

The Plan to Get Ahead of AI: A 90-Day Playbook for Managing AI with Business Context

Oct 9, 2026 • @Louis

Summary

In 90 days, an ITAM, SAM or FinOps team can move AI from an unexplained cost to a managed growth area. It takes four steps: establish where you stand, add business context, free up room to invest, and roll out in stages with the business owning the outcome.

None of the steps needs a new team or a new budget. Each one builds on data and skills asset managers already have. The result at day 90 is simple: every AI spike gets a verdict, every AI investment has an owner, and the next round of AI is funded by waste you have already removed.

The plan at a glance

Four steps in 90 days, each closed by a gate



90-day plan • 4 steps, 4 gates

Each step ends with a gate the business can see, and the cycle restarts every month once rollout begins.

Before day 1: name the owners

Agree who owns what before you pull a single report. The programs that move fastest split the work four ways and hand the outcome to the business.

Role	Owns	Delivers by day 90
ITAM, SAM or FinOps lead	The data, the baseline and the monthly verdict	One view of AI spend, with an owner on every material cost
Business unit leaders	Growth priorities, KPIs and the outcome	A KPI and a target for each AI use case
Finance	Budgets and the rule for reinvesting savings	An agreed rule that recycles savings into AI
IT and security	Readiness, access and shadow AI	A readiness check before every rollout wave

Delegate the outcome and keep the data. Your team supplies the evidence. The business decides whether AI pays, and owns the result.

Step 1, days 1 to 20: establish where you stand

Build one honest baseline across three things: spend, adoption and tools. Without it, every later claim of value is an opinion.

- **Spend:** all AI consumption by month, model and tool. Include model services in your cloud, AI features in SaaS, and Copilot seats and credits.
- **Adoption:** who holds an AI license or access, who actually uses it, and how often.
- **Tools:** every AI service in use, sanctioned or not. This is where shadow AI surfaces.

Do not wait for perfect data. Start with Microsoft 365, your main cloud and your top AI vendors, because that is where most enterprise AI spend begins.

Gate: leadership accepts the baseline as the number of record.

- AI spend baselined by month, model and tool
- License holders compared with active users
- Inventory of AI services, with unsanctioned ones flagged

Step 2, days 21 to 45: add business context

Turn the baseline into answers: where each cost landed, who generated it, and whether it serves a growth area. This is the step that separates good spend from bad.

- **Attribute every cost.** Tag AI spend to department, role, project and owner. Use rules that tag automatically, because manual tagging never keeps pace with AI.
- **Map need by role.** Look at how people work: meetings, email, documents and collaboration. That shows which roles AI will assist most, and where the productivity upside is biggest.
- **Agree the growth areas.** Ask business leaders to name three to five areas where they want AI to drive more output.
- **Set the KPI now.** Choose one outcome measure per use case and record its baseline before rollout. A baseline taken afterward cannot prove anything.

Gate: every material AI cost has an owner and a verdict: back it, prove it, run it leaner or stop it.

- Tagging rules live for department, project and owner
- Growth areas agreed with business leaders
- One KPI and baseline recorded per use case

Step 3, days 46 to 65: free up room to invest

Fund the next wave of AI from waste, not from a new budget request. The [FinOps Foundation](#) reports that many organizations are now told to self-fund AI through optimization savings. Asset managers know exactly where those savings hide.

Where to look	Typical waste	Action
Microsoft 365 licenses	Inactive accounts, premium plans used at basic level	Reclaim, downgrade and right-size before renewal
Copilot seats	Seats assigned by title and rarely used	Reassign to people whose work data shows they benefit
Cloud resources	Idle and oversized resources	Rightsize or remove
Commitments	Unused reservations and savings plans	Match commitments to real usage
AI services	Premium models on simple tasks, agents left over from pilot programs	Switch to a cheaper model or retire

This is the step that makes AI growth credible to Finance. You arrive with money already found, not a request for more.

Gate: Finance validates the savings and ring-fences them for AI.

Step 4, days 66 to 90: roll out in stages, owned by the business

Spend the freed-up budget in waves, starting where the evidence is strongest. Each wave is a small, measurable bet, not a company-wide launch.

1. Start with "back it" use cases and the people most likely to benefit.
2. Give every wave a business owner, a KPI, a target and a review date.
3. Run a readiness check first: licensing, identity and MFA, and oversharing of sensitive data.
4. Expand only when the KPI moves. If it does not, the use case moves to "prove it" and the seats go back to the pool.

This staging protects the business case. Leadership sees results from a controlled group before committing more.

Gate: the business owner signs off on the first wave's result and approves the next.

Day 91 and beyond: monitor, reharvest, repeat

The 90 days build the habit. After that, a light monthly rhythm keeps AI managed as it grows.

- **Monthly:** review every spike against the matrix, reclaim idle seats and agents, refresh the list of likely beneficiaries, and report cost per outcome to leadership.
- **Quarterly:** revisit the growth areas with business leaders and bring usage evidence into every renewal.

What good looks like at day 90:

- One view of AI spend by department, model and tool
- A named owner on every material AI cost
- A KPI baseline for every use case in rollout
- Savings ring-fenced to fund the next wave
- A monthly verdict meeting with business owners on the calendar

Compress the 90 days with Surveil

Surveil gives each step its data from day one, through secure, read-only access with no agents to install.

Step	How Surveil helps
1. Establish where you stand	Surveil for AI shows spend by model and token and flags shadow AI, alongside Microsoft 365 and multicloud cost in one view
2. Add business context	Smart Tags attribute cost by department, project or owner; Copilot Compass ranks likely beneficiaries from real engagement data
3. Free up room to invest	License, cloud and commitment recommendations, with average savings of 18-37% across customers
4. Roll out in stages	Adoption tracking by team, readiness checks and anomaly alerts for every wave

Start the conversation. A Surveil Assessment is a no-cost, read-only snapshot of your AI, cloud and Microsoft 365 estate, set up in four clicks. It becomes your day-1 baseline, so step 1 starts with data instead of a data-gathering project. [Request your assessment.](#)