

AI for a 40-Person Firm: From Hype to Real Results.

2 Days → 4 Hrs

Month-End Reporting Time

3

Workflows Automated

90 Days

Assessment to Production

THE SITUATION

A 40-person financial planning firm in Toronto knew they needed to explore AI — every conference and vendor was talking about it. The managing partner had attended three different presentations, but each assumed the firm had a dedicated IT team, a data lake, and a six-figure budget. They have 40 people and a bookkeeper.

THE CHALLENGE

The firm had started experimenting — a few team members using ChatGPT for drafting, one advisor had signed up for Copilot individually. But nothing was standardized. There were no policies around client data in AI prompts, no governance framework, and no way to measure whether any of it was saving time. Leadership was concerned about compliance risk and wanted to do it properly or not at all.

WHAT FUSION DID

AI Readiness Assessment (Week 1–2): Interviewed staff across all departments to map actual daily workflows — where time was lost, where errors crept in, what was manual that could be automated.

Prioritized Roadmap (Week 3): Identified three high-impact workflows: month-end financial reporting, client meeting prep, and compliance document review. Phased rollout starting with highest ROI.

Governance Framework (Week 4): Clear AI usage policies

DEPLOYMENT

Copilot Rollout (Month 2): Microsoft 365 Copilot deployed to leadership and senior advisors first, with structured training and usage guidelines. DLP policies configured to prevent client PII leaking into AI prompts.

Workflow Automation (Month 2–3): Built a Power Automate workflow pulling data from the portfolio management system into standardized report templates — cutting month-end reporting from two days to four hours.

Measurement (Month 3): KPIs for each automated workflow: time saved per cycle, error rates before vs. after, user adoption. Results reported monthly to the managing partner.

THE OUTCOME

Within 90 days the firm had measurable time savings across three departments, a governance framework their compliance team was comfortable with, and a clear roadmap for what to automate next. AI went from a vague buzzword to a practical tool saving real hours every week — deployed safely, with controls in place.

"For the first time, AI felt like a practical business decision, not a buzzword. Fusion made it real for a company our size."

— Rachel D., Managing Partner, Financial Planning Firm

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