



CHECKLIST

90-DAY AI IMPLEMENTATION ROADMAP





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This checklist provides a systematic approach to implementing AI in your small business over 90 days, broken down into three phases. Following this structured plan will help you transform your business operations, save time, and increase profitability without getting overwhelmed.

1. Phase 1: Foundation (Days 1-30)

Conduct a business task audit

Track time spent on repetitive tasks like email, scheduling, data entry, and customer inquiries to establish a baseline and identify your biggest time drains. This audit will reveal which processes are prime candidates for AI automation.

- **Identify your most time-consuming tasks**
List all tasks that take more than 15 minutes and occur regularly. Focus on repetitive, predictable tasks that follow the same steps each time and could be handled by someone following clear instructions.
- **Research and select your first AI tool**
Choose one simple tool that addresses your biggest time drain. Start with tools under \$200/month that solve a specific problem in your business. This focused approach prevents overwhelm and builds confidence.
- **Implement your chosen AI tool**
Set up and start using the tool for real work. Don't aim for perfection, just progress. Document the setup process for future reference as this will make subsequent implementations easier.
- **Establish success metrics**
Define specific, measurable goals for your AI implementation such as hours saved per week, customer inquiries handled automatically, or increase in sales. Clear metrics will help prove the value of your AI investment.

2. Phase 2: Automation (Days 31-60)

- **Expand features of your first AI tool**
Explore advanced capabilities of your existing tool that you haven't yet utilized. Most AI tools have features

beyond the basics that can further enhance your productivity.

- **Add a second complementary AI tool**
Select and implement another AI tool that works well with your first one. For example, if you started with email automation, consider adding social media scheduling or a customer service chatbot.
- **Connect your AI tools**
Integrate your AI systems so they work together seamlessly. For example, connect your chatbot to your CRM or your email automation to your social media tools. This integration multiplies the effectiveness of each individual tool.
- **Document new workflows**
Create clear process guides that explain how work gets done with your new AI systems. These guides ensure everyone understands the new procedures and can work effectively with the AI tools.
- **Test and optimize automations**
Review how your automated systems are performing and make necessary adjustments. Ensure everything runs smoothly before moving to the next phase and fix any integration issues that arise.

3. Phase 3: Optimization (Days 61–90)

- ❑ **Measure ROI from initial implementations**

Calculate time saved and revenue generated from your AI tools. Compare your current metrics with your baseline to quantify the impact. This data will justify continued investment in AI.
- ❑ **Add predictive analytics or advanced customer insights**

Implement tools that analyze patterns in your business data to forecast trends and customer behavior. This moves you from reactive to proactive business management.
- ❑ **Train your team on AI tools**

Provide hands-on training with real business scenarios. Position AI as a productivity partner that eliminates boring tasks, not as a job threat. Create AI champions within your organization who can help others.
- ❑ **Address any resistance or adoption issues**

Combat team resistance by simplifying processes and providing ongoing support. Make using AI tools easier than the old way of doing things. Celebrate wins publicly to motivate continued adoption.
- ❑ **Develop a data quality improvement plan**

Clean up messy or incomplete data that might be limiting your AI's effectiveness. Organize customer information, clean email lists, and document processes to create a foundation for better AI performance.

- ❑ **Create your next 90-day AI roadmap**

Plan your next AI initiatives based on what you've learned. Identify which processes still need automation and which new AI capabilities could boost your profits. Set clear goals and timelines for continued growth.

4. Ongoing Management

- ❑ **Schedule monthly AI learning sessions**

Set aside time each month to stay informed about AI updates relevant to your business. Follow trusted sources that focus on practical business applications rather than technical details.

- ❑ **Join an AI business community**

Connect with other business owners using AI to share experiences and learn from their successes and mistakes. This network can provide valuable insights and support as you continue your AI journey.

- ❑ **Review and update your AI tools quarterly**

Assess which tools are delivering results and which might need replacement. Technology evolves quickly, so regular reviews ensure you're always using the most effective solutions for your business needs.