decommission of inefficient and legacy systems such as CMAS.

Teams across SE using **AI and automation tools** to improve our ways of working.

Critical processes are simplified, digitised and owned allowing continuous improvements and efficiency gains.

SE systems roadmap - optimised and simplified internal systems/applications shared across EIS partnership enabled by shared policies and approaches.

Scottish Enterprise

Atrium Court
50 Waterloo Street
Glasgow
G2 6HQ

www.scottish-enterprise.com