DecisTech

AI & Automation Roadmap

ILLUSTRATIVE EXAMPLE

22-person professional services business

Planning horizon:
Approximately 9–12 months

Not client work

Example of how DecisTech sequences AI, automation and software initiatives around readiness, dependencies, evidence and decision gates.

EXECUTIVE RECOMMENDATION

AI & Automation Roadmap

BUSINESS PROFILE	22-person professional services business
PLANNING HORIZON	Approximately 9–12 months
PURPOSE	Decide what the business should do now, what should come next, what should wait, and what evidence should determine later investment.

What should this business do next?

The business has several plausible AI, automation and software initiatives.

The main challenge is not identifying more possibilities.

It is deciding:

- what should start now
- what must happen before other initiatives
- which ideas should be tested
- which investments require evidence first
- what should deliberately wait

> **The recommendation is not to launch all initiatives in parallel.**

The business should start with a small number of foundations and evidence-generating activities.

Those results should determine what deserves expansion.

OVERALL RECOMMENDATION

Start with foundations and small evidence-generating initiatives. Use the results to decide what deserves expansion. Delay larger technology commitments until the business has clearer evidence, cleaner processes and a demonstrated need.

Two principles guide the roadmap:

> **Sequence matters. A good initiative started too early can still be the wrong next step.**

> **Do the work that reduces uncertainty first. Commit later when there is evidence.**

EXECUTIVE RECOMMENDATION

Roadmap summary

Now

Focus on:

- approved AI-use rules
- two controlled AI pilots
- enquiry and quotation process standardization
- internal knowledge cleanup
- information ownership
- simple measurement baselines

Next

If the foundations are sufficiently stable:

- evaluate AI pilot results
- introduce meeting-summary assistance where controls are ready
- automate selected enquiry administration
- test internal knowledge search
- evaluate customer-management solution options
- improve management-information inputs

Later

Only where evidence justifies it:

- expand successful AI uses
- broaden automation
- introduce deeper integrations
- revisit advanced workflow automation
- reassess whether broader software/platform change is necessary

Explicitly not prioritized

At this stage:

- do not prioritize custom AI development
- do not replace core systems without a demonstrated business case
- do not automate unstable processes merely because the technology exists
- do not roll AI out broadly before basic working rules are established

Business context

Business profile

The illustrative business has 22 employees and provides professional services to business clients.

The business already uses standard cloud tools for:

- email
- documents
- meetings
- customer communication
- finance
- internal collaboration

There is no dedicated internal AI, automation or enterprise-technology team.

Management wants to improve productivity and operational consistency without creating a large transformation program.

Current situation

The business has identified several possible initiatives:

- AI-assisted drafting
- meeting summaries
- internal knowledge search
- enquiry automation
- customer-management software
- better management reporting
- workflow automation
- custom AI tools

The opportunities are plausible.

The difficulty is that several depend on work that has not yet been completed.

For example:

- automation depends on clearer process rules
- knowledge search depends on better source information
- wider AI use depends on practical controls
- reporting automation depends on reliable underlying data
- larger software investment depends on evidence that existing tools are insufficient

PLANNING QUESTION

What should the business do first so that later decisions become easier, better informed and less risky?

Roadmap principles

The roadmap uses five principles.

PRINCIPLE 1

Reduce uncertainty before increasing commitment

Low-cost or reversible work should happen before major investment where possible.

Examples include:

- process clarification
- pilots
- supplier evaluation
- information cleanup
- baseline measurement

PRINCIPLE 2

Dependencies matter

An initiative may be worthwhile and still not be ready.

For example:

- automating an unclear process creates faster inconsistency
- introducing knowledge search before cleaning source material creates faster access to unreliable information

PRINCIPLE 3

Evidence should change the roadmap

A roadmap is not a promise to complete every listed initiative.

Pilot results may justify:

- expansion
- modification
- delay
- stopping

PRINCIPLE 4

Existing capability comes before unnecessary replacement

Where the business already has suitable software or AI capability, assess it before buying another system.

PRINCIPLE 5

Larger commitments require stronger evidence

The greater the cost, dependency, disruption or technical complexity, the stronger the business case should be.

Initiative portfolio

The roadmap considers twelve initiatives.

INITIATIVE	INITIAL STATUS	PRIMARY PURPOSE
Establish approved AI-use rules	→ START NOW	Create practical boundaries for responsible AI use
Pilot routine document drafting	◑ PILOT	Test whether AI meaningfully improves repetitive drafting
Improve internal knowledge structure	→ START NOW	Make source material more reliable and usable
Introduce meeting-summary assistance	≡ PREPARE NOW	Enable controlled administrative use once rules are ready
Standardize enquiry and quotation process	→ START NOW	Create clear process rules before automation
Automate routine enquiry administration	≡ PREPARE NOW	Reduce repetitive work after process rules stabilise
Review customer-management solution options	⌕ EVALUATE	Determine whether current tools adequately support the requirement
Improve management-information quality	→ START NOW	Improve reliability before reporting automation
Test internal knowledge search	≡ PREPARE NOW	Validate usefulness once source material is sufficiently clean
Revisit advanced workflow automation	◷ DEFER	Wait for stable processes and evidence
Custom AI application	– DO NOT PRIORITIZE	No demonstrated need that justifies custom development
Core-system replacement	– DO NOT PRIORITIZE	No demonstrated case for broad replacement

Horizon 1 — Now

> **The first horizon should reduce uncertainty and improve the conditions for later decisions.**

It is not primarily a technology-purchasing phase.

INITIATIVE 1

Establish approved AI-use rules

→ START NOW

OBJECTIVE

Give employees practical guidance on:

- approved tools/accounts
- information boundaries
- human-review requirements
- prohibited uses
- escalation

DEPENDENCY

None of the other AI initiatives require a complex governance program.

They do require basic working boundaries.

WHY NOW?

Employees may already have access to AI functionality.

Waiting for a larger strategy before defining basic rules increases inconsistency.

EXPECTED OUTCOME

The business knows:

- what employees may use
- what information is appropriate
- what must be reviewed
- when a proposed use needs further assessment

DECISION GATE

Are the rules clear enough for employees to use in practice?

⊣ IF NO

Simplify and clarify them.

→ IF YES

Use them as the operating boundary for the initial AI pilots.

INITIATIVE 2

Pilot routine document drafting

PILOT

OBJECTIVE

Test AI assistance on a narrow group of repetitive internal or routine document-drafting tasks.

WHY NOW?

The opportunity is:

- relatively easy to test
- reversible
- straightforward to review
- useful for generating evidence about real employee value

SCOPE PRINCIPLE

Do not begin with every document type.

Choose a small number of repetitive, reviewable tasks.

DEPENDENCY

Requires:

- approved AI-use rules
- agreed source material
- responsible human review

EVIDENCE TO COLLECT

Assess:

- usefulness
- quality
- review effort
- employee adoption
- failure modes
- whether the task is genuinely improved

Avoid assuming value solely because employees can generate a draft faster.

DECISION GATE

Did the pilot create material value after accounting for review effort and risk?

⊣ IF NO

Stop or modify the use.

→ IF YES

Consider controlled expansion.

INITIATIVE 3

Improve internal knowledge structure

→ START NOW

OBJECTIVE

Improve the quality and organization of important internal information before introducing broader AI-enabled search.

WORK SHOULD INCLUDE

- identify authoritative sources
- remove or archive obsolete material
- clarify ownership of important procedures
- reduce duplicate/conflicting guidance
- improve basic organization

WHY NOW?

AI search cannot make unreliable information authoritative.

Improving the source information has value even if the later AI initiative does not proceed.

DEPENDENCY

Internal knowledge search depends on this initiative.

EXPECTED OUTCOME

Employees and future search tools have a clearer set of trusted sources.

DECISION GATE

Is the source information reliable enough to support an AI-enabled knowledge test?

⊣ IF NO

Continue information cleanup.

→ IF YES

Move to a limited knowledge-search pilot.

INITIATIVE 4

Prepare meeting-summary assistance

PREPARE NOW

OBJECTIVE

Prepare a controlled use of AI for:

- meeting summaries
- action extraction
- follow-up notes

WHY NOT DEPLOY IMMEDIATELY?

The business first needs to confirm:

- approved service/account
- information rules
- recording/transcription approach
- human-review requirements

DEPENDENCY

Requires the basic AI-use rules.

May also require supplier/data review depending on the meeting information involved.

EXPECTED OUTCOME

A clearly bounded use that can move into the next horizon without introducing ad hoc employee practices.

DECISION GATE

Are the tool, information rules and review requirements appropriate for the meetings involved?

⊣ IF NO

Do not introduce the use.

→ IF YES

Proceed to controlled adoption in the next horizon.

INITIATIVE 5

Standardize enquiry and quotation process

→ START NOW

OBJECTIVE

Clarify the operating process before introducing automation.

Define:

- required enquiry information
- qualification steps
- ownership
- quotation structure
- approval points
- follow-up
- process statuses
- exception handling

WHY NOW?

This is the foundation for useful enquiry automation.

Without clear rules, automation would reinforce inconsistent behavior.

DEPENDENCY

Automation of enquiry administration depends on this work.

Customer-management solution evaluation also benefits from clearer requirements.

EXPECTED OUTCOME

The business can describe how the process should work without referring to a particular software product.

DECISION GATE

Are the important process rules stable enough to automate?

⊣ IF NO

Fix the process first.

→ IF YES

Identify the routine steps suitable for selective automation.

INITIATIVE 6

Improve management-information quality

→ START NOW

OBJECTIVE

Improve the consistency and reliability of the information used in recurring management reporting.

WHY NOW?

Automation cannot compensate for unreliable inputs.

The business should first determine:

- which measures matter
- where the information comes from
- who owns it
- where inconsistencies exist

DEPENDENCY

More sophisticated reporting automation depends on this.

EXPECTED OUTCOME

A more reliable baseline for future reporting improvements.

DECISION GATE

Are the underlying inputs sufficiently reliable for additional reporting automation?

⊣ IF NO

Continue fixing inputs.

→ IF YES

Consider selective automation later.

Horizon 2 — Next

> **The second horizon begins only when relevant foundations are sufficiently stable.**

Not every initiative must start at the same time.

INITIATIVE 7

Evaluate AI pilot results

EVALUATE

OBJECTIVE

Decide whether the initial drafting pilot deserves:

- expansion
- modification
- continuation
- stopping

EVIDENCE TO REVIEW

Consider:

- actual usefulness
- quality
- employee adoption
- review effort
- risk
- whether the task itself changed

DECISION GATE

Is there enough evidence to justify wider use?

⊣ IF NO	→ IF YES
Do not scale merely because the pilot occurred.	Expand selectively.

INITIATIVE 8

Introduce meeting-summary assistance

PILOT / CONTROLLED ADOPTION

OBJECTIVE

Use meeting-summary assistance where:

- the service is approved
- information handling is acceptable
- responsible human review is defined

EXPECTED OUTCOME

Reduced routine follow-up effort without treating generated summaries as authoritative.

DECISION GATE

Is the use consistently useful without creating disproportionate confidentiality or accuracy problems?

⊣ IF NO	→ IF YES
Restrict or stop the use.	Continue within defined boundaries.

INITIATIVE 9

Automate routine enquiry administration

PILOT

OBJECTIVE

Automate selected low-judgment process steps.

Possible examples include:

- structured enquiry capture
- completeness checks
- routine missing-information requests
- follow-up scheduling
- status updates where reliable

WHAT SHOULD REMAIN HUMAN

Do not automate:

- commercial qualification
- pricing exceptions
- final quotation approval
- ambiguous situations

DEPENDENCY

Requires stable process rules from Horizon 1.

EXPECTED OUTCOME

Less repetitive administration and more consistent process handling.

DECISION GATE

Are the automation rules stable and are exceptions handled reliably?

⊣ IF NO

Reduce scope or return to process clarification.

→ IF YES

Consider selective expansion.

INITIATIVE 10

Test internal knowledge search

PILOT

OBJECTIVE

Test whether AI-enabled search improves access to approved internal knowledge.

PRECONDITIONS

- source information sufficiently clean
- authoritative sources identified
- permissions understood
- employees can inspect important sources

EVIDENCE TO COLLECT

Assess:

- answer usefulness
- source traceability
- outdated/incorrect results
- employee behavior
- access-control performance

DECISION GATE

Does the system improve access without reducing confidence in source quality or permissions?

⊣ IF NO

Stop or modify the approach.

→ IF YES

Expand gradually.

INITIATIVE 11

Evaluate customer-management solution options

EVALUATE

OBJECTIVE

Determine whether the current software environment can adequately support:

- enquiry visibility
- customer information
- opportunity ownership
- quotation tracking
- follow-up
- pipeline visibility

If existing tools are insufficient, compare proportionate alternatives.

WHY IN THIS HORIZON?

The business should first clarify the enquiry/quotation process.

A clearer process creates better software requirements.

DEPENDENCY

Depends on:

- defined process
- clearer requirement
- understanding of existing-tool limitations

DECISION GATE

Do existing tools meet the requirement adequately?

→ IF YES	⊣ IF NO
Use them.	Compare alternatives.

Then:

DECISION GATE

Does the benefit of a new solution justify the change, cost and dependency?

⊣ IF NO	→ IF YES
Defer.	Proceed to practical validation.

INITIATIVE 12

Improve management reporting

PREPARE / SELECTIVELY AUTOMATE

OBJECTIVE

Reduce repetitive reporting work after source information improves.

Potential actions may include:

- consistent data capture
- simpler consolidation
- assisted commentary
- routine distribution

DEPENDENCY

Requires reliable source information.

DECISION GATE

Is the reporting problem now an automation problem rather than a data-quality problem?

⊣ IF NO	→ IF YES
Continue fixing information quality.	Automate selectively.

Horizon 3 — Later

> **The later horizon contains initiatives that may become worthwhile but do not currently justify commitment.**

Expand successful AI uses

EXPAND IF PROVEN

Only expand uses that have demonstrated:

- practical value
- acceptable review effort
- manageable risk
- employee adoption

Do not turn successful pilots into automatic business-wide mandates.

Broaden process automation

EXPAND IF PROVEN

Add automation only where:

- process rules remain stable
- exceptions are understood
- the first automation works reliably

Do not chase end-to-end automation as a goal in itself.

Deeper system integrations

EVALUATE LATER

Consider deeper integrations only when there is a specific business reason.

Integration should solve an observed problem.

It should not be introduced merely because systems can technically be connected.

Advanced workflow automation

DEFER

Advanced workflow automation may become useful if:

- process volume increases
- rules stabilise
- existing automation demonstrates value
- manual coordination remains a material constraint

At present, broader automation would increase complexity ahead of evidence.

Custom AI application

DO NOT PRIORITIZE

No requirement currently demonstrates the need for custom AI development.

Before reconsidering, establish:

1. a valuable business problem
2. evidence that existing tools are inadequate
3. evidence from simpler approaches
4. a credible benefit that justifies technical dependency

Do not begin custom development because the business wants a proprietary AI asset.

Core-system replacement

DO NOT PRIORITIZE

There is no demonstrated case for broad replacement of the business's existing core systems.

Several identified problems relate to:

- process clarity
- information quality
- adoption
- incomplete use of existing capability

Replacing systems before those issues are understood could create disruption without resolving the root problem.

Revisit only if evidence later demonstrates a material gap that cannot be addressed proportionately.

Now / Next / Later roadmap

Now

Foundations and evidence generation

ESTABLISH FOUNDATIONS

Approved AI-use rules

→ START NOW

Process standardization

→ START NOW

Internal knowledge cleanup

→ START NOW

Management-information improvement

→ START NOW

GENERATE EVIDENCE

Routine document-drafting pilot

◑ PILOT

Prepare meeting-summary use

≡ PREPARE NOW

Establish pilot baselines

Next

Evaluation and selective pilots

EVALUATE AND TEST

Evaluate document-drafting pilot

🔍 EVALUATE

Introduce controlled meeting-summary assistance

◑ PILOT / CONTROLLED ADOPTION

Pilot enquiry administration automation

◑ PILOT

Test internal knowledge search

◑ PILOT

Evaluate customer-management solutions

🔍 EVALUATE

Selectively improve management reporting

≡ PREPARE / SELECTIVELY AUTOMATE

Later

Expansion only where evidence supports it

EXPAND ONLY WHERE JUSTIFIED

Expand successful AI uses

⇢ EXPAND IF PROVEN

Broaden proven process automation

⇢ EXPAND IF PROVEN

Introduce integrations where needed

🔍 EVALUATE LATER

Revisit advanced automation

🕒 DEFER

CONTINUE TO DEFER

Custom AI development

– DO NOT PRIORITIZE

Core-system replacement

– DO NOT PRIORITIZE

unless later evidence materially changes the case.

ROADMAP PRINCIPLE

The roadmap is a sequence of decisions, not a promise that every initiative should eventually happen.

Key dependencies

The roadmap is not a collection of independent tasks.

Several initiatives depend on earlier work.

AI-use rules → **AI pilots**	Wider AI use should not precede basic working boundaries.
Knowledge cleanup → **knowledge search**	Search quality depends on source quality.
Process standardization → **process automation**	Automation quality depends on rule clarity.
Process requirements → **software evaluation**	Supplier evaluation is stronger when the business knows what the process actually requires.
Information quality → **reporting automation**	Better reporting automation depends on reliable underlying information.
Pilot evidence → **expansion**	Expansion should follow demonstrated value, not precede it.
Existing-tool assessment → **new investment**	New systems should follow evidence that existing capability is insufficient.

Decision gates

The roadmap uses decision gates to prevent activities from becoming automatic commitments.

GATE 1

Did the AI pilot create material value?

⊣ IF NO

- stop
- modify
- narrow the use

→ IF YES

Consider controlled expansion.

GATE 2

Are process rules stable enough to automate?

⊣ IF NO

Fix the process first.

→ IF YES

Automate selected routine steps.

GATE 3

Is source information reliable enough?

⊣ IF NO

Improve information quality.

→ IF YES

Test AI-enabled search or reporting assistance.

DECISION GATES

GATE 4

Do existing tools meet the need?

→ IF YES

Use existing capability.

⊣ IF NO

Evaluate alternatives.

GATE 5

Is broader investment justified?

Consider:

- evidence
- business value
- change burden
- supplier dependency
- cost
- risk

⊣ IF NO

Defer.

→ IF YES

Proceed to proportionate evaluation and validation.

DECISION-GATE PRINCIPLE

A roadmap should create points where the business can decide not to continue.

Without decision gates, a roadmap can become a list of commitments made before the evidence exists.

What should wait?

Several initiatives are plausible.

> **That does not make them immediate priorities.**

Custom AI development

RECOMMENDATION — DO NOT PRIORITIZE

There is no demonstrated requirement that justifies custom development.

Test simpler options first.

Core-system replacement

RECOMMENDATION — DO NOT PRIORITIZE

There is no evidence that replacing core systems is currently necessary.

Improve processes, information and use of existing capability before considering broader replacement.

End-to-end process automation

RECOMMENDATION — DEFER

The enquiry/quotation process needs clearer rules first.

Automate selected steps after standardization.

Broad AI rollout

RECOMMENDATION

DEFER UNTIL INITIAL USES ARE PROVEN

The business should not treat initial interest as evidence that every employee or function needs AI.

Use pilot results to determine where wider adoption is justified.

Sophisticated reporting automation

RECOMMENDATION — FIX INFORMATION FIRST

If source data is inconsistent, faster reporting will not necessarily produce better management information.

Major integration program

RECOMMENDATION — DEFER

Introduce deeper system connections only where a demonstrated workflow problem justifies them.

PRINCIPLE

A roadmap gains credibility partly from what it deliberately leaves out.

Evidence required before expansion

The roadmap should not use activity completion as evidence of success.

For pilots and evaluations, evidence may include:

Usefulness
Does the initiative improve an important task or decision?

Quality
Is the output sufficiently reliable?

Review effort
Does human checking eliminate the expected benefit?

Adoption
Do employees use the approach consistently?

Process effect
Does the initiative actually improve the process, or merely add another tool?

Exceptions
How often does the normal approach fail?

Dependency
Does the initiative create more ongoing administration than expected?

Risk
Did practical use reveal risks that were not evident initially?

Existing alternatives
Can the same result be achieved more simply with existing tools or process changes?

PRINCIPLE

Evidence should determine expansion, not enthusiasm.

Ownership

The roadmap should identify responsibility without pretending to design an implementation organization.

Examples of owner types may include:

- business owner / senior management
- process owner
- information owner
- responsible manager
- selected internal users
- technology/provider contact where relevant

Do not invent named roles the business does not have.

The purpose of ownership is to ensure someone is responsible for:

- making the decision
- maintaining the process/rules
- reviewing evidence
- approving continuation

> **DecisTech is not the implementation owner.**

What success looks like

Success is not:

- ~~using more AI~~
- ~~having more automation~~
- ~~buying a new platform~~
- ~~completing every roadmap item~~

Success means the business becomes better able to decide:

- which uses are valuable
- which processes are stable enough to automate
- which information needs improvement
- which tools are sufficient
- which investments deserve expansion
- which ideas should stop

Examples of successful roadmap outcomes may include:

- a pilot that demonstrates value and expands
- a pilot that demonstrates insufficient value and stops
- a process that is improved without automation
- a supplier decision deferred because the business case is weak
- existing software proving sufficient
- an automation initiative becoming viable after process cleanup

PRINCIPLE

Stopping a weak initiative can be a successful roadmap outcome.

Roadmap risks

Too many initiatives at once

Running every idea simultaneously:

- spreads management attention
- weakens learning
- makes outcomes difficult to interpret

Technology before process

Buying or automating before requirements are clear creates avoidable rework.

Pilot without measurement

A pilot that produces no decision criteria may continue because people like it rather than because it creates value.

Roadmap treated as fixed

Business needs, technology and evidence will change.

The roadmap should be reviewed as information improves.

Future capability used to justify present complexity

Potential future need should not automatically justify:

- larger platforms
- custom development
- advanced automation

Activity mistaken for progress

Completing a technology task is not necessarily a business improvement.

Roadmap review points

The roadmap should be reviewed at defined decision moments rather than through constant replanning.

Suggested review moments:

After initial AI pilots	Decide: - expand - modify - stop
After process standardization	Decide whether automation is now justified.
After information cleanup	Decide whether knowledge search is viable.
After software evaluation	Decide whether an additional platform is actually required.
After initial automation	Decide whether broader automation has sufficient evidence.

> **The exact calendar date is less important than the evidence available at each gate.**

Recommended next actions

Now

1. Establish AI-use rules

Create simple practical boundaries for employee use.

2. Start two controlled evidence-generating activities

- routine document-drafting pilot
- internal knowledge cleanup leading toward later search testing

3. Standardize the enquiry/quotation process

Define:

- required information
- ownership
- status
- approval
- exceptions

4. Improve management-information inputs

Clarify important data and ownership.

5. Establish simple pilot baselines

Know enough about the current approach to judge whether the change is useful.

Next

Evaluate evidence

Do not automatically continue every initiative.

Introduce meeting-summary assistance where controls are ready

Keep responsible review.

Automate selected enquiry administration

Only after process rules stabilise.

Test internal knowledge search

Only against suitable source material.

Evaluate customer-management solution options

Only after requirements are clearer.

Improve reporting selectively

Only where the remaining problem is genuinely suitable for automation.

Later

Expand proven uses

Scale only when evidence supports it.

Add integration where justified

Avoid integration for its own sake.

Reassess deferred opportunities

Revisit advanced workflow automation, broader platforms and custom AI only if business conditions change.

RECOMMENDED IMMEDIATE DECISION

Do not launch a large AI and automation program.

Start with foundations and a small number of evidence-generating initiatives.

Use decision gates to determine what should expand, what should change and what should stop.

Delay major software, integration and custom-development commitments until the business has demonstrated a need.

How the roadmap was developed

DecisTech develops roadmaps around business decisions and dependencies rather than creating a calendar of technology projects.

The assessment considers:

Business value
Which initiatives address a meaningful business need?

Dependency
What needs to happen first?

Evidence
What should determine whether the initiative continues?

Existing capability
Can current tools address the need?

Change burden
Can the business absorb the change realistically?

Readiness
Is the process, information and control environment ready?

Reversibility
Can the business test the idea without excessive commitment?

Complexity
Does the initiative introduce disproportionate operational or technical burden?

Risk
What could make the initiative inappropriate or premature?

Decision sequence
What decision will this initiative make easier?

ROADMAP PRINCIPLE

The roadmap is a sequence of decisions, not a promise that every initiative should eventually happen.

A useful roadmap should make it easier to say:

start | **test** | **expand** | **modify** | **defer** | **stop**

The objective is not to fill a calendar with AI and automation activity.

The objective is to make better investment and operating decisions in the right order.