Consulting Engagement Framework

How We Partner with Organizations to Navigate AI Adoption

Introduction

The Jonesi Consultancy helps organizations bridge the gap between people and technology through practical, human-centered AI training and workflow automation solutions. This framework outlines how we partner with clients to deliver measurable results while ensuring employees feel empowered, confident, and prepared for the future of work.

Founded by a Certified Public Accountant and a Licensed Clinical Social Worker, our consultancy blends business acumen with behavioral insight. We understand both the bottom line—efficiency, scalability, and return on investment—and the human side—the anxieties employees feel around AI and the need for training that builds confidence rather than fear.

Our Philosophy

AI adoption succeeds only when business strategy and human capability progress together. We reject the false choice between operational excellence and human readiness. Our approach is grounded in a simple conviction: AI doesn't replace people—it elevates them.

Our Core Values

- **Empathy** — Every training begins with genuine understanding of employees' concerns, experiences, and learning needs.
- **Integrity** — We build trust through transparency, honesty, and responsible decision-making in every engagement.
- **Adaptability** — We help teams grow with technology by building confidence and resilience in an evolving AI landscape.
- **Clarity** — We simplify AI concepts, tools, and workflows so every employee can engage confidently.
- **Collaboration** — We co-create solutions with our clients, ensuring implementation fits their unique culture, goals, and workforce.
- **Foresight** — We design training and automation systems that prepare organizations for long-term technological change.

Engagement Process

Our three-phase engagement model ensures a structured, thoughtful approach to AI integration that delivers lasting results.

PHASE 1: DISCOVER

We begin with a discovery session to understand your organization's goals, challenges, and current comfort level with AI. No judgment—just clarity.

- Stakeholder Interviews: Conversations with leadership, managers, and frontline staff
- Current State Assessment: Review of existing workflows, tools, and pain points

- Readiness Evaluation: Gauge organizational AI maturity and employee sentiment
- Goal Alignment: Define success metrics and desired outcomes

PHASE 2: DESIGN

We create a customized training or consulting engagement tailored to your team's roles, your industry, and your culture. Practical. Relevant. Human.

- Curriculum Development: Custom training materials aligned to your workforce needs
- Workflow Mapping: Identify automation opportunities with clear ROI
- Change Strategy: Communication and adoption plans to minimize resistance
- Timeline & Milestones: Structured implementation roadmap

PHASE 3: DELIVER & SUPPORT

We deliver hands-on workshops and consulting that build real confidence—then provide ongoing support so your team doesn't just learn AI, they use it.

- Interactive Training: Engaging workshops with practical exercises and real-world scenarios
- Implementation Support: Guided rollout with troubleshooting and optimization
- Knowledge Transfer: Documentation and resources for sustained learning
- Follow-Up Coaching: Check-ins to reinforce learning and address emerging questions

Service Offerings

We offer three core services designed to meet organizations wherever they are in their AI adoption journey. Each service includes tiered options to match your organization's specific needs, maturity level, and budget.

1. AI Integration Strategy Workshops

Intensive, hands-on workshops that give leadership teams the clarity and confidence to make smart AI investment decisions and build a practical roadmap for adoption. Each workshop level builds on the previous, allowing organizations to progress from individual fluency to scalable, governed integration.

Level 1: AI in the Workplace — Upskilling for the Future

2-day foundational training introducing AI concepts, practical applications, and responsible use. Built upon the AI Fluency Framework, this level equips participants with confidence and skills for daily AI use. Ideal cohort: 20–25 participants.

Level 2: AI Workflow Architecture & Governance

1-day intermediate training bridging individual AI use and systematic organizational integration. Focuses on workflow redesign, governance frameworks, and scaling strategies. Ideal cohort: 15–20 participants.

Level 1 + Level 2 Combination: AI Fluency to Workflow Integration Pathway

3-day comprehensive workshop series delivering a complete AI capability pathway—from individual fluency to organizational integration. Ideal cohort: 15–20 participants.

Key Deliverables:

- Pre-workshop discovery call and organizational assessment
- Executive briefing on AI landscape, risks, and opportunities
- Hands-on tool demonstrations relevant to your industry
- Workflow analysis and automation opportunity mapping
- Post-workshop summary report with prioritized recommendations

2. Professional AI Coaching

One-on-one coaching engagements designed to help professionals recognize AI integration opportunities, navigate ethical considerations, and build confidence in AI decision-making. Using Motivational Interviewing and Socratic questioning techniques, sessions help participants surface their own insights and develop lasting judgment.

Monthly Insight Track

1 × 60-minute session per month. Reflective support for professionals early in AI adoption or balancing multiple priorities. Focus on use-case identification and ethical reasoning frameworks.

Bi-Weekly Integration Track

2 × 60-minute sessions per month. Deeper engagement for leaders actively guiding AI adoption or translating AI potential into operational reality. Focus on applied strategy and workflow integration.

Key Deliverables:

- Personalized coaching sessions tailored to role and context
- Guided exploration of AI use cases relevant to the participant's work
- Ethical reasoning frameworks for responsible AI adoption
- Implementation strategy development and change management planning
- Ongoing support between sessions as questions arise

3. Ongoing Consulting Retainer

Sustained advisory partnership providing continuous strategic guidance, implementation support, and change management expertise as your organization navigates AI adoption. Choose the level of partnership that matches your organization's needs and AI adoption stage. All retainers require a minimum 3-month commitment.

Level 1: Strategic Advisory

6–8 hours per month. High-level AI guidance, decision support, and governance considerations for organizations in early AI adoption or leadership teams wanting periodic expert input.

Level 2: Embedded Advisory & Enablement

10–12 hours per month. Strategy plus hands-on enablement for organizations actively implementing AI who need consistent guidance and support translating AI potential into operational reality.

Level 3: Embedded AI Partnership

14–16 hours per month. Intensive, hands-on partnership for organizations treating AI as a core business initiative requiring senior-level oversight across strategy, execution, and governance.

Key Deliverables:

- Regular strategic advisory sessions (frequency varies by tier)
- Workflow optimization and automation support
- Governance, compliance, and risk management guidance
- Change management coaching and communication support
- Performance tracking and ROI reporting

Client Partnership Expectations

Successful engagements require partnership. We bring expertise, facilitation, and proven methodologies—you bring organizational knowledge, commitment, and access to the people who will make change happen.

What We Commit To

- Clear, jargon-free communication throughout the engagement
- Deliverables that are practical, actionable, and tailored to your context
- Respect for your employees' time, concerns, and learning pace
- Transparent pricing with no hidden fees
- Accountability for outcomes and continuous improvement

What We Ask of You

- Executive sponsorship and visible leadership support
- Access to key stakeholders for discovery and feedback
- Protected time for employees to participate in training
- Openness to process change and new ways of working
- Timely feedback and decision-making

Expected Outcomes

Our engagements are designed to deliver measurable transformation across three dimensions:

For the Organization

- Increased operational efficiency through smart automation
- Reduced resistance and accelerated AI adoption timelines
- Strengthened competitive positioning for the future of work
- Clear ROI from AI investments

For Leadership

- Confidence in AI strategy and implementation roadmap
- Data-informed decision support
- Reduced risk through responsible AI governance

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For Employees

• Confidence over fear—practical skills that demystify AI

• Clarity over confusion—understanding of how AI enhances their work

• Security in their evolving roles and professional growth

How to Begin

Starting a conversation with The Jonesi Consultancy is simple. We offer a complimentary 30-minute discovery call to explore your challenges, answer questions, and determine if we're the right fit for your organization.

AI doesn't replace people—it elevates them.

Ready to get started? Contact us at info@jonesi.us