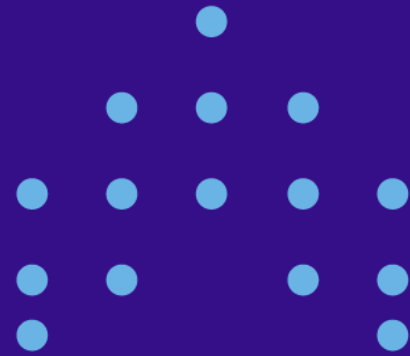
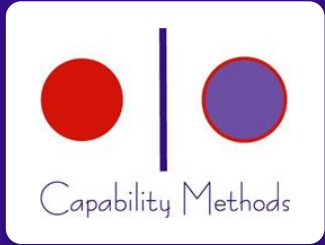




CAPABILITY METHODS LLC · SERVICES OVERVIEW

From AI-readiness clarity to a working platform

Three ways to work with us — diagnose where you stand, keep the roadmap moving, and build what matters.
For executives and operations leaders at growing businesses.

Tier 1 Diagnostic · Tier 2 Fractional Leadership · Tier 3 Platform Project

THE CHALLENGE

AI and operations decisions are getting made faster than they're understood

1

Everyone is being asked about AI — few have a clear starting point

Boards, customers, and staff want an answer. Most businesses don't know where they stand on data, process, or governance.

2

Spending comes before understanding

Tools and platform changes get approved before anyone has checked whether the operation, the data, or the controls are ready for them.

3

Plans stall without ownership and follow-through

A good roadmap still needs someone senior to keep it moving, and someone to build it — without a full-time hire.

OUR APPROACH

Senior, independent, and built for businesses your size

1

Right-sized

Methods adapted from enterprise frameworks (ISO/IEC 42001, NIST AI RMF) and scaled for \$1M–\$15M businesses — not a 6-month study.

2

One named lead

The same principal consultant scopes, delivers, and reports at every tier. No rotating bench, no account handoffs.

3

Fixed and predictable

Fixed fees, written scope, and clear caps. You know what you're buying before you sign.

4

Operations and AI together

We assess how the business runs and how ready it is for AI as one picture, not two separate projects.

5

Scoped around what you own

Recommendations start from the platforms and licenses you already have. Any chargeable add-on is flagged in writing, never assumed.

6

Built to hand off

Every engagement ends with something your team can run without us: a roadmap, a report, or a documented build.

Three tiers, one path from clarity to capability

1 TIER 1	2 TIER 2	3 TIER 3
Diagnose AI & Operations Readiness Diagnostic <i>Where do we really stand, and what should we fix first?</i> 3 weeks · \$8,500 fixed (typically \$6,500–\$12,000)	Sustain Fractional Transformation Leadership <i>Keep the roadmap moving with a senior advisor, without a full-time hire.</i> Monthly · \$4,500 / month (typically \$3,500–\$6,500)	Build Platform / AI-Readiness Project <i>Design and implement the platform or AI-readiness foundation you need.</i> 6–12 weeks · from \$15,000 (fixed fee, 3 milestones)

Diagnostic: five deliverables in three weeks

1

D01 Kickoff & Alignment

Confirm objectives and scope; finalize the interview schedule.

2

D02 Current-State Assessment

5–8 stakeholder interviews plus a review of existing tools and workflows.

3

D03 Gap Analysis & Findings Report

Your top 3–5 blockers in plain English, each with business impact and a recommended action.

4

D04 Executive Readout

A live walkthrough of the findings with your leadership team.

5

D05 Phased Roadmap

What to fix now, next, and later — usable with or without further help.

INVESTMENT

\$8,500

fixed fee · typically \$6,500–\$12,000 by company size

- ✓ 3 weeks, start to finish
- ✓ 50% at signing, 50% at delivery
- ✓ No software cost
- ✓ No long-term commitment

Best for leaders who need an independent answer before they commit real budget to AI or a platform change.

Fractional leadership: a senior advisor, every month

1

2 working sessions a month

60-minute bi-weekly sessions that drive the roadmap forward.

2

Async access between sessions

Quick questions answered without waiting for the next meeting.

3

A written Monthly Progress Report

What moved, roadmap status, what's next, and hours used.

4

A Quarterly Roadmap Review

Every third month: re-prioritize and confirm the value.

INVESTMENT

\$4,500

per month · typically \$3,500–\$6,500
by size and scope

- ✓ Up to 12 hours / month
- ✓ 3-month minimum term
- ✓ Then month-to-month, 30 days' notice
- ✓ Invoiced in advance

Two ways to start

Path A: after a Diagnostic, Month 1 executes against your existing roadmap. Path B: no prior work, so Month 1 opens with a condensed ~2-week current-state capture.

Platform Project: three milestones, one clean handoff

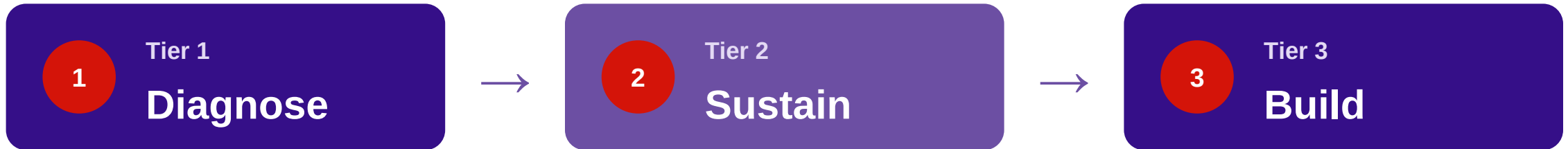
130% of fee Milestone 1 — Kickoff Scope Baseline approved, platform access confirmed.	230% of fee Milestone 2 — Midpoint Design signed off and the core build demonstrated against its acceptance criteria.	340% of fee Milestone 3 — Final Delivery All deliverables accepted, handoff package delivered, handoff session held.
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Four platform paths, one structure

Google Cloud	Open-source stack	Your existing platform	Salesforce
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From \$15,000 per project, set by scope (typically up to \$40,000) · typically 6–12 weeks · licenses and cloud costs are yours; any chargeable add-on is flagged in writing before signing · includes a 30-day defect-correction window.

Start where you are: every tier stands on its own



A

Not sure where to begin?

Start with the Diagnostic. In three weeks you have a scored picture, your top 3–5 gaps, and a Now / Next / Later roadmap.

B

Already know what needs doing?

Go straight to Tier 2 or Tier 3. A short, condensed current-state step comes first, using the same rubrics as the Diagnostic.

C

Finished a Diagnostic?

Your roadmap carries forward. Tier 2 or Tier 3 starts from it directly, with no repeat assessment.

One consistent yardstick runs through every tier

1

Operating Model Maturity

4 dimensions

Customer & value focus, process discipline, team alignment, and continuous improvement: how the business actually runs.

2

AI Readiness

6 domains

Governance, data privacy, risk assessment, third-party AI, training, and policy. Adapted from ISO/IEC 42001 and the NIST AI Risk Management Framework.

Each scored on a 4-point scale

1

Crawl

Ad hoc, informal

2

Walk

Basic and repeatable

3

Run

Defined and managed

4

Fly

Optimized and embedded

Which tier fits? A quick comparison

	Tier 1 · Diagnose	Tier 2 · Sustain	Tier 3 · Build
Best when you...	Need an independent picture before spending	Need senior help keeping a roadmap moving	Know what to build and need it delivered
Duration	3 weeks	3-month minimum, then monthly	Typically 6–12 weeks
Investment	\$8,500 fixed (typically \$6,500–\$12,000)	\$4,500 / month (typically \$3,500–\$6,500)	From \$15,000 fixed, by scope
How you pay	50% at signing, 50% at delivery	Monthly, invoiced in advance	30% kickoff / 30% midpoint / 40% final
Our commitment	Five deliverables, including a live Executive Readout	Up to 12 hours a month, a written monthly report	Written scope, milestone acceptance, handoff package
You walk away with	Scored findings, top 3–5 gaps, phased roadmap	A roadmap that keeps moving, with progress you can see	A working, documented build your team owns

BUILT-IN SAFEGUARDS

Predictable by design: cost, scope, and exit are clear up front

1

Fixed fees, never hourly

Every tier is a fixed fee, with a published typical range.

2

Written scope

Deliverables and acceptance criteria are in the agreement before work starts.

3

Capped hours

Tier 2 states up to 12 hours a month plainly, so expectations match.

4

Change-order discipline

Tier 3 work outside the agreed milestones goes through a written change order.

5

Light commitments

Tier 1 has no long-term commitment; Tier 2 is month-to-month after 3 months.

6

No surprise software bills

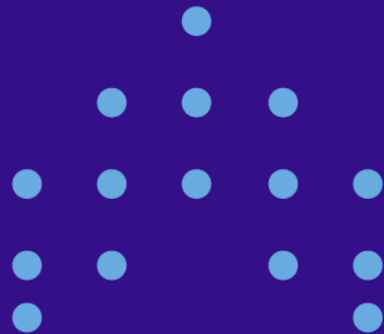
No software cost in Tier 1; platform costs in Tier 3 are yours and flagged in writing.

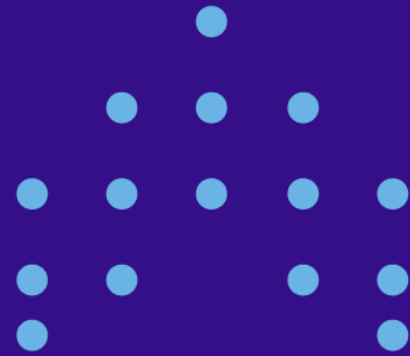
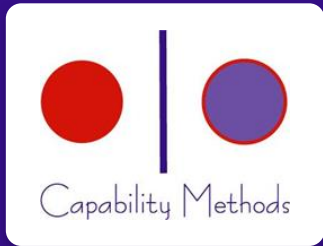
WHO YOU'RE WORKING WITH

Mark Katanani — Principal Consultant

The same named lead at every tier: scoping, delivery, reporting, and handoff. No rotating bench, no account handoffs.

- ✓ TOGAF certified
- ✓ Lean Six Sigma Master Black Belt
- ✓ SAFe Release Train Engineer (RTE)
- ✓ U.S. patent holder — AI/ML-based defect prediction





NEXT STEPS

Let's find the right starting point

Tell us where you are — unsure, mid-roadmap, or ready to build — and we'll recommend the tier that fits.

Mark Katanani — Principal Consultant
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