

● SAMPLE DELIVERABLE

EXECUTIVE AI ADVISORY · ADOPTION PROGRAM

The 90-Day Adoption & Training Plan

Unused tools have zero ROI. This plan names the champions, puts every person through training that changes how their work gets done, and measures adoption from week one — so we fix what stalls while there's still time to fix it.

PREPARED FOR

Meridian & Frost, PLLC
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COVERS

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The targets — written down, dated, scored

Adoption is a system, not a hope. These four numbers are the program's contract with you: each is measured from admin consoles, published in the monthly executive report, and scored at the June 30 quarter review.

70%

WEEKLY ACTIVE USERS

by September, firm-wide

≥50%

WAU IN EVERY
DEPARTMENT

by August — no left-
behind teams

100%

STAFF THROUGH LIVE
TRAINING

by May 15 — all 118 people

0

UNSANCTIONED-
TOOL INCIDENTS

by Q3 — from 41/96 at
assessment

The champion network

Six respected practitioners — one per department, not an "AI committee." Every champion holds a weekly office-hours slot, takes first-line questions, feeds the precedent library, and flags near-misses with no blame attached. Plus one specific thing each owns:

CHAMPION	DEPARTMENT	WHAT THEY OWN
Sam Alvarez	Tax (senior)	Tax office hours; feeds engagement-letter edge cases into the precedent library.
Nicole Tran	CAAS (manager)	First-line questions for the close team; owns the template cleanup behind the knowledge assistant.
Devon Marsh	Admin (lead)	Admin readiness for the document-intake workflow; office hours for operations staff.
Grace Liu	Audit (senior)	Flags near-misses and scope questions; keeps audit's "safe to use" list current with Jordan Pike.
Omar Haddad	Wealth (associate)	Meeting-prep use cases; watches for Tier 3 drift in a small, heavy-use team.
Katie Brand	Marketing	Tier 1 (green) use cases; runs the monthly show-and-tell.

Why champions beat memos

Nobody changes how they work because a memo told them to. They change when someone two desks away shows them a faster way on a real file. Six practitioners with time carved out and a named remit is the cheapest adoption infrastructure a firm can buy — and the only kind that survives busy season.

The calendar

Every session uses the department's own documents. Training that runs on canned examples produces people who are trained on canned examples.

- Apr 8 — All-hands kickoff**
 Forty-five minutes: a live demo on real firm work — an actual engagement letter, an actual SOP — not slides. The tier system and the policy in plain language, plus who your champion is.
- Apr 9 – May 15 — Department trainings, tax first**
 Tax goes first: the engagement-letter workflow is theirs, and a visible win recruits the room. Then CAAS, Admin, Wealth, Audit — each on their own files. All 118 staff through a live session by May 15.
- Weekly — Champion office hours**
 Thirty minutes, standing slot per department. Bring the file you're stuck on; leave with it working or with a straight "that's out of scope, here's why."
- Monthly — Show-and-tell**
 The best real use of the month, presented by the staff member who found it — not by me. Fifteen minutes at the firm meeting; the example goes into the precedent library.
- Jun 30 — Quarter review**
 The four targets scored against actuals in the June executive report. This plan gets revised for Q3 based on what the numbers say, not what the training felt like.

Measurement — from week one

WHAT'S TRACKED	SOURCE	CADENCE
Weekly active users, by department	Claude Enterprise & Copilot admin consoles	Weekly
Workflow completions — letters drafted, organizers processed	Workflow logs (Karbon, SafeSend)	Weekly
Time per engagement letter vs the 3.5-hour baseline	Sampled partner-review timing	Monthly
Near-miss reports	M365 DLP rule + champion flags	As they occur

Published, not filed

Every number above lands in the Monthly AI Executive Report — measured from consoles and logs, not self-reported in a survey. If adoption stalls, it shows up in a document Dana and Marcus read, with a diagnosis and a fix attached (page 4).

The stall playbook

When a department stalls, we diagnose before we push. A stall is always one of three problems, and each has a different fix — applying the wrong one makes it worse.

A seat problem

Wrong people licensed. WAU is low and the seat list doesn't match who actually does the work.

Fix: reassign seats within a week. Licenses follow the work, not the org chart.

A skill problem

Training didn't transfer. Logins happen, sessions are short, the output isn't making it into deliverables.

Fix: the champion re-runs training on that team's own files — paired working sessions, not a re-lecture.

A fear problem

Nobody said it's safe. Capable people, live seats, near-zero use, and quiet "are we allowed?" questions.

Fix: leadership names what *is* safe, in writing, with examples. Silence reads as "no."

The June example: Audit at 39% WAU

Diagnosed as a fear problem, not resistance. Audit's Tier 3 workpapers are genuinely out of bounds, and staff rounded "the risky part is off-limits" down to "don't touch any of it." The fix is the Jul 18 session with Jordan Pike defining exactly what audit *can* use safely — planning memos, PBC list drafting from prior-year files — so the safe zone is explicit instead of assumed.

Results so far — updated June 30

41 → 64%

WAU, APRIL → JUNE

▲ 53% in May · Sept target on track

100%

STAFF TRAINED BY MAY 14

▲ one day ahead of target

12/96

STAFF ON UNSANCTIONED TOOLS

▼ from 41/96 in March

3/5

DEPARTMENTS ≥50% WAU

Wealth & Audit to close by August

About this sample

This is the adoption plan behind the numbers in the monthly executive report: named champions, a training calendar built on real work, and measurement from week one. Meridian & Frost is a fictional composite client — the program structure and the level of accountability are exactly what an advisory client gets.

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