Palmetto Interactive

GIVE PEOPLE AND AI THE SAME BUSINESS LANGUAGE

Knowledge Graphs & Ontologies

A governed layer that connects your data, your terminology, and your rules. So your people and your AI finally work from the same definitions.



ENGAGEMENT OVERVIEW · AUGUST 2026

WHY THIS CONVERSATION IS HAPPENING

You’re probably here for one of these

01 The same customer, product, asset, policy, or risk appears differently across multiple systems

02 Teams spend significant time debating definitions, reconciling records, or reconstructing lineage

03 Search or RAG retrieves documents but still produces incomplete or weakly explained answers

04 A transformation, acquisition, regulatory need, or AI program requires a durable cross-system meaning layer

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

Knowledge & Meaning Diagnostic

Wk 1	Decisions & competency questions
Wk 2–3	Source & terminology audit
Wk 4	Decision brief & target model

ENDS WITH

A recommendation to move to the pilot.

02

Principal-led team

PILOT · 10 WEEKS

Ontology & Graph Pilot

Wk 1–3	Domain ontology & terminology
Wk 4–6	Architecture & identity strategy
Wk 7–9	Pattern build on real data
Wk 10	Evaluation & go-forward decision

ENDS WITH

A working pilot and evaluation evidence.

03

Principal-led team

SCALE · ~4 MONTHS

Governance & Adoption Scale-Out

Wk 1–3	Governance & change process
Wk 4–8	Quality checks & reconciliation
Wk 9–13	Adoption expansion
Wk 14–16	Roadmap & governance handoff

ENDS WITH

A governed model handed over with an adoption roadmap.

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

Knowledge & Meaning Diagnostic

WEEK 1

Decisions & competency questions

Identify the priority decisions and the specific questions the knowledge layer has to be able to answer.

WEEKS 2–3

Source & terminology audit

Audit source systems for identity conflicts, terminology disputes, and provenance gaps against those questions.

WEEK 4

Decision brief & target model

Deliver the decision brief and a sequenced recommendation on modeling scope and platform.

GATE

Decision point

A recommendation to move to the pilot. Or a clear stop, if the real problem turns out to be a narrow reporting need.

WHAT YOU RECEIVE

- The priority decisions and competency questions, written down
- Identity, terminology, and provenance gap findings
- Decision brief, baseline, and target state
- A sequenced recommendation on modeling scope and platform

WHO DELIVERS IT

Principal only

4 weeks, ending in the decision point above.

PILOT · 10 WEEKS

Ontology & Graph Pilot

WEEKS 1–3

Domain ontology & terminology

Build the domain ontology, settle the terminology decisions, and document the model with SME sign-off.

WEEKS 4–6

Architecture & identity strategy

Design graph architecture, source mappings, entity-resolution strategy, and the provenance model.

WEEKS 7–9

Pattern build on real data

Exercise an ingestion, query, API, or GraphRAG pattern against representative data and real users.

WEEK 10

Evaluation & go-forward decision

Score coverage and accuracy against the priority questions and decide on governance investment.

GATE

Decision point

A working pilot and evaluation evidence. You decide whether to invest in governance and scale.

WHAT YOU RECEIVE

- Domain ontology, terminology decisions, and model documentation
- Graph architecture, source mappings, and identity strategy
- Provenance model
- A working pattern exercised with representative data

WHO DELIVERS IT

Principal-led. When the graph spans several business domains, we run an ontologist per domain in parallel, with the principal reviewing model integrity across all of them.

10 weeks, ending in the decision point above.

SCALE · ~4 MONTHS

Governance & Adoption Scale-Out

WEEKS 1–3

Governance & change process

Stand up the governance workflow, versioning, and change-review process for the ontology and mappings.

PRINCIPAL

WEEKS 4–8

Quality checks & reconciliation

Implement data-quality checks, reconciliation paths, and explicit handling of contradictory facts.

DATA/GRAPH ENGINEER + ANALYST

WEEKS 9–13

Adoption expansion

Extend the graph to further workflows, integrations, and AI applications, across domains in parallel.

ONTOLOGISTS, PRINCIPAL REVIEWS

WEEKS 14–16

Roadmap & governance handoff

Deliver the adoption roadmap and transfer governance ownership to the client team.

PRINCIPAL

GATE

Decision point

A governed model handed over with an adoption roadmap. We exit, or move to retained advisory.

WHAT YOU RECEIVE

- Governance workflow and change process
- Data-quality checks and reconciliation paths
- Adoption roadmap
- Governance ownership transferred to your team

WHO DELIVERS IT

Palmetto’s principal owns ontology integrity, governance, and architecture. Alongside the principal: an ontologist per domain, a data and graph engineer, and a data-quality analyst.

~4 months, ending in the decision point above.

WHAT WE NEED FROM YOU

This doesn’t work without your people

- A business owner who can prioritize the decisions and users the model must support
- Domain experts empowered to resolve terminology and relationship questions
- Data owners who understand source quality, identifiers, access, and lineage

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

- Reuse across workflows, integrations, analytics, and AI applications
- Reconciliation and exception rates trending down

WHEN THIS ISN’T THE RIGHT FIT

Your problem is a narrow reporting need with stable definitions. If nothing depends on relationships, reuse, or provenance, a graph is overkill and we’ll tell you that.

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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