



TAKE-HOME GUIDE

SafePoint's 90-Day AI Adoption Framework

Prepared by: SafePoint IT

A practical, step-by-step guide to safely implement Artificial Intelligence in your organization within 90 days.

Core Principle: Manage AI Like an Intern

Think of AI as a very smart, very fast intern who is occasionally wrong. To get strong results, adopt these core principles:



Give Clear Instructions

Just like with a human intern, precise and unambiguous prompts yield better outcomes.



Review Work Carefully

Never assume AI output is perfect. Always verify accuracy and relevance before deployment.



Provide Examples & Templates

Show, don't just tell. High-quality examples and structured templates guide AI towards desired results.

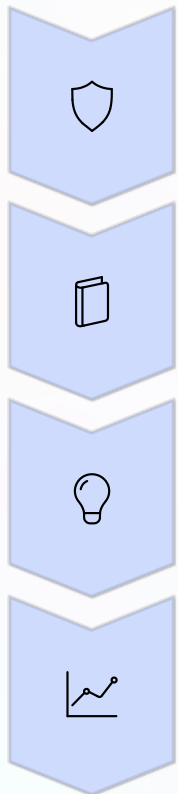


Integrate Intentionally

Embed AI into specific workflows where it adds tangible value, rather than using it haphazardly.

AI Adoption Framework

(Overview of the full roadmap)



Phase 1: Safety & Governance

Phase 2: Foundation & Training

Phase 3: Use Case Development

Phase 4: Measure & Scale



Phase 1 (Weeks 1–2): Build a Safe AI Foundation

Assign AI owner.

- Who owns AI strategy?
- Who approves new tools?
- Who measures ROI?

Data Readiness & Security Review.

- Type: Where it lives? What format it is? Who owns it?
- Quality: duplication, inconsistency, staleness, completeness.
- Security: access control, data loss prevention, vendor security.

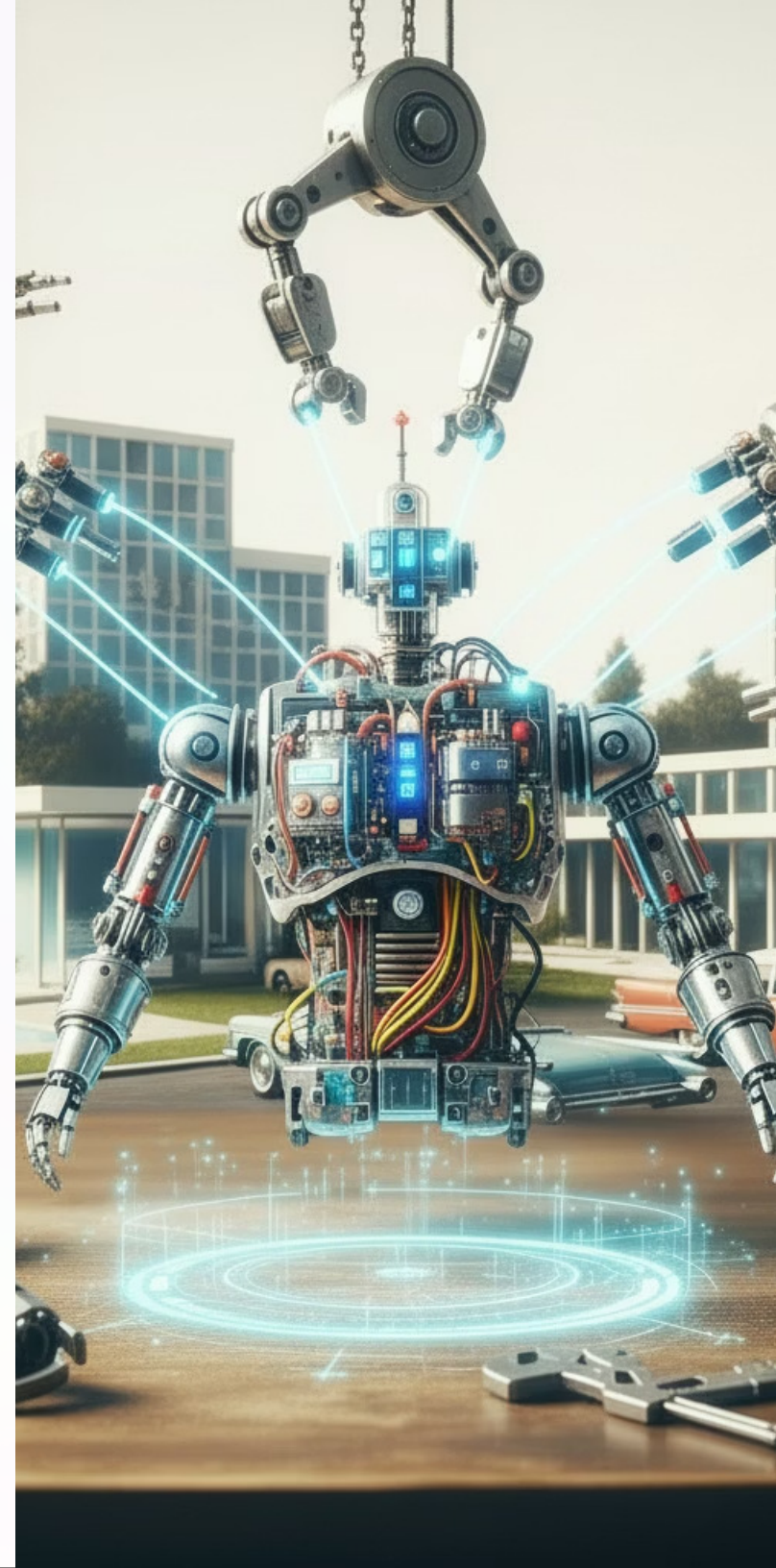
Identify Shadow AI usage across the organization. Ask:

- Who is already using ChatGPT?
- For what tasks?
- Are they uploading sensitive documents?
- Do not punish, centralize, standardize.

Create an AI Acceptable Use Policy:

- Define approved tools.
- Define what data can and cannot be entered.
- Require human validation of outputs.

Goal: AI becomes safe before it becomes productive.



Phase 2 (Weeks 3–4): Awareness & Team Training

Staff must understand how to manage AI effectively.
Training should include:

- What AI is and what it is not.
- Prompt structure and clarity.
- Validating AI output.
- Department-specific hands-on examples.

Recommended Prompt Structure:

- Role – Define who the AI is acting as.
- Task – Clearly state the objective.
- Context – Provide relevant background.
- Output Format – Specify structure and tone.





Phase 3 (Weeks 5–8): Identify High-ROI Use Cases

1. Identify High-ROI use cases. Focus on repetitive, time-consuming tasks. Common areas:

- Sales: quotes, scopes, follow-ups, summaries.
- Operations: SOPs, documentation, reporting.
- HR: job descriptions, onboarding, reviews.
- Leadership: summaries, analysis, planning.

2. Depending on structure of your data, consider use of AI chatbots. Most common ones:

- ChatGPT (OpenAI): Suitable for versatile, general tasks, brainstorming and custom GPTs.
- Gemini (Google): Integrated with Google Workspace (Docs, Gmail), good with images.
- Claude (Anthropic): Known for long-form writing, reasoning, and high safety standards.
- Copilot (Microsoft): Integrated with Microsoft 365, great for meetings, email summaries.

3. Implement master prompts for all job roles:

- Define one comprehensive master prompt per role covering core responsibilities.
- Embed company context (services, ICP, pricing model, tech stack, tone).
- Include clear output standards (formatting, depth, constraints, compliance).

4. Build reusable Prompt libraries:

- Organize by department and use case with clear tagging.
- Store approved prompts in a shared, version-controlled location.
- Include example inputs/outputs and guardrails.

5. Build custom GPTs:

- Create function-specific GPTs (e.g., Sales, QBR, SOP Builder).
- Use ChatGPT to create instructions that go inside of custom GPT.
- Attach historic data and reference documentation as knowledge files.

Phase 4 (Weeks 9–12): Measure & Scale

Gather Success Stories. Ask:

- What tasks improved?
- What saved the most time?
- What failed?

Track Tool Usage. Measure:

- Active users
- Prompts per week
- GPT usage

Expand to Additional Departments Only After:

- ROI proven
- Security validated
- Team comfortable

Quarterly AI Review. Every quarter:

- New tools?
- New automations?
- New compliance concerns?
- Updated use cases?

Goal: AI becomes part of everyday operations.



Don't feel like doing it yourself?

This guide gives you the framework. Execution is a different story.

AI adoption requires governance, security, training, and clear use cases. Without structure, initiatives stall or create risk.

SafePoint IT can help you:

- Build a safe AI foundation
- Train your team
- Identify use cases
- Build internal GPTs
- Scale AI across your company

Ready to get started? Scan the QR code to schedule your AI readiness discovery call.



Your next actions:



Schedule a Discovery Call

Connect with your SafePoint IT advisor to assess your current AI readiness.



Get a Detailed Proposal

SafePoint IT will prepare a customized proposal to fit your AI needs.



Kick Off Phase 1

Start with safety & governance to build a secure foundation for AI adoption.

SafePoint IT's Other AI Services & Capabilities

SafePoint IT helps organizations adopt AI in a secure, practical, and results-focused way. Engagements are delivered as workshops, projects, or hourly consulting—designed to boost productivity, reduce risk, and identify real business value.



AI Discovery Workshop

Prioritized roadmap of practical AI opportunities.



AI Readiness Review

Assess technical, security, and operational readiness; identify gaps.



AI Tool Onboarding & Setup

Select, configure, and securely deploy tools aligned to M365/IT.



AI Acceptable Use Policy Development

Clear guidelines for acceptable use and data handling.



Role-Based AI Employee Training

Role-specific sessions focused on safe, real-world use cases.



Monthly AI Office Hours

Interactive support: Q&A, prompt refinement, continuous adoption.



Custom Prompt Packs & Libraries

Reusable prompt libraries tailored to your workflows



Custom GPT Development

Business-specific assistants aligned to processes and policies.



Workflow Automation (AI Agents & RPA)

Design automations to reduce manual work with control.