

Are you future-proofed?

Steps to prepare for agentic AI in professional services

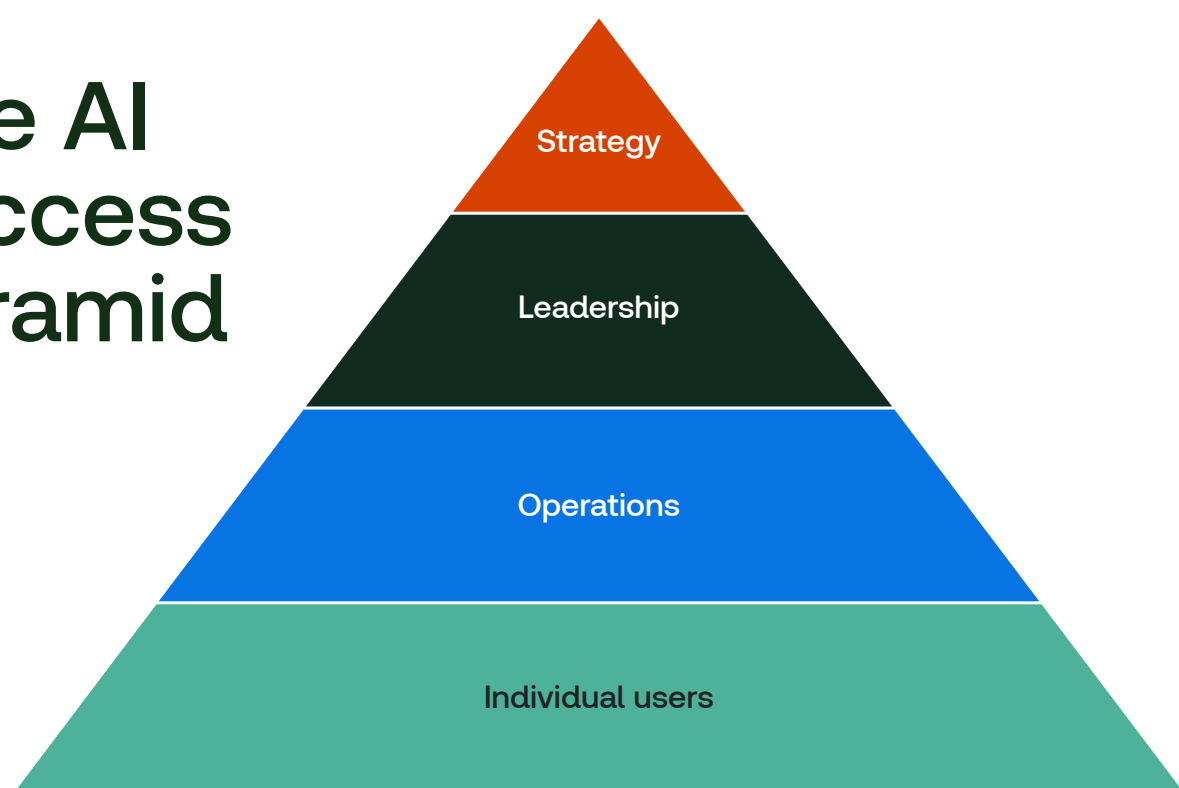
Stats and recommendations are based on insights from the Thomson Reuters *Future of Professionals Report*.

Agentic AI is changing how professional services work, from automating tasks to enhancing decision-making. But strategy is what turns potential into results. Use this checklist to take practical steps that build momentum and confidence with AI.

53%

of professionals say their organization is already seeing ROI from AI, yet 30% believe their organization is moving too slowly.

The AI success pyramid



1 Build your AI strategy

Clear direction leads to stronger outcomes. Organizations with a visible AI strategy are **3.5x as likely to see ROI**.

Key actions:

- ✓ Determine your “why.” What problems should AI help solve?
- ✓ Identify use cases tied to business goals
- ✓ Set clear success metrics and share ROI results openly
- ✓ Decide how time saved through AI will be reallocated and by whom

2 Lead by example

Change works best when leaders go first. Teams are **1.7x as likely to see value** when leadership is actively engaged.

Key actions:

- ✓ Share your own learning curve, including challenges and lessons
- ✓ Talk openly about your AI goals and experience
- ✓ Pilot real use cases and highlight takeaways with your team
- ✓ Foster curiosity and create space for questions and experimentation

3 Adjust operations

Even small workflow changes can unlock real gains. Organizations already making them are seeing **greater ROI**.

Key actions:

- ✓ Start with pilot projects that align with business priorities
- ✓ Update processes to support responsible experimentation
- ✓ Define KPIs and integrate them into existing tracking systems
- ✓ Revisit governance structures to support future-ready decisions

4 Empower individuals

Confidence unlocks greater impact. Users with good or expert AI skills are **2.8x as likely** to report organizational benefits.

Key actions:

- ✓ Create training pathways with role-specific support
- ✓ Ask teams to surface bottlenecks AI could help solve
- ✓ Recognize early adopters and give them a chance to lead
- ✓ Link individual goals to AI exploration and learning

Start small. Learn fast. Build confidence one step at a time.

The future of professional-grade AI is here

AI tools are only as good as the foundation they’re built on. [CoCounsel](#) from Thomson Reuters combines trusted expertise with authoritative content to deliver AI you can rely on. Now is the time to invest in AI that drives real results.

New to Agentic AI? Get the basics with our [Agentic AI 101 guide](#).