Palmetto Interactive

TURN A VALUABLE WORKFLOW INTO A USABLE PRODUCT

AI Products & Workflow Automation

AI products and workflow automation built for adoption. Something your people actually use, wired into the systems they already work in.



ENGAGEMENT OVERVIEW · AUGUST 2026

Confidential · Palmetto Interactive Services, LLC

WHY THIS CONVERSATION IS HAPPENING

You’re probably here for one of these

01 A critical process still runs through email, spreadsheets, swivel-chair entry, or brittle point solutions

02 An AI prototype showed promise but lacks the product design, integration, controls, or evidence to be used

03 Customers or employees need a focused interface over complex information and systems

04 A legacy workflow or application is blocking automation, visibility, or a broader AI initiative

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

Three rungs. Every one is a real stopping point

01

Principal only

DIAGNOSTIC · 4 WEEKS

Product & Workflow Diagnostic

Wk 1	Workflow & user-journey baseline
Wk 2–3	Product brief & value hypothesis
Wk 4	Scope & decision brief

ENDS WITH

A decision to move to a pilot with a named, bounded first release.

02

Principal-led team

PILOT · 10 WEEKS

Production-Shaped Product Pilot

Wk 1–2	Interface & integration design
Wk 3–6	Build with real data & users
Wk 7–9	Controls & telemetry
Wk 10	Release readiness review

ENDS WITH

A pilot in front of real users, with adoption evidence.

03

Principal-led team

SCALE · ~4 MONTHS PER CYCLE

Controlled-Increment Expansion

Wk 1–3	Increment prioritization
Wk 4–9	Build & integrate
Wk 10–13	Release & adoption
Wk 14–16	Documentation & handoff

ENDS WITH

The increment is released and adopted, and the backlog is yours.

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.

DIAGNOSTIC · 4 WEEKS

Product & Workflow Diagnostic

WEEK 1

Workflow & user-journey baseline

Map the current workflow, the user journey through it, and the baseline metrics that matter.

WEEKS 2–3

Product brief & value hypothesis

Define the product brief, the value hypothesis, and the success measures against that baseline.

WEEK 4

Scope & decision brief

Deliver the decision brief and a scoped recommendation for the smallest release worth piloting.

GATE

Decision point

A decision to move to a pilot with a named, bounded first release. Or to stop.

WHAT YOU RECEIVE

- Product brief and user journey
- Workflow baseline
- Value hypothesis and success measures
- A scoped recommendation for the first release

WHO DELIVERS IT

Principal only

4 weeks, ending in the decision point above.

PILOT · 10 WEEKS

Production-Shaped Product Pilot

WEEKS 1–2

Interface & integration design

Design the fit-for-purpose interface, the service and API boundary, and the integration approach.

WEEKS 3–6

Build with real data & users

Build the pilot against representative users, data, and integration boundaries, with the test strategy wired in.

WEEKS 7–9

Controls & telemetry

Add authentication, validation, fallbacks and exception queues, plus application and model telemetry.

WEEK 10

Release readiness review

Review adoption and task-completion evidence, and decide on release and expansion.

GATE

Decision point

A pilot in front of real users, with adoption evidence. You decide whether to expand in controlled increments.

WHAT YOU RECEIVE

- A production-shaped pilot with representative users and data
- Interface, services, APIs, automation, and integration code
- Test strategy and AI evaluations where applicable
- Telemetry and operational controls

WHO DELIVERS IT

Principal-led. Where there’s real frontend and backend surface, we run those as parallel tracks under Palmetto’s architecture direction.

10 weeks, ending in the decision point above.

SCALE · ~4 MONTHS PER CYCLE

Controlled-Increment Expansion

WEEKS 1–3

Increment prioritization

Prioritize the next controlled increment against the operating backlog and the adoption evidence.

PRINCIPAL

WEEKS 4–9

Build & integrate

Build, test, and integrate the increment into the existing systems and controls.

FRONTEND + BACKEND ENGINEERS

WEEKS 10–13

Release & adoption

Release the increment, support the rollout, and monitor the operating measures.

QA ENGINEER + PRINCIPAL

WEEKS 14–16

Documentation & handoff

Deliver documentation, runbooks, handoff sessions, and the next prioritized backlog.

PRINCIPAL

GATE

Decision point

The increment is released and adopted, and the backlog is yours. You decide whether to fund the next cycle. This one renews rather than ends.

WHAT YOU RECEIVE

- The released increment, integrated and adopted
- Release plan, documentation, and runbooks
- Handoff sessions
- The next prioritized backlog

WHO DELIVERS IT

Palmetto's principal owns product decisions and architecture. Alongside the principal: frontend, backend, and QA engineers, sized to the increment.

~4 months per cycle, ending in the decision point above.

WHAT WE NEED FROM YOU

This doesn’t work without your people

- An accountable product or workflow owner with authority to make priority decisions
- Representative users available for discovery

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

- Cumulative user adoption
- Operating cost, capacity, service level, revenue, or customer measures tied to the product case

WHEN THIS ISN’T THE RIGHT FIT

You need bodies rather than a product. Without an accountable owner, access to real users, and a measure this should move, we’d be guessing.

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

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