

SYNTHETIC DEMO — FICTIONAL COMPANY, ILLUSTRATIVE ONLY

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AI Implementation Master Plan

Where the Roles & the Use Cases Line Up

Meridian Trades Alliance — Deliverable
4 of 4

Prepared for Meridian Trades Alliance (synthetic) by Trust Insights

Scope: Synthesizes the TRIPS Role-Task Decomposition Report (Deliverable 2) and the Use-Case Prioritization Framework (Deliverable 3) into one sequenced plan.

Coverage: 5 automation themes • 144 role tasks • 25 use cases • July 2026 (illustrative sample)

This is a fully synthetic sample built for a fictional company — not a real Trust Insights client engagement.

Executive Through-Line

This master plan is the fourth and final deliverable in the AI Implementation Analysis engagement — the piece that marries the other three into one story. The **AI Opportunity Analysis** scored 144 tasks across 6 roles for AI-likelihood. The **TRIPS Role-Task Decomposition Report** rolled that up to a per-role exposure picture. The **Use-Case Prioritization Framework** scored and sequenced 25 candidate AI use cases into build waves. Here, we join the two by **automation theme** — Reporting & Dashboards, Member Data Hygiene, Member & Donor Communications, Event & CE Administration, and Financial Reconciliation & AP — so leadership can see, at a glance, where the opportunity in the roles is already covered by a planned use case, and where it is not.

THE ONE-SENTENCE PLAN

Fix the AMS data foundation first (Wave 0), then accelerate the two themes where high role-exposure already has a Wave-1 use case queued (Member & Donor Communications, Member Data Hygiene), while deliberately expanding coverage in the themes where the opportunity is real but the use-case pipeline is still thin (Financial Reconciliation, Event & CE Administration).

Verdict summary

VERDICT	WHAT IT MEANS	THEMES
Accelerate	Big opportunity, already has traction (Wave 1 or built use cases) — push these first.	Member & Donor Communications
Expand	Big opportunity, thin use-case coverage — the pipeline needs more use cases here.	—
Prioritize	Moderate opportunity with matching coverage — sequence normally by wave.	Reporting & Dashboards, Event & CE Administration, Member Data Hygiene, Financial Reconciliation & AP
Gap	Opportunity exists in the roles but no use case currently targets it.	—

Opportunity vs. Coverage, by Theme

Each theme below shows the size of the automation opportunity found in the role analysis (role tasks scoring AI-likelihood 7+, how many roles it touches, and the average AI confidence) next to how well the use-case register currently covers it (how many use cases target it, how many are already in Wave 1, how many are already built).

Member & Donor Communications

Accelerate

ROLE TASKS (AI 7+)
26

ROLES AFFECTED
5

AVG AI LIKELIHOOD
8.2

USE CASES COVERING IT
7

IN WAVE 1
4

TOP COVERING USE CASES	DEPARTMENT	SCORE	WAVE
AI-Drafted Renewal Reminder Sequences	Membership Marketing	86	Wave 1
Member Inquiry Triage & FAQ Assistant	Member Services	83	Wave 2
Social Media Content Calendar & Drafts	Communications	82	Wave 1
Blog & Newsletter First-Draft Assistant	Communications	82	Wave 1
Attendee Communication Sequences	Events & Education	80	Wave 1

Reporting & Dashboards

Prioritize

ROLE TASKS (AI 7+)
18

ROLES AFFECTED
6

AVG AI LIKELIHOOD
8.1

USE CASES COVERING IT
4

IN WAVE 1
0

TOP COVERING USE CASES	DEPARTMENT	SCORE	WAVE
Automated Board Dashboard Refresh	Member Data & Insights	76	Wave 2
Campaign Performance Reporting Agent	Membership Marketing	75	Wave 2
Self-Service Reporting Template Builder	Member Data & Insights	69	Wave 3
Post-Event Report Generator	Events & Education	68	Wave 3

Event & CE Administration

[Prioritize](#)

ROLE TASKS (AI
7+)

11

ROLES
AFFECTED

3

AVG AI
LIKELIHOOD

7.7

USE CASES
COVERING IT

2

IN WAVE 1

0

TOP COVERING USE CASES

DEPARTMENT

SCORE

WAVE

CE Credit Tracking & Transcript Automation

Events & Education

74

Wave 2

Speaker Proposal Triage & Scoring Assistant

Events & Education

63

Wave 3

Member Data Hygiene

[Prioritize](#)

ROLE TASKS (AI
7+)

10

ROLES
AFFECTED

5

AVG AI
LIKELIHOOD

8.2

USE CASES
COVERING IT

3

IN WAVE 1

0

TOP COVERING USE CASES

DEPARTMENT

SCORE

WAVE

Duplicate Member Record Detection & Merge Queue

Membership Marketing

76

Wave 2

1099 & Tax Documentation Prep Assistant

Finance & Operations

59

Wave 3

Data Dictionary & Governance Docs Assistant

Member Data & Insights

56

Wave 3

Financial Reconciliation & AP

[Prioritize](#)

ROLE TASKS (AI
7+)

7

ROLES
AFFECTED

1

AVG AI
LIKELIHOOD

8.3

USE CASES
COVERING IT

2

IN WAVE 1

0

TOP COVERING USE CASES

DEPARTMENT

SCORE

WAVE

Monthly Reconciliation Matching Agent

Finance & Operations

74

Wave 2

AP Invoice Processing & Coding Agent

Finance & Operations

68

Wave 3

The Sequenced Roadmap

Reconciling both deliverables into one 90-day-and-beyond sequence:

Wave 0 — Foundation (do first, regardless of theme)

- **AMS Data Integrity Cleanup Sprint** — One-time dedupe, field standardization, and sync-error repair across the AMS, email platform, and event registration system.
- **Pre-Rollout Baseline Capture** — Capture time-per-task baselines across all six roles before any AI workflow launches, so reclaimed capacity can be measured.
- **AI Governance Scaffolding** — Brand-voice/context file plus data-handling guardrails (payment data, member PII) for every AI workflow below.

Days 0-90 — Accelerate what already has traction

Themes marked **Accelerate** above: push the Wave-1 use cases live, instrument them, and use the results as the internal proof point for the rest of the roadmap.

Days 90-180 — Expand the thin themes

Themes marked **Expand** or **Gap** above have real opportunity in the role data but not enough (or no) use case queued yet. Task the team owning that theme with proposing 1-2 new use cases before the next planning cycle.

Ongoing — Re-run the loop quarterly

Re-score the register as use cases ship and roles change, and refresh the role-task inventory whenever a role's actual work shifts materially. This master plan is a snapshot, not a one-time deliverable.

Methodology note: automation themes are assigned by keyword matching against task and use-case names/descriptions for this illustrative sample; a live engagement would hand-verify the top themes before client delivery, per the job-to-ai pipeline's standard quality check. Source: Trust Insights AI Implementation Analysis, Meridian Trades Alliance (synthetic), July 2026.