

Read this first. A two-page sample showing the *shape* of a prioritized AI roadmap — the ranking, the reasoning, the sequence. The company is a composite, not a client; the figures are illustrative; a real roadmap runs eight to twelve pages. This is a **Whole-Company Review** deliverable, so it includes staff interviews. A Leadership Review roadmap has the same structure without the staff findings.

Prioritized AI Roadmap

Illustrative Whole-Company AI Review roadmap · regional accounting and advisory firm · about 35 people · four functions reviewed: client service, tax and compliance, bookkeeping, and administration

What leadership believed

- The practice-management system is the single source of truth for client work.
- Staff aren't using AI tools yet, so a policy can wait.
- The biggest opportunity is a client-facing chatbot to reduce inbound questions.
- Month-end close is slow because the firm is short one bookkeeper.

What the people doing the work said

- Three shadow spreadsheets track engagement status because the system's reports don't show what partners ask for.
- Six of eleven staff interviewed already use a consumer AI tool weekly — two have pasted client data into it.
- Inbound client questions are mostly “where is my return” — a status problem, not a knowledge problem.
- Month-end is slow because bank feeds for eleven clients are reconciled by hand from PDFs.

RANKED OPPORTUNITIES

Where AI could create value, in the order that makes sense

Scored 1–5 on value and feasibility (higher is better) and risk (lower is better). The verdict is a judgment, not an average.

	OPPORTUNITY	VALUE	FEASIBILITY	TIME TO VALUE	RISK	VERDICT
1	Written AI acceptable-use standard Two pages: what client data may go into which tools, and who to ask. Costs nothing; every item below depends on it.	4	5	Days	1	DO FIRST
2	Bank-statement reconciliation from PDFs AI-assisted extraction and matching for the eleven clients still on paper feeds — most of a day per client per month, by the staff's own estimate.	5	4	30–60 days	2	DO FIRST
3	Client status page and automated status emails Answers “where is my return” straight from the practice-management system. Removes the reason for most inbound questions.	4	4	60–90 days	2	PURSUE
4	One engagement-status report partners actually use Retires the three shadow spreadsheets by building the report they compensate for. Prerequisite for anything that later reads engagement data.	3	4	30 days	1	PURSUE
5	AI-drafted first pass on engagement letters and routine client correspondence Real savings, but only once the acceptable-use standard exists and staff know how to review a draft.	3	5	After #1	2	DEFER 90 DAYS
6	Client-facing chatbot The item leadership arrived with. Its questions are status questions, which #3 removes at lower cost and without a wrong answer reaching a client.	2	3	6+ months	4	RECOMMEND AGAINST

WHAT I RECOMMEND AGAINST, AND WHY

The most useful section is often this one

The chatbot. It was the reason the review was commissioned, and it would have been built on the wrong diagnosis. The staff interviews showed that inbound questions are overwhelmingly about status, not knowledge. A status page answers them without putting an AI-generated answer in front of a client during tax season. If the question mix changes after #3 ships, revisit — with data.

Replacing the practice-management system. Two vendors had proposed it. Every finding above is reachable with the current system plus connections it already supports. A migration would consume the year and postpone the reconciliation savings, which are the largest and most certain item on the list.

SEQUENCE

The next 30, 90, and 180 days

FIRST 30 DAYS

Remove the risk, prove the method

- Acceptable-use standard written, signed off by the partners, and walked through with staff in one 45-minute session (#1).
- Reconciliation pilot on three of the eleven paper-feed clients, measured against the staff's own time estimate (#2).
- The engagement-status report specified with two partners and built (#4).

DAYS 31–90

Scale what worked

- Reconciliation extended to all eleven clients if the pilot held its numbers; if it didn't, stop and say why (#2).
- Client status page and automated status emails built against the practice-management system (#3).
- Shadow spreadsheets retired once the report has survived one month-end (#4).

DAYS 91–180

Widen carefully

- AI-drafted correspondence introduced to the two staff who asked for it first, with a review checklist (#5).
- Inbound question mix re-measured; chatbot decision revisited only if the data says so (#6).
- Second review of employee AI use, now that there's a standard to measure against.

TRAINING AND RESPONSIBLE USE

What the people need before the tools do

Everyone (one session)

- The acceptable-use standard, in plain terms: what never goes into a consumer tool.
- How to check an AI draft the way you'd check a junior's work.

Bookkeeping and admin (hands-on)

- The reconciliation workflow, including what to do when the extraction is wrong.
- Who owns the status page content and how a correction is made.

WHAT THIS SAMPLE CAN'T SHOW YOU

Why the real one is written from your business

The ranking above is only defensible because of what the interviews turned up — the two staff who had already pasted client data into a consumer tool, the eleven clients on paper feeds, the fact that “where is my return” was most of the inbound volume. None of that was in leadership's brief, and all of it changed the answer. A roadmap for your company would rest on what your people and your systems say, which is the part no sample can supply.

To find out what yours would say: start with the five-minute readiness survey at kennangle.com/readiness, or book a complimentary 30-minute conversation directly at kennangle.com/contact.