

Future Proofing Your Agency

AI Strategic Workshop



A two-day customized strategic consulting session where you'll receive a personalized business diagnostic, a 12-month pivot plan, and a peer advisory group of C-Suite leaders facing the same decisions you are.

Your clients are increasingly using AI to replace your services. **This is your protected time**, with the right peers and a strategic framework to decide what to do next.

FORMAT	DATES	LOCATION	PLUS
2-Day Session	Sept 22–23, 2026	Chicago, Illinois	1-Hr Post-Workshop Private Consultation

WHAT'S ACTUALLY HAPPENING

The AI disruption isn't just about efficiency.

Clients are self-serving with AI-enabled DIY platforms. Synthetic data is filling sampling gaps. Internal insights teams are being handed AI tools and told to eliminate vendor spend.

Insights agency C-Suite leaders have invested heavily in AI training, but the ROI isn't keeping pace with the investment. The problem was never individual capability. It's the firm's direction: which strategy you pivot to, and how you get there before the market decides for you.

WHAT THIS WORKSHOP IS

A consultative workshop, not a conference.

YOU ARRIVE WITH

A preliminary assessment

A Preliminary AI Business Strategy Assessment and a Leadership AI Activation Profile, prepared from your pre-audit data before you walk in the door. You start from a baseline, not a blank page.

YOU LEAVE WITH

A verdict and a plan

A verdict on your AI pivot business strategy, a 12-month roadmap, and a private one-hour follow-up consultation with Kristi and Heidi to discuss execution once you're back in the office.

THE DIFFERENCE

AI Training vs. This Workshop.

	AI Training	This Workshop
THE QUESTION IT ANSWERS	"How do we use AI to work faster?"	"Which business strategy does our firm pivot to, and how do we get there?"
THE OUTPUT	Your team learns new tools. Productivity improves marginally.	A personalized 12-month pivot plan, a business-strategy verdict, a 30-60-90 action card, and a peer advisory group.
WHAT MOVES	Individual capability. The strategic problem remains unsolved.	The firm's direction: revenue model, pricing, talent mix, tech stack, competitive positioning.
WHO'S IN THE ROOM	Your team, a trainer, and a curriculum built for everyone.	16 Insights C-Suite leaders navigating the same transition, under MNDA.

WHAT YOU WALK AWAY WITH

Six concrete deliverables.

01 Preliminary AI Business Strategy Assessment Walk in with a personalized pre-audit diagnosis, including an Organizational AI Readiness Assessment.	02 Your Business Strategy Verdict A scored diagnostic that maps your firm to the right strategic future.
03 12-Month Pivot Plan Outline Your confidential playbook: value proposition, pricing, talent, tech stack, and positioning.	04 30-60-90 Action Card Three committed next steps, witnessed by your peer group before you leave the room.
05 Peer Advisory Group Accountability groups of C-Suite leaders facing the same decisions to keep you on track and navigate the unexpected.	06 Private 1-Hour Follow-Up A post-workshop consultation with Kristi and Heidi to discuss your execution plan once you're back in the office.

WHO THIS IS FOR

C-Suite ready for change.

C-Suite leaders of mid-sized market research firms (**\$2M–\$30M revenue**) ready to make strategic decisions about their firm's future, but who haven't had the protected time, the right peers, or the strategic framework to figure out exactly what to do next. Bring your second seat: this can be powerful when the CEO and the COO or partner who will execute the plan are in the room together.

IN THEIR WORDS

From C-Suite leaders who've been in the room.

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The AI Transformation workshop reshaped how I think about strategy and value creation. Heidi and Kristi helped me shift from an operational mindset to a broader, more visionary perspective, one that strengthens the strategic impact we bring our clients.

WORKSHOP PARTICIPANT

“

This workshop gave me the framework, tools, and confidence to take my business in a more future-proof, AI-integrated direction. Very few people are actively helping leaders work through how these changes will affect their businesses. Don't let an uncertain future eat away at your foundation. Be proactive. Make change on your own terms.

WORKSHOP PARTICIPANT

“

As a small business owner, this was exactly what I needed. Being in a room with like-minded executives in my industry, all navigating the same questions about AI, created a level of honesty and collaboration you just don't get in larger settings. I walked away with a plan to future-proof my business, and the support to actually execute it.

WORKSHOP PARTICIPANT

“

I had already embraced AI, but was drowning more than swimming amidst all the information out there. This workshop was like a fast pass to help me filter through what components might matter most for my business. I came away with immediate actions to implement, and a more confident vision for future positioning.

WORKSHOP PARTICIPANT

WORKSHOP INVESTMENT

One decision makes the downstream picture clear.

Pricing is tiered by how early you commit, and seats are limited to 16 C-Suite leaders.

BEST VALUE		
Early Bird 60+ days out	Regular 30–59 days out	Last Minute Under 30 days
\$3,500	\$4,500	\$5,500

BRING YOUR LEADERSHIP TEAM Two seats, one firm	PRIMARY · CEO \$4,500	+1 · COO / PARTNER \$2,000	Max 2 per firm
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PREMIUM ADD-ONS

Optional Execution Packages

OPTIONAL · DAY 3 +\$750 AI Fluency for Executives Executive AI Fluency gives you the hands-on experience you need to direct an AI-First strategy with confidence. This session puts the tools for building agents and prototypes in your hands. You see firsthand the possibilities AI could bring to your doorstep. You leave with agents and prototypes you built yourself, not a stack of generic instructions to translate back in the office.	OPTIONAL · POST-WORKSHOP Customized Implementation Consulting Customized consulting packages are available, tailored to your organization's specific needs. These may include training, team alignment, operational assessment, guardrails and governance, or product innovation. Pricing is provided after a free 30-minute scoping conversation.
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RESERVE YOUR SEAT
16 seats. One room. The same decision.
Join 16 Insights C-Suite leaders navigating the same transition, under MNDA, in a safe, confidential working environment.

DATES	LOCATION	SEATS
Sept 22–23, 2026	Chicago, Illinois	Limited to 16

Register Now

www.heididickert.com/sept2026workshop

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