

● SAMPLE DELIVERABLE

EXECUTIVE AI ADVISORY · LIVING DOCUMENT · V4

# The AI Opportunity Backlog

Every candidate AI workflow at the firm, scored on one system and ranked — including the ideas we killed, kept visible so they stay dead. Revised monthly against real usage data and challenged in the leadership session.

PREPARED FOR

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VERSION

v4 · June 30, 2026  
Revised monthly

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## How scoring works

Eighteen ideas are scored; five are ranked for build; the rest watch, hold, or die. Four factors produce a composite from 0 to 100. The factors are deliberately few — a score you can't explain in one sentence is a score nobody will challenge.

### Impact

Annual hours or dollars at stake, taken from Karbon time data and the March workflow map — not from enthusiasm in interviews. Weighted heaviest.

### Feasibility (1-5)

Can approved tools do this today? 5 is configuration; 1 is a research project. Nothing below 3 enters the build queue.


### Data tier


Green, yellow, or red per the governance policy. Drag on speed, not value — red adds consent, counsel, and controls to a timeline; it doesn't shrink the prize.


### Time-to-value

Weeks from kickoff to a measurable result. Quick wins score higher because they recruit the next department — the letters workflow proved it.

### Reading the composite (0-100)

 **70-100**  
**Build queue.** Funded in rank order, one at a time.

 **45-69**  
**Watch or hold.** Real value, not next. Re-scored monthly.

 **<45**  
**Parked.** Reviewed quarterly, not monthly.

### Data tiers — drag, not disqualification

**TIER 1 · GREEN** Public or publishable. Any approved tool.

**TIER 2 · YELLOW** Internal operations. Approved enterprise tools only.

**TIER 3 · RED** Client tax-return information (§7216), PII, workpapers. Governed systems only — never public tools.

### What gets an idea killed

Risk exceeds value at any feasible cost; professional standards say never; or it can't name the P&L line it moves. Killed items leave the ranking — never the document (page 5).

### What gets an idea held



The value is real but a dependency isn't: the data isn't trustworthy yet, consent isn't in place, or the owner has no capacity. Every hold carries a named unblock condition.

### Why keep a document that mostly says no

The winners run fewer pilots, chosen better — the backlog exists to say no in writing. Eighteen scored ideas produce one build at a time; everything else waits its turn or dies with a reason attached.

## The top five

The top five haven't changed rank since March — that's the point. A backlog that reshuffles every month is a mood, not a plan. Scores were re-checked June 27 with Marcus; the movement below is status, not rank.

#	WORKFLOW	ANNUAL HOURS	FEAS.	TIER	SCORE	STATUS
1	Engagement letters & proposals	1,400 h	5	YELLOW	 87	● Shipped May 12
2	Client document intake & organizer chase	2,100 h	4	RED	 84	● In build
3	Internal knowledge assistant	1,800 h	4	YELLOW	 81	● Corpus prep
4	CAAS close checklist + variance narratives	950 h	4	RED	 74	● Q3
5	Post-filing client advisory letters	600 h + revenue	3	RED	 71	● Q4

## What changed in June

ITEM	OWNER	JUNE MOVEMENT
1 · Engagement letters	Priya Raman	212 letters since May 12; drafting time holding at 3.5 h → 45 min. A May model update shifted tone — the house style guide now pins voice, with a 10-letter regression check on every model update.
2 · Document intake	Marcus Bell	Karbon + SafeSend integration built. August go-live is gated on the \$7216 consent refresh (draft due Jul 3) and the v1 scope call Jul 22. My recommendation: e-signature chasing waits for v1.1.
3 · Knowledge assistant	Nicole Tran	Corpus cleanup 40% done — 118 of ~290 duplicate templates retired. The build stays held until the corpus is trustworthy; an assistant over five versions of the truth answers with the wrong one.
4 · CAAS close	Elena Ruiz	June deep-dive on two live closes reshaped the design: drafting paired with a mandatory reviewer, not replacing one. Score holds at 74; build scheduled Q3.
5 · Advisory letters	Priya Raman	No change. July's sample of 20 post-filing files puts a revenue number on the upside before the Q4 build is scoped.

## 🕒 Items 6–13 — the middle of the list

Real value that isn't next. None of these gets built while a top-five slot is open — capacity follows rank order, not enthusiasm. **Watch** means the score could move on new data; **hold** means a named dependency has to clear first.

#	CANDIDATE WORKFLOW	ANNUAL HOURS	FEAS.	TIER	SCORE	STATUS
6	<b>PBC list drafting from prior-year files</b> Audit's safest entry point; scoped with Jordan Pike in the Jul 18 session.	380 h	4	YELLOW	<div style="width: 80%;"><div style="width: 80%;"></div></div>	68 ● Watch
7	<b>Client onboarding packet assembly</b> Shares Karbon plumbing with intake automation; re-score after that ships.	320 h	4	YELLOW	<div style="width: 75%;"><div style="width: 75%;"></div></div>	61 ● Watch
8	<b>Internal IT helpdesk answers</b> Feasibility 5, but Tom Osei's two-person team has no capacity to own it this year.	260 h	5	GREEN	<div style="width: 70%;"><div style="width: 70%;"></div></div>	58 ● Hold
9	<b>Proposal pricing research</b> Pricing history lives in partner heads and old spreadsheets; needs the knowledge corpus first.	240 h	3	YELLOW	<div style="width: 65%;"><div style="width: 65%;"></div></div>	55 ● Hold
10	<b>Internal meeting summarization</b> Internal meetings only. Recorders on client calls stay on the killed list (consent).	300 h	5	YELLOW	<div style="width: 60%;"><div style="width: 60%;"></div></div>	53 ● Watch
11	<b>Marketing first drafts</b> Katie Brand already does this well ad hoc in Claude; a built workflow adds little.	180 h	5	GREEN	<div style="width: 55%;"><div style="width: 55%;"></div></div>	50 ● Watch
12	<b>Expense coding review (CAAS)</b> Red-tier client financials for modest hours; the math doesn't clear the bar yet.	220 h	3	RED	<div style="width: 50%;"><div style="width: 50%;"></div></div>	47 ● Hold
13	<b>Client FAQ email responses</b> Most "FAQ" answers turn out to be client-specific advice; the risk profile is advisory, not admin.	200 h	3	RED	<div style="width: 45%;"><div style="width: 45%;"></div></div>	45 ● Hold

Items 14–18 score below 45 and sit parked; they are re-checked quarterly, not monthly.

### The middle exists to stay put

A watch item earns promotion with data — a changed impact or feasibility number — not by being interesting in a meeting. When a top-five slot closes, item 6 gets a full re-score before anything is promised.



## The killed list

Killed ideas leave the ranking, never the document. Each keeps its reason and its revive condition, so the next time it comes up — and it will — the conversation starts from the written record, not from scratch.

IDEA	KILLED	REASON	WHAT WOULD REVIVE IT
<b>Public website chatbot</b>	Mar 2026	Risk exceeds value. A chatbot speaking for a CPA firm invites reliance nobody reviews.	A revenue case a partner will sign their name to.
<b>Fully automated 1040 prep</b>	Mar 2026	\$7216 exposure plus quality risk. No partner would sign the output.	Nothing, at full automation. Assisted prep is a different idea and can be scored on its own.
<b>Meeting recorders on client calls</b>	Mar 2026	Consent. Clients didn't agree to be recorded into a vendor's cloud.	A consent framework counsel approves and clients actually sign.
<b>Fine-tuned custom model</b>	Mar 2026	Six figures to build a worse version of what \$60 a seat already does. No differentiator.	A workflow where commercial models demonstrably fail in a real evaluation.
<b>AI-drafted audit opinions</b>	Mar 2026	Never. The opinion is the partner's professional judgment.	Nothing.
<b>AI social-media generator</b>	Mar 2026	Brand risk for near-zero value. Katie's bottleneck is strategy, not drafting.	It won't. Item 11 already covers the useful part.
<b>Expense-report anomaly detection</b>	Apr 2026	Roughly 40 hours a year at stake at current volume. The build costs more than a decade of the problem.	3× expense volume, or a fraud incident that changes the math.

### Ideas don't resurrect by hallway conversation

If you want one back, bring its revive condition to the monthly session with new facts attached. Twice this quarter someone pitched the chatbot again; both times this page ended the discussion in under a minute.

## Change log

- v1 — March 13, 2026**  
Born in the assessment readout: 24 candidate ideas from ten interviews and the workflow map. 18 scored, 6 killed on the spot with reasons.
- v2 — April 30, 2026**  
First monthly re-score after the Claude Enterprise rollout. No rank changes; expense-report anomaly detection killed (the seventh); feasibility notes updated.
- v3 — May 31, 2026**  
Engagement letters marked shipped (May 12) — the first idea to leave the queue through the front door. Intake automation moved to build on the signed \$52K SOW.
- v4 — June 30, 2026 (this version)**  
No rank changes. #4's design sharpened by the June CAAS session; corpus cleanup hit 40%; item 6 annotated ahead of the July 18 audit session.

## How to read this document

<b>Challenge scores in the monthly session</b>	That's what the session is for. Bring data — a changed hours number, a feasibility fact — and the score moves.
<b>Don't reorder by hallway conversation</b>	If an idea deserves a higher slot, name which factor changed. "It came up at a partner dinner" is not a factor.
<b>Respect the killed list</b>	Re-pitching a dead idea starts at its revive condition, not at zero.
<b>One build at a time</b>	A top-five slot closes before item 6 opens. This is a queue, not a menu.

### About this sample

This is the living backlog every advisory client maintains with me: eighteen scored ideas, one build at a time, and a killed list that keeps dead ideas dead. Meridian & Frost is a fictional composite; the scoring system, the candor, and the level of detail are exactly what you'd get.

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