Palmetto Interactive

MAKE THE CONSEQUENTIAL DECISIONS BEFORE THE EXPENSIVE ONES

AI & Data Strategy

Independent guidance connecting AI ambition to value, readiness, and risk. Plus a delivery sequence someone can actually own.



ENGAGEMENT OVERVIEW · AUGUST 2026

WHY THIS CONVERSATION IS HAPPENING

You’re probably here for one of these

01 AI activity is multiplying but leadership cannot see a coherent value case, sequence, or accountability model

02 A platform or vendor commitment is approaching before the operating requirements and exit costs are clear

03 A promising initiative is blocked by data, architecture, governance, security, or ownership questions

04 The organization needs senior technology leadership to align a transition, recovery, or transformation

If none of these sounds like you, this probably isn’t the right engagement. We’d rather say that early than scope work nobody needs.

WHAT YOU GET AND WHEN

Two ways in

01

Principal only

DIAGNOSTIC · 5 WEEKS

Executive AI & Data Decision Diagnostic

Wk 1	Opportunity mapping
Wk 2–3	Readiness assessment
Wk 4	Architecture & build-versus-buy
Wk 5	Roadmap & executive readout

ENDS WITH

A decision brief and roadmap with a clear build, buy, sequence, or stop recommendation.

02

Principal-led team

RETAINED · 3–6 MONTH TERM, RENEWABLE

Retained Architecture & Decision Advisory

Wk 1–2	Cadence & decision rights
Wk 3–8	Decision-gate execution
Wk 9–16	Program alignment
Wk 17–24	Readout & renewal decision

ENDS WITH

The term ends with a decision: renew, narrow it, or exit.

Every engagement ends with a decision you actually make. Timings are planning ranges. The right path depends on scope, access, risk, and what the evidence shows. Most strategy work finishes with a decision brief and a roadmap. Pilot or rollout support is a separate choice you make later. And when the diagnostic turns up a buildable workflow, that becomes an engagement in one of the other three pillars.

DIAGNOSTIC · 5 WEEKS

Executive AI & Data Decision Diagnostic

WEEK 1

Opportunity mapping

Map the AI and data opportunity set and draft value hypotheses with their assumptions made explicit.

WEEKS 2–3

Readiness assessment

Assess readiness across process, knowledge, data, architecture, people, governance, and risk.

WEEK 4

Architecture & build-versus-buy

Develop the target-state architecture, decision principles, and a build-versus-buy or vendor scorecard.

WEEK 5

Roadmap & executive readout

Deliver the sequenced roadmap with decision gates, owners, and measures, presented to the leadership team.

GATE

Decision point

A decision brief and roadmap with a clear build, buy, sequence, or stop recommendation. Most strategy work ends right here, and that’s by design.

WHAT YOU RECEIVE

- Executive decision brief and opportunity map
- Readiness assessment across seven dimensions
- Target-state architecture and decision principles
- Build-versus-buy analysis or vendor scorecard
- Sequenced roadmap with gates, owners, measures, and funding logic

WHO DELIVERS IT

Principal only. This is executive judgment, and it doesn’t need build capacity.

5 weeks, ending in the decision point above.

RETAINED · 3–6 MONTH TERM, RENEWABLE

Retained Architecture & Decision Advisory

WEEKS 1–2

Cadence & decision rights

Establish the operating cadence, decision rights, and escalation path for the retainer.

WEEKS 3–8

Decision-gate execution

Work the roadmap's decision gates as they come due: architecture reviews, vendor and build decisions, risk retirement.

WEEKS 9–16

Program alignment

Provide architecture and technology leadership across the transition or delivery program, unblocking dependencies.

WEEKS 17–24

Readout & renewal decision

Deliver a cumulative executive readout and a renew, narrow, or exit decision on the retainer.

GATE

Decision point

The term ends with a decision: renew, narrow it, or exit. We won't run this open-ended without a named set of decisions.

WHAT YOU RECEIVE

- Executive readouts on an agreed cadence
- Ongoing decision records and assessments
- Scorecards and roadmap updates
- Retained decision support against a named decision set

WHO DELIVERS IT

Principal-led. We pull in specialists for specific decision gates as they come due. A security architect for a vendor risk review, say, or a data engineer for a feasibility spike. Scoped per gate, not staffed for the whole term.

3–6 month term, renewable, ending in the decision point above.

WHAT WE NEED FROM YOU

This doesn’t work without your people

- An executive sponsor who owns the decision and can align the affected leaders
- Business, operations, product, data, technology, security, and risk perspectives
- Access to current plans, architecture, economics, constraints, and prior findings
- Time in the working sessions. We build strategy with the people who have to execute it

The most common reason this work stalls isn’t technical.
It’s that nobody with authority was free to settle a
definition or approve an access request.

HOW SUCCESS IS MEASURED

- Roadmap milestones and pilot-to-production decisions
- Risks and dependencies retired before production or procurement gates

WHEN THIS ISN’T THE RIGHT FIT

You want an AI trends deck, or cover for a vendor you’ve already picked. This only works when an executive is ready to decide and fund it.

ENABLING CAPABILITY

Digital Product Modernization & Integration

Not every valuable technology problem needs AI. Sometimes a legacy application, a manual handoff, or a missing integration is the real constraint behind the AI outcome you want. We name that work during the diagnostic and price it before the pilot fee is fixed, then deliver it inside the engagement at the standard implementation rate. You won't find it discovered halfway through and quietly absorbed. And if it turns out to be most of the work, we'll say so and quote it as a modernization engagement instead.

Bring us the hardest question you've got.

If a bounded diagnostic isn't the right next step, we'll tell you in the first conversation. Not the first invoice.

THE ENGAGEMENT PATH

Diagnostic

Typically 2–6 weeks

Decision brief, baseline, target state, and sequenced recommendations

Production-shaped pilot

Typically 6–12 weeks

Working pilot, evaluation evidence, operating lessons, and go-forward decision

Scale & rollout

Often 3–6 months

Production capability, rollout evidence, runbooks, and ownership handoff

matt@palmettointeractive.com
(843) 732-1460
palmettointeractive.com