

STRATEGY GUIDE

AI Strategy, Integration & Foundation

A comprehensive guide to how we help companies adopt AI that's powerful, accountable, and designed to last. From risk assessment to policy development to hands-on execution.

PREPARED BY
VERA Consulting

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CLASSIFICATION
General Distribution

OUTCOMES · PART 1 OF 2

What you actually get, in the first ninety days.

Our goal is to get you through these unprecedented times with real outcomes and real understanding. Four wins owners feel almost immediately. The other four, the ones that build over the year, are on the next page.

01

PROSPECTING

More leads in the pipeline.

Most owners have a stack of leads they haven't touched in months. Past clients, sphere contacts, people who went quiet. AI works that list. It pulls who's likely buying now, drafts the message in your voice, and keeps the follow-up moving so nothing sits cold.

43%

OF US BUSINESSES SAY AI LIFTED THEIR REVENUE

No deals lost to silence.

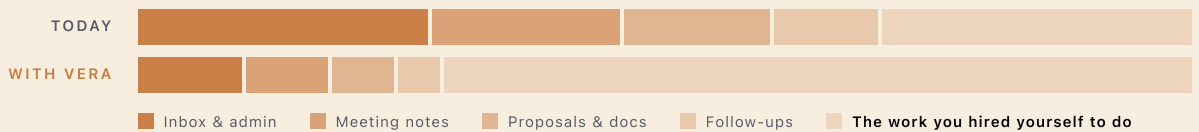
Intuit / QuickBooks AI Impact Report, 2026

02

THE HOOK

Hours back, every day.

Look at your last week. How many hours went to email triage, meeting notes, drafting the same kind of proposal for the fifth time? Most clients get five to ten hours back a week within the first month, on work that didn't need them in the first place.



5-10 hrs a week back for frequent AI users *Run your business instead of being run by it.*

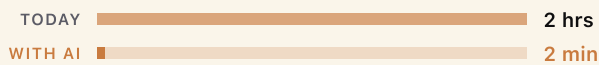
Intuit / QuickBooks, 2026 - 78% of US businesses say AI improved productivity (up from 46% in 2024)

03

SERVICE SPEED

Customers who feel heard.

85% of small business owners using AI say it made their company more efficient. Faster replies, smarter follow-ups, the right thing said at the right time. AI does the heavy lift, in your voice, without replacing the relationship.



500 customers, treated like 50.

Goldman Sachs 10,000 Small Businesses Voices Survey, 2026

04

JUDGMENT

Decisions you can defend.

Right now, half your calls are gut. Some of them are good. Some of them aren't, and you find out 90 days later. AI brings real data into the room. Comps, scenarios, market shifts. Not to replace your judgment, to back it up.

"Evidence in hand, not gut alone."

OUTCOMES · PART 2 OF 2

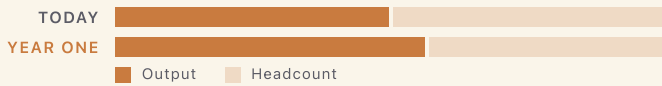
And what those wins turn into over the year.

The first four show up fast. These four are what they grow into once AI is built into the way the business runs, not bolted on top.

05 TEAM OUTPUT

A team in a higher gear.

Same headcount, more output. New hires ramp in days because AI carries the institutional knowledge. Your veterans stop spending afternoons on busywork and get back to the work you actually hired them for.



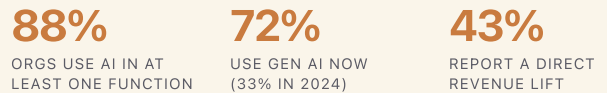
78% of US businesses say AI improved their productivity.

Intuit / QuickBooks AI Impact Report, 2026 (up from 46% in 2024)

06 MARGIN

Margins that don't depend on growth.

You shouldn't have to add headcount to grow revenue. AI does the work three hires used to do. Cost to serve drops. Profit per customer goes up. The business gets worth more without getting bigger.



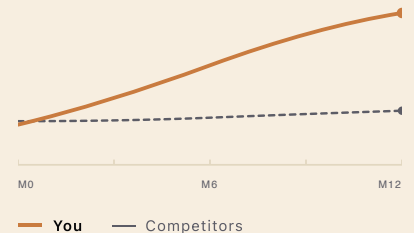
McKinsey State of AI, Nov 2025 · Intuit / QuickBooks, 2026

07 THE GAP

Out-shipping the competition.

Your competitors are still in meetings about AI. You're already running things. The longer it's been working in your business, the harder it gets for anyone to catch up. Your team gets sharper, your data gets richer, your customers get used to what you give them.

The gap doesn't shrink. It widens.



A business that runs without you in the room.

08 THE POINT

You take a Friday off and nothing breaks. You go on vacation and proposals still go out. The day-to-day runs on systems, not on your willpower. Most owners tell me this is the real reason they took AI seriously. Not because they care about AI, because they want their time back.

NEXT

The how. Landscape, risks, services, and the engagement model start on the next page.

THE AI LANDSCAPE

The adoption is here. The infrastructure isn't.

Adoption has outpaced readiness

88% of organizations now use AI regularly in at least one business function. 92% of Fortune 500 companies have deployed generative AI across their operations. But only 25% have moved those experiments into reliable production.

88%

of organizations use AI regularly in at least one business function
McKinsey, 2026

The foundation gap is wider

Most organizations have AI somewhere in the business but haven't built the infrastructure to scale it. Evaluation frameworks, monitoring, architecture decisions, and the policies that hold the work together. The gap between using AI and running AI as a system is what separates leaders from pilots that never ship.

92%

of Fortune 500 companies have deployed generative AI
Fortune, 2026

Foundation is the new differentiator

What used to set leaders apart was access to better models. That's increasingly a commodity. What separates them now is the foundation around the model, the evaluation systems, the integration patterns, the monitoring, the policies that make the work survive a quarter. Leaders are building this. Most are still shipping prototypes.

25%

of organizations have moved AI experiments into production
Grant Thornton, 2026

The gap is widening

McKinsey identifies a small group of "AI high performers" (roughly 6% of companies) that attribute more than 5% of EBIT to AI. These organizations are 2.8x more likely to have fundamentally redesigned their workflows around AI, not just layered it on top.

78%

of executives lack confidence in their AI evaluation and oversight
Grant Thornton, 2026

What this means for you

The question isn't whether to adopt AI. That decision has already been made. The question is whether your organization is structured to use it well, govern it properly, and adapt as everything changes. That's what VERA helps with.

\$2.5T

global AI spending in 2026, up 44% year-over-year
Gartner, 2026

Where the impact hits hardest

Financial services, healthcare, legal, insurance, HR, manufacturing, and customer experience are seeing the fastest AI-driven shift. Firms in regulated sectors face the most pressure to build the foundation right before scaling. The ones that move first set the standard for their industries.

The high performer gap

Only 25% of organizations have moved at least 40% of their AI experiments into production. What separates the leaders: they redesigned workflows around AI rather than layering it onto existing processes. They built the foundation, architecture, evaluation, and operating habits, before they scaled. The gap between leaders and everyone else is accelerating.

KEY RISKS

Where AI adoption goes wrong.

Most AI failures aren't technical. They're organizational. These are the six areas where we see companies get caught off guard.

58pt

gap between AI adoption and foundation readiness

01 Bias & Fairness

AI systems inherit and amplify biases from training data. In hiring, lending, healthcare, and insurance, this leads to discriminatory outcomes that create legal exposure and erode public trust.

04 Regulatory Exposure

What's compliant today may not be compliant next quarter. The EU AI Act, state-level legislation, and FTC enforcement are accelerating. Retroactive compliance costs significantly more than building it in from the start.

02 Hallucination & Accuracy

Large language models produce confident outputs that can be factually wrong. Without validation pipelines, incorrect information enters your workflows and corrupts downstream decision-making.

05 Workforce Disruption

Without a transition plan, AI adoption creates friction and talent gaps instead of productivity gains. Organizations that invest in change management see 3x higher adoption rates.

03 Data Privacy & Security

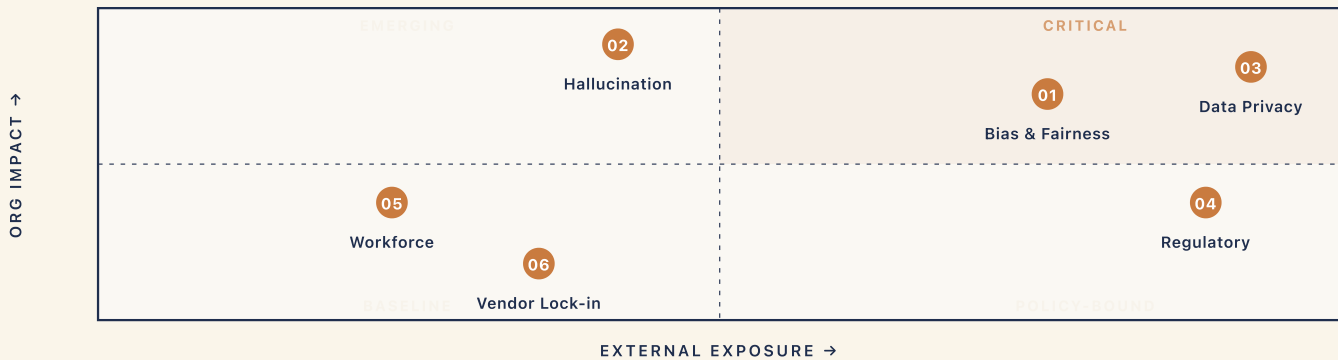
AI creates new attack surfaces, from prompt injection to training data extraction, that traditional security frameworks weren't designed to address. Compliance with GDPR, CCPA, and HIPAA requires AI-specific controls.

06 Vendor Lock-in

Architecture decisions made today determine your flexibility for years. Committing to a single vendor without proper evaluation is expensive to undo and often requires rebuilding from scratch.

RISK LANDSCAPE

VERA Assessment · positions plotted from published research



Sources: McKinsey, *The State of AI* (2024, 2026) · European Commission, *EU AI Act* (Regulation 2024/1689, Annex III high-risk classifications) · Stanford HAI, *AI Index Report 2025* · NIST *AI Risk Management Framework* (AI 100-1).

"The companies that get AI right aren't the ones that move fastest. They're the ones that build the foundation to sustain it."

How we address these risks

We identify the risks most relevant to your business and design the evaluations, policies, and monitoring to manage them. Every assessment ends with mitigation steps tied to how you actually operate.

SERVICES

What we offer.

01 AI Strategy

We assess what's feasible, map it to your infrastructure, and build the plan. Not a generic roadmap, a strategy built around your business, your constraints, and where AI is heading in 12, 24, and 36 months.

INCLUDES

Feasibility assessment, architecture planning, vendor evaluation, evaluation criteria, implementation timeline, resource planning

02 AI Integration

AI woven into your workflows at a foundational level, not bolted on as a feature. We handle technical implementation, data pipelines, and change management so your team actually adopts it.

INCLUDES

Workflow design, system integration, data pipeline architecture, performance monitoring, change management, team onboarding

03 AI Foundation

AI built right from day one. Architecture decisions, evaluation systems, model selection, integration patterns, and the policies that make it last. Designed for where AI is heading, not just where it is.

INCLUDES

Architecture planning, evaluation frameworks, model selection criteria, monitoring and observability, policies and guardrails, vendor strategy

04 Training & Enablement

Hands-on training tailored to your industry, your tools, and the specific roles in your organization. From C-suite briefings to technical workshops on prompt engineering and tool evaluation.

INCLUDES

Executive AI briefings, team workshops, AI literacy programs, best practices documentation, ongoing enablement support

ENGAGEMENT OPTIONS

01

ONGOING

Retainer

Ongoing monthly partnership. Direct access to Brett for strategy questions, policy reviews, vendor evaluations, and implementation guidance as they come up.

02

ONE-TIME

Audit, Roadmap & Training

One-time deep dive into current AI use, infrastructure, risks, and opportunities. Ends with a written audit, prioritized roadmap, leadership walk-through, and a half-day team training.

03

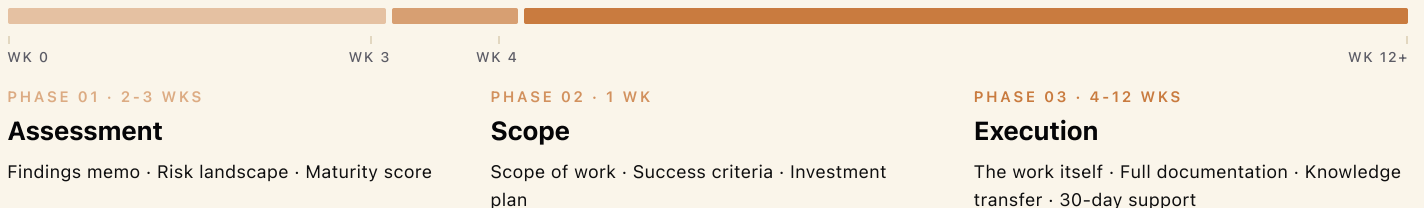
SCOPED

Project Build

Scoped delivery of a specific outcome. AI policy document, evaluation framework, custom integration, or training cohort. Fixed scope, fixed fee, defined success criteria.

HOW AN ENGAGEMENT UNFOLDS

PROCESS DETAIL, PAGE 5 →



PROCESS

How an engagement works.

Every engagement follows a structured, transparent process. You'll know what we're doing, why, and what you'll have at the end.

TYPICAL TIMELINE

Assessment — 2-3 weeks

Scope of Work — 1 week

Execution — 4-12 weeks

1 Assessment

We start by understanding where you are, infrastructure, AI maturity, goals, and constraints. We evaluate what's working, what's not, and where AI can create real value. The strategy we build is only as good as our understanding of your reality.

Infrastructure review Stakeholder interviews Data readiness Risk identification Competitive landscape

2 Scope of Work

We define exactly what we'll deliver, when, and what success looks like. Every scope of work includes measurable success criteria. We typically present two or three options at different levels of depth so you can choose the engagement that fits your budget and timeline.

Defined deliverables Timeline and milestones Resource requirements Success criteria Investment summary






3 Execution

We do the work, strategy, integration, foundation, training, whatever the scope calls for. Regular updates, full documentation, no lock-in. When we're done, you own everything we built. Every engagement includes a 30-day post-completion support window.

Weekly check-ins Progress reporting Full documentation Knowledge transfer Post-engagement support

WHAT YOU WALK AWAY WITH

Artifacts your team owns and runs without us

 <p>Strategy</p>	 <p>Workflows</p>	 <p>Evaluation</p>	 <p>Policy</p>	 <p>Documentation</p>
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OUR VISION

"I started VERA because AI is going to change the workforce at an unprecedented pace, and many companies are not prepared for it. We believe in using AI to strengthen human capabilities and being transparent about both the risks and the opportunities ahead."

Brett Ponters, Founder

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VERA •

VALUE-DRIVEN, ETHICAL, RESEARCH-GROUNDED AI

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