



TIO
The Intelligent Organization

Delivery Ecosystem Guide: Small and Mid-Sized Businesses

Building the Right Mix of Internal Capability, External Partners, Platforms, and Support.

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How to Use This Guide

This guide is written for owners, CEOs, presidents, chief operating officers, technology leaders, transformation leaders, and senior teams in organizations with roughly 50 to 1,000 people. Use it to design a small internal delivery core, decide what to source, evaluate provider models, and build a first 90-day delivery rhythm.

Use the early sections to understand the delivery ecosystem and clarify what must remain inside the organization. Use the middle sections to compare delivery models and provider roles. Use the final sections and appendices to validate candidates, shape the first 90 days, and make a decision based on evidence.

Bottom line

A small or mid-sized business needs more than a random collection of AI vendors. It needs a clear internal owner, practical Data and Technology foundations, a disciplined Factory rhythm, and the right external partners arranged around the work that must improve.

Research basis and reader responsibility

This Guide is based on publicly available information available at the time of writing. Sources may include company websites, public case studies, partner directories, public reviews, press releases, public job postings, marketplace listings, and other publicly accessible material. TSLA has not interviewed the providers, performed confidential reference checks, reviewed private proposals, tested delivery teams, or verified non-public claims.

The provider examples in this Guide are research candidates. No endorsement is implied. Readers should validate all facts directly before making a sourcing decision, including current ownership, delivery locations, security posture, pricing, staffing model, client references, contractual terms, data handling, intellectual property rights, and fit for their specific organization.

01 The SMB Reality

Small and mid-sized businesses sit in a demanding middle ground. They are large enough to have real complexity, but usually too small to carry a complete internal team across AI engineering, data engineering, solution architecture, product management, automation, cybersecurity, change, and support.

AI makes that gap more visible. A manager can open a model and produce useful drafts in minutes. A team can test a Copilot. A vendor can show an impressive demo. Turning those experiments into reliable operating value takes more than enthusiasm. It takes work redesign, usable data, connected technology, risk controls, adoption support, and evidence.

The business usually already has systems. Customer relationship management, finance, scheduling, enterprise resource planning, spreadsheets, shared drives, email, reporting tools, and industry-specific platforms may all exist. The difficulty is that work still moves across them through manual effort, rekeying, exceptions, and people who know the workaround.

That is why the delivery question matters. The organization needs enough structure to move safely and enough speed to learn before the opportunity passes.

Typical signal	What it usually means
AI use is already spreading	People are experimenting faster than the organization can define safe use, value, and review.
Systems are useful but disconnected	The business has digital tools, but work still depends on manual joins, spreadsheets, email and status chasing.
Data is available but uneven	Leaders can see reports, but trust, definitions, ownership, access and quality vary by function.
Managers carry change without enough support	Managers are expected to explain AI, automation and workflow change before they have a practical story or guide.
The technology team is overloaded	Internal technology capacity is focused on operations, support, vendors and security, leaving little capacity for AI-enabled redesign.
Vendors are already calling	External offers arrive before the organization has a clear sourcing model or evaluation discipline.

The practical issue

The SMB can remain focused on its business while assembling enough Data, Technology, and Factory capability to improve important work safely and measurably.

02 The TIO Point of View

TIO starts with the organization and the work. The technology decision comes after leaders understand the business pressure, the workflow, the data, the users, the risk, and the value that would make the effort worthwhile.

For an SMB, the right question is usually: What capability do we need, where should it come from, and what must we retain so we become stronger over time?

The TIO value statement for delivery ecosystems is simple: every organization should become as independent, sovereign, and capable of serving its own needs as is possible and reasonable at each point in time.

That principle does not require complete insourcing. A growing business may use Canadian partners, platform specialists, nearshore engineering, managed services, fractional leaders, AI tools, and internal champions. The point is to assemble those sources deliberately, with ownership and evidence in view.

Principle	What it means for an SMB
Capability first	Define what the organization must be able to do before choosing firms or tools.
Client context first	The best provider depends on size, maturity, risk, budget, platforms, industry and internal capacity.
Evidence before reputation	Brand visibility and polished demos do not replace proof, references, support model and delivery evidence.
Outcomes before activity	A finished project has value only if the work improves and evidence supports the decision to continue.
Sovereignty with trade-offs	Control matters, but speed, depth, cost and capability also matter. Make the trade-offs visible.
Right work, right place	Keep judgment and business design close. Source technical capacity where it can be delivered well and controlled properly.

03

What an AI Delivery Ecosystem Includes

An AI Delivery Ecosystem is the combination of internal people, external partners, platforms, cloud services, AI models, software vendors, data sources, support routines and governance practices used to improve real work.

For an SMB, this ecosystem should stay small enough to manage. A large vendor map can become a second problem. The strongest pattern is usually a small internal TIO delivery core working with one primary partner and a small number of specialists when the work requires them.

Ecosystem part	Practical role
Internal sponsor	Sets mandate, removes barriers, approves value decisions and keeps the work connected to strategy.
Business and process owners	Explain the workflow, exceptions, users, pain points and operating constraints.
Technology owner	Protects systems, identity, access, architecture, cybersecurity, vendor coordination and supportability.
Data owner or analyst	Clarifies definitions, quality issues, access, reporting needs and data readiness for the AI Use Case.
Primary delivery partner	Coordinates Discovery, design, build, testing, documentation, transfer and support with the client.
Specialist providers	Fill specific gaps such as AI engineering, data engineering, integration, cybersecurity, privacy, platform configuration or global development capacity.
AI tools and platforms	Provide the models, copilots, workflow tools, low-code platforms, cloud services, automations and systems that enable the improved work.

A simple example

A 300-person services company wants to reduce quoting delays. Factory work maps the quote workflow, defines the baseline and redesigns the handoffs. Data work clarifies customer, pricing, product and capacity information. Technology work connects the customer system, pricing data, document generation and review workflow. People work helps sales, operations and finance use the new flow. Leadership decides whether the evidence justifies expansion.

04 The Internal Core

The SMB can source a large share of delivery capability. It should still retain enough internal ownership to avoid becoming dependent on one provider or one person. This does not require a large team. It does require named accountability.

Internal role	Minimum responsibility
Executive sponsor	Owns the mandate, funding posture, value priorities, risk appetite and Evidence Gate decisions.
TIO delivery lead	Coordinates the internal work, provider interactions, backlog, decisions, progress review and issue escalation.
Business/process owner	Owns the workflow, users, exceptions, operating measures and adoption reality.
Technology owner	Owns technology fit, systems access, identity, cybersecurity, vendor coordination and supportability.
Data owner or analyst	Owns definitions, access, quality, data movement and reporting evidence for priority use cases.
People/change lead	Owns practical communication, manager support, adoption, training and role impacts.
Finance/value partner	Helps define baseline, investment case, value measurement and benefit tracking.

In a 50-person organization, one person may hold several of these roles. In a 1,000-person organization, each role may be formal. The principle remains the same: external capability should strengthen the business, not replace business ownership.

05 The Delivery Model

The recommended delivery model for SMBs is: Assess, Establish, Co-Run, Transfer, Govern, Scale. It is practical enough for a 75-person business and disciplined enough for a 1,000-person organization.

Stage	Practical meaning	Primary outputs
Assess	Clarify the business pressure, systems, data, workflows, risks, owners and the first few AI Use Case candidates.	Opportunity scan, current-state map, readiness view, first backlog.
Establish	Create the delivery structure, safe-use boundaries, architecture direction, partner roles, measures and decision rhythm.	Delivery charter, ecosystem map, decision rights, first Evidence Gate.
Co-Run	Client and partners deliver together so knowledge stays close to the business while work moves forward.	Working releases, user feedback, issue log, shared documentation.

Stage	Practical meaning	Primary outputs
Transfer	Move understanding, documentation, access, source code, prompts, workflows and operating knowledge toward the client.	Runbooks, architecture notes, admin access, support procedures, handover plan.
Govern	Use decision rights, Evidence Gates, security, privacy, value and portfolio discipline to keep the work safe and focused.	Value review, risk review, change decisions, portfolio updates.
Scale	Repeat what works, adapt what is promising, and stop work where the evidence does not support more investment.	Scale decision, next backlog, capability maturity plan, quarter plan.

06 Delivery Ecosystem Models

SMBs have several workable sourcing models. The useful question is which model best fits the organization's current capability, risk and budget.

Model	Best use	Main risks to manage
One integrated partner	The client wants one accountable partner to lead Discovery, design, build and support.	Overdependence, weak transfer, broad claims, higher cost if the partner lacks specialist depth.
Primary partner plus specialists	The client needs one lead partner and targeted help for data, security, AI, integration or platforms.	Coordination burden, unclear decision rights, duplicate work, gaps between providers.
Internal product core plus Forward-Deployed pod	The client has a strong internal owner and wants fast learning close to the work.	Knowledge concentrated in a few people, weak documentation, limited coverage after launch.
Internal Technology plus global engineering	The client can define work well and needs cost-effective engineering capacity.	Business context too far from builders, data access risk, quality control, transfer gaps.
Platform-centered model	The organization already depends heavily on Microsoft, Salesforce, ServiceNow, SAP, or another major platform.	Platform lock-in, configuration without work redesign, licensing growth, weak portability.
Managed services plus selective build	The client needs reliable Technology operations with selected AI or automation builds.	Managed operations can absorb attention while value-producing redesign work remains slow.

A mature SMB may combine these models. A practical path is to start with a primary partner or platform partner for the first AI Use Case, add specialist depth where needed, and keep the internal core responsible for decisions and evidence.

07

Data, Technology, and Factory Together

The delivery ecosystem should reflect how TIO works. Data, Technology, and Factory are separate capabilities, but the work only creates value when they move together.

TIO domain	What the ecosystem must provide	Failure pattern when missing
Data	Ownership, definitions, quality, access, flow and insight for the data that matters to the AI Use Case.	The AI or automation works in a demo but fails in operation because the information is incomplete, inconsistent, inaccessible or untrusted.
Technology	Architecture, platforms, integration, automation, resilience, identity, security, support and vendor coordination.	The solution depends on manual movement, fragile connectors, unmanaged access, unsupported tools or a platform that nobody owns.
Factory	Discovery, design, delivery, measurement and scaling discipline for AI Use Cases and workflow redesign.	The organization launches scattered pilots, cannot prove value, and keeps weak work alive because no Evidence Gate exists.

The practical sequence

Start with the work. Clarify the data. Understand the systems. Design the improvement. Build a controlled release. Measure against the baseline. Decide what happens next.

08

What Should Remain Internal

A provider can help build capability. The business must keep the decisions that shape its future.

Keep internal	Why it matters
Mandate and priorities	The provider can advise, but leaders must decide what matters and why.
Workflow ownership	The process owner understands exceptions, judgment, customers, risk and adoption.
Data ownership	The business must decide what data means, who can use it, and whether it is good enough.
Architecture understanding	The organization should understand how the solution works, what it depends on, and how it can change.
Accounts, repositories and access control	Client control of environments, credentials and code reduces dependency and transition risk.
Evidence Gates	The business should decide whether evidence justifies continuation, redesign, scale or stop.
Human judgment boundaries	Leaders must decide where human review remains required.

Keep internal	Why it matters
Employee and customer commitments	Trust is owned by the organization, not the provider.

09 What Can Be Sourced

External partners should fill capability gaps that would be slow, expensive or impractical to build internally. The right partner mix changes by AI Use Case.

Sourced capability	Typical work
AI engineering	Agents, retrieval, model selection, prompt systems, testing, evaluation and human review design.
Data engineering and analytics	Data movement, pipelines, quality work, dashboards, metrics, analytics and AI-ready data foundations.
Systems integration	Application programming interfaces, middleware, data flows, eventing, managed integration and workflow connections.
Platform configuration	Microsoft, Salesforce, ServiceNow, SAP, cloud, low-code, identity, collaboration and productivity tooling.
Custom software and product engineering	Workflow applications, portals, mobile apps, internal tools, modernization and supported releases.
Security and privacy	Risk assessment, access design, secure configuration, penetration testing, privacy review and data handling.
Factory leadership and product management	Discovery, work redesign, backlog, user testing, value measurement and release decisions.
Change and adoption support	Communication, manager enablement, user support, training, adoption measures and role impacts.

10 Forward-Deployed Engineers and Factory Pods

AI-enabled work often reveals real requirements only after the team sees the workflow, exceptions, data and users in context. A Forward-Deployed Engineer works close to that reality. The title varies, but the practical behavior is the same: technical capability sits close enough to the business to learn quickly and build responsibly.

Role	What the role should do
Factory or product lead	Clarifies the business problem, workflow, users, value hypothesis, backlog and Evidence Gate.

Role	What the role should do
Forward-Deployed Engineer	Works close to users and systems, builds or configures quickly, observes what happens, and improves the solution through short cycles.
Data and integration specialist	Handles data access, quality, integration, reporting and data movement required for the AI Use Case.
Architecture, platform or security specialist	Checks fit with systems, identity, resilience, privacy, cybersecurity and support model.
Change and adoption support	Helps managers and users understand the new workflow, practice it, and surface concerns early.

The risk is knowledge concentration. A single embedded engineer can become the only person who understands the solution. The antidote is simple: documentation, code review, backup coverage, client-owned environments, named internal owners and a transfer plan from the first week.

Requirement	Evolve the Current Operation	Establish the New Operation Beside It
Partner role	Work within the existing operation, progressively improve work, data, systems, controls, skills, and operating ownership.	Build a complete bounded target operation with a clear interface to the current one, then support proof, work routing, authority transfer, stabilization, and legacy outcome.
Control focus	Protect current-state integrity, service continuity, portable improvements, and client ownership.	Define old/new synchronization, authoritative truth, transaction commit, reconciliation, recovery, support, transfer, and retirement or deliberate coexistence.
Enterprise Autonomy test	Provider evidence question	
Mandate and control	Does the client retain priorities, architecture direction, decision rights, value decisions, Evidence Gates, and residual-risk accountability?	
Knowledge and data	Can the provider use the required Enterprise Knowledge and State without uncontrolled copies, unclear provenance, or provider-held dependency?	
Identity and authority	Can people, agents, models, tools, services, and devices be separately identified, limited, monitored, and revoked?	
Action and transaction	Are consequential changes validated and committed through controlled authoritative services?	
Trust and recovery	Can the client observe, stop, investigate, reconcile, recover, and continue service?	
Portability and exit	Can the client replace a model, platform, or provider without losing the operating capability?	
Capability transfer	Will the client understand and operate what has been built, or will essential knowledge remain outside?	

11

Global Delivery and Nearshore Engineering

Global and nearshore delivery can be useful for SMBs when the client has enough business ownership, architecture discipline and control to use external engineering safely. Delivery location matters less than control. The organization should retain understanding, ownership and the ability to change direction.

Delivery location pattern	When it can help	What to validate
Canadian or local partner	High business context, trust, regulatory comfort, easier collaboration and local accountability.	Actual delivery location, outsourcing practices, support model, price, capacity and specialist depth.
Nearshore Americas	Time-zone alignment, engineering capacity and communication convenience.	Data access, subcontracting, IP terms, team continuity, security controls and client ownership.
Eastern Europe	Strong engineering depth, AI/data/software talent and cost flexibility.	Time-zone overlap, product ownership, communication, legal terms, data handling and backup coverage.
India or Philippines	Scale, cost efficiency and mature delivery operations for well-defined work.	Business context, time-zone load, quality assurance, knowledge transfer, management overhead and sensitive data access.
Hybrid model	Local product leadership with distributed engineering capacity.	Clear role split, architecture ownership, acceptance criteria, documentation and escalation path.

For most SMBs, the safer pattern is to keep sponsor decisions, workflow design, product ownership, architecture knowledge, environments and Evidence Gates close to the business. Engineering capacity can be sourced more broadly once those pieces are clear.

12

Enterprise Autonomy, Sovereignty, and Independence

Sovereignty in an SMB does not mean doing everything alone. It means the organization keeps enough control and understanding to operate, change, stop, recover and move the solution later.

Sovereignty dimension	Practical question
Business sovereignty	Does the organization retain the mandate, priorities, process ownership, value decisions and Evidence Gates?
Data sovereignty	Can the organization control where data is stored, processed, accessed, transferred and deleted?
Technology sovereignty	Does the client own or control accounts, environments, credentials, configurations, architecture knowledge and transition rights?
Operational sovereignty	Can the client understand, operate, monitor, stop, recover and change the solution?
Capability sovereignty	Is the client becoming more able to make decisions and serve its needs over time?
Talent sovereignty	Can the organization access global expertise without allowing critical knowledge to live only outside the organization?

A healthy partner relationship

A healthy partner relationship should leave the client stronger after every cycle. The client may still choose to use the partner, but that choice should come from value and trust, not helplessness.

13

Commercial Models and Budget Ranges

Commercial structure matters because it shapes behavior. The first engagement should be small enough to limit exposure and substantial enough to produce a useful decision. Free discovery often stays close to sales. Paid discovery can give both sides room to understand the work.

Commercial model	Best use	Main caution
Paid discovery	Clarify workflow, data, systems, value, risk and first solution design before committing to build.	Scope should produce usable artifacts, not a disguised sales deck.
Fixed-scope build	Clear, bounded work with agreed outputs, acceptance criteria and limited uncertainty.	Rigid scope can hide learning needs and encourage change orders.
Retained pod	Ongoing Factory, engineering or product capacity across several AI Use Cases.	Can become dependency without transfer, documentation and internal ownership.
Co-run / Build-Operate-Transfer	The client wants external capability now and internal capability later.	Transfer must be contracted clearly and measured.

Commercial model	Best use	Main caution
Managed service	Ongoing support, monitoring, maintenance, cloud, cybersecurity or platform operation.	Managed service may keep systems stable without improving work unless linked to Factory priorities.
Staff augmentation	The client has strong internal leadership and needs added capacity.	Weak fit when the client lacks product ownership, architecture and acceptance discipline.
Outcome-linked model	Useful only where baseline, measurement, attribution and shared control are clear.	Risk of disputes when value depends on client behavior, adoption or external factors.

Planning range	Typical use
CAD \$25k to \$75k	Assessment, ecosystem design, opportunity scan, paid Discovery, first AI Use Case design, data/technology readiness view.
CAD \$50k to \$200k	One bounded AI Use Case, automation workflow, application extension, integration or controlled build with measurement.
CAD \$200k to \$750k	First-year multi-use-case program with internal core, primary partner, selected specialists, adoption support and quarterly value review.
CAD \$500k to \$2M+	Complex platform, data, integration, modernization or cross-functional transformation program.

These ranges are planning estimates. Actual costs depend on systems, data condition, security needs, licensing, integrations, custom development, support requirements and the amount of client participation.

14 Provider Landscape and Scenario Guidance

Provider selection should begin with the role the SMB needs filled. A single ranking of firms would be misleading. The better approach is scenario-based: define the job to be done, then test providers that appear credible for that job.

SMB scenario	Provider examples to evaluate	Validation focus
Microsoft-heavy SMB needing data, automation and custom apps	Whitecap Canada, ProServeIT, deltAlyz, Long View Systems	Power Platform, Power BI, Fabric, Azure, identity, security, integration, support and source-code ownership.
Western Canadian industrial, field-service or operations-heavy SMB	Digital Fractal, Punchcard Systems, Fabled Solutions, AltaML, TTT Studios	Workflow proximity, field operations, practical AI Use Case discipline, support and transfer.
Upper-SMB with custom software modernization needs	Spiria, Punchcard Systems, Whitecap Canada, Osedea, TTT Studios	Discovery, modernization, architecture, product ownership, release support and knowledge transfer.

SMB scenario	Provider examples to evaluate	Validation focus
Data-heavy SMB preparing for AI scale	Adastra, deltAlyz, AltaML, ProServeIT, Whitecap Canada	Ownership, data flow, integration, reporting, data quality, AI-ready data and governance.
Regulated, public-sector-adjacent or workflow-heavy organization	AOT Technologies, AltaML, Adastra, Long View Systems, Nortal	Governance, auditability, human review, open standards, workflow orchestration, security and procurement reality.
SMB needing engineering capacity after design is clear	Netguru, STX Next, N-iX, BairesDev, Intellias	Architecture, product ownership, security, data access, acceptance criteria, team stability and time-zone fit.

How to read the provider examples

The firms named in this section are public-evidence candidates. They illustrate the kinds of providers a reader may evaluate. They are not a ranked list, and they should not be treated as approved providers without current validation.

15

How to Select and Validate Providers

A polished AI presentation can be useful, but it rarely proves delivery quality. The provider should be tested against a real business scenario and asked for evidence that matches the role it is expected to play.

1. Define the business problem, owner, baseline, expected outcome and available budget.
2. Identify the Data, Technology, and Factory capabilities required for the first AI Use Case.
3. Decide what must remain internal and what can be sourced.
4. Choose the likely ecosystem model: integrated partner, primary partner plus specialists, Forward-Deployed pod, global engineering, platform-centered, or managed service.
5. Screen providers for SMB fit, delivery evidence, sovereignty, supportability and commercial practicality.
6. Ask each finalist to respond to the same bounded scenario so responses can be compared.
7. Start with a paid Discovery engagement before committing to a larger build.

Provider questions that matter

- Which SMB client profiles are your best fit by size, industry, budget and internal maturity?
- What first engagement do you recommend before a client commits to build?
- Who works directly with business users and process owners?
- How do you map current work before designing technology?
- How do you set baselines and prove value?
- Which parts of the solution will the client own: accounts, repositories, code, data, prompts, configurations, documentation and runbooks?
- Where will work be performed, and who can access client data?
- What happens when the client wants to bring work in-house or change providers?
- How do you support privacy, cybersecurity, data residency, intellectual property, compliance and auditability?
- What does knowledge transfer look like in practice?
- Which current client references can confirm outcomes, collaboration quality, support quality and commercial discipline?

Evidence to request before a larger commitment

- Current legal entity, ownership, locations and delivery geography.
- Named delivery team, roles, seniority and backup coverage.
- Relevant client examples, with permission to speak to references where possible.
- Security, privacy, data handling, subcontracting and access-control practices.
- Sample architecture, data-flow, runbook and handover documentation.
- Intellectual property and source-code ownership terms.
- Support model, service levels, escalation path and post-launch responsibilities.
- Commercial model, assumptions, exclusions and change-control process.
- Clear explanation of how value will be measured and reviewed.

Warning signs

- The provider leads with a tool before understanding the work.
- The proposal skips baseline, value hypothesis, risk check and user workflow review.
- Client ownership of accounts, repositories, data, prompts, documentation or environments is vague.
- Delivery geography and data access are unclear.
- The provider cannot describe support after launch.
- The commercial model creates dependency before architecture and transfer are understood.
- The firm uses Forward-Deployed language but cannot explain who will work with users and how knowledge will transfer.
- References do not resemble the client's size, operating reality, risk profile or budget.
- The provider claims broad AI capability but provides little evidence of operational deployment.

16 The First 90 Days

The first 90 days should create a working delivery rhythm and a decision-ready first AI Use Case. One quarter is enough time to prove the pattern, learn from evidence and decide the next move.

Timing	Focus	Practical outputs
Days 1 to 15	Set the mandate and internal core.	Executive sponsor named, TIO delivery lead named, first business areas identified, safe-use boundary reviewed.
Days 16 to 30	Find the right work to improve first.	Opportunity scan, short-list of AI Use Cases, first baseline view, data and technology readiness scan.
Days 31 to 45	Design the ecosystem for the first AI Use Case.	Internal roles, provider archetype, validation criteria, first provider screen, public-evidence review.
Days 46 to 60	Run paid Discovery with one or more finalists.	Workflow map, solution concept, data-flow view, security questions, budget range, delivery plan.
Days 61 to 75	Build or prototype in a controlled setting.	Working release or prototype, user feedback, issue log, adoption needs, support model.
Days 76 to 90	Run the Evidence Gate.	Decision to continue, redesign, scale, pause or stop; next-quarter plan; lessons captured.

The 90-day Evidence Gate

Evidence Gate question	What leaders should look for
Did the work improve?	Compare against the baseline. Look for time saved, errors reduced, throughput improved, cost avoided, risk reduced or customer experience improved.
Did people use it?	Check whether managers and users adopted the new workflow and whether support needs are visible.
Did trust hold?	Review privacy, security, quality, human review, data handling and customer or employee concerns.
Can it be supported?	Confirm ownership, documentation, monitoring, escalation, vendor responsibilities and internal capability.
What should happen next?	Choose continue, redesign, expand, scale, pause or stop.

17 TIO Recommendation

The strongest starting model for most SMBs is a small internal TIO delivery core working with one primary delivery partner and a small number of specialists. The internal core owns mandate, workflow, data, technology fit, adoption and Evidence Gates. The external ecosystem supplies depth, speed and technical capacity.

Start with one business-relevant AI Use Case or workflow redesign. Use paid Discovery to clarify the work, systems, data, users, risk and value. Build only after the business understands what will remain internal, what the partner will deliver, how value will be measured, and how knowledge will transfer.

The provider decision should be role-based. A Microsoft-heavy organization may need a Microsoft and integration partner first. A data-heavy organization may need Data and integration capability before AI work scales. A field-service business may need a partner close to the operating workflow. A larger SMB with clear design may use global engineering capacity. The right answer depends on the work, the risk and the capability the organization wants to retain.

The first year should make the organization more capable. The business should finish the year with better leadership fluency, clearer data ownership, more reliable technology foundations, a practical Factory rhythm, stronger adoption support, and evidence from the first few AI Use Cases. That is how the ecosystem becomes a capability, rather than another vendor relationship.

Final recommendation

Build the smallest ecosystem that can deliver real work safely. Keep ownership, evidence and trust inside the business. Use partners for depth and speed. Validate public claims before acting. Transfer knowledge from the first day. Scale only what the evidence supports.

A

Provider Candidate Matrix

The table below summarizes provider examples from public evidence. It should be used as a starting point for reader validation, not as a procurement list.

Provider	Public-evidence role	Evidence confidence	Possible fit and validation focus
Whitecap Canada	Canadian integrated Microsoft and custom software partner	Strong public evidence	SMBs with Microsoft, Power Platform, Fabric, Dynamics, custom applications, modernization, data and support needs. Validate scope, pricing, hosting, support and source-code ownership.
Spiria	Canadian custom software and modernization partner	Strong public evidence	Upper-SMB and mid-sized organizations needing discovery, modernization, team extension, product engineering and long-term support. Validate fit for AI-specific work and transfer model.
Punchcard Systems	Canadian mid-sized custom software and process automation partner	Strong public evidence	Western Canadian SMBs and mid-sized organizations needing software tied to operating metrics and business process improvement. Validate AI depth and post-launch support.
Fabled Solutions	Canadian custom software, BI and operations application partner	Useful public evidence	Owner-led and lower-SMB organizations needing close local collaboration, process mapping, BI, database migration, legacy maintenance and practical operational applications. Validate scale capacity.
TTT Studios	Canadian fractional technology partner and custom software firm	Useful public evidence	Organizations needing discovery, AI enablement, new software, legacy upgrades or fixing underperforming systems. Validate commercial model, team continuity and AI delivery depth.
deltAlyz	Canadian data, integration, BI and AI-powered software partner	Strong public evidence	SMBs needing data movement, BI, reporting automation, systems integration, custom software and managed integration support before AI scales. Validate managed iPaaS fit and architecture transfer.

Provider	Public-evidence role	Evidence confidence	Possible fit and validation focus
AltaML	Canadian applied AI and vertical AI specialist	Strong public evidence	Clients needing applied AI discovery, opportunity validation, agentic AI exploration, or industry-specific AI work. Validate SMB commercial fit and data readiness needs.
AOT Technologies	Canadian open technology, orchestration and regulated-sector specialist	Strong public evidence	Public-sector-adjacent, healthcare, regulated and workflow-heavy organizations where open standards, orchestration, auditability and data controls matter. Validate fit for commercial SMB budgets.
Osedea	Canadian AI, product, design and industrial innovation partner	Strong public evidence	Complex AI, computer vision, robotics, manufacturing, mining, healthcare, product and industrial work. Validate first-engagement size and business-process involvement.
Adastra	Data, AI, cloud and analytics specialist with Canadian and global footprint	Strong public evidence	Upper-SMB and mid-sized clients with meaningful data readiness, governance, cloud, analytics or AI platform needs. Validate ownership, delivery geography, team model and current corporate status.
ProServeIT	Canadian Microsoft cloud, cybersecurity, managed IT and AI-readiness partner	Strong public evidence	SMBs whose near-term needs are Microsoft 365, Copilot, Azure, cybersecurity, managed IT, productivity and safe platform adoption. Validate build depth beyond platform services.
Long View Systems	Canadian IT, cloud, cybersecurity and managed services provider	Useful public evidence	SMBs needing mature managed IT, workplace, cloud, security, licensing and Microsoft-oriented Technology foundation. Validate SMB practicality and Factory capability.
Netguru	Global digital product, AI, data and engineering partner	Strong public evidence	AI/data/product engineering, AI pods, Forward-Deployed Engineer model, cloud and commerce-oriented development. Use after client has product ownership and governance clarity.
STX Next	Eastern European AI, data, automation and engineering partner	Strong public evidence	AI, data, cloud, automation and software engineering where the client has enough internal or advisory capability to define work and manage acceptance.

Provider	Public-evidence role	Evidence confidence	Possible fit and validation focus
N-iX	Global AI, data, cloud and software engineering provider	Strong public evidence	Upper-SMB and mid-sized clients needing scale in AI engineering, cloud, data, software engineering and delivery. Validate fit for SMB budget and control model.
Intellias	Global product engineering and digital solutions provider	Useful public evidence	Larger SMBs and mid-sized clients needing product engineering, global delivery and industry expertise. Validate whether engagement size fits the client.
BairesDev	Latin American nearshore software engineering provider	Strong public evidence	Time-zone-aligned engineering capacity across software development, AI and QA. Best once business design, architecture, security and product ownership are already clear.
Nortal / Nearsure	Global digital transformation and LatAm IT outsourcing option	Useful public evidence	Upper-SMB and mid-sized clients needing data and AI, platform optimization, product and experience, technology and engineering or nearshore team capacity. Validate contracting entity and delivery model.
Essential Designs	Canadian custom web, software, mobile and business applications firm	Useful public evidence	Lower-SMB custom application and modernization work where practical software delivery and support matter more than complex AI depth. Validate AI and integration fit.
Appnovation	Canadian-origin broader digital consultancy	Monitor	Larger SMBs and mid-sized enterprises with broader digital, platform, experience and modernization needs. Validate fit, scope size, current delivery model and cost.

B**Reader Validation Worksheet**

Use this worksheet before committing to a larger engagement. Add client-specific questions for privacy, security, legal, finance, procurement and technology review.

Validation area	What to confirm	Status
Current facts	Legal entity, ownership, location, size, delivery geography, leadership and corporate changes.	Open / Confirmed / Concern
Client fit	Comparable clients by size, industry, budget, internal maturity and operating complexity.	Open / Confirmed / Concern
Delivery model	Project, pod, co-run, managed service, staff augmentation, Build-Operate-Transfer or hybrid.	Open / Confirmed / Concern
Team	Named roles, seniority, continuity, backup coverage, subcontractors and availability.	Open / Confirmed / Concern
Security and privacy	Data handling, residency, access, credentials, auditability, cyber controls and incident process.	Open / Confirmed / Concern
Ownership	Accounts, repositories, code, prompts, configuration, data, models, runbooks and documentation.	Open / Confirmed / Concern
Value	Baseline, value hypothesis, measurement method, Evidence Gate and decision criteria.	Open / Confirmed / Concern
Support	Post-launch support, monitoring, service levels, escalation, maintenance and recovery process.	Open / Confirmed / Concern
Commercials	Pricing, assumptions, exclusions, change control, termination, transition and IP terms.	Open / Confirmed / Concern
References	Relevant client references or case evidence that can be validated before commitment.	Open / Confirmed / Concern

C**Public Source Notes**

Source notes are included so readers can refresh and validate the research. Public web evidence changes. URLs should be reviewed again before any sourcing decision.

Internal TIO and TSLA sources used

- TIO Delivery Ecosystem Research Standard, Version 1.0, July 2026.
- TIO SMB Delivery Ecosystem Research Framework and Partner Scorecard, Draft v0.1.
- TIO SMB Delivery Ecosystem Phase II Research Program and Market Landscape, Draft v0.1.
- TIO SMB Delivery Ecosystem Candidate Universe and Initial Screening, Draft v0.1.
- TIO SMB Delivery Ecosystem Public-Evidence Diligence and Shortlist, Draft v0.1.
- TIO SMB Delivery Ecosystem Public-Evidence Validation Pack, Draft v0.1.
- TSLA-TIO Writing Voice and Authoring Standard, Version 1.0.
- TSLA-TIO Writing Quality Checklist, Version 1.0.

Public sources reviewed

Source	URL reviewed
Whitecap Canada	https://www.whitecapcanada.com/
Fabled Solutions	https://fabledsolutions.com/
Digital Fractal Technologies	https://digitalfractal.com/
deltAlyz	https://deltalyz.com/
AOT Technologies	https://www.aot-technologies.com/
Spiria	https://www.spiria.com/en
Osedea	https://www.osedea.com/
Punchcard Systems	https://punchcard.io/
AltaML	https://altaml.com/
ProServeIT	https://www.proserveit.com/
Adastra	https://adastracorp.com/
Long View Systems	https://www.longviewsystems.com/
Netguru	https://www.netguru.com/
STX Next	https://www.stxnext.com/
N-iX	https://www.n-ix.com/
Intellias	https://intellias.com/
BairesDev	https://www.bairesdev.com/
Nortal / Nearsure	https://nortal.com/en-us/
TTT Studios	https://ttt.studio/
Essential Designs	https://www.essentialdesigns.net/
Appnovation	https://www.appnovation.com/
CIFAR Pan-Canadian AI Strategy	https://cifar.ca/ai/
Government of Canada Pan-Canadian Artificial Intelligence Strategy	https://ised-isde.canada.ca/site/ised/en/pan-canadian-artificial-intelligence-strategy