DECISION REVIEW
Kingfisher Advisory

Northline Engineering

AI Decision Review

Independent evaluation of a proposed AI-enabled project assistant

November 2026

Prepared for Northline Engineering

ILLUSTRATIVE SCENARIO | NOT A CLIENT ENGAGEMENT OR VERIFIED TEST

A PURCHASE DECISION, NOT AN IMPLEMENTATION PLAN

Executive recommendation

RECOMMENDATION

Hold off on the $18,000 annual AI project-assistant purchase. First, compare the vendor with what Northline can already do in Microsoft 365, Autodesk Construction Cloud and Deltek Ajera. Approve a subscription only if a controlled trial shows a meaningful improvement, suitable data protections and a sound business case.

Northline Engineering is a 32-person civil engineering practice whose teams already rely on several systems for drawings, revisions, consultant updates and financial reporting. The real question is whether a new product will reduce missed handoffs and duplicated work enough to justify another subscription.

Executive question	Current assessment	Decision required
What is the actual operational gap?	Revision status and responsibility are duplicated across email, SharePoint and design systems.	Approve a baseline of time, rework and version errors.
Does the vendor solve it?	Demo claims are not supported by a representative trial or independent evidence.	Require side-by-side testing and source attribution.
Is the investment justified?	Subscription is $18,000/year before onboarding, training or operating costs.	Authorize only a scoped test, not a subscription.

DEFINE THE DECISION

Business workflow and current systems

A project manager approves a drawing in Autodesk Construction Cloud. A coordinator then notifies consultants, updates SharePoint and reconciles project status in Deltek Ajera. When the same information moves between systems, staff can lose track of the latest revision or who needs to act.

System	Role today	What must be tested
Autodesk Construction Cloud	Design documents, revisions and project collaboration.	Authoritative release status and revision identifier.
Microsoft 365 and SharePoint	Email, consultant access and parallel registers.	Whether a governed register and access-closeout rule remove duplicate work.
Deltek Ajera	Financial and utilization reporting.	Whether project-finance views can use authoritative data without another system of record.
Proposed AI assistant	Claims to classify drawings, summarize changes and recommend status.	Accuracy, permissions, source citations, operating cost and handling of ambiguous revisions.

Three observable problems

- **Revision confusion:** old PDFs or links may remain in circulation after a new approved revision.
- **Duplicate entry:** coordinators reproduce release status across email and local spreadsheets.
- **Access exposure:** project guests or vendors may retain access after closeout unless an owner removes it.

COMPARE ALTERNATIVES FAIRLY

Options and independent vendor challenge

Option	Potential benefit	Evidence or condition
A | Improve existing workflow	Uses licensed systems and keeps source-of-truth authority in current tools.	Named release owner, baseline registers and test of guest-access closeout.
B | Targeted integration	May reduce repeated updates with narrow connector behavior.	Connector capabilities, stable event identifiers, support and exception ownership.
C | Buy AI-enabled platform	May classify changes and draft helpful summaries across projects.	Independent trial showing accurate references, permission boundaries and net value.

Vendor claims that require evidence

Sales claim	Validation standard
“AI understands drawing revisions.”	Blind test against approved revision identifiers, with a confusion log and source-linked explanations.
“Status updates are automated.”	Show authoritative system-of-record mapping and idempotent update behavior, including failures.
“Data stays secure.”	Produce identity and storage diagrams, contractual data-use terms, retention and cross-project denial tests.
“Teams save hours.”	Measure net minutes including review, correction, training and exception response, not demo-only timings.

PREFERRED PATH

First improve the workflow using existing software. Keep a targeted connection or new AI platform under consideration, but require the same measurable results and safeguards from every option.

CAPACITY IS NOT CASH SAVINGS

Commercial decision and sensitivity

The $18,000 subscription is only the starting cost. The comparison also includes onboarding, staff training and controls. All figures are planning assumptions, not verified expenses or promised savings.

Cost assumption	Illustrative amount	Why it matters
Recurring subscription	$18,000 annually	Known sample vendor quote, subject to actual contract and pricing.
Onboarding and migration	$5,000 once	Planning placeholder. Confirm fixed fee, data clean-up and integrations.
Internal adoption and controls	$3,000 in year one	Planning placeholder for training, reviews and operating ownership.
Total year-one economic cost	$26,000	Equals $18,000 + $5,000 + $3,000; excludes unquantified disruption.
Capacity-equivalent threshold	578 staff hours yearly	At $45 per staff hour, recovering $26,000 in cost would require about 578 hours annually, or 11.1 hours each week.

Decision rules

- Savings must be **measured after human verification and correction**, not inferred from vendor claims.
- Hours recovered are a capacity benefit. They become realizable cash savings only if budgets, staffing or purchased services actually change.
- The cost comparison must cover at least a comparable 12-month horizon and include contract renewal, data export, training, support and termination provisions.

TEST WHAT MATTERS, NOT THE DEMO

30-day evidence plan

Test three projects with different drawing-revision and consultant workflows. Before the trial, the principal should approve which cases will be used and what would count as success.

Week	Activity	Recorded evidence
1 Scope	Map drawing release, communications and authoritative systems. Select a synthetic/approved dataset for vendor testing.	Current-state process and roles; approved test set; data-use authorization.
2 Baseline	Measure revision-to-acknowledgment delays, duplicate entries and stale-access exceptions.	Case-level measurements, not estimates or staff anecdotes alone.
3 Comparative test	Trial current-stack improvement and vendor assistance on matched cases; record AI errors and correction time.	Blind scoring, false summaries, access denials, staff review and exception logs.
4 Decision	Compare alternatives on the same outcomes and economic assumptions.	Signed recommendation and unresolved dependency register.

Suggested acceptance criteria

- **Version fidelity:** no unapproved drawing revision is presented as current; uncertain cases must be flagged for human review.
- **Authorization:** project and consultant boundaries deny cross-project access in negative tests.
- **Evidence:** summaries link to original approved source material and clearly distinguish uncertain content.
- **Business benefit:** net workflow time and exception burden improve enough to justify the total cost without transferring hidden work to coordinators.

EXECUTIVE SIGN-OFF

Decision memo and owner handoff

Recommendation	Do now	Revisit when
DEFER subscription	Run a current-stack improvement pilot; invite the vendor into a controlled comparison.	Evidence confirms an unmet requirement and benefits outweigh full operating cost.
Assign accountable owner	Principal owns the decision; operations owns process; IT provider owns access changes.	RACI, source-of-truth and data-use agreement signed.
Retain optional scope	If the vendor wins the test, independently review access, contract terms and rollout gates.	Pilot shows verified technical fit and a sponsor accepts residual risk.

Executive questions to answer at the decision meeting

- What specific business failure was reduced, by how much, and on how many cases?
- Which assumptions or vendor statements remain unverified? Who owns the answer?
- What would cause us to terminate the pilot or decline the renewal?
- Would we make the same purchase if the product did not advertise AI?

VALUE DELIVERED

Northline can now make a clear purchase decision based on its own results rather than a sales demonstration. Kingfisher compares the alternatives, checks the evidence and documents what must be true before approval.