

Offerings

Three engagement types, each calibrated to the realities of regulated work. Every engagement begins with a written intake, a 25-minute call, and a written proposal with specific deliverables, timeline, and pricing.

OFFERING 01

AI Strategy & Product Selection

Independent evaluation of AI tools against actual workflows, security and compliance requirements, and operational realities. Output is a written recommendation an executive team or board can act on — not a vendor demo summary, not a feature comparison spreadsheet.

SCOPE	Requirements mapping, vendor landscape review, security and compliance posture, total cost modeling, and a defensible recommendation with rationale.
DELIVERABLES	Written recommendation report (typically 15–25 pages), executive summary suitable for board distribution, and a working session to walk leadership through findings.
TIMELINE	Four to six weeks from kickoff.
ENGAGEMENT FEE	Fixed fee. Provided in the written proposal following intake.

AI Implementation & Adoption

End-to-end leadership of AI rollout from pilot through durable adoption. The work covers what most implementations skip: workflow redesign, role-by-role training, policy and governance development, and the change management that determines whether tools get used six months in.

SCOPE	Pilot design, workflow integration, training development and delivery, internal policy drafting, governance structure, and adoption measurement.
DELIVERABLES	Written implementation plan, training materials, policy documents, governance framework, and a measured adoption review at engagement close.
TIMELINE	Three to six months. Retainer or fixed-fee structure.
ENGAGEMENT FEE	Fixed fee or monthly retainer. Provided in the written proposal following intake.

AI-Enabled Research & Analysis

Project-based or retained analytical work that organizations need but can't produce internally on the timelines decisions require. The output is a written analysis with specific findings — not a deck, not a dashboard.

SCOPE	Defined research question, structured analytical approach, source review and synthesis, and written findings with recommendations.
DELIVERABLES	Written analytical report sized to the question. Executive summary. Working session to discuss findings and implications.
TIMELINE	Two to eight weeks for project work. Monthly retainer available for ongoing analytical support.
ENGAGEMENT FEE	Project fee or monthly retainer. Provided in the written proposal following intake.

Where this work lands

Law firms

Vendor evaluation for legal research, document review, and drafting tools. Implementation work focused on privilege protection, conflicts management, and partnership-level governance. Engagement scoping accounts for the structural differences between practice groups.

Healthcare organizations

AI tool evaluation against HIPAA, state privacy law, and clinical workflow. Implementation work covering clinical, administrative, and patient-facing use. Healthcare engagements carry a specialty premium reflecting the additional regulatory and clinical-validation work required.

Patient advocacy

Analytical and strategic work for organizations representing patient populations. Vendor selection and implementation calibrated to nonprofit operations and the trust requirements of patient-facing services.

Education and EdTech

Vendor evaluation for instructional, administrative, and learning-analytics applications. Implementation work covering FERPA, accreditation, and institution-specific governance. Recent work includes K–12, higher education, and professional credentialing contexts.

Accounting and professional services

AI tool evaluation for audit, tax, advisory, and client-facing work. Implementation calibrated to professional-responsibility frameworks, client confidentiality requirements, and the documentation standards expected by regulators and peer reviewers. Engagement scoping accounts for the differences between assurance, tax, and advisory practice lines.

How engagements work

Every engagement begins with a written intake, a 25-minute intake call, and a written proposal with specific deliverables, timeline, and pricing. The practice is selective; not every inquiry results in a fit.

Work is performed under written engagement agreement. Confidentiality terms reflect the regulatory and operational context of the client. Fee structure is fixed-fee or monthly retainer, set in the proposal following intake, and is not negotiated on standing rate cards.

Engagements are scheduled in advance. The practice carries a small number of active engagements at any time. Response within two business days from the contact form or direct email.

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