ADVISORY BRIEF

Kingfisher Advisory

Ridgeway Operations Group

Monthly Executive Brief

Portfolio priorities, business value, vendor accountability and risk

November 2026

Prepared for Ridgeway Operations Group

ILLUSTRATIVE SCENARIO | NOT A CLIENT ENGAGEMENT OR VERIFIED TEST

OCTOBER 2026 SAMPLE MONTHLY REVIEW

Executive summary for the month

LEADERSHIP READOUT

Continue the intake assistant only as a small trial, with staff reviewing every message. Do not buy the proposed $22,000 AI platform yet. Before expanding the internal knowledge assistant, ask IT to prove it cannot open other teams' client files.

At Ridgeway Operations Group, a 42-person professional-services business, leadership needs a clear monthly view of what AI is delivering, which risks remain open, and what decisions cannot wait. This sample follows the costs, vendor commitments and safeguards behind those decisions.

Portfolio signal	Illustrative October status	Leadership implication
Intake drafting pilot	240 sample cases; 16 net staff hours of capacity equivalent after review effort.	Continue a controlled trial; verify durability and full operating costs.
Security and oversight	2 High integration risks remain open.	No wider data access until technical denial tests pass.
Procurement exposure	$22,000 annual vendor proposal remains unapproved.	Require an alternative analysis, pilot scorecard and exit terms.
Vendor accountability	One acceptance milestone late; ownership assigned.	Escalate the missing access-control test evidence this month.

INVEST WHERE THE EVIDENCE SUPPORTS IT

Portfolio and decision scorecard

Initiative	Decision status	Next evidence and owner
1 Intake drafting assistant	CONTROLLED PILOT; no autonomous sending	Operations: log baseline and review time on 100 additional cases; IT: retest approval bypass.
2 Internal knowledge assistant	HOLD EXPANSION	IT: confirm role-based search restrictions and prove denied cross-team retrieval.
3 AI vendor consolidation platform	DEFER PURCHASE	Managing director: require vendor comparative test and detailed first-year costs.
4 Conventional workflow cleanup	PROCEED WITHOUT AI	Operations: eliminate duplicate data entry using existing forms and rules.

Decisions we avoided making prematurely

- A feature demonstration is not proof of value. Ask the vendor to show measurable results after staff review and support costs.
- A working demonstration is not a reason to give an assistant access to another team's client records.
- Some repetitive tasks can be improved using the software Ridgeway already owns, without adding AI.

RETAINED ACCOUNTABILITY

Management decides what to fund and which risks to accept. Kingfisher reviews the evidence, clarifies the tradeoffs and keeps the provider's commitments visible.

SEPARATE ASSUMPTIONS FROM RESULTS

Commercial value and vendor performance

In this example, staff handled 240 cases. Saving six minutes on each case creates 24 hours of potential capacity. After eight hours spent reviewing and correcting the drafts, the net benefit is 16 hours. At a planning rate of $40 per hour, that represents $640 of staff capacity each month, not $640 of guaranteed payroll savings.

Economic input	Constructed value	Interpretation
Case volume	240 each month	Must be supported by actual workflow logs.
Gross time difference	6 minutes per case	Includes only the task comparison before quality control.
Human review + correction	8 hours monthly	Deduct before attributing a net benefit.
Net capacity equivalent	16 hours x $40 = $640	Capacity value, not realized reduction in expense.
Example tool run-rate	$480 monthly	Net capacity margin appears $160 **before** support, governance, advising and setup costs.

Delivery provider scorecard

Provider obligation	Status	Required action
Document least-privilege connector design.	AT RISK	Effective permissions and negative-access test by next checkpoint.
Preserve human approval before outbound messages.	PROVISIONAL PASS	Repeat denial tests after configuration changes.
Provide incident owner and rollback runbook.	OVERDUE	Named lead, tested stop path and escalation contacts.

Time saved matters only if Ridgeway can use that capacity for more client work, better service or lower outside spending. The cost case is not complete until that benefit is demonstrated.

EXECUTIVE VIEW, TECHNICAL EVIDENCE BELOW

Risk and governance register

Risk and severity	Exposure and action	Owner and completion test
R-01 HIGH Excessive knowledge access	Assistant could retrieve another team's client workspace. Hold expansion and narrow service permissions.	IT owner; denied-access negative test for unapproved folders.
R-02 HIGH Unreviewed messages	A workflow branch may send externally without a recorded approval. Block unattended sends.	Operations + provider; test all bypass and replay paths.
R-03 MEDIUM Vendor dependence	Long-term storage and export assumptions for a proposed platform are unverified.	Procurement; contractual exit, retention and export review.
R-04 MEDIUM Exception ownership	Failed drafts currently depend on an analyst noticing the queue.	Operations; owned alerts, exception report and tested replay.

Framework basis

The review uses relevant NIST AI risk-management guidance to check who is responsible for each system , and how open risks are handled. It also uses NIST CSF 2.0 PR.AA-05 for access permissions and GV.RR-02 for accountability. This is a selective reference, not a NIST audit or certification.

A High risk stays open until the agreed tests show that the fix works. A vendor saying the setting was changed is not enough; a Ridgeway owner must review the evidence and approve closure.

WHAT THE SPONSOR NEEDS TO SIGN

Executive decision log and 90-day direction

Decision requested	Kingfisher recommendation	Approver and deadline
D-01 Intake pilot extension	Authorize an additional controlled sample after staff-review and data-boundary tests pass; no autonomous sending.	Managing director; November review.
D-02 $22,000 vendor proposal	Defer the annual commitment; conduct a documented alternative and contract-risk review.	Managing director + finance; next review.
D-03 Knowledge assistant	Fund no broader rollout until permissions, logging and shutdown ownership are demonstrated.	Operations + IT sponsor; next checkpoint.

Priorities over the next three months

Horizon	Action and evidence of completion
30 days	Close approval and access gaps; gather pilot observations; require vendor redlines and complete permission export.
60 days	Reconcile net time data with actual service quality, exceptions and full operating cost; revisit vendor options.
90 days	Decide whether to expand, redesign or stop the pilot; review the next portfolio opportunity with explicit owners.

WHY RETAIN AN ADVISOR

This monthly brief gives leadership an action plan: what the evidence shows, which vendor promises still need proof, what the business can afford, and who follows up before the next meeting.

A typical engagement includes a monthly leadership review, follow-up on urgent issues, and a maintained decision and risk record. The agreed statement of work defines the actual cadence and responsibilities.