

PEXIVA PERSPECTIVE · ENGAGEMENT METHODOLOGIES

How PEXIVA *actually delivers* — phases, durations, deliverables.

This pack lays out how PEXIVA delivers across its core disciplines: the phases, indicative durations, deliverables, and outcome measures your leadership team can interrogate before kickoff. It is built on real delivery experience our founding team carries forward — methodology, not fabricated client stories.

5

methodologies, one delivery system

4 phases

Assess · Design · Execute · Govern

Realphases, durations, deliverables — no
fabricated clients**KPIs**every engagement scoped to a
measure**Vendor-neutral**

no platform bias

Owned

every artifact is yours to keep

01 How to read this pack

PEXIVA runs one delivery system across five disciplines. Each methodology shares the same four-phase spine — **Assess & Baseline**, **Design & Blueprint**, **Execute & Validate**, and **Govern & Optimize** — adapted to the work. Durations are indicative ranges for mid-market scope and are confirmed per client against a baseline. Every phase produces an artifact you own and can act on independently of PEXIVA.

Methodology, not mythology. We publish how we work — phases, durations, and deliverables — instead of fabricated client stories.

02 Digital Transformation

Bounded current-state, thesis-aligned target, phased delivery. We bound the current state, align a target to a clear business thesis, and sequence delivery so value lands in phases — not in one risky leap.

How we run it

Indicative phases & durations — scoped per client against a baseline.

- ◆ **Assess & Baseline (1–2 wks)** — current-state, constraints, and a measurable baseline.
- ◆ **Design & Blueprint (1–3 wks)** — thesis-aligned target architecture and a phased roadmap with KPIs.
- ◆ **Execute & Validate (4–12 wks, scope-dependent)** — bounded delivery waves with validation gates.
- ◆ **Govern & Optimize (ongoing, optional)** — a cadence that holds gains and adapts the roadmap.

- ◆ **Deliverables** — current-state map, target blueprint, phased roadmap, KPI scorecard.
- ◆ **Outcome categories** — modern platform, faster delivery, measurable OpEx and CX movement.

03 Cloud Migration

FinOps from Day 1, predictable run-rate. Architecture-first, vendor-neutral migration across AWS, Azure, and GCP — with cost governance built into delivery rather than discovered at month-end.

How we run it

Indicative phases & durations — scoped per client against a baseline.

- ◆ **Assess & Baseline (1–2 wks)** — landing-zone readiness, workload fit, and a spend baseline.
- ◆ **Design & Blueprint (1–3 wks)** — target landing zone, security guardrails, migration-wave plan.
- ◆ **Execute & Validate (2–8 wks per wave)** — bounded cutovers with rollback and post-migration checks.
- ◆ **Govern & Optimize (ongoing)** — FinOps cadence: tagging, rightsizing, commitment management.

- ◆ **Deliverables** — landing-zone design, migration-wave plan, FinOps baseline, run-rate dashboard.
- ◆ **Outcome categories** — 99.99% uptime target, ~40% downtime reduction, 20–25% cloud cost savings.

04 AI & Automation

Production-grade AI in day-to-day operations. We move AI from demo to dependable — the right model for the task, grounded on clean data, governed, and human-in-the-loop where stakes are high.

How we run it

Indicative phases & durations — scoped per client against a baseline.

- ◆ **Assess & Baseline (1–2 wks)** — use-case ranking by KPI impact, data readiness review.
- ◆ **Design & Blueprint (1–2 wks)** — model/architecture selection, guardrails, success metric.
- ◆ **Execute & Validate (2–8 wks)** — scoped pilot to a target number, then hardening for production.
- ◆ **Govern & Optimize (ongoing)** — consumption governance, evaluation, and expansion.

- ◆ **Deliverables** — use-case ledger, data-readiness scorecard, governed pilot, production runbook.
- ◆ **Outcome categories** — lead lift, lower cost-to-serve, productivity hours returned, forecastable AI spend.

05 Contact Centre & CX

Vendor-neutral CCaaS modernization. Connected voice and digital journeys with context that follows the customer — mapped to a CX KPI before kickoff, on the platform that actually fits.

How we run it

Indicative phases & durations — scoped per client against a baseline.

- ◆ **Assess & Baseline (1–2 wks)** — channels, routing, and current CX KPIs (containment, FCR, AHT, CSAT).
- ◆ **Design & Blueprint (1–3 wks)** — vendor-neutral platform fit and a connected journey design.
- ◆ **Execute & Validate (3–10 wks)** — build, AI-assist where it helps, and validate against KPIs.
- ◆ **Govern & Optimize (ongoing)** — the loop that keeps containment and CSAT improving.

- ◆ **Deliverables** — CX baseline, platform-fit recommendation, journey design, KPI dashboard.
- ◆ **Outcome categories** — higher containment and FCR, lower AHT and cost-to-serve, improved CSAT.

06 CRM Integrity & FinOps

Data integrity, migration assurance, and CRM cost governance. We make CRM platforms trustworthy enough to operate on, clean enough to run AI on, and economically accountable — on any major CRM.

How we run it

Indicative phases & durations — scoped per client against a baseline.

- ◆ **Assess & Baseline (1–2 wks)** — data-quality scorecard, license/utilization map, AI-consumption baseline.
- ◆ **Design & Blueprint (1 wk)** — remediation plan ranked by revenue and cost impact.
- ◆ **Execute & Validate (2–6 wks)** — deduplication, normalization, migration validation, license rationalization.
- ◆ **Govern & Optimize (ongoing, optional)** — recurring integrity and cost-governance cadence.

- ◆ **Deliverables** — data-quality scorecard, license/utilization map, remediation plan, AI-consumption guardrails.
- ◆ **Outcome categories** — cleaner data, lower migration risk, higher adoption, predictable AI economics.

07 Principles we hold — and anti-patterns we refuse

Principles we hold

- ◆ **Depth behind the delivery** — one accountable team, end-to-end.
- ◆ **Outcome-first scoping** — a measurable KPI before kickoff.
- ◆ **Vendor-neutral** — the recommendation fits your environment, not a quota.
- ◆ **Compliance-mapped & FinOps-embedded** — from day one, not at month-end.
- ◆ **Honest about fit** — if it isn't a fit, we say so.

Anti-patterns we refuse

- ◆ **Big-bang cutovers** — we migrate in bounded waves with rollback.
- ◆ **Vendor lock-in** — platform chosen on fit, never on a reseller quota.
- ◆ **Fabricated case studies** — we publish methodology, not invented clients.
- ◆ **Results without baselines** — no claim ships without a before/after number.
- ◆ **Scope creep** — bounded phases, each with an artifact you own.

Bring us your challenge

Start with a short, expert-led assessment in any of these disciplines — scored against a clear model, prioritized by impact, with an action one-pager you keep whether or not we engage further.

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PEXIVA Technologies — contact@pexivatechnologies.com · pexivatechnologies.com · LinkedIn. Durations and outcome categories are indicative for mid-market scope and are confirmed per client against a baseline; they are not guarantees of outcome. PEXIVA delivery benchmarks reflect the founding team's delivery experience.