30/60/90-Day Plan for Agentic AI Tool Pilot

by Flowla

Don’t let your AI pilot become just another experiment. Too many companies dive into agentic AI with bold ambitions, only to stall when it’s time to scale. The problem? They skip the foundation – clear KPIs, ownership, and systems. This 3/60/90-Day Plan helps you launch with focus: one use case, smart guardrails, and measurable progress in just 90 days.

Sample implementation timeline

Days 0-30	Days 31-60	Days 61-90
Pick a pain, run a controlled test	Optimize, expand, evaluate	Standardize and scale

Days 0-30 — Pick a pain, run a controlled test

Goal: Identify one high-friction task and test a tool that removes it.

1. Pick a clear use case

Choose something manual, annoying, and easy to measure. For example:

- Call summaries → auto-generated recaps pushed to CRM
- Cold outreach → triggered sequences based on buying signals
- Deal follow-up → nudges sent when buyers go silent for 3+ days

2. Select one agentic tool

Use the Tool Index. Don’t aim for perfect – aim for 80% functional out-of-the-box. Make sure:

- It integrates with at least one of your core systems (CRM, calendar, Slack, etc.)
- You can get it up and running in under a day

3. Define success upfront

Use a simple “before/after” metric:

- X hours saved
- Y more follow-ups sent
- Z% improvement in process compliance

4. Pilot with a small team

1–2 reps or a sales pod. Keep the loop tight. Make feedback part of the experiment.

Days 31-60

Optimize, expand, evaluate

Goal: Iterate on what's working, cut what's not, and pressure-test at a slightly larger scale.

1. Tweak the agent logic
Improve prompt design, retrain based on team feedback, or reconfigure how the agent triggers. This is where you refine for real-world edge cases.

2. Expand to more reps or a full segment
If the agent works, give it to 3–5 more reps and observe performance across different selling styles or buyer types.

3. Add simple guardrails
Use Slack alerts, CRM logs, or approvals to maintain visibility and trust. Let reps know what's automated vs. what they own.

4. Measure outcomes
Did you reduce effort, speed up action, or improve consistency? Share findings internally to build buy-in.

Days 61-90

Standardize and scale

Goal: Decide if this agent becomes part of your sales stack – and who owns it going forward.

1. If it works → operationalize it

- Build SOPs around it
- Define ownership (RevOps, Enablement, etc.)
- Create a simple onboarding doc for new reps

2. If it doesn't → retire or repurpose it
Not all tools will work. Kill what's clunky or hard to maintain. Keep a doc of learnings for future experiments.

3. Prepare for stack integration
If the agent creates real lift, look for ways to integrate it into:

- Sales plays / workflows
- Onboarding for new hires
- Dashboards or reporting flows

4. Document & share learnings
Whether it's a win or not, share what you learned. This builds a culture of experimentation and gives RevOps a foundation for scaling smarter.

Before you pilot:
4 essential things to get straight

Adopting agentic AI is like adding a new team member – one that doesn't sleep, scales instantly, and doesn't ask for PTO. But like any new hire, it only works if you know where to place it, how it fits into the team, and who's responsible for its performance.

So, before you roll out a new agentic tool – or even run a pilot – there are a few things to get straight:

Does it fit into your current workflows?
Ask yourself:
- Can this tool connect to your CRM, calendar, Slack, or email without duct tape?
- Can it trigger automatically from buyer actions (meeting booked, stage changed, email replied)?

How much control do you have over the execution?
- Does this need a human-in-the-loop? (e.g., pre-send review)
- Should it act fully autonomously, or just tee up suggestions?
- Can you set guardrails (timing, content, actions) or fallback logic?

Does it balance customization and speed to value?
Pick your complexity level:
- If you're testing, use tools with ready-made templates and integrations (e.g., Flowla, Zapier MCP, Clay)
- If you're scaling, look for agent frameworks (e.g., CrewAI, custom GPTs) that allow orchestration.

Who will own the tool?
Assign people in charge of the tool:
- RevOps → owns the workflows, systems, and rules.
- Enablement → trains the humans, collects feedback.
- Sales leadership → owns the outcomes, trust, and rollout velocity.
- Engineering → only needed for deeply custom or self-hosted builds.