CORPORATE SYNERGY SOLUTIONS

ONE-PAGE OVERVIEW

PARTNERSHIP TIER 3 · MONTH-TO-MONTH

# Fractional Product Lead

For an organization with a larger transformation effort that needs closer weekly involvement.

**$7,500**
a month

| TERM | ANSWERS | SCOPE | CADENCE |
|---|---|---|---|
| Month-to-month, no onboarding fee | Within 4 business hours | Agreed in writing around your priorities | Weekly 30-minute sync, or a weekly written progress report |

## IT'S FOR YOU IF

- ✓ Several priorities need coordination and a senior lead involved every week.
- ✓ You want advice connected to practical work and measurable progress.

**It's not for you if**

- × You want unlimited delivery or a guaranteed project completion date without agreeing a scope.
- × You cannot provide a workflow owner, access or timely decisions.

## WHAT'S INCLUDED

- A written monthly scope tied to your business outcomes
- **AI employees and assistants.** Included when agreed in your monthly scope.
- **Custom software and builds.** Included when agreed in your monthly scope.
- **Workflows and automations.** Included when agreed in your monthly scope.
- **Team training and adoption.** Included when agreed in your monthly scope.
- **AI strategy, advisory and ongoing improvement.** Included when agreed in your monthly scope.

## WHAT WE NEED FROM YOU

- A named workflow owner and timely decisions
- Access to the tools and information in the agreed scope
- A weekly 30-minute sync, or a weekly written progress report

## YOUR MONTHLY WORKING CYCLE

**Step 1 · Set priorities**

Review the baseline and agree this month's outcome, deliverables and boundaries.

**Step 2 · Deliver and learn**

Work the agreed scope, review the result and help the team use it.

**Step 3 · Choose what comes next**

Keep this tier, move up or down, or stop before the next billing date.

## CLIENTS ON THIS TIER

**Campbell Tax & Accounting**

We built Firm Ops, one client portal for documents, milestones and advice that replaced seven tools. Onboarding fell from 11 days to 1.5, and staff sign in once instead of seven times.

**Acuity Senior Advisors**

As Acuity's fractional product lead, we bring AI expertise to healthcare and a data-driven approach to transitional care for older adults and anyone who needs extra care. A vetted family shortlist now takes under 4 hours, not 3–4 days of phone tag.

**Tarlis**

As Tarlis's fractional product lead, we coach and advise on AI strategy and how to approach it.

## THE TERMS

- Full refund within 3 days of your tier's first payment, even if you started with a Diagnostic. After that the current month is not refundable. You can stop before the next billing date.
- Had an AI Operations Diagnostic? The full $1,000 you paid for the Diagnostic comes off your first month if you submit the pre-work within 48 hours of booking, attend both live sessions, and start your term within 30 days of the readout. It applies once, to whichever you sign first.
- Renews monthly. Agree a change of tier, pause or cancellation in writing before the next billing date. Changes apply to the next month, with a revised scope; no three-month commitment.
- AI employees, custom builds, workflows, automations, training and advisory can all be scoped within your monthly partnership. A larger effort may span several months.
- Your written scope identifies what hosting and AI usage are included, and which third-party licenses or usage charges you pay directly. Any additional spend needs your approval.
- The written scope identifies included hosting and AI usage, and any approved third-party charges.

**Book a discovery call:** www.corporatesynergysolutions.com/book?topic=sprint · and ask about the Diagnostic credit

anthony@corporatesynergysolutions.com · (425) 435-7747 · Prices and terms as of November 13, 2026. Your signed scope and agreement govern.