



CBA STANDARD

AI-Driven Management Professional

Management · 5 weighted domains · 28 learning objectives

Version 6.0

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About this standard

This standard defines what competent practice consists of in the discipline set out under Scope below. It divides the discipline into weighted domains and states, for each domain, the learning objectives a competent practitioner meets. It is one of the CBA Standards, which the Corporate Business Alliance maintains across finance, accounting, management and technology.

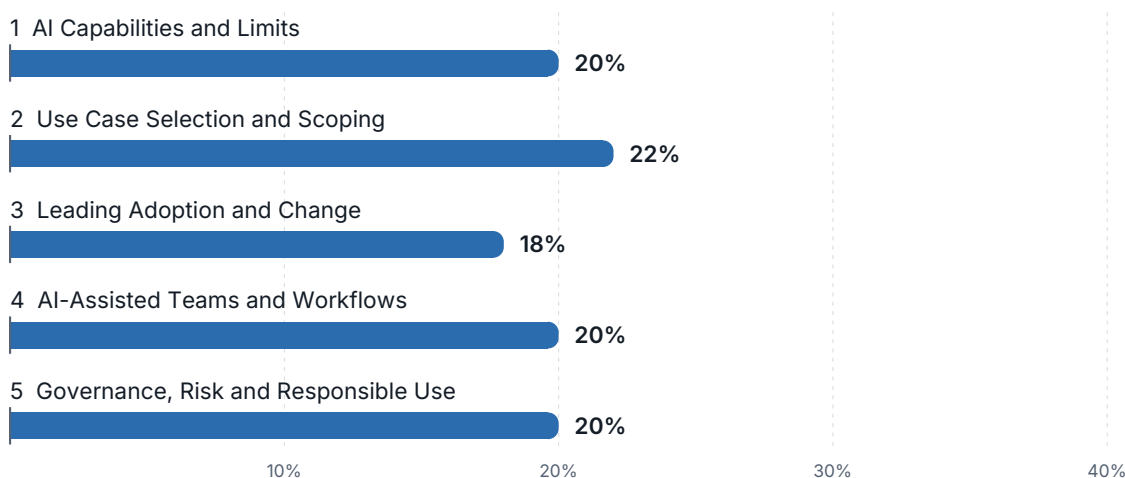
The standard is written for employers defining what a role requires, for training providers designing courses to a published specification, and for practitioners planning their own development.

Each domain carries a weight: its share of the standard, and of the examination for the CBA-AIM credential, which is assessed against it. The version number rises whenever a change would alter what competence in the discipline means, and every credential records the version its holder met.

Scope

CBA-AIM certifies that a manager can judge what current AI can and cannot do, select and scope viable use cases, lead adoption across a team, redesign workflows around AI assistance, and apply proportionate governance and risk controls at manager level.

Weighting by domain



Domains and learning objectives

Domain 1

20% of the standard

AI Capabilities and Limits

- 1.1 Distinguish generative AI, predictive analytics and rule-based automation by the type of problem each is suited to
- 1.2 Interpret the probabilistic nature of large language model output and its consequences for reliability, consistency and factual accuracy
- 1.3 Identify task characteristics that predict strong AI performance, such as pattern-rich, language-heavy and tolerance-for-review tasks, versus characteristics that predict failure
- 1.4 Evaluate claims made about an AI tool by asking what evidence, evaluation method or

benchmark would substantiate them

- 1.5 Select an appropriate response to hallucinated, biased or outdated AI output in a work context

Domain 2

22% of the standard

Use Case Selection and Scoping

- 2.1 Evaluate candidate use cases using a value, feasibility, data and risk screen, and rank them for a pilot portfolio
- 2.2 Distinguish between tasks to automate, tasks to assist and tasks to leave fully human, based on error cost and review capacity
- 2.3 Calculate simple expected benefit figures, such as hours saved per week and cost per output, using spreadsheet-level arithmetic
- 2.4 Select success criteria and baseline measures for a pilot before it starts, including quality as well as speed measures
- 2.5 Identify scoping failures such as unbounded ambition, missing data, no owner and no exit criteria, and choose the correction
- 2.6 Decide among build, buy, use-existing-tools and wait options for a given scenario

Domain 3

18% of the standard

Leading Adoption and Change

- 3.1 Select communication and framing approaches that reduce fear and build realistic expectations when introducing AI to a team
- 3.2 Distinguish causes of resistance, such as job insecurity, quality distrust and skill anxiety, and match each to an effective response
- 3.3 Evaluate skill-building options for a team, from structured practice sessions to champion networks and shared prompt libraries
- 3.4 Interpret adoption signals, including usage patterns, shadow use of unapproved tools and quiet abandonment, and choose the correct intervention
- 3.5 Select what to report to senior stakeholders about an AI initiative, balancing candour about limits with credible progress

Domain 4

20% of the standard

AI-Assisted Teams and Workflows

- 4.1 Select the appropriate human review point for an AI-assisted workflow given the error cost and volume of the task
- 4.2 Distinguish accountability for AI-assisted work: who owns the output, who owns the error, and what the manager must make explicit
- 4.3 Evaluate quality control approaches for AI-assisted output, including sampling, second review and checklist verification
- 4.4 Interpret changes in team workload, skill mix and role content as AI absorbs routine tasks, and select fair responses
- 4.5 Calculate simple throughput and review-capacity figures to judge whether a proposed

AI-assisted workflow is sustainable

- 4.6 Select delegation practices for AI-assisted work, including when to require disclosure that AI was used

Domain 5

20% of the standard

Governance, Risk and Responsible Use

- 5.1 Distinguish AI-related risks a manager owns, such as data leakage, confidentiality breaches and unreviewed errors, from risks owned at organisational level
- 5.2 Select the correct handling of personal, confidential or client data when staff use AI tools, applying data protection principles at decision level
- 5.3 Evaluate an acceptable-use rule set for a team, identifying gaps, overreach and unenforceable provisions
- 5.4 Identify situations that require escalation beyond the manager, including high-stakes automated decisions, regulated-sector constraints and suspected harmful output
- 5.5 Interpret the manager-level implications of emerging AI regulation and risk-tiered approaches, without reliance on any single jurisdiction's text
- 5.6 Select proportionate responses to an AI-related incident, including containment, disclosure and process correction

Competence at award

What a holder of the CBA-AIM credential has demonstrated.

- Explain in plain terms how current AI systems produce output, and distinguish tasks where they are reliable from tasks where they predictably fail
- Evaluate candidate AI use cases against value, feasibility, data availability and risk, and scope a bounded pilot with measurable success criteria
- Lead a team through AI adoption, including expectation setting, skill building, resistance handling and communication with senior stakeholders
- Redesign team workflows so that AI-assisted output passes through appropriate human review, with clear ownership of quality and errors
- Apply manager-level governance to AI use, including data protection judgement, acceptable-use rules, disclosure decisions and escalation of high-risk situations
- Interpret simple adoption and benefit metrics in a spreadsheet and decide whether to expand, adjust or stop an AI initiative

Recognition at Practitioner level

The CBA-AIM credential is awarded at Practitioner level of the CBA Competency Framework, which evidences that the holder can carry out the core tasks of the discipline.

Awarded on the examination and 4 assessed workbooks of applied work.

Who the standard is written for

Team leads and line managers

Managers of functional teams in operations, sales, finance, HR, marketing or service delivery whose staff are beginning to use AI tools and who must set direction, standards and boundaries for that use.

Project and programme managers

Delivery professionals asked to run AI pilots or fold AI-assisted work into existing projects, who need to scope use cases, estimate benefit realistically and manage stakeholders through change.

Business owners and department heads

Owners of small and medium enterprises and heads of department who make build, buy or wait decisions about AI, allocate budget for adoption, and carry accountability for governance and risk.

Appendix: glossary of management terms

Terms used across the management standards, as CBA defines them.

Anti-money laundering (AML)

The laws, controls and procedures designed to prevent the proceeds of crime being disguised as legitimate funds, including customer due diligence, monitoring and reporting of suspicion.

Assurance

An objective examination that gives a stated level of confidence that a process, control or report works as intended.

Attribution model

A rule or algorithm for sharing credit for a conversion among the marketing touches in a customer's journey: last-click, first-click, linear, position-based, time-decay or algorithmic. None is a controlled test of which conversions would have happened without the spending.

Bottleneck

The step in a process with the least capacity relative to demand. It limits the output of the whole process, so improvement elsewhere does not raise throughput.

Break-even ROAS

The return on ad spend at which contribution from attributed sales covers the advertising: one divided by the contribution margin rate. The rate is net of payment and delivery costs, returns, discounts and every other variable cost except the advertising.

Business continuity plan

A documented plan for keeping critical activities running, or restoring them within set times, after a disruption.

Campaign tracking parameters

Labels appended to a link telling analytics which source, medium, campaign and ad sent a visit. A spelling or case difference splits a campaign into several, so links follow a naming convention and are fixed at source, not in reports.

Capacity

The maximum output a process, resource or organisation can produce in a period under normal conditions.

Capacity utilisation

Actual output as a percentage of capacity. Running close to full utilisation lengthens queues and lead times sharply.

Category management

Managing a group of related purchases as a single strategic unit, with a plan based on the organisation's demand and the supply market for that category.

Change management

The structured approach to moving people and processes from a current state to a new one, so that the change is adopted and sustained.

Claim substantiation

Holding evidence, before publication, that supports a factual, comparative, price or environmental claim as it is worded. That competitors make the same claim is not evidence, and evidence about one component does not support a claim about the whole product.

Click-through rate (CTR)

Clicks as a percentage of impressions. In organic search, a fall in CTR while position holds can mean the results page is answering the query itself, though more ads above the result or a changed snippet can do the same.

Compliance

Conformity with the laws, regulations, internal policies and contractual obligations that apply to an organisation.

Compliance risk

The risk of legal or regulatory sanction, financial loss or reputational damage from failing to comply with applicable rules.

Conflict of interest

A situation in which a personal interest could influence, or appear to influence, the performance of a professional duty. It is managed by disclosure and, where needed, by removing the person from the decision.

Contract management

Managing a contract after award so that both parties meet their obligations and the intended value is delivered, including performance monitoring, variations and closure.

Control

In risk management, an action, process or mechanism that reduces the likelihood or impact of a risk.

Control environment

The attitudes, structures and standards across an organisation that set the tone for how controls are designed and followed.

Conversion rate (CVR)

Conversions as a percentage of the clicks, visits or users that could have converted, with the base named, since each gives a different figure. A funnel stage's rate is the users completing it divided by those who reached it.

Corrective action

Action taken to remove the cause of a detected problem so that it does not recur, as distinct from correcting the problem itself.

Cost per click (CPC)

Advertising spend divided by the number of clicks it bought. For a lead goal, the most that can be paid per click is the target cost per lead multiplied by the conversion rate per click.

Cost per thousand impressions (CPM)

Advertising spend divided by impressions, multiplied by 1,000. Impressions include repeat showings to the same person, so CPM is not the cost of reaching a thousand people, which is spend divided by reach, multiplied by 1,000.

Creative fatigue

The decline in response to an ad as the same people see it repeatedly, which fresh creative shown to the same audience restores. In audience saturation, by contrast, reach stops growing and only a new audience restores response.

Customer acquisition cost (CAC)

The cost of winning one new customer: marketing and sales cost in a period divided by the new customers won in it. The highest affordable CAC is the contribution a new customer earns within the payback period

the business sets.

Cycle time

The time taken to complete one unit of work from start to finish in a process.

Deliverability

The ability of a sender's messages to reach the inbox rather than being blocked or filtered as spam. Bounce, complaint and click rates indicate it; delivery rate counts mail filed as spam, and automatic image loading can inflate open rates.

Due diligence

A structured investigation undertaken before a decision — appointing a supplier, onboarding a customer, making an acquisition — to identify risks and verify claims.

Economic order quantity (EOQ)

The order size that minimises the combined cost of ordering and holding inventory, calculated as the square root of twice annual demand times the cost per order, divided by the annual holding cost per unit.

Engagement rate

Engagements, counting specified actions such as likes, comments, shares and saves, as a percentage of reach. A rate worked on followers or impressions is a different figure, so two rates compare only when the actions counted and the base match.

Escalation

Referring an issue to a higher level of authority under defined criteria, so that it is decided by someone with the authority to act.

Five whys

A root cause technique that asks "why" repeatedly, each answer forming the basis of the next question, until the underlying cause is reached.

Frequency

In advertising, the average number of times each person reached was shown an ad in a period: impressions divided by reach. Rising frequency with falling click-through fits both creative fatigue and audience saturation, so on its own it shows neither.

Governance

The system of rules, roles and processes by which an organisation is directed and controlled, including who decides what and how they are held to account.

Incrementality

The conversions that marketing caused, over and above those that would have happened without it, measured against a randomly held-out group or matched control regions. Platform- and retailer-reported conversions, by contrast, can include sales that would have happened anyway.

Inherent risk

The level of a risk before any controls are applied.

Internal audit

An independent function that provides assurance to the board on whether governance, risk management and controls are effective.

Inventory turnover

Cost of sales divided by average inventory, showing how many times inventory is sold and replaced in a period.

Invitation to tender (ITT)

A formal request to suppliers to submit a bid against a defined specification, terms and evaluation criteria.

Kaizen

Continuous improvement through frequent small changes, typically led by the people who do the work.

Key risk indicator (KRI)

A measure that signals rising exposure to a risk, with thresholds that trigger review or escalation before the risk crystallises.

Know your customer (KYC)

Verifying the identity of customers and understanding the nature of their business and the source of their funds, as part of anti-money laundering controls.

Lead scoring

Awarding leads points for fit and behaviour, such as job role and pages visited, so that those above a threshold pass to sales. The threshold matches sales capacity, passing the best leads sales can promptly follow up, not the most.

Lead time

The total time from a request or order to its delivery, including waiting time as well as processing time.

Lean

A management approach that improves flow and value to the customer by systematically removing waste from processes.

Lifetime value (LTV)

The contribution a customer is expected to generate over the whole relationship, worked from margin per order, purchase frequency and retention rather than revenue. Also called customer lifetime value (CLV), it caps what is worth paying to acquire a customer.

Marketing consent

A person's recorded agreement, given freely by positive action, to receive marketing from an identified sender through a named channel. Pre-ticked boxes, bundled consent and a list seller's generic consent do not count; when consent is required varies by market.

Marketing mix modelling (MMM)

A statistical model that estimates each channel's contribution to sales, offline channels included, from aggregate spend and sales over time, not individual journeys. It models carry-over, where advertising keeps working after it stops, and saturation, where extra spend returns less.

Maverick spend

Purchasing that bypasses agreed contracts, approved suppliers or procurement procedures.

Negative keyword

A word or phrase that stops a paid search campaign or ad group showing ads for queries that match it, such as job-seeking or wrong-language searches. Negatives are set at launch, then added from the search terms report.

Policy

A statement of what an organisation requires and why, approved at an appropriate level. A procedure sets out how the policy is carried out.

Process mapping

Drawing the steps, decisions, handoffs and roles in a process, so that delays, duplication and control gaps

become visible.

RACI matrix

A chart assigning, for each task or decision, who is Responsible, Accountable, Consulted and Informed.

Reorder point

The inventory level at which a new order is placed: expected demand during the supply lead time plus safety stock.

Request for information (RFI)

An early approach to the market to learn about possible suppliers and solutions before a requirement is finalised.

Request for quotation (RFQ)

A request to suppliers for prices against a clearly defined requirement, typically used where price is the main differentiator.

Residual risk

The level of a risk remaining after controls are applied. It is compared with risk appetite to decide whether further action is needed.

Return on ad spend (ROAS)

Attributed revenue divided by the advertising spend it is attributed to. It measures revenue, not profit: attributed sales cover their advertising only when ROAS reaches break-even ROAS, with both on one revenue basis, such as net of VAT and returns.

Risk appetite

The amount and type of risk an organisation is willing to accept in pursuit of its objectives, approved by its board.

Risk matrix

A grid that scores risks by likelihood and impact, often coloured as a heat map, to prioritise attention. Its scores are judgements and should be read as such.

Risk register

A record of identified risks with their causes, owners, ratings, controls and actions, reviewed regularly.

Root cause analysis

A structured method for identifying the underlying cause of a problem, rather than its symptoms, so that corrective action prevents recurrence.

Safety stock

Inventory held above expected demand to protect against variation in demand or supply lead time.

Sanctions screening

Checking customers, suppliers and transactions against government sanctions lists before dealing with them.

Search engine optimisation (SEO)

Improving a site's visibility in unpaid search results through crawlable, indexable pages matched to the intent behind queries, original content and links earned rather than bought. Search engines' published spam policies prohibit links bought to pass ranking credit.

Search intent

The purpose behind a search query, usually classed as informational, navigational, commercial or transactional. Each query, in any language, dialect or script, is matched to the page type that serves its

purpose, such as a guide for a question.

Service level agreement (SLA)

A defined, measurable standard of service a supplier or internal team commits to, such as response time or availability, with the consequences of missing it.

Six Sigma

A data-driven improvement method that reduces variation and defects, typically following the DMAIC cycle: define, measure, analyse, improve, control.

Specification

The statement of what is required from a supplier. A technical specification describes the product or method; an output-based specification describes the result to be achieved.

Spend analysis

Collecting, cleaning and classifying an organisation's purchasing data to show what is bought, from whom and at what cost, as the basis for category strategies.

Stakeholder

A person or group who affects, or is affected by, a decision, project or organisation.

Standard operating procedure (SOP)

A written, step-by-step instruction for carrying out a routine activity consistently.

Supplier relationship management

A structured approach to managing interactions with important suppliers to improve performance, reduce risk and develop value over time.

Supply positioning

Classifying purchases by their value to the organisation and the risk in their supply market — often shown as the Kraljic matrix — to choose a sourcing approach for each.

Suppression list

A list of contacts never to be messaged or uploaded to ad platforms, such as those who unsubscribed, complained or hard-bounced, checked before every send and upload. Opted-out contacts are suppressed, not deleted, so a later import cannot restore them.

Tender evaluation criteria

The weighted criteria against which bids are scored, fixed and published before bids are opened so that the evaluation cannot be shaped to a preferred bidder.

Three lines model

A governance model, published by the Institute of Internal Auditors, that distinguishes management's ownership of risk (first line), specialist risk and compliance oversight (second line) and independent assurance by internal audit (third line).

Throughput

The rate at which a process produces finished output, set by its bottleneck.

Total cost of ownership (TCO)

The full cost of acquiring, operating, maintaining and disposing of an asset or service over its life, not only its purchase price.

Transcreation

Adapting marketing copy into another language so that its intent, tone and effect survive, rewriting idiom, humour and cultural references rather than translating them word for word. Regulated wording, such as

offer terms, prices and legal statements, is translated exactly.

Value stream map

A diagram of every step, delay and information flow needed to deliver a product or service, used to separate value-adding time from waste.

Waste

In lean practice, any activity that consumes resources without adding value for the customer, such as waiting, rework, excess inventory and unnecessary movement.

Whistleblowing

Reporting suspected wrongdoing through a channel that protects the person reporting from retaliation.

Workflow redesign

Changing the sequence, roles and handoffs of a process — for example, to incorporate automation or AI assistance — rather than adding a new tool to an unchanged process.

Using this publication

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