



People-Focused Transformation

Underpinned by the Latest in Technology

SFG CBA READINESS ASSESSMENT | ENGAGEMENT-GRADE REPORT

Prestige Family Office University

Process, Data & AI Readiness Report

Launch Readiness, 12-Month Roadmap & Controlled Pilot Design

"People-Focused Transformation, Underpinned by the Latest in Technology."

SFG USA

Prepared for	George P Brown PhD, Founder and President
Organization	Prestige Family Office University
Prepared by	SFG USA - Technology & Business Solutions
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EXECUTIVE DECISION BRIEF

Executive Summary

Prestige Family Office University is in launch mode: the strategic objective is to enroll its first student and establish a dependable student onboarding process. Leadership sponsorship and change readiness are unusually strong. The operational evidence, data controls and live performance baseline required for scaled AI are not yet present.

The correct next move is therefore not a broad AI deployment. It is a tightly controlled 30-60 day Student Onboarding Readiness Sprint that completes the process, governance and measurement foundations needed to serve the first student safely and consistently.

Headline Verdict

Conditionally ready - launch-foundation ready, not AI-scale ready.

Composite readiness: 3.2 / 5.0 (Amber). Proceed with a bounded onboarding-readiness pilot using synthetic or de-identified data, one accountable process owner and an approved system of record. Do not use unapproved external AI for sensitive data. Defer predictive insights and automated student decisions until live operations, trustworthy data and governance controls are demonstrated.

The Six Findings That Matter

Finding	What it means
Overall readiness	Moderate. Strong human sponsorship is offset by pre-operational process and data foundations.
Leadership & people	A clear strength: sponsorship, champions, learning capacity and standard-work discipline are all strongly supported.
Best immediate opportunity	Complete and test the first-student onboarding journey before pursuing broader AI use cases.
Primary governance gap	Current use of ChatGPT/other AI conflicts with the requirement to avoid external AI tools where data is sensitive.
Primary operating risk	The workflow is named but not yet proven with a live student; assumptions may fail at first use.
30-60 day focus	Create a launch-ready onboarding process, system-of-record decision, evidence pack and KPI baseline.

RECOMMENDED DIRECTION

What We Recommend

1. Run a 30-60 day Student Onboarding Readiness Sprint. Map, standardize, simulate and approve the full enquiry-to-course-access journey.
2. Establish the sensitive-data and AI boundary first. Use synthetic or de-identified test data until approved tooling, privacy settings, retention rules and human approval points are documented.
3. Select one system of record for prospects and students. LifterLMS may remain the learning platform, but the authoritative record for identity, consent, status, communication and evidence must be explicit.
4. Measure launch readiness before productivity. Track completion, ownership, evidence capture, cycle time and data re-entry; enroll the first student only after the readiness gate passes.
5. Use role-based training. Train each participant against the actual onboarding workflow, approved tools, sensitive-data rules and escalation paths.
6. Delay predictive AI. Predictions require sufficient clean operational history and stable definitions; neither exists in launch mode.

How We Read This Engagement

This report applies the current SFG CBA Framework. Technology follows people, process and evidence; it does not substitute for them.

Stage	Purpose	Assessment lens
People First	Align leaders and equip people.	Sponsorship, champions, learning capacity, ownership and change discipline.
C - Continuous Improvement	Clarify and standardize work.	Workflow, waste, roles, controls, exceptions and standard operating procedures.
B - Business Intelligence	Make truth visible and decisions reliable.	Definitions, quality, system of record, KPIs, evidence and governance.
A - AI & Automation	Scale the improved way of working responsibly.	Approved use cases, data boundary, human oversight, tools, risk and value.

Non-negotiable sequence

People First > C > B > A. In this assessment, the human foundation is strong. C and B are the active constraint. A should be used only inside the controls established by C and B.

CURRENT STATE

Prestige Family Office University: Situation Analysis

Organization Profile

Organization	Prestige Family Office University
Leadership	George P Brown PhD - Founder and President
Operating stage	Launch mode; no students enrolled at the time of the QuickScan
Industry	Education, professional services and consulting
Team size	1-20 staff (self-reported)
Locations	Multi-site within one state (self-reported)
Core systems	Custom line-of-business system; LifterLMS hosted on WordPress
Other record sources	CRM, Excel and multiple locations / not sure
Entity description	Founder describes the university as a personally financed not-for-profit 501(c)(3); not independently verified in this report
Current AI	ChatGPT and other AI tools

How We Characterize the Current State

The university is best characterized as a high-sponsorship, pre-operational organization. Its ambition is credible and specific, but most maturity scores describe intended capability rather than repeated operating evidence.

7. High strategic clarity: first-student enrollment and onboarding are explicit 90-day outcomes.
8. High change capacity: leadership, champions, learning and standard-work readiness are all strongly supported.
9. Low operational evidence: no live enrollment cases have yet validated the workflow, exception paths or reporting.
10. Fragmented truth: custom systems, LifterLMS, CRM, Excel and multiple locations are all referenced.
11. High governance sensitivity: PII/PHI/regulated information is identified, while external AI avoidance is required.

Management interpretation

This is not a weak starting point. It is an early starting point. The distinction matters: the next investment should prove the operating model, not scale assumptions.

LAUNCH AMBITION

The Stated 90-Day Ambition

“We have yet to enroll our first student, which is likely to be a family business owner.”

SFG CBA QuickScan response - July 22, 2026

Success Vision

Priority	Source ambition	SFG interpretation
1	Enroll the first student.	Primary outcome and launch gate.
2	Streamline the student onboarding process.	Best 30-60 day quick win.
3	Establish operational launch procedures.	Required C foundation before automation.
4	Improve customer response times.	Leading experience measure for enquiry and onboarding.
5	Strengthen compliance and reporting.	Required B foundation and evidence trail.

The Workflow to Fix First

Lead > Quote / Offer > Order / Enrollment > Delivery > Invoice / Receipt

The source names the commercial workflow above. During the sprint, it should be translated into the university's actual academic language and extended through identity verification, consent, payment or sponsorship, LMS provisioning, orientation, support and evidence capture.

Constraints That Must Shape the Design

Constraint	Implication
Budget and time sensitivity	Use fixed scope, short cycles, existing platforms and explicit exit criteria.
Personally financed development	Protect founder capital; no speculative platform build before workflow proof.
Avoid external AI tools	Sensitive data must not enter unapproved public or external AI services.
High PII/PHI/regulated sensitivity	Data classification, least privilege, consent, retention and audit evidence are launch requirements.
Pre-operational volume	Predictive models and trend claims are premature; start with deterministic workflow and controls.

PILLAR 0

People First

The strongest foundation - and the area that must absorb founder-dependency risk.

Scoring

Dimension	Score	RAG	Plain-English meaning
Leadership sponsorship	5 / 5	Green	Founder sponsorship is explicit and scored at the highest level.
Change champions	5 / 5	Green	Team champions are reported as strongly available.
Capacity to learn	5 / 5	Green	Staff capacity to learn is strongly supported.
Standard-work discipline	5 / 5	Green	The team reports it can enforce agreed standard work.
Performance measurement	3 / 5	Amber	The ability to measure performance consistently is neutral.
Founder / key-person resilience	2 / 5	Red	The organization is founder-led and personally financed; continuity and delegation are not evidenced.

People First pillar average: 4.2 / 5 (Green)

Leadership commitment is a genuine accelerator. The score is moderated by measurement discipline and the absence of evidence that critical knowledge, authority and continuity sit beyond the founder.

What This Tells Us

The organization has enough willingness to change. The management task is to convert that willingness into named ownership, role clarity, time allocation and decision rights. A champion network without protected capacity will not deliver launch readiness.

People Actions for the Next 30 Days

12. Name one accountable owner for the end-to-end first-student journey.
13. Assign a privacy/security approver and an academic/service approver.
14. Document delegated authority for routine onboarding decisions and escalation thresholds.
15. Protect scheduled time for role-based training and simulation.
16. Create a minimum continuity file: systems, credentials ownership, key contacts, critical records and incident steps.

PILLAR C

Continuous Improvement

Clarify and prove the work before automating it.

Dimension	Score	RAG	Plain-English meaning
End-to-end workflow definition	3 / 5	Amber	A commercial flow is named, but the detailed student journey is not evidenced.
Process standardization	3 / 5	Amber	Self-reported as moderate.
Operational validation	1 / 5	Red	No live student has yet tested the process.
Student onboarding standard work	2 / 5	Red	This is the stated quick win, indicating the process is not yet launch-ready.
Exception management	3 / 5	Amber	Exceptions are reported as rare, but the claim is not validated by live volume.
Compliance-by-design integration	3 / 5	Amber	Compliance is prioritized; embedded controls and evidence are not yet demonstrated.

C pillar average: 2.5 / 5 (Amber, leaning Red)

The principal constraint is not staff resistance; it is that the process has not been exercised. The first live student should not become the process-discovery mechanism.

The Critical Finding: Launch Before Automation

The named Lead-to-Invoice workflow is a useful starting spine, but an online university needs additional control points: eligibility and identity, consent, payment/sponsorship, course assignment, LMS access, orientation, support, evidence retention, completion and exception handling.

What Good Looks Like

17. One approved current-state and launch-state process map.
18. A named owner and backup for every critical step.
19. Standard operating procedures and checklists for the first-student journey.
20. Defined exception paths for incomplete information, payment issues, access failures and sensitive-data incidents.
21. A simulated run using synthetic personas before the first live enrollment.
22. A post-enrollment review after each of the first three students.

PILLAR B

Business Intelligence

Create one trusted operating record and a small launch dashboard.

Dimension	Score	RAG	Plain-English meaning
Metric definitions	4 / 5	Green	Key metric definitions are reported as consistent.
Reporting maturity	3 / 5	Amber	Self-reported as moderate, without live enrollment operations.
Record completeness	3 / 5	Amber	Neutral response; quality is not yet proven.
Duplicate control	3 / 5	Amber	Neutral response; no evidence of a managed duplicate process.
Trust in reporting	3 / 5	Amber	Neutral response; trust cannot be demonstrated before operations.
Single source of truth	1 / 5	Red	CRM, Excel, custom systems and multiple places are all identified.
Course-content governance	2 / 5	Red	Course and lesson content is named as the biggest data issue; ownership, versioning and approval are not evidenced.

B pillar average: 2.7 / 5 (Amber, leaning Red)

The largest weakness is architectural, not analytical: the organization has not declared where authoritative prospect, student, consent, payment, learning and compliance records live.

The Minimum Viable Launch Dashboard

Metric	Definition
First-student readiness	% of mandatory launch controls completed and approved.
Response time	Median time from enquiry received to first human response.
Onboarding cycle time	Elapsed time from qualified enquiry to course access.
Right-first-time completion	% of enrollments completed without rework or missing evidence.
Manual re-entry	Number of fields re-keyed across systems per enrollment.
Governance exceptions	Count of privacy, access, consent or unapproved-AI incidents.

PILLAR A

AI & Automation

Governed intent is strong; approved execution controls are incomplete.

Dimension	Score	RAG	Plain-English meaning
Use-case clarity	4 / 5	Green	Onboarding, routing, evidence capture and future insights are clearly identified.
Governance intent	5 / 5	Green	Strict controls are explicitly preferred.
Sensitive-data controls	2 / 5	Red	High PII/PHI sensitivity is named; implemented controls are not evidenced.
Approved tooling environment	2 / 5	Red	Current AI use and the external-AI restriction are not reconciled.
Data readiness for AI	2 / 5	Red	Fragmented systems and unproven record quality limit AI use.
Implementation capacity	3 / 5	Amber	Budget and time are constrained despite high sponsorship.
Human oversight readiness	5 / 5	Green	Leadership, champions and learning readiness support supervised use.

A pillar average: 3.3 / 5 (Amber)

The score reflects readiness to run a controlled, human-supervised experiment - not readiness to place sensitive student information into external AI, automate student decisions or rely on predictive outputs.

The Right AI Now

Appropriate now - inside guardrails	Not appropriate yet
Draft internal checklists, SOP language and role-based training using non-sensitive source material.	Enter PII, PHI or regulated student records into unapproved external AI.
Generate synthetic test personas and simulate onboarding scenarios.	Automate eligibility, admissions, payment, compliance or access decisions.
Draft non-sensitive student communications for human approval.	Auto-send AI-generated communications.
Classify and tag approved course content in a controlled environment.	Use predictive risk/demand/failure models without reliable operational history.
Support routing and evidence checklists with deterministic rules.	Treat AI output as the official compliance or academic record.

READINESS SYNTHESIS

Composite Readiness Verdict

Pillar	Score	RAG	Headline
People First	4.2 / 5	Green	Strong sponsorship and change capacity; founder resilience needs attention.
C - Continuous Improvement	2.5 / 5	Amber	Workflow is defined at headline level but not proven in operation.
B - Business Intelligence	2.7 / 5	Amber	Moderate self-reported data quality; no declared single source of truth.
A - AI & Automation	3.3 / 5	Amber	Strong intent and oversight; tooling and sensitive-data controls incomplete.
COMPOSITE	3.2 / 5	Amber	Conditionally ready for a controlled onboarding-readiness sprint.

Reading the Composite Honestly

The average can conceal the shape of readiness. People and governance intent are ahead of operating process and data evidence. That asymmetry is common in founder-led launches: leadership is ready to move, while the operating system is not yet ready to carry the move safely.

Management conclusion

Lead with C and B while using A only as a controlled support tool. The sprint should finish the first-student process, declare the system of record, establish evidence and train the team. AI expansion is a gate outcome, not a starting assumption.

Readiness Gates

Gate	Required evidence	Decision
Gate 1 - Design	Approved process map, RACI, data classification and AI guardrails.	Ready to simulate.
Gate 2 - Simulation	Synthetic end-to-end test completed; exceptions resolved; evidence captured.	Ready for first live student.
Gate 3 - Stabilization	First three enrollments reviewed; metrics and issues recorded; no critical control failure.	Ready for targeted automation.
Gate 4 - AI expansion	Approved tooling, sufficient clean history, measurable value case and accountable owner.	Ready to pilot advanced AI.

EXECUTION PLAN

12-Month Roadmap

Phased through People First > C > B > A, with a decision gate at each stage.

Phase 1 - Establish Launch Foundations (Days 0-60)

Theme	People First + C + B foundations
Activities	23. Confirm the first-student journey and accountable process owner. 24. Map enquiry through enrollment, LMS access, orientation, support and evidence retention. 25. Define sensitive-data categories, approved systems and prohibited AI use. 26. Select the authoritative record for prospect and student status. 27. Create SOPs, checklists, exception paths and approval points. 28. Simulate the full journey using synthetic personas. 29. Train each role against the workflow and escalation path.
Primary outcome	A launch-ready onboarding system that can serve the first student consistently without relying on undocumented founder knowledge.
Gate to live use	Process, ownership, system of record, privacy/security controls, AI guardrails and simulation results approved.

Phase 1 Deliverables

Deliverable	Minimum acceptance test
First-student process map	Every step, owner, system, input, output, control and exception is visible.
Onboarding SOP and checklist	A trained team member can complete the process without verbal reconstruction.
Data and AI guardrails	Approved/prohibited data and tools; human review and incident steps documented.
System-of-record decision	One authoritative status and evidence location is named.
Launch dashboard	Six metrics have definitions, owners and collection methods.
Simulation record	At least two synthetic scenarios completed, including one exception case.
Role-based training	Participants demonstrate the workflow and pass a short scenario check.

EXECUTION PLAN

Roadmap: Stabilize, Then Extend

Phase 2 - Stabilize Operations & Evidence (Months 3-6)

Theme	Deepen C and build B
Activities	30. Run a structured review after each of the first three student enrollments. 31. Remove rework, duplicate entry and unclear handoffs identified in live use. 32. Implement monthly data-quality checks and evidence review. 33. Establish the six-metric launch dashboard and a single reporting cadence. 34. Version and approve course and lesson content. 35. Document continuity arrangements and delegated operational authority.
Primary outcome	A stable onboarding process, trustworthy operational record and evidence-based improvement rhythm.
Gate to Phase 3	Three live enrollments reviewed; critical defects closed; single source of truth used consistently; no unresolved high-severity data incident.

Phase 3 - Extend AI Responsibly (Months 7-12)

Theme	Apply A after C and B foundations are demonstrated
Activities	36. Pilot approved AI for internal drafting, course-content support and staff knowledge retrieval. 37. Automate deterministic routing, reminders and evidence checks where rules are stable. 38. Keep all external communications human-approved. 39. Review vendor privacy, security, retention and administrative controls. 40. Evaluate predictive use cases only when reliable history and decision value are sufficient. 41. Refresh the AI guardrails and risk register quarterly.
Primary outcome	AI and automation extend team capacity without weakening privacy, academic judgment, compliance or human accountability.
12-month target	Composite readiness at 3.8+; C and B at 3.5+; approved AI environment; measurable cycle-time or quality benefit; zero material AI data incidents.

CONTROLLED QUICK WIN

30-60 Day Student Onboarding Readiness Sprint

Goal	Make the first-student onboarding journey launch-ready, measurable and safe.
Primary KPI	100% of mandatory launch controls completed and approved before first live enrollment.
Secondary KPIs	Response time; onboarding cycle time; right-first-time completion; manual re-entry; governance exceptions.
Scope	Process, roles, data boundary, system-of-record decision, SOPs, simulation, dashboard and role-based training.
Data rule	Synthetic or de-identified data only until the live-use gate is approved.
Human control	Every external communication, access decision and exception resolution remains human-approved.
Duration	30-60 days, depending on staff availability and system access.
Commercial structure	Fixed scope and capped budget; no open-ended build.

Sprint Workplan

Week	Focus	Evidence produced
1	Confirm scope, owners, systems, risks and first-student definition.	Sprint charter, RACI, system inventory.
2	Map the current and launch-state journey.	Process map, waste/risk log, exception list.
3	Define data, privacy, AI and evidence controls.	Data classification, AI guardrails, control checklist.
4	Create SOPs, forms, scripts and dashboard definitions.	Operational pack and metric dictionary.
5	Simulate standard and exception scenarios.	Test record, defects and corrective actions.
6-8	Train, retest, approve and support first live use if ready.	Training record, readiness decision, launch review.

Exit Criteria

Decision	Condition
Proceed	All mandatory controls pass; owners are trained; simulation succeeds; system of record is operational.
Iterate	No critical failure, but material defects or unclear ownership remain; fix and retest.
Pause	Sensitive-data controls, system access, compliance requirements or accountable capacity are unresolved.

STEWARDSHIP LENS

Value and Investment Logic

The source data does not provide enough verified cost, volume, staffing or conversion information to produce a defensible dollar ROI. The right investment case is therefore a stage-gated value model that protects founder capital and converts assumptions into evidence.

Value Measures for the First 90 Days

Value category	Measure	Why it matters
Launch outcome	First student enrolled and onboarded successfully.	Tests whether the operating model works in practice.
Experience	Faster response and shorter onboarding cycle time.	Supports the top-ranked customer-response objective.
Quality	Higher right-first-time completion; less rework.	Reduces avoidable founder and staff effort.
Governance	Complete consent, identity, access and evidence records.	Protects students and strengthens audit readiness.
Data	Reduced manual re-entry and one authoritative status.	Creates the B foundation for reliable reporting.
Capacity	Time recovered from repeatable steps.	Allows leadership to focus on students, partnerships and quality.

Investment Guardrails

42. Use existing platforms first. Do not commission a custom replacement before the workflow and data model are proven.
43. Cap the sprint by scope, duration, decision rights and budget.
44. Separate required launch controls from optional enhancements.
45. No annual or multi-year tool commitment until the pilot proves fit, security and measurable value.
46. Include staff time and founder attention in the cost, not only software subscriptions.
47. Stop or redesign if the process cannot be operated without disproportionate founder intervention.

Break-even logic

The sprint is justified if it enables a safe first enrollment, prevents a material privacy or compliance failure, and creates a repeatable onboarding process that reduces avoidable effort. Dollar ROI should be calculated after actual cycle time, rework, conversion and tool costs are known.

GOVERNANCE

Risk Register & AI Guardrails

Top Risks

Risk	Severity	Required mitigation
Sensitive data exposed through external AI	Red	Pause sensitive-data use in unapproved AI; classify data; approve tools and settings; train users.
Current AI use conflicts with stated policy	Red	Reconcile ChatGPT/other AI use with the external-AI restriction; document approved and prohibited scenarios.
First live student reveals process failure	Red	Simulate standard and exception journeys before launch; apply a formal readiness gate.
No single source of truth	Red	Declare authoritative systems and eliminate ambiguous status tracking.
Founder/key-person dependency	Amber	Delegate routine authority; document continuity, ownership and escalation.
Course-content version or approval weakness	Amber	Assign content owners, approval status, version history and release control.
Scope and cost expansion	Amber	Fixed scope, capped budget, stage gates and stop/iterate criteria.
Premature predictive AI	Amber	Require sufficient clean operational history, decision value and human accountability.

One-Page AI Guardrails - Minimum Content

48. Purpose and approved use cases.
49. Prohibited data, tools and decisions.
50. Human review and approval points.
51. Approved vendors, administrative settings and retention rules.
52. Recordkeeping for prompts, outputs and material decisions.
53. Incident response, correction, notification and review.
54. Quarterly review and named policy owner.

Immediate rule

No PII, PHI or regulated student information should be entered into ChatGPT or any other unapproved external AI service. Use synthetic or de-identified data until an approved environment and operating controls are in place.

LEADERSHIP ACTION

Decisions Required in the Next Two Weeks

#	Decision	Why now
1	Approve the 30-60 day onboarding-readiness sprint, its owner, capacity and capped scope.	The first-student goal needs an accountable delivery mechanism.
2	Approve an interim data and AI rule: no sensitive data in unapproved external AI.	The current AI-use and policy positions are not reconciled.
3	Confirm the launch-state student journey and mandatory evidence.	A named commercial workflow is not yet a complete university onboarding design.
4	Choose the authoritative system for prospect/student status and records.	Multiple systems currently create ambiguity and re-entry risk.
5	Approve six launch metrics and their owners.	Reporting cannot become reliable without definitions and collection responsibility.
6	Set the first-live-student readiness gate and approvers.	The launch decision must be evidence-based, not enthusiasm-based.

Final Word

Prestige Family Office University does not need to slow its vision. It needs to sequence it. Leadership energy is already present. The stewardship task is to ensure the operating process, evidence and guardrails are strong enough to carry that energy without creating avoidable risk.

The SFG CBA Framework gives the sequence: equip the people, clarify the work, establish the truth, then use AI and automation to scale what has been proven. The first-student onboarding sprint is the practical expression of that sequence.

Recommended next step

Leadership should confirm the sprint owner, sensitive-data rule, system-of-record decision process and readiness gate within two weeks. Begin with synthetic scenarios, close defects, then authorize the first live student only when the evidence supports it.

Stewardship principle

Protect students, staff and founder capital by proving the operating model before scaling technology. Plan, simulate, verify and then release.

APPENDIX

Methodology, Assumptions and Scope

How Scoring Was Derived

Each dimension is scored on a five-point scale using the July 22, 2026 QuickScan responses and the attached strategic assessment dashboard. Scores reflect readiness evidence available in the source, not a technical audit or independent certification.

Score	RAG	Meaning
1	Red	Significant gap or no evidence. Address before live use.
2	Red	Weak foundation. Address in parallel with any bounded pilot.
3	Amber	Moderate or self-reported. Pilot-ready only with explicit mitigation.
4	Green	Good evidence or a credible positive foundation.
5	Green	Strong and actively enabling foundation.

Composite Calculation

Each pillar score is the simple average of its dimensions. The composite is the simple average of the four pillar scores: $(4.2 + 2.5 + 2.7 + 3.3) / 4 = 3.175$, rounded to 3.2 / 5 (Amber). Equal weighting is used for transparency; the recommendation still treats C and B as the gating foundations.

Key Assumptions

55. The organization remains pre-operational and had not enrolled a student at the assessment date.
56. The 501(c)(3), multi-site and staff-count statements are self-reported and not independently verified.
57. Neutral data-quality answers indicate uncertainty, not confirmed quality.
58. The reference to current ChatGPT/other AI use does not prove that sensitive data has been entered; the report identifies a policy conflict and preventive risk.
59. Tool architecture, access controls, integrations and compliance obligations have not been technically assessed.
60. Founder dependency is an inference from founder leadership and personal financing; actual delegation may be stronger than the source demonstrates.

What This Report Does Not Cover

This report is not legal, privacy, cybersecurity, accreditation, tax, financial or regulatory advice. It does not certify 501(c)(3) status, LMS security, HIPAA applicability, vendor compliance, system architecture, implementation effort or commercial pricing. Appropriate professional review is required before live use where those matters apply.

APPENDIX

Source Summary

Primary source	SFG CBA QuickScan - Process, Data & AI Readiness Assessment
Assessment date	July 22, 2026
Respondent	George P Brown PhD, Founder and President
Organization	Prestige Family Office University
Contact	george@prestigestrategiesllc.com
Source format	One-page strategic assessment dashboard with vertical response data
Evidence basis	Self-reported organization, process, data, AI, change and constraint responses
External research	None used in this report

Source Response Highlights

Area	Source response
90-day success	Enroll first student; streamline onboarding; establish launch procedures.
Priority workflow	Lead > Quote > Order > Delivery > Invoice.
Top outcomes	Customer response; compliance/audit readiness; reporting/visibility.
Core systems	Custom line-of-business system; LifterLMS on WordPress.
Truth locations	CRM, Excel and multiple places / not sure.
AI interest	Approvals/routing; compliance evidence; predictive insights.
Governance	Strict controls preferred; avoid external AI; high PII/PHI/regulated sensitivity.
Change readiness	Strong champions, learning capacity and standard-work discipline.
Quick win	Streamline the student onboarding process.
Constraints	Budget, time and personally financed development.

End of report

Prepared by SFG USA. Powered by the SFG CBA Framework: People First > Continuous Improvement > Business Intelligence > AI & Automation.

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