

# Initial Advisory Engagement

AI, Bitcoin, and Digital Growth Advisory for SMEs

A fixed-fee first step for leaders who want clarity before investing in AI, Bitcoin-related decisions, or broader digital projects.

## Clear decisions before larger commitments

Understand where AI can help, whether Bitcoin has a practical role, and what to do next.

For leaders who want clarity before committing bigger budgets.

**Practical. Risk-aware. No hype.**

**MOST CLIENTS START HERE**  
**CHF 3,000 fixed fee**

Includes a focused assessment, synthesis work, written roadmap, and presentation workshop.

- Free introductory call
- Assessment workshop with key people
- Written 90-day opportunity roadmap
- Presentation workshop with next steps

## Who this is for

SMEs in every industry, especially leaders curious about AI, Bitcoin, or broader digital projects who want clarity before investing in tools, consultants, or implementation work.

## What this is not

Not generic AI training, investment advice, legal or tax advice, a promise that Bitcoin is right for your company, or a full transformation project by default.

## Focus areas

### AI Adoption

We map AI opportunities, internal risks, usage rules, and pilot ideas with clear success measures: knowledge search, reporting, document analysis, customer support, sales support, and workflow automation.

### Bitcoin Assessment

We assess Bitcoin in business terms: payments, education, technical foundations, operational risks, treasury discussion, and whether action, testing, monitoring, or no action makes sense.

### Digital Growth & Execution

With 20+ years in digital commerce and business operations, I connect technology choices to sales, customer experience, administration, cash flow awareness, decision-making, and execution.

## How it works

### 1 Fit call

Check relevance and fit.

### 2 Assessment workshop

Map needs, risks, and opportunities.

### 3 Roadmap creation

Prepare the 90-day roadmap.

### 4 Presentation & next steps

Decide what to do, test, monitor, or avoid.

## What you receive

A written 90-day opportunity roadmap including key findings, priority opportunities, practical AI use cases, Bitcoin-related options if relevant, risks and constraints, first tests, success measures, recommended next actions, and what not to do yet.

Designed to support internal decision-making, not to create unnecessary projects.

## Typical outcomes

Leadership should be able to answer where AI can realistically help, what use cases to test first, what rules are needed for safe usage, whether Bitcoin has a practical role, which opportunities are worth testing, and what to do in the next 90 days.

## Start with a free fit call

Book a free 30-minute fit call to see whether the Initial Advisory Engagement is useful for your company.

[Book at marcogiorgetti.com](https://www.marcogiorgetti.com)

Disclaimer: I do not provide legal, tax, or investment advice. Bitcoin-related work is focused on education, business assessment, and strategic decision support.