

The 6A Method™ - AI Transformation Framework

From Strategy to Success in Six Strategic Phases

Why the 6A Method Exists

Most SMBs fail at AI not because the technology doesn't work, but because they:

-  Jump into tools without strategy
-  Implement without governance
-  Train without context
-  Build solutions they can't maintain
-  Create isolated pilots that never scale

The 6A Method™ is [SherpaTech.AI](#)'s proprietary framework for comprehensive AI transformation. Built on years of technology implementation experience, it guides organizations from strategic planning through successful adoption - ensuring you build capability, not dependency.

The Complete Framework

Phase 1: Assess: *Understanding Your Starting Point*

What It Is: A comprehensive evaluation of your organization's AI readiness, current state, and transformation potential.

Key Activities:

- AI maturity assessment across people, process, technology
- Current workflow analysis and pain point identification
- Data landscape review and quality assessment
- Technology stack evaluation
- Quick-win opportunity mapping

Deliverables:

- AI Readiness Scorecard
- Current State Analysis Report
- Opportunity Heat Map (prioritized by ROI and complexity)
- Risk and Gap Analysis

Success Metrics:

- Clear understanding of organizational baseline
- Leadership consensus on readiness level
- 10-15 prioritized opportunities identified
- Budget and resource requirements understood

Typical Duration: 1-2 weeks

Phase 2: Align: *Creating Strategic Consensus*

What It Is: Building executive alignment and creating a strategic roadmap that connects AI initiatives to business outcomes.

Key Activities:

- Executive AI strategy workshop
- Stakeholder alignment sessions
- ROI modeling and business case development
- Resource planning (budget, people, time)
- Change management strategy
- Communication plan creation

Deliverables:

- Strategic AI Roadmap (12-24 months)
- Executive Summary & Business Case
- Budget and Resource Allocation
- Success Metrics Dashboard
- Stakeholder Communication Plan

Success Metrics:

- 100% executive team alignment on vision
- Approved budget and timeline
- Clear ownership and accountability defined
- Board/investor communication prepared

Typical Duration: 1-2 weeks

Phase 3: Activate: Building Governance and Guardrails

What It Is: Establishing the policies, procedures, and governance framework that enable safe, compliant AI innovation.

Key Activities:

- AI governance framework design
- Policy creation (acceptable use, data privacy, ethics)
- Risk assessment and mitigation planning
- Compliance review (industry-specific regulations)
- Security and access control design
- Vendor evaluation framework
- Pilot program guidelines
- Monitoring and audit procedures

Deliverables:

- AI Governance Framework Document
- AI Use Policy (employee-facing)
- Risk Management Plan
- Compliance Checklist
- Vendor Evaluation Scorecard
- Pilot Program Guidelines
- Incident Response Procedures

Success Metrics:

- Policies approved and communicated
- Risk mitigation plans in place
- Compliance validated by legal/compliance team
- Governance committee established
- Monitoring dashboard operational

Typical Duration: 2-3 weeks

Phase 4: Accelerate: *Building Organizational Capability*

What It Is: Custom training programs that build AI literacy and practical skills across all organizational levels.

Key Activities:

- Training needs assessment
- Role-based curriculum development
- Executive AI briefings
- Manager implementation training
- Staff hands-on workshops
- Power user bootcamps
- Train-the-trainer programs
- Knowledge base and resource library creation

Deliverables:

- Custom Training Curriculum (by role)
- Executive AI Briefing Deck
- Manager Implementation Playbook
- Staff Quick Start Guides
- Power User Advanced Training
- Prompt Engineering Library
- Internal Knowledge Base

Success Metrics:

- 90%+ training completion rates
- Pre/post assessment score improvements
- Measured AI literacy increase
- Active usage of AI tools
- Early adoption success stories

Typical Duration: 4-8 weeks (ongoing)

Phase 5: Apply: Implementing Real Solutions

What It Is: Building your first AI solutions with a "teach-to-fish" approach - implementing WITH you, not FOR you.

Key Activities:

- Solution design workshops
- Low-code solution implementation (Copilot Studio, Power Platform)
- Azure AI service integration (when needed)
- Knowledge transfer sessions ("show your work")
- Documentation creation
- Handoff and empowerment

Deliverables:

- 2-4 Implemented AI Solutions
- Solution Architecture Documentation
- Build Process Documentation (so you can replicate)
- User Guides and Training Materials
- Maintenance Playbooks
- Troubleshooting Guides
- Handoff Certification

Success Metrics:

- Solutions live and being used
- Measurable time/cost savings
- User adoption rates >70%
- Client team can modify solutions independently
- Minimal support tickets post-handoff
- Documented ROI achieved

Typical Duration: 6-12 weeks

Phase 6: Amplify: Scaling and Optimizing

What It Is: Expanding successful pilots, optimizing performance, and building continuous improvement capability.

Key Activities:

- Performance monitoring and optimization
- New use case identification
- Solution scaling and replication
- Advanced feature implementation
- Integration expansion
- Quarterly strategy reviews
- ROI tracking and reporting
- Continuous learning programs

Deliverables:

- Quarterly Business Reviews
- Performance Dashboards
- Optimization Recommendations
- New Use Case Roadmap
- ROI Reports
- Updated Training Materials
- Scaling Playbooks
- Center of Excellence Framework

Success Metrics:

- Solutions scaled to additional departments
- Continued ROI improvement
- Self-sufficient AI team
- Internal champions identified
- New use cases identified quarterly
- Organizational AI maturity increase

Typical Duration: Ongoing (with quarterly touchpoints)

What Makes the 6A Method Different

1. Governance BEFORE Implementation

Most consultants rush to build. We establish guardrails first, so you can innovate safely.

2. Teach-to-Fish Approach

We don't create dependency. Every implementation includes knowledge transfer so your team can maintain and evolve solutions.

3. Business Outcomes, Not Tech Features

We start with what you're trying to achieve, then find the right tools - not the other way around.

4. Low-Code First Philosophy

90% of SMB needs can be met with Copilot Studio and Power Platform - tools your team can maintain. We know when custom Azure AI is actually needed.

5. Multi-Level Training

From executives to frontline staff, everyone gets training appropriate to their role and needs.

Who the 6A Method Is For

Perfect Fit:

- SMBs with 10-200 employees
- Leadership that sees AI potential but doesn't know where to start
- Organizations that value learning and capability building
- Companies that want governance and risk management
- Businesses ready to invest in transformation (\$5K-30K)
- Teams that want independence, not vendor dependency

Not a Good Fit:

- Organizations wanting a quick fix or silver bullet
- Companies unwilling to invest in training
- Leadership that just wants to "buy AI" without strategy
- Businesses looking for custom code they can't maintain
- Organizations without budget for proper implementation

The SherpaTech Promise

When you complete the 6A Method with [SherpaTech.AI](#):

- You'll have a clear AI strategy** aligned with business goals
- You'll have governance and policies** that protect your organization
- Your team will be trained** and confident using AI tools
- You'll have working solutions** delivering measurable value
- You'll be self-sufficient** - able to maintain and evolve without us
- You'll have a roadmap** for continued growth and optimization