Ultimarii

CASE STUDY

Scaling a Value-Add Consulting Advisory Model with Ultimarii



The Challenge

When Differentiation Stops Scaling

A mid-market consulting advisory firm focused on early-stage and growth clients had built its reputation on a highly differentiated, hands-on onboarding experience for clients. This process—deep, expert-led, and highly contextual—was central to how the firm created value.

As the firm's client base expanded, the model began to strain.

The firm now manages 100+ client intake processes each year, and onboarding was largely defined by the individual assigned. Turnaround times were unpredictable, and critical context lived in individual workflows rather than shared systems. What had once been a strength became difficult to scale without sacrificing consistency.

Importantly, this was not a team new to AI. Consultants were already using tools such as ChatGPT Pro, Notion, and an AI inbox assistant and were comfortable experimenting with AI in their day-to-day work. This level of AI fluency made it possible to move quickly—but those tools were designed for individual productivity, not institutional workflows.

They lacked shared governance, traceability, and the security controls required for handling sensitive client and investor data. As a result, the firm faced several challenges:

- **Knowledge silos:** Onboarding quality depended on individual memory and experience, making it difficult to enforce firm-wide standards.
- **Process latency:** The handover from sales to advisory teams could take up to a full week, delaying first expert engagement.
- **Security and privacy constraints:** Confidential client materials required stronger data segregation and governance than consumer-grade AI tools could provide.

Ultimarii's Approach ↘

Leading the Workflow Redesign

Ultimarii engaged as an operating partner, not just a software provider.

We led a series of structured design workshops with the full advisory team to map the onboarding lifecycle end to end. These sessions captured how work was actually being done across experts and consultants—decision points, judgment calls, and variations in approach—rather than forcing a theoretical process onto the team.

Because the firm was already AI-literate and open to change, workshops moved rapidly from discovery to execution. Ultimarii focused on creating alignment, documenting a shared operating process, and designing a workflow that could scale without losing nuance.

Throughout this engagement, privacy and security were non-negotiable requirements. The firm needed confidence that sensitive client data would remain segregated, governed, and protected. Ultimarii's security-first architecture enabled centralization without compromising confidentiality.

As part of this work, Ultimarii:

- Built consensus across experts and consultants on what high-quality onboarding looks like in practice
- Authored a formal, end-to-end onboarding and handover process
- Trained the full team on a standardized, system-supported workflow

Expanding Ingestion to Match Real-World Client Data

One of the most impactful outcomes of the workshops was recognizing how much time was lost simply assembling context.

Client materials arrived in many formats and volumes, often scattered across decks, documents, and data rooms. Based directly on this engagement, Ultimarii expanded its ingestion capabilities to support:

- Native ingestion of common client file types
- Bulk uploads of up to 100 documents at once, enabling full data rooms to be analyzed in a single step
- Structured intake pipelines that preserve source context while enabling downstream analysis

These capabilities were productized and are now available across Ultimarii's broader customer base.



The Solution

Encoding the Process into Ultimarii Playbooks

With the process defined and ingestion standardized, Ultimarii translated the firm's onboarding workflow into logic-driven playbooks embedded directly in the platform.

Each major step in the onboarding journey was encoded to produce rapid, consistent intelligence, including:

- **Intake summaries:** Automated synthesis of client materials into standardized business profiles
- **Client questionnaires:** Dynamic question sets triggered by missing or inconsistent data
- **Analytical outputs:** Structured insights aligned with the firm's advisory and engagement criteria
- **Draft deliverables:** End-to-end workflows that generate draft business plans and advisory memos

As a result, **what once took days of manual preparation is now available within minutes.**

The Impact

From Days to Minutes, at Scale

By combining Ultimarii's services with its governed AI platform, the firm achieved measurable, operational impact:

- **100+ intakes per year, standardized**
  High-volume onboarding is now consistent and repeatable
- **Expert readiness in 30 minutes**
  Context assembly and handover that once took up to a week now prepares experts for first client calls in under half an hour
- **Scalable differentiation**
  Draft business plans are now a standard part of the firm's offering, made viable by automated, repeatable workflows
- **Tool consolidation**
  Three legacy tools were fully retired, eliminating fragmentation and redundant spend
- **Predictable turnaround**
  Onboarding deliverables consistently turn in 24–48 hours



The Bottom Line



Turning Value-Add into a Scalable Advantage

This engagement allowed the firm to scale its value-add without increasing headcount or compromising quality.

Expertise that once lived in individual workflows is now embedded in a secure, governed system. What was previously a bespoke service is now a repeatable, market-facing differentiator.

For Ultimarii, this case study illustrates how process leadership, secure AI infrastructure, and configurable playbooks enable firms to operationalize what makes them unique.

As the firm's Managing Director summarized:

"We used to spend days getting aligned internally before engaging clients. Now, within 30 minutes, our experts are fully up to speed. Ultimarii didn't just speed us up—it changed what we're able to offer at scale."