

AI Agent Planning Engagement

From Concept to a Clear Execution Plan



This engagement helps your team move from a defined AI Agent or Automation use-case to a production-ready solution path with confidence. In just a few days, we will bring your business and technical stakeholders together to define the functionality and capabilities, align on a high-value approach, and produce the documentation, design, and delivery plan needed to move into execution with clarity, fiscal visibility, and reduced risk.

Benefits

This engagement brings the right stakeholders together to align on a high-value use case, define what success looks like, and establish a clear path to execution.

- Reduces design and delivery risk before implementation begins
- Manages investment requirements by identifying cost considerations
- Clarifies responsibilities, decision points, and next steps for implementation

Intended Stakeholders

- **Project Sponsor:** accountable for solution success and key decisions
- **Business Stakeholders & Subject Matter Experts:** aligned to the use-case, business goals, reporting needs, and operational needs
- **Technical Stakeholders:** IT, security, application, and development leads

Engagement Agenda

Session	Topic	Topics Covered	Intended Audience
Session 1	Business Discovery	Use-case goals, current workflows, pain points, stakeholders, and project considerations	Business Stakeholders, SMEs, Project Sponsor
Session 1	Use Case Deep Dive	Desired functionality, required capabilities, constraints, and success criteria	Business Stakeholders, SMEs, Project Sponsor
Session 2	Technical Discovery	Systems, data sources, integrations, infrastructure, security, and governance	Technical Stakeholders, Business Stakeholders, Project Sponsor
Session 2	Solution Scope & Alignment	Scope alignment, capability prioritization, production-ready solution definition, phased delivery considerations, and ownership	Cross-functional: Business, SMEs, Technical, Sponsor

Deliverables & Outcomes

Beyond the live sessions, our team performs substantial follow-on work to consolidate and validate requirements, prioritize functionality, shape the recommended solution approach, and confirm that the proposed solution is feasible, supportable, and aligned to your objectives.

You will leave this engagement with:

- Product Requirements Document (PRD)
- Solution Architecture Diagram
- Defined and prioritized functionality and capabilities for the initial product launch
- Identified Project Timeline
- Pricing and a Statement of Work (SOW) for implementation and ongoing maintenance
- Clear client requirements, inputs, and decisions needed to make delivery successful

Why This Works

- **Focused:** Strong alignment on a high-impact, high-value use case
- **Expert-led:** Sessions run by a dedicated Product Manager and Lead Engineer
- **Structured:** Based on a proven discovery and design framework that accelerates readiness and reduces execution risk

Ready to See What's Possible?

Turn promising ideas into a clear, actionable plan with the alignment and confidence to move forward. Contact your Cerium Account Executive to get started.

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