

AI ROADMAP For TEAMS

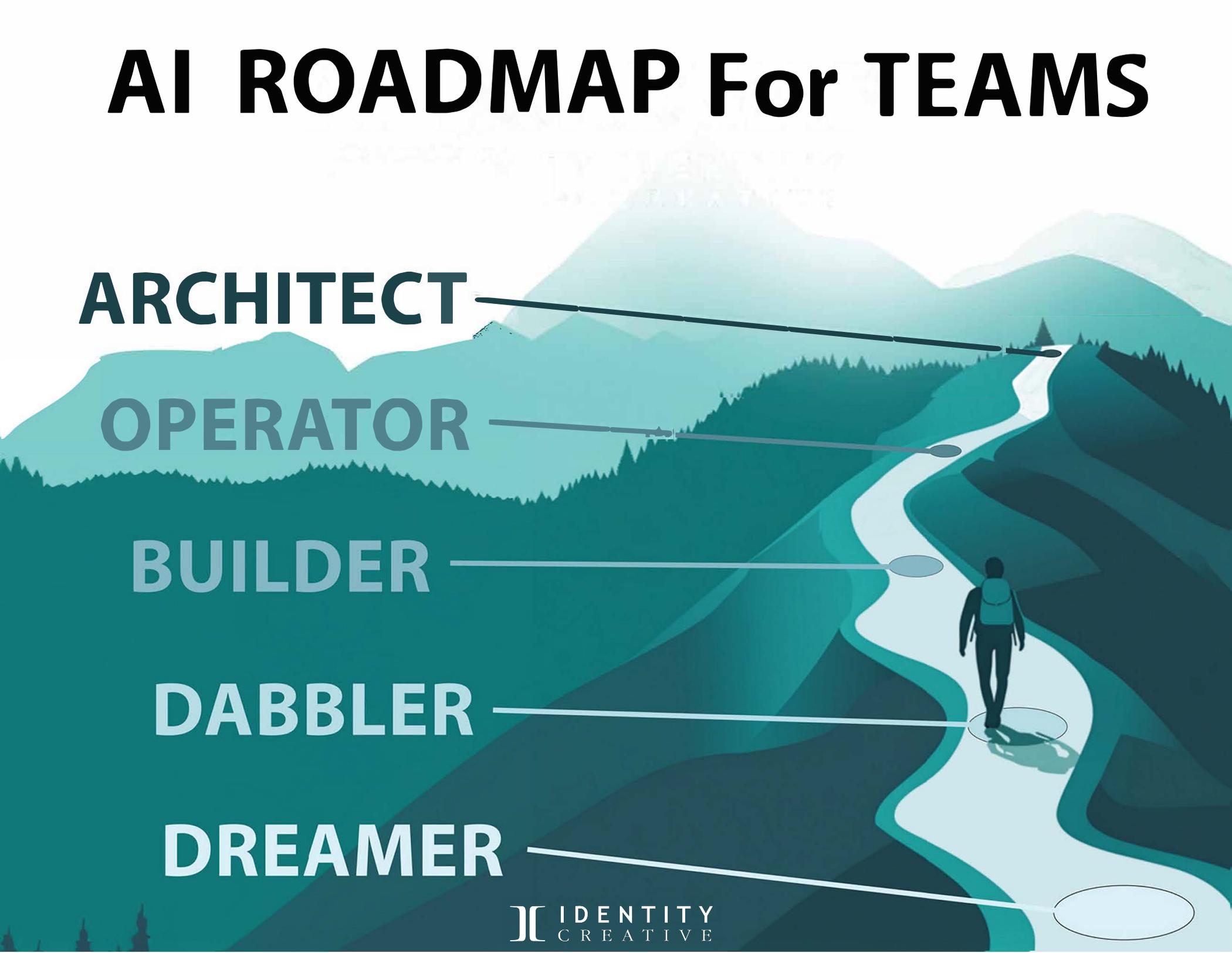
ARCHITECT

OPERATOR

BUILDER

DABBLER

DREAMER



AI ROADMAP FOR TEAMS

PHASE	KEY ACTIONS	EXPECTATIONS (Time/Cost/Tools/Outcome)	DIY vs Help	KEY CHECKPOINT
<p>Exploration "The Dreamer"</p> <p>Curious about AI's potential; no regular use yet</p>	<ul style="list-style-type: none"> __ Watch videos __ Read case studies __ Brainstorm bottlenecks __ Team discussion __ Self-assessment 	<p>2-4 hours / \$0-\$25</p> <p>Access free learning on YouTube, Substack, LinkedIn</p> <p>Conceptual clarity, ideas, and team awareness</p>	<p>Fully DIY</p> <p>Optional: Facilitator for workshops</p>	<p>Do I understand how AI could specifically solve a problem in my business?</p>
<p>Activation "The Dabblers"</p> <p>Using AI casually for tasks like writing, summarizing, or to-do lists</p>	<ul style="list-style-type: none"> __ Use ChatGPT/Claude __ Implement in workflows __ Compare & test tools __ Social posts/editing __ Test on personal tasks __ Initial plan w/team __ Create internal AI FAQ 	<p>~15 mins/task / \$20-\$60/mo / ChatGPT Plus, Grammarly, Notion AI, Canva / Individual time savings, confidence, early use cases documented</p>	<p>DIY</p> <p>Optional: Onboarding session or playbook from AI coach</p>	<p>Do I consistently use at least one AI tool to improve my daily work?</p>
<p>Enablement "The Builder"</p> <p>AI is part of content, research, and operational workflows</p>	<ul style="list-style-type: none"> __ Build/test AI content __ Train custom GPT __ Summarize reports __ Competitor research __ Create AI templates 	<p>1-2 hours/workflow / \$50-\$150/mo / Jasper, Claude, ChatGPT, Surfer SEO, Canva, HubSpot AI / Faster content, reusable templates, strategic insights</p>	<p>Mostly DIY with tutorials</p> <p>External help for content planning, tone setup, GPT training</p>	<p>Have I created AI-assisted templates or workflows that are reused by others on my team?</p>
<p>Integration "The Operator"</p> <p>AI automates internal workflows, sales, and service delivery</p>	<ul style="list-style-type: none"> __ Connect AI tools w/ internal systems __ Automate email inbox __ Lead follow-up __ Access & generate reports __ Build AI-triggered SOPs 	<p>5-15 hours/system / \$300-\$800/mo / Zapier, Make, HubSpot, Salesforce, Pipedrive, RunwayML / Automated tasks, time savings, repeatable systems</p>	<p>Requires technical implementor (API integration often required)</p> <p>External consultant for architecture</p>	<p>Have I connected AI tools across systems to run automatically?</p>
<p>Innovation "The Architect"</p> <p>You're building custom agents, local models, or hybrid workflows</p>	<ul style="list-style-type: none"> __ Build autonomous agents __ Implement long-term memory __ Build human-in-loop systems __ Train on data 	<p>20-60+ hours/project / \$1,000+/mo / OpenAI API, Pinecone, LangChain, AWS, Azure, Modal Labs / Proprietary IP, scalable infrastructure, differentiation</p>	<p>Requires AI engineer, software dev, or CTO / Advisory board, R&D partner, or custom dev shop recommended</p>	<p>Am I (or my team) building custom AI agents, models, or infrastructure that gives us proprietary capabilities?</p>