



# 90-Day AI Implementation Checklist for Movers

A practical implementation plan for moving companies that want to move from AI experimentation to structured use

## Purpose of this checklist

This checklist helps moving companies introduce AI in a structured, low-risk way over 90 days. It is designed for practical operational use, not theory. The goal is to choose a small number of useful workflows, test them safely, train people, measure value, and decide what should continue, change, expand, or stop.

Use it for areas such as customer communication, quote support, move coordination, document checking, claims handling, reporting, scheduling, marketing, internal knowledge, and admin automation.

## How to use it

- Assign one implementation owner before starting.
- Use this checklist during weekly or biweekly review meetings.
- Keep the first 90 days narrow: one to three workflows is usually enough.
- Do not scale AI use until the workflow, data rules, review steps, and ownership are clear.
- Measure practical value: time saved, fewer errors, faster response time, better consistency, or improved visibility.

## Before day 1: readiness check

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	A senior sponsor or manager is assigned to support the AI implementation.	
<input type="checkbox"/>	An implementation owner is assigned to coordinate the 90-day plan.	
<input type="checkbox"/>	The company has identified the teams involved in the first AI tests.	
<input type="checkbox"/>	The company has agreed that AI should support work, not replace human judgment.	
<input type="checkbox"/>	There is basic agreement that sensitive data must not be pasted into unapproved AI tools.	
<input type="checkbox"/>	The first implementation effort is limited to low-risk, practical workflows.	

## 90-day implementation overview

<b>Phase</b>	Days 1-15: Select and define
<b>Goal</b>	Choose a small number of practical AI use cases and define what success looks like.
<b>Output by end of phase</b>	Use case shortlist, pilot owner, approved scope, and first success measures.

<b>Phase</b>	Days 16-30: Prepare and protect
<b>Goal</b>	Set simple data rules, review steps, tool access, and team guidance before testing.
<b>Output by end of phase</b>	Basic governance rules, approved tools, redaction rules, and human review checkpoints.

<b>Phase</b>	Days 31-60: Test in real workflows
<b>Goal</b>	Run controlled pilots with selected users and real or realistic examples.
<b>Output by end of phase</b>	Working pilot process, user feedback, issues list, and early value measures.

<b>Phase</b>	Days 61-75: Improve and standardize
<b>Goal</b>	Adjust prompts, templates, workflows, and review steps based on what happened in the pilot.
<b>Output by end of phase</b>	Reusable templates, updated workflow notes, and clearer operating rules.

<b>Phase</b>	Days 76-90: Decide and plan next steps
<b>Goal</b>	Decide whether to continue, expand, change, or stop each pilot.
<b>Output by end of phase</b>	Decision summary, next 90-day roadmap, training needs, and ownership plan.

### Days 1-15: Select and define

Focus: choose where AI should be tested first. Avoid broad ideas. Start with specific workflows that are repetitive, visible, and easy to review.

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	List 5-10 possible AI use cases across customer communication, quoting, coordination, admin, reporting, or documents.	
<input type="checkbox"/>	Choose 1-3 use cases for the first 90 days.	
<input type="checkbox"/>	Define the business problem for each use case in one clear sentence.	
<input type="checkbox"/>	Identify the current manual process and where time, errors, delays, or inconsistencies happen.	
<input type="checkbox"/>	Assign one process owner for each use case.	
<input type="checkbox"/>	Define the expected value: time saved, fewer errors, faster turnaround, better consistency, or improved customer communication.	
<input type="checkbox"/>	Decide which use cases are out of scope because they involve high risk, sensitive data, or unclear value.	
<input type="checkbox"/>	Create a simple baseline for each selected workflow, such as current time spent, volume, response time, or error rate.	

### Days 16-30: Prepare and protect

Focus: put basic guardrails in place before live testing. This does not need to be a large policy exercise, but people need clear rules.

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	Identify which AI tools are approved for the pilot.	
<input type="checkbox"/>	Review the privacy and data-retention settings of the selected tools.	
<input type="checkbox"/>	Define what data can and cannot be used in the pilot.	
<input type="checkbox"/>	Create simple rules for removing or masking names, addresses, shipment details,	

	passport data, financial information, and confidential partner information.	
<input type="checkbox"/>	Define which outputs require human review before use.	
<input type="checkbox"/>	Create a short internal guide for users participating in the pilot.	
<input type="checkbox"/>	Prepare 2-3 example prompts or templates for each selected use case.	
<input type="checkbox"/>	Confirm that AI will not make final decisions on pricing, claims, insurance, customs, HR, legal, compliance, or customer commitments.	

## Days 31-60: Test in real workflows

Focus: run the pilot with selected users. Keep the test controlled. The goal is to learn what actually works in the business, not to prove that AI is perfect.

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	Select a small group of users for each pilot workflow.	
<input type="checkbox"/>	Train users on the approved prompts, templates, data rules, and review steps.	
<input type="checkbox"/>	Run the AI-assisted workflow using real or realistic examples.	
<input type="checkbox"/>	Record when AI saves time, improves clarity, catches an issue, or creates a useful first draft.	
<input type="checkbox"/>	Record where AI produces weak, wrong, incomplete, or risky outputs.	
<input type="checkbox"/>	Collect user feedback at least once per week during the pilot.	
<input type="checkbox"/>	Compare pilot outputs against the original baseline where possible.	
<input type="checkbox"/>	Keep a list of process changes needed before the workflow can be expanded.	

## Days 61-75: Improve and standardize

Focus: turn lessons from the pilot into repeatable ways of working. This is where prompts, templates, and human review steps become more consistent.

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	Update prompts and templates based on pilot feedback.	
<input type="checkbox"/>	Remove use cases, prompts, or steps that created too much risk or too little value.	
<input type="checkbox"/>	Document the standard workflow for each pilot that will continue.	
<input type="checkbox"/>	Clarify who reviews AI outputs and what they must check.	
<input type="checkbox"/>	Create simple examples of good and bad AI outputs for training.	
<input type="checkbox"/>	Identify where the process still depends on manual copy/paste or disconnected systems.	
<input type="checkbox"/>	Decide whether automation, integrations, or internal tools may be useful later.	
<input type="checkbox"/>	Confirm that data protection and review rules are still clear enough for users to follow.	

## Days 76-90: Decide and plan next steps

Focus: decide what happens after the first implementation cycle. Each pilot should have a clear decision: continue, adjust, expand, pause, or stop.

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	Review the results for each pilot against the original success measures.	
<input type="checkbox"/>	Estimate practical impact: time saved, faster responses, fewer errors, better consistency, improved reporting, or better customer communication.	
<input type="checkbox"/>	Identify the main risks or unresolved issues for each pilot.	
<input type="checkbox"/>	Decide whether each pilot should continue, change, expand, or stop.	
<input type="checkbox"/>	Assign owners for any workflows that will continue beyond day 90.	
<input type="checkbox"/>	Create a short training plan for additional users or teams.	
<input type="checkbox"/>	Update approved tools, data rules, templates, and review requirements.	
<input type="checkbox"/>	Define the next 90-day AI roadmap with no more than 3-5 priorities.	

## Suggested first AI use cases for movers

- Summarizing customer or agent email chains into action items.
- Drafting customer replies with sensitive details removed.
- Preparing move checklists, handover notes, or internal task lists.
- Reviewing document lists and identifying missing information for human follow-up.
- Drafting quote-support notes, proposal text, or sales follow-up emails.
- Summarizing shipment, claims, service, or KPI reports for management review.
- Creating SOP drafts, internal training materials, or knowledge base entries.
- Creating marketing drafts, blog outlines, or social posts for human review.

## Use cases to avoid in the first 90 days

- Fully automated customer communication without human review.
- Final pricing, margin, claims, insurance, customs, legal, HR, or compliance decisions.
- Workflows using sensitive customer data in unapproved public AI tools.
- Direct automation into operational systems before testing and approval.
- Large company-wide AI rollouts before the first pilots are understood.

## Weekly review questions

Done	Implementation check	Owner / Notes
<input type="checkbox"/>	What worked this week?	
<input type="checkbox"/>	Where did AI save time or improve quality?	
<input type="checkbox"/>	Where did AI produce incorrect, incomplete, or risky output?	
<input type="checkbox"/>	What did users have to fix manually?	
<input type="checkbox"/>	Were any data rules unclear or difficult to follow?	
<input type="checkbox"/>	Do prompts, templates, or review steps need to change?	
<input type="checkbox"/>	Is the pilot still worth continuing?	
<input type="checkbox"/>	What should be communicated to managers or users before the next review?	

## Final 90-day decision summary

<b>Pilot workflow</b>	
<b>Process owner</b>	
<b>Users involved</b>	
<b>Main value observed</b>	
<b>Main risks or issues</b>	
<b>Decision</b>	
<b>Next owner</b>	
<b>Next 90-day actions</b>	

*Reminder: the purpose of the first 90 days is not to automate everything. The purpose is to learn where AI creates practical value, where human review is required, where data must be protected, and what the company is ready to standardize.*