



D&S Advisory Group
ADVISORY GROUP

SERVICES & PRICING GUIDE · 2026

Build operations that *perform at scale.*

Fractional CX leadership · AI agent implementation & B2B workflow automation · Data pipelines & FP&A ·
Workforce management · LSS transformation · Director/VP career coaching

MBA	Lean Six Sigma Black Belt	COPC Certified	AI Agent Design	Welch Scholar
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\$670M+ Managed	98% CSAT	\$2.5M+ Defects Eliminated → <i>\$150M operational gain</i>	23% Production Gain
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WHAT WE DO

01	AI Agent Implementation & B2B Workflow Automation	AI TRANSFORMATION
02	Data Pipelines, FP&A; & Workforce Management	DATA · FINANCE · WORKFORCE
03	Fractional CX & Operations Leadership	FRACTIONAL LEADERSHIP
04	Operational Transformation	OPERATIONAL EXCELLENCE
05	Director & VP Job Search Intensive	CAREER COACHING

01

AI TRANSFORMATION

AI Agent Implementation & B2B Workflow Automation

Purpose-built AI pipelines that automate repetitive cognitive work across business and engineering environments. Deployed by practitioners who have applied generative AI tooling at enterprise scale with measurable results.

AI Agent Builds	B2B Workflow Automation
→ AI Operations Diagnostic & Roadmap → Weekly Intelligence Pipeline (done-for-you) → Custom AI Agent Build + Team Handoff → MCP server integration (Claude + your tools)	→ Custom pipeline: Trigger → Process → Deliver → Connect CRM, email, Slack, docs → Voice note → email + CRM log + tasks → Monthly retainer: monitoring & scaling
Training & Enablement	Business Launch Infrastructure
→ Prompt Engineering Workshops → AI ROI assessment → AI-accelerated engineering workflows → AI governance & guardrails	→ Website design, build & deployment → Domain, DNS, hosting & email setup → Master services agreement & onboarding framework → Brand identity, document suite & CRM pipeline

PRICING

Diagnostic & Roadmap	Contact for details
Pipeline Build	Contact for details
Monthly Retainer	Contact for details
Prompt Engineering Workshop	Contact for details

All engagements begin with a free discovery call. · First consultation always complimentary.

02

DATA · FINANCE · WORKFORCE

Data Pipelines, FP&A; & Workforce Management

End-to-end operational intelligence — from raw data to executive-ready reporting, financial planning frameworks, and workforce optimization. Built by practitioners with enterprise and silicon-scale measurement experience.

Data Pipelines & Reporting	Financial Planning & Analysis	Workforce Management
→ Automated operational data pipelines	→ Annual budgeting, forecasting & cash flow	→ Staffing model design & optimization
→ Executive dashboard design & build	→ Variance & trend analysis with dashboards	→ Scheduling framework & coverage analysis
→ KPI framework architecture	→ Scenario modeling — revenue, cost & growth	→ Labor cost benchmarking
→ Weekly intelligence report systems	→ Strategic planning for investments & growth	→ Performance management systems

PRICING

Project Engagement	Contact for details
Retainer Package	Custom pricing
Dashboard Build	Contact for details
FP&A; Model Build	Contact for details

All engagements begin with a free discovery call. · First consultation always complimentary.

03

FRACTIONAL LEADERSHIP

Fractional CX & Operations Leadership

Enterprise-grade CX leadership — without the full-time cost. Embedded as your VP or Senior Director of CX, running the team, tooling, and strategy while you scale.

- Fractional VP of CX (retainer, 10–20 hrs/wk)
- CX Operations Audit + Roadmap (30-day)
- Scale-Up Readiness for Series A/B SaaS
- COPC Compliance Readiness & Implementation
- M&A; Integration Support
- Team Structure & Capacity Design

PRICING

Monthly Retainer	Contact for details
CX Operations Audit	Contact for details
COPC Implementation	Contact for details
Scale-Up Engagement	Custom pricing

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04

OPERATIONAL EXCELLENCE

Operational Transformation

Lean Six Sigma Black Belt methodology applied to real operational problems. DMAIC-driven engagements backed by \$2.5M+ in combined defect elimination (→ \$150M operational gain) across business and engineering environments.

- 30-60-90 Transformation Sprint
- Process Waste Audit (DMAIC, 2-week)
- KPI Architecture & Dashboard Build
- Cost Reduction Engagement
- Root Cause Analysis & Remediation
- Performance-based pricing available

PRICING

Process Waste Audit	Contact for details
30-60-90 Sprint	Contact for details
KPI Architecture Build	Contact for details
Performance-based option	Custom — contact us

All engagements begin with a free discovery call. · First consultation always complimentary.

05

CAREER COACHING

Director & VP
Job Search Intensive

A proven, systematic job search methodology for senior operations leaders. JD-matched documents, network activation strategy, and pipeline management — built for the Director+ market.

- Job Search System Build (full methodology)
- Resume + Cover Letter Overhaul (JD-mirrored)
- 4-Week 1:1 Director/VP Search Intensive
- LinkedIn Positioning for Ops Leaders
- Interview Preparation & Coaching
- Network Activation Strategy

PRICING

Resume + Cover Letter Package	Contact for details
LinkedIn Positioning	Contact for details
4-Week 1:1 Intensive	Contact for details
Full Job Search System	Contact for details

All engagements begin with a free discovery call. · First consultation always complimentary.

THE ADVISORS

SENIOR ADVISOR — OPERATIONS & AI

Principal Advisor · Operations & AI Strategy

Expertise includes 18+ years building and transforming customer-facing organizations across legal tech, EdTech, hospitality, and multi-unit operations — leading 125-person teams, managing \$17M+ budgets, and delivering transformations that simultaneously reduced cost and improved performance. Credentials include MBA (Welch Scholar), LSS Black Belt, COPC Certification, and AI Agent Design. Applied AI agent pipelines in a live \$150M operational environment.

SENIOR ADVISOR — ENGINEERING & VERIFICATION

Principal Advisor · Engineering & Technical Builds

Expertise includes 13+ years as a Senior Mixed Signal Design Verification Engineer and Technical Lead at a leading global semiconductor company. Specializations span UVM/SystemVerilog testbench development, DDR4/5, LPDDR4/5 and HBM protocol verification, memory controller and PHY interface validation, AMS co-simulation, coverage-driven verification (functional, code, assertion), post-silicon validation, and generative AI applied to verification workflows. Leads all technical development at D&S Advisory — AI pipeline architecture, workflow automation, and client-facing engineering builds.

MBA	Lean Six Sigma Black Belt	COPC Certified	AI Agent Design	Welch Scholar
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READY TO GET STARTED?

The first consultation is always free. Reach out to schedule a discovery conversation.

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hello@dsadvisory.co	linkedin.com/company/ds-advisory-group	Atlanta, GA · Remote Nationwide	dsadvisory.co

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