PREPARED FOR THE BOARD

Q3 AI strategy: three workflows. One worth funding.

This is what a Strategy engagement hands the board. Not a survey of everything AI could touch. The three workflows we sized, the two we're not funding, and the one we are.

01 — WHAT WE LOOKED AT

Three workflows surfaced in interviews with execs and leads. We sized each one the same way: hours per month, cost of the status quo, and whether a model can take the repetitive part without taking the judgment call with it.

WORKFLOW	MONTHLY COST	STATUS	WHY
Claims intake triage	310 hrs / mo	Not funded	The judgment IS the work
Renewal risk scoring	140 hrs / mo	Funded	Clear signal, clean handoff
Contract redlines	90 hrs / mo	Not funded	Volume doesn't justify it

02 — THE RECOMMENDATION

Renewal risk scoring. Today, two people read account history and guess which renewals are in trouble. The model reads all of it and flags the ones worth a human look — before the renewal date, not after. 140 hours a month becomes a review queue. The call stays human.

03 — WHY THIS MODEL CHOICE

The account data is the business — pricing, usage, churn signals. So the model is an open-weights model in the company's own locked cloud, not a frontier API. For this task it scores within a few points of the frontier, at a fraction of the marginal cost, and nothing about a customer's contract history leaves the building. Frontier models stay on the table for work where the ceiling matters more than the walls. This isn't one of those.

04 — THE 90-DAY PLAN

WEEKS 1–2

Assess

Map the renewal workflow end to end. The data it touches, the two people who make the call today, and the exceptions that break a simple rule.

WEEKS 3–8

Build

Ship the score into the CRM the team already uses. No new dashboard. No new tab to check. The score shows up where the renewal already lives.

WEEKS 9–12

Teach

The renewals team learns the system inside a Habitat — the prompts, the overrides, the cases where they disagreed with the score and why. That becomes company knowledge, not one person's chat history.

05 — WHAT WE'RE NOT DOING

Claims intake and contract redlines are real workflows with real cost. They are not on this plan. Claims triage is a judgment call wearing a workflow costume — automate it and you automate the mistake. Redlines don't happen often enough to pay back the build. Saying no to both is the strategy. It's the board's evidence that we looked broadly before committing narrowly.

THE PLAIN VERSION

We looked at three workflows and funded one. The data stays inside the walls. By week twelve, the team owns the system — not us, and not the lab that rented us the model.