

# AI Roadmap

Preparing for the Age of AI

William McKee  
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Rotary Club of Charlotte





# LOOKING BACK



# LOOKING AHEAD



# Five Trends

1. 75% of organizations lack an AI Roadmap
2. Knowledge work is at risk
3. Collapsing cost of compute
4. Trust is dropping
5. Widening gap between leaders and laggards

"AI will handle 95% of  
marketing work done  
by agencies and  
creatives"

*Sam Altman*



# AI ROADMAPS



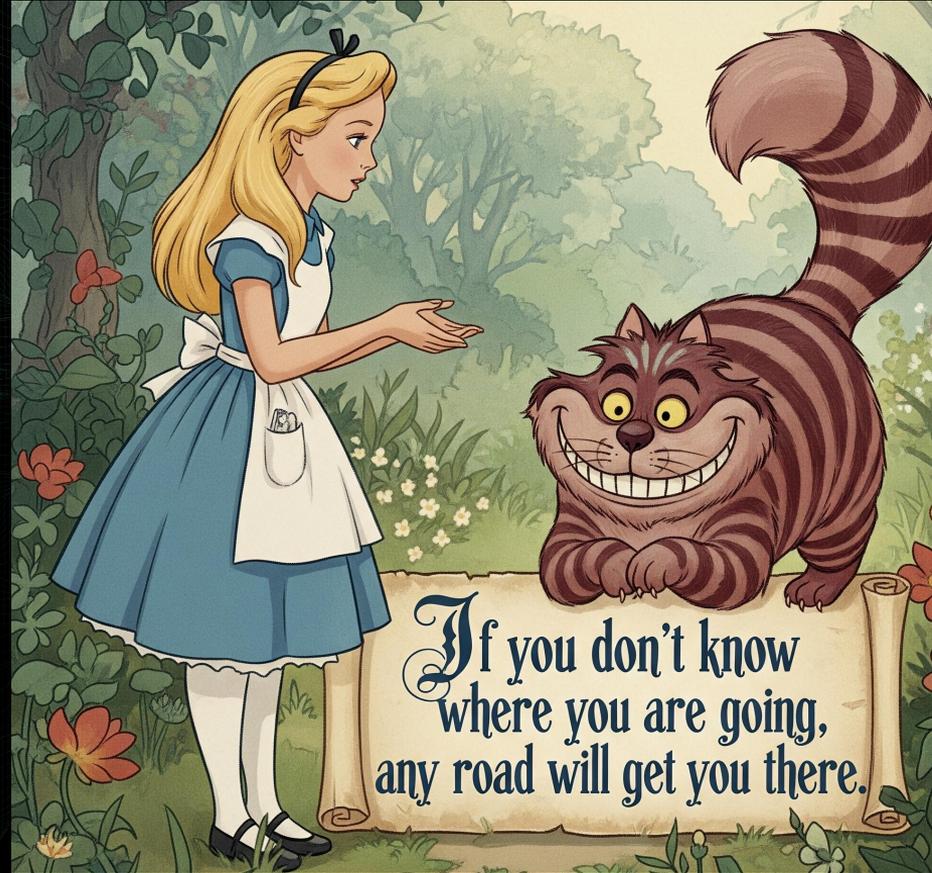
# Why Roadmaps?

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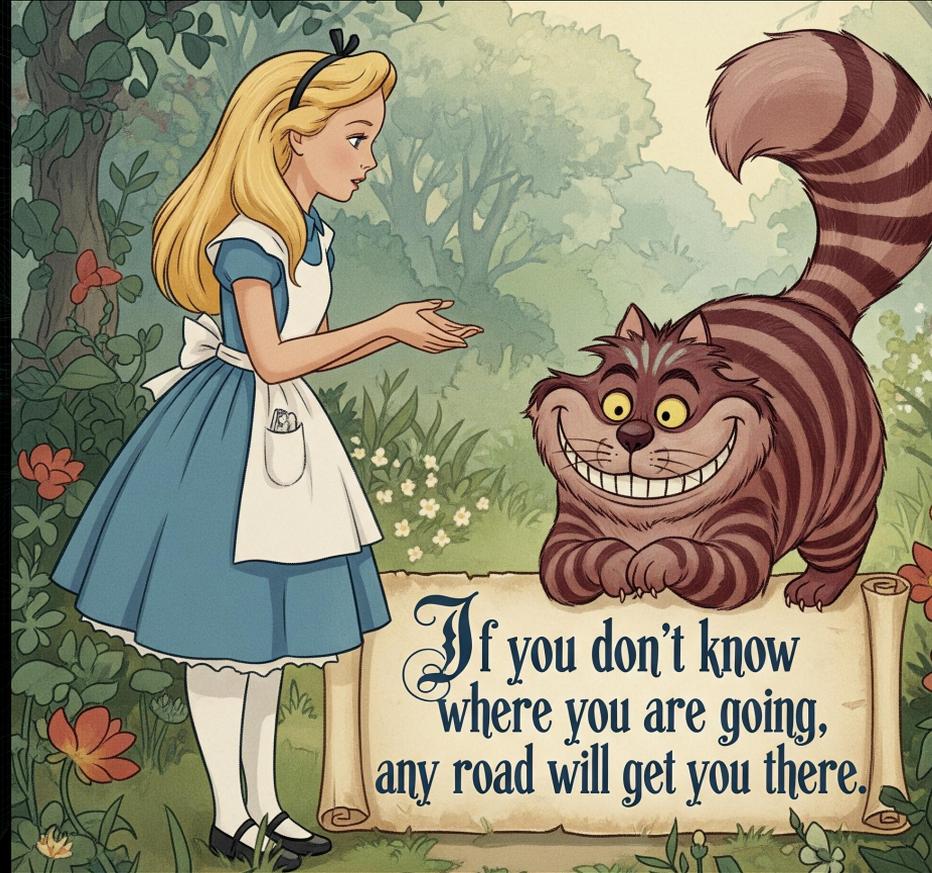
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3. Roadmaps maximize ROI by ensuring AI investments align with business priorities and build upon each other systematically.



# Why is an AI Roadmap hard to implement?

1. Lack of vision/leadership. No Head of AI.
2. It easier & more fun to jump in and start experimenting.
3. Not enough time.
4. Fear of change. Concerns about impact of AI on jobs.
5. Privacy and security concerns.
6. AI initiatives led by individual contributors rather than strategic decision-makers.

# TEMPLATES



# Marketing AI Institute (2023 - 2025)

- Next-Gen Marketing Department Vision Statement
- AI Trends Report
- Marketing Department Assessment
  - Goals, Priorities and OKRs
  - AI Adoption Barriers
  - Past and Current AI Initiatives
  - AI Talent Analysis
  - AI Team Impact Assessment
  - AI Tech Review
  - AI Code of Ethics / Responsible AI Principles
  - Generative AI Policies
- State of Industry + AI Report
- Use Case Priorities
- Problem-Based Priorities
- Timelines, Budgets, Team and Action Plans



“Scaling AI Course Series”

# AI Blueprints by Marketing AI Institute (2023)



## AI for Agencies Blueprint

Published October 2023



Sponsored By

## AI for Content Marketing Blueprint



## AI for B2B Marketers Blueprint

Published October 2023

## AI for CMOs: The Real-World Blueprint for AI-Powered Digital Transformation

(2nd Edition)



Marketing AI Blueprints

# Trust Insights - AI-Ready Marketing Strategy Kit (2025)

## THE AI CHALLENGE FOR MODERN MARKETERS

Many marketing leaders are navigating the complexities of AI integration, facing common hurdles that can stall progress and impact ROI. Does this sound familiar?

### LACK OF CLEAR STRATEGY

"75% of marketers report lacking a clear AI roadmap." Feel like you're operating without a compass?

### PROVING ROI

Struggling to demonstrate the tangible business impact and justify AI investments to stakeholders?

### DATA OVERWHELM

Drowning in data? Finding it hard to translate vast amounts of information into actionable insights?

### IMPLEMENTATION HURDLES

Facing challenges in selecting the right tools and integrating AI seamlessly into existing workflows?

### KEEPING PACE WITH CHANGE

The AI landscape evolves rapidly. Is keeping up with trends and new platforms a constant battle?

### RESOURCE CONSTRAINTS

Limited budget, personnel, or the right tools hindering your ability to leverage AI effectively?

["The AI-Ready Marketing Strategy Kit"](#)

# Kendall Project - The Kendall Framework (2024)

AI adoption is no longer an option but a necessity. The Kendall Framework solves the “Where to Start?” challenge by enabling teams to align on AI opportunities, prioritize their most impactful problems, and create a clear roadmap for AI deployment.

[“The Kendall Framework”](#)

# Critical Elements of a Roadmap

## 1. PRIORITIZED PROJECTS & USE CASES

Not a wish list - a ranked order of AI applications based on impact and feasibility

## 2. PROJECT TIMELINES

1-2 year view with specific milestones, not "someday we'll do AI"

## 3. RESOURCE ALLOCATION

Who, what budget, what tools - the actual commitments

## 4. SUCCESS METRICS

How you'll know if it's working (time saved, revenue gained, efficiency improved)

# Don't Just Build a Roadmap—Tell a Story



# Communicators Toolkit

## Internal Communications

(Building Trust & Adoption)



AI Vision Statement



CEO Memo



Manager FAQs & Team Huddle  
Guides



Training Announcements &  
Skill-Building Initiatives



AI Council Charter

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## External Communications

(Building Confidence & Buzz)



Press Releases for New Capabilities



Investor Relations Updates



Blog Posts & Case Studies  
("How AI is improving our service")



Customer & Partner Newsletters

# AI Voice Governance Plan

## Audit Your "Gold Standard"

Analyze your most effective content (blogs, emails, speeches) to find recurring patterns in tone, vocabulary, and structure. This turns your brand voice from a feeling into data.

## Codify Your AI Style Guide

Translate the audit findings into a clear set of rules for the AI. Provide specific "Use this word / Avoid that word" examples. This is the constitution for all AI-generated content.

## Implement Governance Tiers

Apply a human-in-the-loop workflow based on risk. Not all content requires the same level of review. This gives you both safety and speed.

High Risk: Human-Authored  
Medium Risk: Human-Led  
Low Risk: AI-Assisted

# Service Above Self: A Four-Way Test for the Age of AI



# Let's Connect



[/in/williammckee/](https://www.linkedin.com/in/williammckee/)



<https://www.knowmad.com/>



[william@knowmad.com](mailto:william@knowmad.com)



“



**François Chollet** ✓

@fchollet



AI will help us make sense of an increasingly complex and information-intensive world in ways that wouldn't be possible with just our brains, much like telescopes and microscopes help us see the world in ways that wouldn't be possible with just human eyes

3:02 AM · Mar 15, 2018

AI Researcher & Software Engineer, Google  
<https://x.com/fchollet/status/974179103514357760>