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The AI Core Competency Roadmap for Leaders

A practical guide for consultants, coaches, and advisors navigating AI adoption

Most leaders struggle with AI for one reason: they treat it as a technology decision, not a leadership decision.

AI plays very different roles depending on the outcome you're actually trying to achieve. When leaders skip steps, AI creates noise instead of leverage.

This guide shows five distinct outcomes leaders pursue with AI, each grounded in real examples. Use it to identify where you are, where you're headed, and what actually matters at each stage.



How to Use This Guide

AI shows up in leadership work three ways:

AI Assist helps you think better - clarifying decisions, pressure-testing strategy, simplifying complexity.

Automation with AI frees up capacity - removing repetition, reducing friction, protecting leadership energy.

Agentic AI delivers outcomes without constant involvement - systems that do useful work, creating repeatable capability and infrastructure.

Most leaders want the third. Most need to start with the first.

The five outcomes below show what each stage actually looks like in practice. Find the one closest to what you're trying to achieve right now.

Outcome 1: Be a Better Leader

What this looks like: You use AI to stay current, reduce confusion for clients, and explain complexity simply. You're not trying to sell AI or build systems. You're trying to lead with clarity in a moment of rapid change.

Real Example: Cam Vacek, Consultant

Cam Vacek is an experienced consultant who spends time every week learning about AI. She uses it to maintain her edge - staying current on what's possible, reducing confusion for clients who ask about it, and explaining complexity in ways that build trust rather than anxiety.

She often frames AI for clients as: "Mysterious technology that's actually quite easy to deploy."

That positioning:

- Lowers fear
- Builds trust
- Positions her as calm, credible, and relevant

The result: AI increased her confidence and credibility, not her workload. She's not implementing AI systems for clients. She's leading better because she understands the landscape.

What This Stage Requires

- Regular learning (not mastery)
- Willingness to experiment privately
- Ability to translate complexity into client language
- Comfort with "I don't know, but here's what I'm seeing"

Common Mistake at This Stage

Trying to become an AI expert instead of an informed leader. You don't need to build things. You need to understand enough to guide decisions, ask good questions, and help others separate signal from noise.

Outcome 2: Grow Capacity as a Leader

What this looks like: You have leadership instincts that don't scale - personally welcoming people, writing thoughtful messages, staying connected to details. AI helps you maintain the intent while removing the repetitive execution.

Real Example: Robert Mendelson, Community Builder

Robert leads Fractional Pros Canada, a community that grew to 1,000+ members. His leadership instinct was simple and human: he wanted to personally welcome every new member.

The constraint was obvious. Writing 1,000 individual emails is impossible. Generic messages would erode the culture he was building.

The solution: Robert used an agent builder (Manus) to remove repetition without losing authenticity.

The agent:

- Watches a New Member Google Sheet
- When someone joins, finds them on LinkedIn and learns their background
- Drafts a "Welcome Home" email using Robert's standard template
- Inserts one specific sentence referencing their experience
- Saves the draft in Gmail and waits for Robert to review and send

The result: Every member feels personally seen. Messages are relevant and human. Robert reviews and sends, but never writes from scratch.

As he put it: "Every member feels seen, but I touched zero keys to write it."

What This Stage Requires

- Clarity on what matters (the personal touch) vs. what doesn't (typing from scratch)
- Willingness to let AI handle first drafts while you maintain final control
- Systems thinking: mapping the steps before automating them
- Comfort with "good enough" over perfect

Common Mistake at This Stage

Trying to automate everything instead of protecting what matters. The goal isn't efficiency. It's scaling leadership intent without losing what makes it work.

Outcome 3: Grow a Practice or Firm

What this looks like: You're shifting from episodic project work to recurring revenue, from being the sole expert to building transferable capability. AI becomes part of how you deliver value, not just how you work internally.

Real Example: John Lund, Strategic Coach

John focused his practice on the Microsoft ecosystem. Rather than become a generalist AI consultant, he:

- Developed deep competence in Copilot
- Added partners for data analysis and automation
- Positioned himself as the guide who helps leadership teams prioritize and sequence AI adoption

He productized this into a recurring leadership service.

The result: John shifted from episodic \$6,000-per-day consulting to \$6,000-per-month recurring revenue, with less dependence on his personal time.

What This Stage Requires

- A defined niche or platform (John chose Microsoft, you might choose something else)
- Partnership or team additions for technical capability
- Packaging: turning expertise into repeatable service offerings
- Positioning: helping clients sequence and prioritize, not just implement

Common Mistake at This Stage

Trying to be everything to everyone. The leaders who succeed here narrow their focus, develop real depth in one area, and position themselves as guides rather than doers.

Outcome 4: Enhance a Product or Service

What this looks like: You already have a strong core offering. AI extends that value - making your thinking accessible between sessions, enhancing live interactions, creating new ways for clients to engage with your expertise without requiring more of your time.

Real Example: Michael Erath, Strategic Coach

Michael had an established coaching practice. Rather than replace what was working, he layered in AI to enhance it.

Between sessions:

He created an AI version of himself using Delphi.ai to complement his new book. Clients can now:

- Ask for suggestions on issues they're facing
- Clarify specific concepts from his book
- Get virtual advisory support anytime

Michael reviews Delphi transcripts behind the scenes to ensure accuracy and updates the system as his thinking evolves.

During sessions:

He uses Plaud in live, in-person meetings for AI collaboration and note-taking, enhancing the quality of capture and synthesis without breaking the human connection.

The result: The service stayed human. The value increased. His thinking became accessible beyond live time.

What This Stage Requires

- A strong existing methodology or body of work to build from
- Tools that complement rather than replace human interaction (Delphi.ai, Plaud.ai, or similar)
- Ongoing curation: reviewing AI interactions to maintain quality
- Clear boundaries: knowing what AI handles vs. what stays human-only

Common Mistake at This Stage

Trying to build the AI layer before the core offering is solid. If your methodology isn't clear or your service isn't working, AI won't fix it - it will amplify the confusion.

Outcome 5: Build and Deploy AI Solutions

What this looks like: AI becomes core infrastructure, not a side project. You're building internal capability, deploying solutions for clients, and treating AI as durable competitive advantage rather than vendor-dependent experimentation.

Real Example: Joseph Frost, yorCMO

The goal was to make AI a core competency across the firm.

The approach:

1. Normalize learning internally
2. Bring in outside experts
3. Test vendor partnerships
4. Recognize core capability must be owned
5. Engage a fractional CTO
6. Hire AI-capable engineers
7. Roll out crawl → walk → run

Crawl: Internal capability building

One of the first projects was automating competitor analysis. It took several meetings between the AI team and coordinators to map the steps, identify what could be automated, and determine what needed to stay human-in-the-loop.

Built in N8N (a workflow automation platform), the system was tested, tweaked, and refined. The team made deliberate choices: some steps remained manual because the cost to fully automate them was too high.

Result: 20-30 hours of detailed competitor analysis saved per project through automation and AI steps.

Walk: Client deployment

A client was spending significant time building weekly prospect lists - searching cities for specific company types, reviewing online info from Yelp and social media, finding owners, enhancing contact data with ZoomInfo.

yorCMO built an N8N automation that handled the entire workflow.

Result: 6 hours saved every week, with a system the client could modify as their needs evolved.

Run: Full deployment with strategic positioning

As yorCMO prepared to run, the focus shifted to how AI fits into the value proposition - not as the product, but as infrastructure that makes fractional CMO leadership more effective.

The approach:

- Developed AI-specific messaging and sales support materials for CMOs
- Continued to lead with core value: strategic leadership, fractional by design
- Positioned AI as support for that leadership, determined by marketing strategy - not the other way around
- Showcased AI through case studies and demos, not by leading with agents and tools

The strategic choice: Don't become value-added resellers of AI. Instead, help CMOs become better leaders with AI (Assist), understand its capabilities to scale their practice (Automation), and make their clients more productive (Agentic AI) - but only when it makes strategic sense.

The result: Stronger leaders. More scalable practices. Recurring revenue from agentic agents deployed selectively, not reflexively.

AI became infrastructure that reinforces the core offering rather than replacing it.

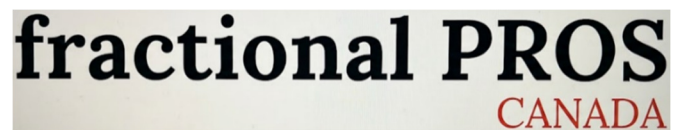
What This Stage Requires

- Real technical capability (hired or partnered)
- Iterative approach: crawl before you walk, walk before you run
- Ownership mindset: recognizing what must be built vs. what can be bought
- Patience: building infrastructure takes longer than buying tools
- Clear ROI: knowing what's worth automating vs. what should stay human
- Strategic discipline: leading with value, not with tools

Common Mistake at This Stage

Skipping straight to "run" without building foundations. Leaders see demos, get excited, and try to deploy agentic AI without the team capability, process clarity, or infrastructure to support it. The result is expensive failures and loss of trust.

The second mistake: becoming an AI vendor instead of a leader who uses AI. When you lead with tools instead of outcomes, you compete on features rather than strategic value.



Find More AI Resources For Fractionals at
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