

Ongoing Consulting Retainer

Executive Strategy, Governance, and Systems Integration

AI adoption is an ongoing operational decision, not a one-time project. This retainer is a sustained advisory partnership that puts senior AI expertise in the room as decisions get made, week by week, and keeps senior counsel close enough to act on.

FORMAT	CADENCE	COMMITMENT	BUILT FOR
Advisory partnership	Scheduled & on call	6 months minimum	Executive leadership

THE PROBLEMS THIS RETAINER ADDRESS

Leadership teams face pressure to adopt AI quickly, usually without the governance or alignment that would make it safe to move fast.

1. Speed without governance

Pressure to adopt arrives before anyone has defined policy, ownership, or acceptable use.

Symptom: AI is in production before it is in any policy document.

2. Scattered experimentation

Several teams pilot several tools independently. Nothing consolidates and nothing compounds.

Symptom: no one can inventory what the organization is actually running.

3. Vendor noise

Every platform claims transformation. Leadership has no neutral basis for comparison or sequencing.

Symptom: buying decisions driven by demos rather than requirements.

4. Unaddressed workforce anxiety

Employees read AI investment as a signal about their own jobs, and adoption slows accordingly.

Symptom: quiet resistance that never surfaces in a meeting.

WHAT THE PARTNERSHIP DELIVERS

- **Sustained momentum.** Consistent expert guidance so initiatives do not stall between leadership cycles.
- **Fast resolution.** On-call advisory support when an adoption question needs an answer this week, not next quarter.
- **Demonstrated ROI.** Regular performance reporting that links AI initiatives to business outcomes leadership already tracks.
- **Reduced exposure.** Disciplined governance replacing unmanaged, ad-hoc AI use across the organization.
- **Leadership confidence.** Executives who can defend their AI decisions to a board, a regulator, or their own workforce.
- **Internal capability.** Your team becomes self-sufficient over time. That is the intended endpoint, not a risk to us.

HOW THE PARTNERSHIP RUNS

1. ALIGN

We collaboratively establish goals, success metrics, and a regular meeting cadence.

2. ADVISE

Ongoing strategic guidance through scheduled sessions and as-needed consultations.

3. SUPPORT

We help your team implement, troubleshoot, and optimize AI workflows in practice.

4. REPORT

Monthly summaries tracking progress, challenges, and return on investment.

THE THREE PARTNERSHIP LEVELS

Three tiers matched to stage rather than size. Involvement runs deepest where the work is just beginning, and lighter and sharper where capability is already established.

LEVEL 1 STRATEGIC ADVISORY

6 TO 8 HRS MONTHLY

Lighter, sharper guidance for organizations whose capability is already established.

Intended for. Mature organizations that want periodic senior input rather than continuous involvement, with internal teams carrying execution.

Focus. Fractional executive guidance, AI strategy stress-testing, governance and policy review, and benchmarking your approach against the frontier of practice.

LEVEL 2 IMPLEMENTATION ADVISORY

10 TO 12 HRS MONTHLY

Strategic counsel paired with hands-on enablement while AI moves through active implementation.

Intended for. Organizations actively implementing AI that need consistent guidance, cross-functional alignment, and structured support to avoid missteps.

Focus. Workflow design support, cross-functional alignment, policy and governance guidance, and prioritization of automation and efficiency opportunities.

LEVEL 3 FOUNDATIONAL ADVISORY

14 TO 16 HRS MONTHLY

The deepest involvement, for organizations at the very start of the AI journey.

Intended for. Organizations beginning AI adoption that need senior oversight through execution, change management, and continuous course correction.

Focus. Deep involvement in execution, change management coaching, governance design, and establishing the psychological safety required before workforce-wide rollout.

HOW RETAINER ENGAGEMENTS ARE STRUCTURED

All retainers require a **six-month minimum and renew in six-month terms**. Organizations may move between levels as their adoption stage changes. Monthly hours are allocations rather than a hard cap on responsiveness, and pricing reflects risk reduction and capability creation rather than hours alone. Every engagement includes monthly reporting on progress, open challenges, and measured return.

WHY THE JONESI CONSULTANCY

We are not vendors who disappear when the project closes. **The retainer model means we are invested in your long-term success.** With combined expertise in finance, operations, and human behavior, we address the full range of AI adoption challenges, from budget justification to employee anxiety. We measure success by your outcomes, not our billable hours.

info@jonesi.us • www.jonesiconsultancy.com

