

AI-SOURCING

12-Month Implementation

Roadmap

A Companion Guide to the AI-Sourcing Framework

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How to Use This Roadmap

This document is the companion to the AI-Sourcing whitepaper. Where the whitepaper provides the strategic framework and the case for action, this roadmap provides the operational detail: what to do, when, with what resources, and what success looks like at each stage.

It is designed for organisations that have completed their first 30 days (as outlined in the whitepaper) and are ready to move from pilot to scale. The four phases, Audit, Pilot, Scale, and Embed, should be followed in sequence. The timelines are indicative and should be adapted to your organisation's size, complexity, and risk appetite.

Roadmap Overview

	Phase 1: Audit	Phase 2: Pilot	Phase 3: Scale	Phase 4: Embed
Timeline	Months 1-3	Months 4-6	Months 7-9	Months 10-12
Focus	Map capability landscape, establish governance, build business case	Run controlled pilots on 2-3 functions, measure rigorously	Expand successful pilots, redesign org structure, execute transitions	Establish AI-Sourcing as standing capability, continuous improvement
Key Output	AI-Sourcing strategy with prioritised shortlist and governance framework	Evidence base: quality, cost, speed, and risk data from live pilots	Scaled AI-sourced functions, redesigned teams, transition plans executed	AI-Sourcing Centre of Excellence, quarterly review cycle, embedded culture
Board Gate	Approve strategy and pilot selection	Review pilot results and approve scale plan	Confirm scaled deployment and resource allocation	Annual AI-Sourcing strategy review

Phase 1: Audit and Governance Design (Months 1-3)

Objective

Understand where AI-Sourcing creates the most value in your organisation, and build the governance structures that will underpin every decision that follows.

Activities

Month 1: Capability Mapping

- Identify all significant business functions across the organisation
- Categorise each by volume, cost, complexity, and strategic importance
- Conduct initial AI capability assessment: for each function, can current AI systems perform it at the required quality level?
- Engage department heads in structured conversations about pain points, bottlenecks, and capability gaps

Month 2: Four-Lens Evaluation

- Apply the AI-Sourcing Decision Framework (Capability, Economics, Strategic Value, Risk) to each shortlisted function
- Score each function and rank by AI-Sourcing viability
- Identify the top 5-10 functions for further evaluation
- Develop preliminary cost models: current human delivery cost vs estimated AI delivery cost over 3 years

Month 3: Governance and Business Case

- Establish an AI-Sourcing governance board (chaired by a board-level sponsor, not the IT director)
- Define decision rights: who can approve AI-Sourcing decisions, at what threshold?
- Design monitoring and escalation protocols
- Establish rollback procedures for each pilot candidate
- Build the business case for 2-3 pilot functions with detailed ROI projections
- Present strategy and pilot shortlist to the board for approval

Deliverables

- AI-Sourcing capability map with four-lens scores for all evaluated functions
- Governance framework document with decision rights, escalation paths, and monitoring protocols
- Business case for 2-3 pilot functions with 3-year cost projections
- Board presentation and approval to proceed to Phase 2

Common Failure Modes

- **Boiling the ocean:** Trying to evaluate every function in detail. Focus on the top 10-15 by volume or cost, not every process.

- **IT ownership:** If the CTO or IT director is the sole sponsor, the initiative will be perceived as a technology project. Board-level sponsorship is essential.
 - **Skipping governance:** The temptation to jump straight to pilots is strong. Resist it. Governance established now prevents crises later.
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Phase 2: Pilot (Months 4-6)

Objective

Build the evidence base, operating model, and organisational confidence needed for scale.

Activities

Month 4: Pilot Setup

- Select 2-3 functions from the approved shortlist
- For each pilot, define: success metrics, baseline measurements, governance controls, and rollback triggers
- Make build/buy/configure/partner decisions for each pilot function
- Assign a pilot lead (not from IT) with clear accountability
- Brief affected teams: be transparent about what is being tested and why

Month 5: Live Pilots

- Deploy AI solutions alongside existing human delivery (parallel running)
- Measure daily: quality, cost per transaction, speed, error rates, escalation rates
- Conduct weekly reviews with pilot leads and governance board
- Document everything: what works, what fails, what surprises you

Month 6: Evaluation and Scale Decision

- Compile pilot results against pre-defined success metrics
- Conduct honest assessment: which pilots met the bar, which did not?
- For successful pilots: develop scaling plan with resource requirements and timelines
- For unsuccessful pilots: document learnings and decide whether to iterate or abandon
- Begin reskilling and redeployment planning for affected roles
- Present results and scaling recommendation to the board

Deliverables

- Pilot results report with quantified outcomes vs baseline for each function
- Scaling plan for successful pilots with resource requirements and timeline
- Reskilling and redeployment plan for affected staff
- Updated governance framework incorporating pilot learnings

Common Failure Modes

- **Success theatre:** Declaring victory too early. Insist on 8+ weeks of parallel running data before making scale decisions.
- **Ignoring the people:** Pilots that surprise staff create resistance. Over-communicate, not under.
- **Measuring the wrong things:** Cost reduction alone is insufficient. Measure quality, speed, employee experience, and customer/tenant satisfaction.

Phase 3: Scale (Months 7-9)

Objective

Expand successful pilots into production operations and begin the organisational redesign that AI-Sourcing demands.

Activities

- Scale proven AI-Sourcing initiatives from pilot to full operational deployment
- Redesign affected roles and team structures around the new capability model
- Execute transition plans for affected employees: redeployment, reskilling, or role evolution
- Stress-test governance frameworks under real operational conditions and at full volume
- Renegotiate or retire vendor/outsourcing contracts that are now superseded
- Begin evaluating the next wave of AI-Sourcing candidates based on Phase 1 audit
- Establish operational dashboards for ongoing monitoring of AI-sourced functions

Deliverables

- Fully operational AI-sourced functions with governance controls in place
- Redesigned team structures and completed staff transitions

- Operational monitoring dashboards
- Next-wave AI-Sourcing candidate shortlist

Common Failure Modes

- **Scaling without governance:** What worked in a pilot with close oversight may fail at scale without automated monitoring and alerting.
- **Forgetting the humans:** Staff who were promised redeployment must actually be redeployed. Broken commitments destroy trust for future waves.
- **Vendor lock-in:** If you chose 'Buy' in the pilot, ensure contract terms allow for transition if the vendor relationship deteriorates.

Phase 4: Embed (Months 10-12)

Objective

Establish AI-Sourcing as a standing strategic capability that evolves continuously, not a one-off transformation programme.

Activities

- Create an AI-Sourcing Centre of Excellence (or equivalent governance body) with permanent resource
- Integrate AI-Sourcing evaluation into standard business planning and annual budgeting cycles
- Build internal capability in AI operations, governance, and human-AI workflow design
- Establish a quarterly review cycle to reassess functions as AI capabilities evolve
- Develop an AI-Sourcing maturity model to benchmark progress over time
- Share results and learnings across the organisation to build cultural acceptance
- Plan Year 2: identify the next wave of functions and begin the cycle again

Deliverables

- AI-Sourcing Centre of Excellence with defined mandate and resource
- AI-Sourcing integrated into annual planning and budgeting
- Quarterly review cadence established
- Year 2 AI-Sourcing plan

Success Metrics: What Good Looks Like at Month 12

Metric	Target	Measured By
Functions AI-Sourced	3-5 functions in production	Operational dashboard
Cost Reduction	20-40% reduction in delivery cost for AI-sourced functions	Finance team validation
Quality	Equal or better than human baseline	Quality audit vs pre-pilot baseline
Staff Impact	Zero involuntary redundancies; all affected staff redeployed or reskilled	HR reporting
Governance	Zero governance incidents; all AI decisions auditable	Governance board reporting
Board Confidence	Board approves Year 2 plan and expanded budget	Board minutes

AI-Sourcing is not a project with an end date. It is a capability that compounds. The organisations that build this muscle in Year 1 will accelerate in Year 2 and dominate in Year 3.

For the strategic framework behind this roadmap, see the AI-Sourcing whitepaper. For a diagnostic of your organisation's readiness, see the AI Readiness Assessment.

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