

The 90-Day AI Roadmap for Growing Businesses

Most companies don't have an AI problem. They have a "we tried ChatGPT, it was cool, and nothing changed" problem. This roadmap is the plan we use with clients to get AI out of experiments and into the work people do every day — in three phases, one quarter.

How to use this roadmap

Work through it in order. Each phase ends with a short checklist — don't move on until it's done. The goal isn't to "adopt AI." The goal is **one workflow that measurably runs faster or cheaper by day 60**, and a repeatable way to do it again.

Step 0 — Quick readiness check

Answer honestly. Every "no" is not a blocker — it's the first thing to fix.

- ☐ We can name the 3–5 tasks that eat the most staff hours each week.
- ☐ Our customer and lead data lives in one system (a CRM), not in inboxes and spreadsheets.
- ☐ Someone on the team owns "AI" as part of their job — even a few hours a week.
- ☐ We know what a lead, a sale, or a support ticket is worth to us in dollars.
- ☐ We have a written rule for what company or customer data may go into AI tools.

Phase 1 — Find & prioritize

GOAL: A RANKED LIST OF YOUR TOP 3 AI OPPORTUNITIES

1. Map the work

Spend one week listing every recurring task in sales, operations, service, and admin. For each one, note who does it, how often, and roughly how long it takes. Repetitive, text-heavy, rules-based tasks are the best AI candidates.

2. Score every opportunity

Rate each candidate 1–5 on the four factors below. Multiply Impact × Frequency, then subtract Effort and Risk. The top three scores are your shortlist.

Factor	Ask yourself
Impact	If this ran itself, how many hours or dollars would it free up?
Frequency	How often does it happen — daily, weekly, monthly?
Effort	How many systems, people, and approvals does it touch?
Risk	What happens if AI gets it wrong? Is a human reviewing the output?

3. Set your baseline

For each of your top three, write down how it performs today: time per task, response time, error rate, or cost. You can't prove a win without a "before."

Phase 1 checklist

- ☐ Task inventory complete across all departments
- ☐ Top 3 opportunities scored and ranked
- ☐ Baseline metric recorded for each
- ☐ One owner named for the pilot

Got your top 3? Get a second opinion before you build.

In a free 30-minute roadmap call we'll pressure-test your ranking and tell you which one to pilot first.

[Book a roadmap call](#)

DAYS 31-60

Phase 2 — Pilot one workflow

GOAL: ONE WORKFLOW RUNNING IN PRODUCTION, WITH NUMBERS

Pick the #1 opportunity and build it end to end. Resist the urge to run three pilots — one finished win beats three half-built ones.

Proven starter workflows

Speed-to-lead follow-up

Every new lead gets a personalized reply and a booking link within minutes, day or night.

Missed-call text-back

Missed calls trigger an instant text so the prospect doesn't call the next company on the list.

Review requests

Happy customers get an automatic, well-timed request for a review after the job is done.

Meeting notes → CRM

Calls are summarized, action items extracted, and the CRM updated without anyone typing.

Proposal & quote drafts

AI drafts the first version from call notes and templates; a person reviews and sends.

Inbox & ticket triage

Incoming requests are sorted, tagged, and routed — with suggested replies ready to approve.

Build it the right way

1. **Keep a human in the loop** at first. AI drafts, a person approves. Remove the checkpoint only once the output is consistently right.
2. **Connect it to your real systems** — CRM, calendar, email, phone. A tool that lives in a separate tab gets forgotten.
3. **Run it for two to three weeks**, then compare against your Phase 1 baseline.

Phase 2 checklist

- ☐ Pilot workflow live and used by the team daily
- ☐ Before/after numbers compared to baseline
- ☐ Failure cases documented and fixed
- ☐ Go / adjust / stop decision made

DAYS 61–90

Phase 3 — Scale & make it stick

GOAL: A REPEATABLE SYSTEM, NOT A ONE-OFF PROJECT

1. Write your AI policy

One page is enough: which tools are approved, what data can and can't go into them, and who reviews AI output before it reaches a customer.

2. Train the team

Show people the pilot, what it saves them, and how to use it well. Adoption fails more often from confusion than from bad technology.

3. Roll out opportunity #2

Use the same playbook — baseline, pilot, measure — on the next item from your Phase 1 list. It will go faster the second time.

4. Review monthly

Put a 30-minute AI review on the calendar: what's working, what broke, and what's next on the list.

Phase 3 checklist

- ☐ AI use policy written and shared
- ☐ Team trained on the live workflow
- ☐ Second workflow in pilot
- ☐ Monthly review on the calendar

Five mistakes that stall AI projects

1. **Starting with the tool instead of the problem.** Pick the workflow first, then the technology.
2. **No baseline.** Without "before" numbers, nobody can tell whether it worked.
3. **Too many pilots at once.** Focus beats breadth in the first 90 days.
4. **Removing humans too early.** Earn trust in the output before you automate the final step.
5. **No owner.** If AI is everyone's job, it's nobody's job.

Want us to build your roadmap with you?

Book a free 30-minute roadmap call. We'll walk through your workflows and leave you with your three highest-ROI AI opportunities — whether you work with us or not.

[Book my free roadmap call](https://links.integracoreconsulting.com/widget/bookings/ai-roadmap-call-7989)

links.integracoreconsulting.com/widget/bookings/ai-roadmap-call-7989