

90 Day AI-First Implementation Roadmap



HOW TO USE THIS ROADMAP

This is your working document. Print it, share it with your team, fill in the blanks, and check boxes as you go.

Key Principles:

- Start small, measure obsessively, scale what works
- Each week builds on the previous one
- Document everything (what worked, what didn't, why)
- Adjust timelines based on your team size and complexity



B2B Marketing Intelligence and Action Platform

Version 1.0 | Oct 2025

www.omnibound.ai

MONTH 1: FOUNDATION (Weeks 1-4)

Goal

Build the core infrastructure that enables AI adoption

WEEK 1: AUDIT & FOUNDATION SETUP

✔ Task 1: Audit All Marketing Context Sources

What to do: Map where all your marketing knowledge currently lives (ICP docs, messaging frameworks, personas, customer journey maps, campaign briefs, product messaging, past campaign data, competitive intel, call transcripts, etc.)

Your findings:

- Total context sources identified: _____
- Most critical gaps: _____
- Most outdated sources: _____
- Biggest redundancies: _____
- Tools where context lives: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Run AI Skills Assessment

What to do: Send a survey to your team covering familiarity with AI tools (ChatGPT, n8n, Zapier, etc.), prompting ability, workflow design knowledge, and comfort with data interpretation.

Your results:

- Team members surveyed: _____
- Average AI familiarity score (1-5): _____
- Top 3 skill gaps identified:
 - _____
 - _____
 - _____
- Top 3 blockers to AI adoption:
 - _____
 - _____
 - _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Select Your Context Hub Platform

What to do: Choose where your centralized context library will live (Notion recommended, or Confluence, Airtable, SharePoint).

Your choice: _____

Rationale: _____

Access provisioned for: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Pick Your First Pilot Use Case

What to do: Select ONE high-impact, repeatable workflow to pilot (examples: call summarization, content repurposing, competitor monitoring, email sequence builder).

Your pilot: _____

Success criteria:

- Current baseline: _____
- Target goal: _____
- Success metric: _____
- Timeline: _____ weeks

Pilot team members: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Assign AI Champions per Function

What to do: Designate one person per marketing function to lead AI adoption for their area.

Function	Champion Name	Responsibility
Content Marketing		AI for content creation, repurposing
Demand Generation		AI for campaigns, lead routing
Product Marketing		AI for competitive intel, positioning
Customer Marketing		AI for feedback analysis, retention
Brand/Comms		AI for tone validation, monitoring
Marketing Ops		AI for workflows, automation

Owner: _____ **Deadline:** _____

Status: Not Started In Progress Complete

WEEK 1 CHECKPOINT

- Context audit complete
- Skills assessment done
- Platform selected
- Pilot use case chosen
- AI Champions assigned

Completion: _____% | Key learnings: _____

WEEK 2: BUILD CONTEXT HUB + LAUNCH TRAINING

✔ Task 1: Set Up Context Hub Structure

What to do: Create your centralized knowledge repository with folders for: Company Strategy, ICP & Personas, Messaging & Positioning, Product Knowledge, Campaign History, Competitive Intel, Brand Guidelines, Customer Insights.

Your structure created: Yes No

Platform URL: _____

Team access granted: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Migrate Top 5 Context Pieces

What to do: Move your most critical context into the hub (start with ICP, messaging framework, top persona, competitive positioning, and brand guidelines).

Your top 5 migrated:

1. _____ (migrated on: _____)
2. _____ (migrated on: _____)
3. _____ (migrated on: _____)
4. _____ (migrated on: _____)
5. _____ (migrated on: _____)

Metadata added (tags, audience, use case): Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Schedule First AI Jam

What to do: Set up a recurring 30-minute weekly meeting where each team member brings 1 AI workflow, prompt, or output they tried. Team reviews, refines, and decides whether to adopt it.

AI Jam details:

- Day/Time: _____
- Frequency: Weekly (every _____)
- Attendees: _____
- Meeting link: _____
- Agenda template: Each person shares 1 prompt/workflow + output

Owner: _____ First AI Jam date: _____

Status: Not Started In Progress Complete

✔ Task 4: Create Your First Prompt Template

What to do: Based on your pilot use case, create your first standardized prompt template. Document: Context needed, Prompt structure, Expected output, Review criteria.

Your first prompt template:

Your first prompt template:

Use case: _____

Prompt template:

[Write your structured prompt here]

Role: Act as a _____

Context: _____

Task: _____

Format: _____

Constraints: _____

Example output: _____

Where stored: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Create AI Playbook (Notion/Confluence/Other)

What to do: Set up your living AI Playbook document that will store: prompt templates, workflow diagrams, tool guidelines, brand guardrails, and lessons learned.

Playbook created: Yes No

Platform: _____ URL: _____

Sections created:

Prompt Library Workflow Blueprints Tool Guidelines Brand Guardrails Lessons Learned

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 2 CHECKPOINT

- Context Hub structure live
- Top 5 context pieces migrated
- First AI Jam scheduled
- First prompt template created
- AI Playbook launched

Completion: ____% | Key learnings: _____

WEEK 3: LAUNCH PILOT + BUILD FIRST AGENT

✔ Task 1: Launch Your Pilot Use Case

What to do: Start executing your chosen pilot workflow with 2-3 team members using real marketing tasks.

Pilot details:

- Use case: _____
- Team members: _____
- Start date: _____
- Daily/weekly check-ins scheduled: Yes No
- Documentation location: _____

Track these metrics:

- Time spent (before AI): _____
- Time spent (with AI): _____
- Quality score (1-5): _____
- Errors/revisions needed: _____
- Team feedback: _____

Owner: _____ Pilot end date: _____

Status: Not Started In Progress Complete

✔ Task 2: Set Up Basic Guardrails

What to do: Create a one-page "AI Charter" defining what AI can do (e.g., draft emails, summarize transcripts) and what it cannot do (e.g., finalize pricing, send unreviewed customer comms).

Your AI Charter:

AI CAN do	AI CANNOT do
● _____	● _____
● _____	● _____

Review process defined: Yes No

Approval workflow: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Build Your First Lightweight AI Agent

What to do: Create one simple automation using no-code tools (Zapier, Make, or n8n) for a repetitive task. Examples: call summarizer, content snippet generator, competitor tracker.

Your first agent:

- Task automated: _____
- Tool used: Zapier Make n8n Custom GPT Other: _____
- Input: _____
- Output: _____
- Where output goes: _____

Agent workflow:

1. Trigger: _____
2. Action 1: _____
3. Action 2: _____
4. Final output: _____

Testing completed: Yes No

Agent launched to team: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Upload Brand Guidelines to Context Hub

What to do: Add your brand voice, tone, style guidelines, and approved/banned phrases to the context hub so AI can reference them.

Brand guidelines uploaded:

- Voice & tone document: Yes No
- Visual identity: Yes No
- Approved terminology: Yes No
- Things we never say: Yes No
- Custom GPT created with brand guidelines: Yes No

Location in hub: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

Task 5: Document Everything in AI Playbook

What to do: Add your pilot workflow, first prompt template, first agent blueprint, and AI Charter to the playbook.

Added to playbook:

- Pilot workflow documentation
- Prompt template #1
- Agent blueprint #1 (with JSON export if applicable)
- AI Charter
- Week 1-3 learnings

Playbook shared with team: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 3 CHECKPOINT

- Pilot launched
- AI Charter defined
- First agent built and tested
- Brand guidelines uploaded
- Everything documented

Completion: ____% | Key learnings: _____

WEEK 4: SIGNALS + ORCHESTRATION + METRICS

✔ Task 1: Set Up Signal Capture (1 Source)

What to do: Pick ONE signal source (customer calls, competitor blogs, G2 reviews, support tickets) and set up automatic capture using Zapier/Make/n8n.

Your first signal source: _____

Setup details:

- Data source: _____
- Tool used: Zapier Make n8n API direct
- Frequency: Real-time Daily Weekly
- Where data lands: _____
- AI summarization added: Yes No

Signal types captured:

Customer feedback themes

Competitor updates

Support ticket trends

Review sentiment

Other: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Set Up First Orchestration Rule

What to do: Connect AI outputs from one function to trigger actions in another. Example: New customer feedback theme → Content Marketing agent → Suggested blog topics.

Your first orchestration rule:

IF: _____ (trigger event in Function A)

THEN: _____ (action in Function B)

RESULT: _____ (output/notification)

Functions connected:

Function A: _____

Function B: _____

Workflow tool: Zapier Make n8n Slack automation Other: _____

Testing completed: Yes No Live: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Define Baseline Metrics

What to do: Measure your current state (before AI optimization) for 3 key metrics: campaign setup time, approval cycle speed, and content volume per person.

Your baseline metrics:

Metric	Current Baseline	Target Goal	Timeline to Goal
Campaign setup time	____ days	____ days	____ weeks
Approval cycle speed	____ days	____ days	____ weeks
Content volume/person/week	____ assets	____ assets	____ weeks
Repetitive task hours/week	____ hours	____ hours	____ weeks
Pipeline velocity	____ days	____ days	____ weeks

How you're tracking: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ **Task 4: Host Second AI Jam + Review Pilot Progress**

What to do: Run your second weekly AI Jam. Each person shares 1 prompt or workflow. Review pilot progress and gather feedback.

AI Jam #2 details:

- Date: _____
- Attendees: _____
- Prompts/workflows shared: _____

Pilot progress review:

- Time saved so far: _____
- Quality improvement (1-5): _____
- Team feedback: _____
- Adjustments needed: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ **Task 5: Plan Month 2 Focus Areas**

What to do: Based on Month 1 learnings, decide what to prioritize in Month 2.

Month 2 priorities:

1. _____
2. _____
3. _____

New pilot use cases to test:

1. _____
2. _____
3. _____

Team members ready to scale to: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 4 CHECKPOINT

- Signal capture launched
- First orchestration rule live
- Baseline metrics defined
- Second AI Jam complete
- Month 2 plan ready

Completion: ____% | Key learnings: _____

MONTH 1 FINAL REVIEW

Overall completion: ____% complete

What worked well:

1. _____
2. _____
3. _____

What didn't work:

1. _____
2. _____

Adjustments for Month 2:

1. _____
2. _____

Early wins to celebrate:

MONTH 2: BUILD & VALIDATE (Weeks 5-8)

Goal

Prove value, refine workflows, expand adoption

WEEK 5: REFINE PILOT + BUILD AGENT #2

✔ Task 1: Refine Pilot Based on Feedback

What to do: Fix bottlenecks in your pilot workflow (unclear prompts, manual review steps, missing context).

Pilot refinements:

- Issues identified:
 - a. _____
 - b. _____
 - c. _____
- Solutions implemented:
 - a. _____
 - b. _____
 - c. _____

Version 2 of workflow ready: Yes No

Documented in playbook: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Build AI Agent #2

What to do: Create your second lightweight automation for a different repetitive task.

Your second agent:

- Task automated: _____
- Tool used: Zapier Make n8n Custom GPT Other: _____
- Input: _____
- Output: _____
- Integration points: _____

Agent workflow:

1. Trigger: _____
2. Action 1: _____
3. Action 2: _____
4. Final output: _____

Testing completed: Yes No Agent launched: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Migrate More Context into Hub

What to do: Add 5 more critical context pieces to your centralized hub (customer journey maps, campaign history, product roadmap, competitive analysis, FAQ database).

Context pieces migrated:

6. _____ (migrated on: _____)
7. _____ (migrated on: _____)
8. _____ (migrated on: _____)
9. _____ (migrated on: _____)
10. _____ (migrated on: _____)

Metadata/tags added: Yes No

Accessible to team: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Add 3 More Prompt Templates to Library

What to do: Document 3 additional battle-tested prompts for different use cases. Prompt templates added:

Template #2:

- Use case: _____
- Function: _____
- Prompt: _____
- Example output: _____

Template #3:

- Use case: _____
- Function: _____
- Prompt: _____
- Example output: _____

Template #4:

- Use case: _____
- Function: _____
- Prompt: _____
- Example output: _____

Stored in playbook: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Add Signal Source #2

What to do: Set up automatic capture for a second signal source.

Your second signal source: _____

Setup details:

- Data source: _____
- Frequency: Real-time Daily Weekly
- Where data lands: _____
- AI summarization: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 5 CHECKPOINT

- Pilot refined (v2 ready)
- Agent #2 built and tested
- More context migrated
- 3 more prompt templates added
- Signal source #2 live

Completion: ____% | Key learnings: _____

WEEK 6: MEASURE PILOT RESULTS + BUILD ASSET LIBRARY

✔ Task 1: Measure Pilot Results

What to do: Collect quantitative data (time saved, quality, volume) and qualitative feedback (ease of use, adoption, pain points).

Pilot results:

- Time saved: _____% faster (baseline: _____ → current: _____)
- Quality improvement: _____ (score 1-5)
- Volume increase: _____% more output
- Errors reduced: _____% fewer revisions
- Team adoption: / team members using weekly

Qualitative feedback:

- What worked: _____
- What didn't: _____
- Suggestions: _____

ROI calculation:

- Hours saved per week: _____
- Cost savings: \$_____ per month
- Revenue impact: \$_____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Scale Pilot to Wider Team

What to do: Document the workflow, train the broader team, and roll it out beyond the pilot group.

Scaling plan:

- Workflow documented: Yes No
- Training session scheduled: _____ (date)
- Loom walkthrough recorded: Yes No (link: _____)
- Playbook updated: Yes No

New team members trained:

1. _____ 2. _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

Task 3: Build AI Asset Library

What to do: Create a centralized library (Notion database or Airtable) for prompts, workflows, content snippets, and datasets.

Library structure:

Platform: _____ URL: _____

Sections created:

- Prompt Templates (by function)
- Workflow Blueprints (JSON exports + guides)
- Content Snippets (CTAs, intros, headlines)
- Datasets & Context Packs (CSVs, persona profiles)
- Approval & Versioning Log

Assets migrated so far:

- ____ prompt templates
- ____ workflow blueprints
- ____ content snippets
- ____ datasets

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Set Up AI Impact Dashboard

What to do: Create a simple dashboard (Google Sheets, Airtable, or Data Studio) that tracks your key metrics.

Dashboard created: Yes No

Platform: _____ URL: _____

Metrics tracked:

- Campaign setup time
- Approval cycle speed
- Content volume per person
- Repetitive task hours saved
- Pipeline velocity
- Other: _____

Update frequency: Daily Weekly Monthly

Dashboard shared with: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Launch Pilot Use Case #2

What to do: Start your second pilot using the same framework (pick a use case, define success, test with a small team).

Pilot #2 details:

- Use case: _____
- Team members: _____
- Success metric: _____
- Baseline: _____
- Target: _____
- Timeline: ____ weeks

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 6 CHECKPOINT

- Pilot results measured and documented
- Pilot scaled to wider team
- AI Asset Library created
- Impact dashboard live
- Pilot #2 launched

Completion: ____% | Key learnings: _____

WEEK 7: EXPAND SIGNALS + ORCHESTRATION

✓ Task 1: Add 2 More Signal Sources

What to do: Expand your signal capture to include 2 additional sources (total: 4 signal sources live).

Signal source #3:

- Source: _____
- Setup complete: Yes No
- AI summarization: Yes No

Signal source #4:

- Source: _____
- Setup complete: Yes No
- AI summarization: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✓ Task 2: Create Signals Dashboard

What to do: Centralize all signal outputs into one view (Notion, Airtable, or dedicated dashboard).

Dashboard details:

Platform: _____ URL: _____

Dashboard sections:

- Daily customer sentiment summaries
- Weekly competitor updates
- Top 5 support questions
- Emerging LinkedIn/community trends
- Product feedback themes
- Win/loss insights

Auto-refresh frequency: Daily Weekly

Shared with: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Build Orchestration Workflow #2

What to do: Create a second cross-function orchestration rule.

Your second orchestration rule:

IF: _____ (trigger)

THEN: _____ (action)

RESULT: _____ (output)

Functions connected:

Function A: _____

Function B: _____

Testing: Complete In Progress

Live: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

Task 4: Host Monthly AI Jam Review

What to do: Run a longer AI Jam session (60 mins) to review all learnings from Weeks 1-7, share wins, and plan next focus areas.

Monthly review:

Date: _____ Attendees: _____

Review topics:

- Pilot #1 results shared
- Best prompts/workflows demonstrated
- AI Asset Library walkthrough
- Metrics dashboard review
- Feedback collected
- Next priorities identified

Key wins celebrated:

1. _____
2. _____
3. _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Document Month 2 Learnings

What to do: Add all Week 5-7 learnings, workflows, and templates to the AI Playbook.

Added to playbook:

- Pilot #1 final results & documentation
- Agent blueprints #1 and #2
- 4+ prompt templates
- Signal capture setup guides
- Orchestration rules
- Lessons learned (what worked, what didn't)

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 7 CHECKPOINT

- 4 signal sources live
- Signals dashboard created
- Orchestration workflow #2 live
- Monthly AI Jam complete
- Playbook updated

Completion: _____% | Key learnings: _____

WEEK 8: GUARDRAILS + TRAINING

Task 1: Add Advanced Guardrails

What to do: Layer in plagiarism checks, compliance screening, and SEO validation.

Guardrails added:

- Plagiarism check (tool: _____)
- Compliance screening (if regulated industry)
- SEO validation (tool: _____)
- Brand tone check (Custom GPT or manual)

Review workflow: AI draft → [Guardrail 1] → [Guardrail 2] → Human review → Publish

Documented: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

Task 2: Train Team on AI Asset Library

What to do: Run a walkthrough session showing the team how to access, use, and contribute to the library. Training session:

Date: _____ Attendees: _____

Recording: Yes (link: _____) No

Topics covered:

- How to find prompts in the library
- How to use workflow blueprints
- How to submit new assets
- How to version control
- How to give feedback

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Review Metrics Dashboard

What to do: Analyze your metrics dashboard to see what's working and what's not.

Metrics review:

Metric	Baseline	Current	% Improvement	Target
Campaign setup time	____ days	____ days	____ %	____ days
Approval cycle speed	____ days	____ days	____ %	____ days
Content volume/person/week	____ assets	____ assets	____ %	____ assets
Repetitive task hours/week	____ hours	____ hours	____ %	____ hrs
Pipeline velocity	____ days	____ days	____ %	____ days

What's working:

1. _____
2. _____
3. _____

What needs optimization:

1. _____
2. _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Assign Library Maintenance Role

What to do: Designate someone to keep the AI Asset Library updated monthly (rotating the "Librarian" role recommended).

Librarian assigned: _____

Responsibilities:

- Monthly library audit (outdated assets, gaps)
- Version control updates
- Usage tracking (most/least used assets)
- Team feedback collection
- Quarterly review presentation

First review date: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Plan Month 3 Priorities

What to do: Based on Month 2 results, decide what to scale and what to add in Month 3. Month 3 priorities:

1. _____
2. _____
3. _____

Which pilots to scale org-wide: _____

New workflows to test: _____

Functions ready for advanced orchestration: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 8 CHECKPOINT

- Advanced guardrails added
- Team trained on the library
- Metrics reviewed and optimized
- Librarian assigned
- Month 3 plan ready

Completion: _____% | Key learnings: _____

MONTH 2 FINAL REVIEW

Overall completion: _____% complete

Pilots proven:

1. _____
2. _____

Measurable results:

- Time saved: _____%
- Quality improvement: _____ (1-5 scale)
- Team adoption: %
- ROI: \$_____

What worked well:

1. _____
2. _____

What didn't work:

1. _____
2. _____

Adjustments for Month 3:

1. _____
2. _____

Key wins to celebrate: _____

MONTH 3: SCALE & SYSTEMATIZE (Weeks 9-12)

Goal

Scale proven workflows org-wide, build advanced orchestration, and achieve measurable ROI.

WEEK 9: SCALE PILOTS + EXPAND ORCHESTRATION

✓ Task 1: Scale Both Pilots to Entire Marketing Org

What to do: Roll out both proven pilots to all marketing team members with training, documentation, and support.

Pilot #1 scaling:

- Pilot: _____
- Total team members trained: _____
- Training sessions completed: Yes No
- Documentation updated: Yes No
- Support channel created: Yes (where: _____)

Pilot #2 scaling:

- Pilot: _____
- Total team members trained: _____
- Training sessions completed: Yes No
- Documentation updated: Yes No

Adoption tracking:

- Week 9 adoption rate: _____%
- Issues/blockers: _____
- Support provided: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Launch 2 New Pilot Use Cases

What to do: Using the proven pilot framework, start testing 2 additional high-value workflows.

Pilot #3:

- Use case: _____
- Team members: _____
- Success metric: _____
- Baseline vs. target: _____
- Timeline: ____ weeks

Pilot #4:

- Use case: _____
- Team members: _____
- Success metric: _____
- Baseline vs. target: _____
- Timeline: ____ weeks

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ **Task 3: Complete Signal Capture (All Sources)**

What to do: Add remaining signal sources so you have full coverage (customer, market, competitive, social/community signals).

Final signal sources:

Signal source #5:

- Source: _____
- Setup complete: Yes No

Signal source #6:

- Source: _____
- Setup complete: Yes No

All signal sources now live:

1. _____
2. _____

Dashboard fully automated: Yes No

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Build Orchestration Flows for All Marketing Functions

What to do: Create cross-function workflows that connect all marketing teams (Content, Product Marketing, Demand Gen, Customer Marketing, Brand/Comms).

Orchestration rules created:

Rule #1:

IF: _____ (trigger)

THEN: _____ (action)

Functions: _____ → _____

Rule #2:

IF: _____ (trigger)

THEN: _____ (action)

Functions: _____ → _____

Rule #3:

IF: _____ (trigger)

THEN: _____ (action)

Functions: _____ → _____

Rule #4:

IF: _____ (trigger)

THEN: _____ (action)

Functions: _____ → _____

Total orchestration rules live: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Expand AI Agents

What to do: Build additional lightweight agents to cover 50%+ of repetitive tasks across all functions.

New agents built:

Agent #3:

- Task: _____ Tool: _____
- Status: Testing Live

Agent #4:

- Task: _____ Tool: _____
- Status: Testing Live

Agent #5:

- Task: _____ Tool: _____
- Status: Testing Live

Agent #6:

- Task: _____ Tool: _____
- Status: Testing Live

Total agents live: _____

Estimated hours saved/week (all agents): _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 9 CHECKPOINT

- Both pilots scaled org-wide
- 2 new pilots launched
- All signal sources live
- Orchestration across all functions
- 6+ agents live and working

Completion: _____% | Key learnings: _____

WEEK 10: SYSTEMATIZE + CERTIFY

Task 1: Document the 10-Part AI System

What to do: Compile everything you've built into a comprehensive playbook that documents your full AI-first Intelligence.

AI system documented:

- Tip 1: Team Alignment (training tracks, AI Jams, playbook)
- Tip 2: AI Asset Library (structure, usage, maintenance)
- Tip 3: Signal Capture (sources, dashboard, activation workflows)
- Tip 4: Guardrails (AI Charter, review process, compliance)
- Tip 5: Context Centralization (how we built it, where it lives, how to use it)
- Tip 6: Prompt Engineering (library of templates, best practices)
- Tip 7: Lightweight Agents (all agent blueprints, setup guides)
- Tip 8: Orchestration (all rules, workflows, integration points)
- Tip 9: Custom Metrics (dashboard, tracking, reporting)
- Tip 10: Pilot Framework (methodology, templates, success criteria)

Playbook location: _____

Accessible to: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Create Role-Based Certifications

What to do: Build certification paths for each marketing function so team members can prove AI proficiency.

Certifications created:

Content Marketer Certification:

- Prompt engineering for content
- Content repurposing workflows
- Brand guardrails & tone validation
- Signal capture for content ideas

Certified team members: _____

Product Marketer Certification:

- Competitive intelligence automation
- Battlecard generation
- Product positioning workflows
- Customer feedback analysis

Certified team members: _____

Customer Marketer Certification:

- Customer call summarization
- Sentiment analysis
- Retention workflows
- Feedback theme identification

Certified team members: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Set Up Monthly Metrics Reviews

What to do: Establish a recurring monthly review of all AI impact metrics with the leadership team.

Monthly review scheduled:

- Frequency: Monthly (every _____ day of the month)
- Attendees: _____
- Meeting length: _____ minutes
- Agenda template created: Yes No

Review agenda:

- Dashboard walkthrough (all metrics)
- ROI analysis (time saved, cost savings, revenue impact)
- Success stories from each function
- Blockers and how we're addressing them
- Next month's priorities

First monthly review date: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Host Quarterly Team Summit

What to do: Run a larger team event (60-90 mins) to celebrate wins, share learnings, and align on next quarter.

Summit details:

- Date: _____
- Format: In-person Virtual Hybrid
- Attendees: _____

Summit agenda:

- Month 1-3 journey recap (what we built)
- Metrics showcase (baseline vs. now)
- Team testimonials (what changed for them)
- Best workflow/prompt/agent demos
- Wins celebrated (biggest impact stories)
- Q4 vision (where we're going next)

Materials prepared:

- Presentation deck
- Metrics one-pager
- Playbook overview
- Q&A session

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Update Onboarding for New Hires

What to do: Build AI-first onboarding, so new marketing hires are productive on Day 1.

Onboarding materials created:

- "Welcome to AI-First Marketing" deck
- Context Hub walkthrough (15-min video)
- AI Playbook orientation (30-min session)
- Prompt library tour (access + usage guide)
- Required certifications (by role)
- First week tasks checklist

Onboarding timeline:

Day 1: _____

Week 1: _____

Week 2: _____

Week 4: _____ (certification expected)

New hire productivity target:

Day 1: Can access context hub and playbook

Week 1: Can use 3+ prompt templates independently

Week 2: Can run 1 agent workflow

Month 1: Certified in their function

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 10 CHECKPOINT

- AI system fully documented
- Role-based certifications created
- Monthly metrics reviews scheduled
- Quarterly summit complete
- New hire onboarding updated

Completion: _____% | Key learnings: _____

WEEK 11: ADVANCED ORCHESTRATION + REVENUE TRACKING

✔ Task 1: Implement Advanced Orchestration

What to do: Chain multiple agents into multi-step workflows for cross-function orchestration.

Advanced workflows created:

Workflow #1: Customer Feedback → Content → Campaign

Step 1: Customer signal captured (support, calls, reviews)

Step 2: AI identifies themes and trends

Step 3: Content agent suggests blog/webinar topics

Step 4: Demand Gen receives suggested campaign angles

Step 5: Assets created and campaigns launched

Status: Built Testing Live

Workflow #2: Competitor Alert → Positioning → Sales Enablement

Step 1: Competitor change detected

Step 2: AI summarizes what changed and impact

Step 3: Product Marketing updates battlecards

Step 4: Sales team gets positioning snippets

Step 5: Content Marketing drafts response campaign

Status: Built Testing Live

Workflow #3: Signal → Insight → Action (Multi-Function)

Your custom workflow: _____

Functions involved: _____

Steps: _____

Status: Built Testing Live

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✓ Task 2: Track Revenue Impact

What to do: Connect AI workflows to revenue metrics (pipeline acceleration, deal velocity, close rates).

Revenue metrics tracked:

Metric	Baseline (Pre-AI)	Current	% Improvement	Attribution
Pipeline velocity	_____ days	_____ days	_____%	AI workflow: _____
Deal close rate	_____%	_____%	_____%	AI workflow: _____
Lead-to-opp conversion	_____%	_____%	_____%	AI workflow: _____
Average deal size	\$_____	\$_____	_____%	AI workflow: _____
Time to first meeting	_____ days	_____ days	_____%	AI workflow: _____

How you're tracking: _____

Revenue impact calculation:

- Deals influenced by AI: _____
- Total revenue attributed: \$_____
- Time to close improvement: _____ days faster
- Cost savings: \$_____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 3: Build Automated Reporting

What to do: Set up automated weekly/monthly reports that summarize AI impact and send to leadership.

Automated reports created:

Weekly Report:

- Frequency: Every _____ (day of week)
- Recipients: _____
- Content included:
 - Key metrics snapshot
 - Top 3 wins this week
 - Agent performance (uptime, accuracy)
 - Signal highlights (trends spotted)
 - Blockers/issues

Monthly Executive Report:

- Frequency: First _____ of each month
- Recipients: _____
- Content included:
 - Full metrics dashboard
 - ROI analysis (time + cost + revenue)
 - Success stories
 - Team adoption rates
 - Next month priorities

Delivery method: Email Slack Dashboard link

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 4: Optimize Underperforming Workflows

What to do: Review metrics to identify which workflows aren't delivering expected results and fix them.

Workflows to optimize:

Workflow #1:

- Current performance: _____
- Issue identified: _____
- Fix implemented: _____
- New result: _____

Workflow #2:

- Current performance: _____
- Issue identified: _____
- Fix implemented: _____
- New result: _____

Workflow #3:

- Current performance: _____
- Issue identified: _____
- Fix implemented: _____
- New result: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✓ Task 5: Expand Agent Coverage to 50%+ of Tasks

What to do: Ensure that AI agents now handle at least half of all repetitive marketing tasks.

Task coverage audit:

Function	Total Repetitive Tasks	Tasks Automated	% Coverage
Content Marketing	_____	_____	_____%
Demand Generation	_____	_____	_____%
Product Marketing	_____	_____	_____%
Customer Marketing	_____	_____	_____%
Brand/Comms	_____	_____	_____%
Marketing Ops	_____	_____	_____%

Overall automation coverage: _____%

Hours freed per week (total team): _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 11 CHECKPOINT

- Advanced orchestration live
- Revenue impact tracked
- Automated reporting set up
- Underperforming workflows optimized
- 50%+ task automation achieved

Completion: _____% | Key learnings: _____

WEEK 12: FINAL REVIEW + NEXT 90 DAYS PLANNING

✔ Task 1: Conduct Full Baseline vs. Current Performance Review

What to do: Compare where you started (Week 1 baseline) vs. where you are now (Week 12).

Complete performance comparison:

Function	Baseline (Week 1)	Current (Week 12)	Improvement	Target Hit?
Campaign setup time	____ days	____ days	____ %	<input type="checkbox"/> Yes <input type="checkbox"/> No
Approval cycle speed	____ days	____ days	____ %	<input type="checkbox"/> Yes <input type="checkbox"/> No
Content volume/pers on/week	____ days	____ days	____ %	<input type="checkbox"/> Yes <input type="checkbox"/> No
Hours saved/week	____	____	____%	<input type="checkbox"/> Yes <input type="checkbox"/> No
Pipeline velocity	____ days	____ days	____ %	<input type="checkbox"/> Yes <input type="checkbox"/> No
Team AI adoption	____%	____%	____%	<input type="checkbox"/> Yes <input type="checkbox"/> No
Agent coverage	____%	____%	____%	<input type="checkbox"/> Yes <input type="checkbox"/> No

Qualitative improvements:

- Team morale: _____
- Quality of outputs: _____
- Cross-function collaboration: _____
- Speed to market: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 2: Calculate Total ROI

What to do: Quantify the business value of your 90-day AI transformation.

ROI calculation:

Time savings:

- Hours saved per week (total team): _____
- Annual hours saved: _____ (weekly × 52)
- Cost savings: \$_____ (hours × average hourly rate)

Efficiency gains:

- Campaign setup speed: _____% faster
- Content output volume: _____% increase
- Approval cycles: _____% faster

Revenue impact:

- Pipeline velocity improvement: _____ days faster
- Deals influenced: _____
- Revenue attributed: \$_____
- Close rate improvement: _____%

Quality improvements:

- Error reduction: _____%
- Brand consistency: _____ (score 1-5)
- Customer satisfaction: _____ (if tracked)

Total ROI:

- Investment (time, tools, training): \$_____
- Return (savings + revenue): \$_____
- ROI: _____% or _____x

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

Task 3: Share Results with Executive Team

What to do: Create an executive presentation showcasing your 90-day transformation and business impact.

Executive presentation prepared:

Deck sections:

- The Challenge (where we started)
- The Approach (10-part AI Workspace overview)
- The Results (metrics, ROI, success stories)
- The Proof (before/after examples, team testimonials)
- The Future (next 90 days, scaling opportunities)
- The Ask (resources, budget, expansion)

Presentation details:

- Date scheduled: _____
- Attendees: _____
- Format: Live presentation Recorded video Written report
- Duration: _____ minutes

Key messages:

1. _____
2. _____
3. _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✓ Task 4: Plan Next 90 Days (Q2 Roadmap)

What to do: Based on what worked, plan your next phase of AI-first evolution.

Next 90 days priorities:

Q2 Focus Areas:

1. _____
2. _____
3. _____

New capabilities to build:

- _____
- _____
- _____

Functions to expand to:

- Sales (if not already)
- Product
- Customer Success
- Other: _____

Advanced workflows to implement:

- _____
- _____

Metrics to add:

- _____
- _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

✔ Task 5: Celebrate and Document Wins

What to do: Recognize team contributions, celebrate successes, and document the journey.

Celebration planned:

Event type: Team lunch Awards Slack recognition Other: _____

Date: _____

Recognition categories:

- Best AI workflow innovator: _____
- Most improved AI adopter: _____
- Best prompt engineer: _____
- AI Champion of the quarter: _____

Success stories documented:

1. _____
2. _____
3. _____

Lessons learned captured:

- What worked: _____
- What didn't: _____
- What we'd do differently: _____

Owner: _____ Deadline: _____

Status: Not Started In Progress Complete

WEEK 12 CHECKPOINT

- Full performance review complete
- Total ROI calculated
- Executive presentation delivered
- Next 90 days planned
- Team wins celebrated

Completion: _____% | Key learnings: _____

MONTH 3 FINAL REVIEW

Overall completion: _____% complete

The transformation achieved:

- AI is now our AI Workspace (not just a tool)
- Team is aligned and confident
- Context is centralized and activatable
- Agents handle 50%+ of repetitive work
- Functions are orchestrated (not siloed)
- Signals captured in real-time
- Guardrails enable scale with confidence
- Metrics prove ROI
- System is documented and repeatable

Final metrics:

- Time saved: %
- **Quality improved:** _____ (1-5)
- **Revenue impact:** \$
- Team adoption: _____%
- ROI: _____%

What worked exceptionally well:

1. _____
2. _____

What was harder than expected:

1. _____
2. _____

How we're different now:

The biggest win:

FINAL NOTES

This roadmap is your blueprint. The teams that execute this framework systematically will build a 6-12 month competitive advantage.

Key success factors:

- Don't skip steps. Each week builds on the previous one.
- Measure obsessively. You can't improve what you don't measure.
- Document everything. Your playbook becomes organizational IP.
- Celebrate wins. Team morale drives adoption.
- Stay flexible. Adjust timelines based on what works for your team.

You now have the complete 90-day roadmap. Go build your AI-first workspace.