



Before You Buy Another AI Tool

The AI Decision Architecture & Three Filters Framework

Why Sequence Matters Before Vendor Selection

With the pressure to capitalize on new AI workflows, your organization is considering more new tools than ever before. Taking the time to clarify your organizational grounding — and recognizing the dependencies between tools — will avoid data silos, functional redundancy, and technical debt that will eventually require expensive rework.

Most AI purchasing mistakes are not made during vendor evaluation. They are made before it begins — when constraints are assumed rather than stated, when the existing stack is not mapped, and when a single function selects a tool that will eventually collide with decisions made by another function doing the same thing.

The AI Decision Architecture sequences the right questions before any purchase decision is made. The Three Filters then narrow a broad vendor field to a qualified shortlist of four to five candidates ready for structured evaluation.

The AI Decision Architecture

AI decisions made in isolation produce silos, redundancy and rework

LAYER 1 Constraints

What's even viable?

Company Size

Vendors specialize by size segment

Data Residency

Where data must (and can't) reside

Internal Build Capability

Engineering capability and appetite

Risk & Lock-in

Integrated stack vs. portable / open

Regulatory Posture

HIPAA, CMMC, FedRAMP, EU AI Act

LAYER 2 Existing Stack

What's already in place?

Workplace

Microsoft 365 / Google

Primary Cloud(s)

Azure / AWS / GCP

Data Platform

Snowflake / Databricks / Fabric

Functional Anchors

CRM

ERP

HRIS

ITSM

Marketing

Collab

LAYER 3

↓ Project Parameters: choose path(s) by opportunity or pain point ↓

PATH 1 – EMPLOYEE PRODUCTIVITY

Productivity & Add-Ons

AI assistants and lightweight functional point tools.

Decision Sequence:

- ▶ AI Assistants: Copilot, Claude, ChatGPT, Gemini
- ▶ Team agent frameworks (GPTs, Gens, Projects)
- ▶ Functional Point tools: Greenhouse AI, Jasper, Cursor

Buyer: End users / managers · Low commitment

PATH 2 – TEAM EFFICIENCY

Functional Anchor Upgrades

Activate AI inside the SaaS systems you already run.

Decision Sequence:

- ▶ Agentic SaaS: Agentforce, ServiceNow Otto, Workday Sana
- ▶ Bolt-on AI: Gong, Moveworks, Ramp / Brex AI
- ▶ Workflow automation: Make, n8n, Zapier, Workato
- ▶ Platform-native: Copilot Studio, Vertex, Bedrock

Buyer: Functional VPs + IT · Medium commitment

PATH 3 – CORE DIFFERENTIATION

AI Fine-Tuning & Implementation

Fine-tuning, custom models, proprietary AI capability.

Decision Sequence:

- ▶ ML platform (watsonx, SageMaker, Vertex, Databricks)
- ▶ Model selection (Frontier, Granite, Llama, Mistral)
- ▶ AI Data Infra (Pinecone, LangChain, LlamaIndex)
- ▶ Fine-tuning, distillation, RAG architecture
- ▶ Custom build / agentic harness

Buyer: CTO / CDO / BU P&L · High commitment

LAYER 4

End-State Vision

Emerges from experience; guides future decisions

How to Use the AI Decision Architecture

Work through each layer in sequence before advancing to vendor consideration. Each layer produces a specific output that informs the next.

Layer 1 — Constraints

Convene IT and Legal to reiterate the hard lines: data residency requirements, regulatory posture, and vendor size and segment fit. Identify where there is room to experiment and where there is not. The output is a short written statement of non-negotiable constraints that any vendor must clear before entering the conversation. This step prevents the most common override — a vendor championed by a loud executive voice that doesn't actually fit the organization's boundaries.

Layer 2 — Existing Stack

Map the key dependencies and interfaces that any new tool must connect to. Focus on systems of record — your workplace platform, primary cloud, data platform, and functional anchors (CRM, ERP, HRIS, ITSM). The output is an articulation of the integration requirements a vendor must meet for the project to succeed. A tool that can't connect to what already matters will create more work than it eliminates.

Layer 3 — Project Parameters

Identify which path the current decision sits on — Productivity & Add-Ons, Functional Anchor Upgrades, or Differentiation & Core. Look carefully at existing prior decisions within this path, as some tools may have expansion capabilities that support the required functionality, or tight integrations may be required.

Complete a Double Helix Project Canvas for the initiative under consideration. The canvas walks through Value Chain, Data, People, Workflow, and Tools — surfacing the dependencies and success criteria that define whether a project is ready to proceed. The output is a scoped project definition that vendor candidates are evaluated against.

Layer 4 — End-State Vision

Document a directional architectural vision statement — even if incomplete. This does not need to be a fully defined target architecture. It should answer: what platform bets is the organization making, what is the AI maturity trajectory, and which options must remain open for future decisions? The output is a living orientation document that prevents today's tactical decisions from foreclosing tomorrow's strategic options.

Three Filters: Building the Shortlist

Narrowing selection to aligned vendors

Each filter narrows the field to reduce silos, redundancy and rework.
Together, they ensure a cohesive data and tool architecture forms to maximize AI investments.



The strategic-vs-tactical tension is real. Resolve it by documenting the override — not by pretending it didn't happen.

How to Use the Three Filters

The Three Filters are applied once the path is identified. They narrow a broad vendor field — typically drawn from a Magic Quadrant or equivalent universe — to four or five candidates ready for structured scoring.

Layers 1-2 — Constraints & Existing Stack

Search specifically for vendors that fit within your narrow ecosystem. Begin by evaluating vendors already in your stack — doubling down on an existing investment reduces integration complexity, maintenance costs, and operational friction. This stage also surfaces specialists outside the starting field who may be better aligned than the obvious names. Do not begin with a pre-determined shortlist. Begin with the constraints and let them define the field.

Layer 3 — Project Parameters

Evaluate how each remaining vendor supports the vision defined in your Double Helix Project Canvas — specifically how each candidate addresses the data, people, workflow, and tools dependencies identified in the scoping process. Vendors that cannot credibly support the canvas requirements are eliminated here.

Layer 4 — End-State Vision

Assess the remaining candidates against your directional architectural vision. Identify which vendors enable reuse of existing platform elements and fit within your emerging suite strategy. A vendor that solves the immediate problem but forecloses future platform options carries hidden long-term cost.

On Overrides

The strategic-versus-tactical tension is real. When a constraint is bypassed — by executive preference, vendor pressure, or crisis timeline — document the override explicitly. An undocumented override becomes invisible technical debt. A documented one remains a known risk that can be revisited.

Gaining Strategic Clarity Minimizes Costly Retractions

The AI Decision Framework and AI Double Helix Prevent Expensive Mistakes

Without Strategic Clarity

Decisions made reactively, in silos

✗ Ignore Data Gravity

✗ Buy in Functional Silos

✗ Solve Narrow Point Problems

✗ Accumulate Redundant Tools

AI Decision Framework

Grounds AI vendor decisions in your organization's business profile and technology stack.

AI Double Helix

Ensures team efficiency and core product AI projects are scoped with dependencies and success criteria identified.

With AI Decision Framework & Double Helix

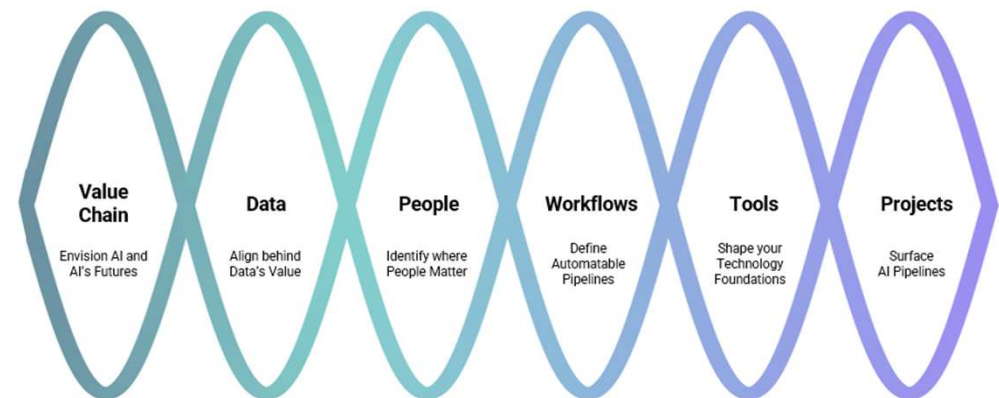
Decisions scoped against a target architecture

✓ Respect Data Gravity

✓ Align People from Multiple Functions

✓ Support End-to-End Workflows

✓ Maximize Investment in Fewer Tools



Next Steps

The AI Decision Architecture and Three Filters give your organization a repeatable process for sequencing AI vendor decisions — grounding each choice in constraints, existing infrastructure, project requirements, and directional vision before evaluation begins.

Across the three paths, the framework maps 13 distinct vendor and implementation categories — from AI point tools to fully custom agentic systems. Knowing which path you're on determines which categories are relevant and which can be set aside.

The decision sequences within each path — and the structured vendor evaluation that follows shortlisting — are covered in detail in the Executive AI Clarity Program.

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