

90-DAY AI LEADERSHIP

AI & Automation Adoption Blueprint

WEEK 1-2: Diagnose and Listen

- ☐ **Shadow Sales Calls**
Observe sales conversations; capture AI conversation intelligence data.
- ☐ **CRM & Workflow Audit**
Review data quality, automation rules, and pipeline velocity metrics.
- ☐ **Team Interviews**
Meet with top reps and managers to uncover bottlenecks and successes.

WEEK 3: Define Opportunities

- ☐ **Identify Bottlenecks**
Select 1-2 high-impact issues to address first.
- ☐ **Data Driven Validation**
Run AI simulations or analyze historical data for ROI potential.

WEEK 4: Secure Buy-In

- ☐ **All-Hands Briefing**
Explain the "why" behind AI and automation changes.
- ☐ **Baseline Metrics**
Capture current performance for conversion, cycle time, and activity ratios.

WEEK 5-6: Pilot & Test

- ☐ **Launch Pilot Program**
Roll out AI/automation changes to a champion group.
- ☐ **Monitor & Adjust**
Track results with AI alerts for anomalies and adoption issues.

WEEK 7: Evaluate and Refine

- ☐ **Compare to Control Group**
Analyze improvements vs. baseline and non-pilot teams.
- ☐ **Feedback Loop**
Gather rep feedback; refine workflows.

WEEK 8: Scale & Automate Further

- ☐ **Full Rollout**
Deploy refined AI and automation processes team-wide.
- ☐ **Continuous Coaching**
Add AI-powered coaching prompts into enablement platforms.



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