

THE CASE FOR GROWTH

90-Day AI Implementation Roadmap

Integrate AI into your firm without disrupting operations

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The 90-Day Plan

Days 1-30: Foundation

- Week 1: Assess current workflows and identify AI opportunities
- Week 2: Select initial AI tools (start with 1-2 max)
- Week 3: Set up accounts and basic training
- Week 4: Pilot with small, low-risk tasks

Goal: Get comfortable with AI without overwhelming the team

Days 31-60: Expansion

- Week 5-6: Expand to more use cases
- Week 7: Create templates and best practices
- Week 8: Train entire team on approved uses

Goal: Scale AI usage across the firm

Days 61-90: Optimization

- Week 9-10: Measure time savings and quality
- Week 11: Refine workflows based on results
- Week 12: Plan next phase of AI adoption

Goal: Make AI a sustainable part of operations