AI Implementation Planning: From Idea to Funded Pilot

Seven bounded deliverables — grouped into three phases — that take any company from opportunity to funded pilot

Each POC is a fixed-scope deliverable — not open-ended consulting. Every artifact is board-ready on completion.
The sequence is intentional: understand before designing, design before building, evaluate before scaling.

PHASE 1 · ASSESS

6–8 WEEKS · What's worth building, and on what platform?

01 · USE CASE VALUE MODEL

Maps AI capabilities to business KPIs.
Which AI patterns — generative, predictive, agentic — drive which outcomes? Quantifies value so the investment decision becomes straightforward.

→ Value Mapping Workbook

02 · PLATFORM FIT ASSESSMENT

Scores each platform option against requirements.
Agentforce, custom build, MCP server, or hybrid — each assessed on capability fit, feasibility, cost and regulatory constraints.

→ Platform Fit Scorecard

GATE

PHASE 2 · ARCHITECT

8–12 WEEKS · What does it look like, and how do we measure it?

03 · TARGET-STATE ARCHITECTURE

Defines the full multi-layer technical design.
Experience, orchestration, LLM gateway, RAG layer, MCP servers, observability & guardrail layers — a spec engineers can build from immediately.

→ Architecture Spec + Diagrams

04 · AGENT EVALUATION FRAMEWORK

Defines how success is measured before building.
Telemetry schema, metric families, quality gates — agreed across business and engineering so pilots have clear pass/fail criteria from day one.

→ Eval Framework + Telemetry Schema

GATE

PHASE 3 · EXECUTE

4–6 WEEKS · What do we build first, and what's the plan?

05 · PILOT CHARTER(S)

Scopes the first build — named pilot, sponsor, timeline, budget, success criteria & go/no-go gate.

→ Pilot Charter(s)

06 · EXECUTIVE PROPOSAL

5-minute leadership summary of all findings.
Investment ask, outcomes, risk posture — board-ready.

→ Executive Brief

07 · ENGAGEMENT ROADMAP

Sequences everything for delivery. Phased build, rollout waves, team requirements & milestones.

→ Delivery Roadmap

WHAT EACH PHASE DELIVERS

Use case portfolio validated.
Platform decision made and scored.
No more 'what should we build?' ambiguity.

Full technical and measurement blueprint.
Architecture defined. Eval framework agreed.
Ready to build — no architectural unknowns.

Executive buy-in secured. Pilot scoped and funded.
Delivery sequenced with rollout waves defined.
The plan is real — not a slide deck.