

CLIENT INFORMATION REQUEST / OPERATIONS FIRST

What we need from KII to start.

Fill this in and send it back, or answer by email if that is easier. We start the day the agreement is signed and these items are in hand. Almost everything here is a name, a link, or a date.

90 Days, signature to handover	4 Milestones, each accepted separately	1 On-site week in Zurich, included	0 Production changes without approval
---	---	---	--

THE FOUR STEPS

01 SEND DETAILS Return this document Or reply by email with the same points. Sections 2 to 7 are the whole request.	02 REVIEW AND AGREE Review the work, then one signature Your security owner reviews the data plan, then MIOSA sends the agreement for one signature. Day 0 starts at signature.	03 GRANT ACCESS Open the doors Read-only access to the systems listed on page 4, through your approved method.	04 ON-SITE WEEK One week in Zurich Included in the price. We pick the dates in section 7 and confirm them.
--	--	---	---

WHAT IS INSIDE

- 02 Company and contract details
- 03 People and contacts
- 04 Systems and access
- 05 Infrastructure for the on-prem install
- 06 Data and security
- 07 Operations examples and scheduling
- 08 Roadmap, Day 0 to Day 90
- 09 Kickoff checklist

IF SOMETHING IS MISSING Send what you have and mark the rest open. We close the gaps together on the first Friday review.	IF THE PILOT DOES NOT FIT Stop after Milestone 1 with no further fees, and keep everything delivered to that point.	WHO OWNS IT KII owns the platform, with the full source handed over in KII's own repository by Day 90.
HOW TO SEND IT BACK Return the filled document, or email the same points to roberto@miosa.ai. Partial answers are welcome, and the rest can be marked open.	WHAT HAPPENS TO YOUR ANSWERS They become the environment plan, the access plan, and the interview schedule in the first ten days, and the first Friday review records them as the baseline.	

Agency MIOSA is the delivery practice of MIOSA LLC. Prepared by Roberto H. Luna, Chief Executive Officer and Engagement Lead, roberto@miosa.ai.

WHO WE CONTRACT WITH AND HOW WE BILL

Your company and contract details.

These are the fields that go straight into the agreement. If a field does not apply, write "not applicable" and we will leave it out.

FULL LEGAL ENTITY NAME	LEGAL FORM (FOR EXAMPLE AG OR GMBH)
REGISTERED ADDRESS	COMMERCIAL REGISTER NUMBER OR UID
VAT NUMBER	COUNTRY OF REGISTRATION
AUTHORIZED SIGNATORY: NAME, TITLE, EMAIL	COUNTRY OF INVOICE AND NOTICE ADDRESS FOR THE AGREEMENT

INVOICING

ITEM	YOUR ANSWER
Billing contact and invoice email	
Purchase order or invoicing requirements PO number, portal, reference format, or anything else the invoice must carry	
Preferred invoice currency Fees are stated in USD. Tell us if you need the invoice in another currency and we will confirm the exchange basis.	

ANYTHING ELSE ON THIS SECTION

NOTES: OTHER ENTITIES, SUBSIDIARIES, OR CONTRACT REQUIREMENTS

Why we ask: the agreement is signed with the legal entity named here, invoices go to the contact named here, and notices under the agreement go to the address named here. One page now avoids an amendment later.

ONE NAME PER ROLE

People and contacts.

One name per row, with the person who decides. Where a role is shared, list the decision maker here and the others in the notes column.

ROLE	NAME	EMAIL	PHONE	DECIDES
Executive sponsor	_____	_____	_____	Scope, milestone acceptance, date changes
Engineering evaluator	_____	_____	_____	Architecture and technical acceptance
Business and budget owner	_____	_____	_____	Invoices and any scope change
Operations owner	_____	_____	_____	The Operations pilot and daily acceptance
Security and data owner	_____	_____	_____	Access methods, data handling, Restricted Data
Microsoft 365 and Teams admin	_____	_____	_____	Microsoft Graph consent and tenant policy
Data center and infrastructure owner	_____	_____	_____	Install environment, network path, internal model
Accounting contact Later phase	_____	_____	_____	Read-only accounting integration, after Day 90
Day-to-day project contact	_____	_____	_____	Scheduling, examples, and the weekly status

A SECOND PERSON FOR EACH DECISION, OPTIONAL

ROLE	SECOND PERSON	EMAIL	NOTES
Executive sponsor	_____	_____	_____
Operations owner	_____	_____	_____
Security and data owner	_____	_____	_____

ANYTHING ELSE ON THIS SECTION

NOTES: WHO IS AVAILABLE FOR A 30-MINUTE INTERVIEW, AND ANY ROLE WE HAVE MISSED

What this unlocks: the named people set the 30-minute interview schedule, join the Friday review, and approve access. A missing name is the most common reason a first week goes slowly.

READ-ONLY IS ENOUGH TO START

Systems and access.

Your current tools keep running. We read through a mirror layer, and nothing writes to a production system without your approval. Tell us who owns each system and tick the box when access is ready.

SYSTEM	WHAT WE NEED	ACCESS TYPE	OWNER	READY
Autotask	Accounts, contracts, tickets, and time entries	Read-only mirror	_____	☐
KII ERP (in progress)	Current schema, APIs, and a staging environment	Read-only mirror, API	_____	☐
Ticketing	Ticket sources, status fields, priorities, escalation paths	Read-only mirror	_____	☐
Time billing	Time entries and the billing rules tied to tickets and cases	Read-only mirror	_____	☐
Microsoft Teams via Microsoft Graph	An app registration with tenant consent for meetings and channels	Microsoft Graph API	_____	☐
Repositories	The Git host and the repositories to read, then a KII-owned repository for the fork: _____	Read, then admin on the KII repository	_____	☐
Documentation location	Where the current documentation lives, so we reuse it instead of rewriting it: _____	Read-only	_____	☐
Internal RAG	The current retrieval setup, sources, and embedding approach	Read-only, API	_____	☐
Accounting systems Later phase	Read-only integration after Day 90. Migration is out of scope for these 90 days.	Read-only, later phase	_____	☐
Other systems Add rows as needed	_____	_____	_____	☐

ANYTHING ELSE ON THIS SECTION

NOTES: ACCESS RESTRICTIONS, APPROVAL STEPS, OR SYSTEMS WE HAVE NOT LISTED

How access is granted: system by system, read-only by default, through your approved method only, with each account reviewed at every milestone and removed when it is no longer needed.

Do not email: passwords, shared administrator credentials, or unredacted client data. We will ask for credentials through your approved method and store them under the Data Management Plan.

THE PLATFORM RUNS IN YOUR DATA CENTER

Infrastructure for the on-prem install.

The platform runs on your hardware, with your internal model. Give us the shape of the environment and we will write the environment plan in the first ten days.

SERVER OR VM FOR THE PLATFORM: CPU, RAM, STORAGE

SERVER OS AND VERSION

GPU FOR THE INTERNAL MODEL: MODEL NAME, GPU TYPE, MEMORY

VLLM ENDPOINT: URL FORMAT, PORT, AUTHENTICATION

NETWORK ACCESS FOR OUR ENGINEERS: VPN OR APPROVED REMOTE ACCESS

BACKUP AND MONITORING EXPECTATIONS

ENVIRONMENTS: TEST AND PRODUCTION, AND WHO APPROVES A CHANGE TO EACH

INSTALL WINDOW: WHEN OUR ENGINEERS MAY WORK ON THE SERVERS

ANYTHING ELSE ON THIS SECTION

NOTES: HARDWARE NOT YET AVAILABLE, OTHER ENVIRONMENTS, OR TIMING CONSTRAINTS

IF SOME OF THIS IS NOT SETTLED YET

Tell us what is still open. The on-site week is where the environment plan is written with your infrastructure owner. If the GPU or the vLLM endpoint is not ready, say so in section 7 and we will sequence around it without moving the milestones.

SET THE BOUNDARY BEFORE PRODUCTION DATA

Data and security.

KII decides what is Restricted Data. We follow that instruction for the whole engagement.

RESTRICTED DATA CATEGORY	DESCRIPTION	OWNER

Add rows as needed. Example: any client configuration or credential material that must stay inside your data center.

DATA CLASSIFICATION POLICY: LEVELS, LABELS, AND WHAT MAY ENTER THE PLATFORM

NOTICES OR CONSENTS YOUR CLIENTS REQUIRE (SWISS FADP AND EU GDPR)

RETENTION REQUIREMENTS

INCIDENT CONTACTS: NAME, EMAIL, PHONE

CERTIFICATIONS OR AUDITS KII MUST SATISFY

SECURITY QUESTIONNAIRE, IF KII HAS ONE: WHO RECEIVES IT AND WHO REVIEWS THE ANSWERS

ANYTHING ELSE ON THIS SECTION

NOTES: RULES WE SHOULD KNOW ABOUT, OR DOCUMENTS YOU WILL SEND US

Restricted Data is never sent to third-party AI providers (see the Data Management Plan). It is handled only on KII infrastructure, or only with KII's internal model.

REAL WORK, AND THE DATES

Operations examples and scheduling.

We measure the system against your real work, not a demo set. Tick each item you can provide and add where to find it.

□ SAMPLE SIGNALS

A small set of real signals, with the routing you expect for each.

WHERE TO FIND IT

□ TICKETS

Open and closed tickets across priorities, with one escalation example.

WHERE TO FIND IT

□ CASES

Representative cases with owner and history, including one that went wrong.

WHERE TO FIND IT

□ TIME ENTRIES

Time entries tied to tickets and cases, with the billing rules.

WHERE TO FIND IT

□ ONE HANDOVER

One task that moves from one person to another, and the context each needs.

WHERE TO FIND IT

□ ONE CLIENT REPORT

One periodic report KII sends to a client, with its source data.

WHERE TO FIND IT

How these are handled: read through the mirror layer, under the Data Management Plan. Nothing is copied out of your estate unless you approve it.

SCHEDULING

30-MINUTE INTERVIEWS: WHO, AND WHEN THEY ARE AVAILABLE

FRIDAY REVIEW SLOT: DAY, TIME, TIMEZONE

ON-SITE WEEK: PREFERRED DATES (DAY 1 TO DAY 5), LOCATION, AND WHO JOINS

BUILDING ACCESS OR VISITOR REQUIREMENTS

ANYTHING ELSE ON THIS SECTION

NOTES: CONSTRAINTS ON THE INTERVIEWS, THE EXAMPLES, OR THE ON-SITE WEEK

Reza is back in Zurich no earlier than October 19. Our preference is the week of October 20, and we will confirm the exact dates with you.

90 DAYS, 4 MILESTONES AT USD 30,000, USD 120,000 TOTAL

From signature to a governed, owned platform, one department at a time.

DAYS 0 TO 10	ON-SITE WEEK	DAY 30	DAY 45	DAY 70	DAY 90
Mobilize (remote)	Operations audit and install	M1 Operations pilot	M2 Operations live	M3 Second department wave	M4 Company rollout and handover

MILESTONE	DAYS	WHAT IS DELIVERED	ACCEPTANCE	INVOICE
M1 Mobilization and Operations Pilot	Days 0 to 30	NDA signed, agreement signed once (Exhibits A and B attached), access, environment plan, 30-minute interviews, one on-site week, foundation installed on KII infrastructure, Operations pilot running on mirrored data with human approval gates.	Operations pilot runs on mirrored data with approval gates, confirmed in the Friday review.	USD 30,000 at signature
M2 Operations Live	Day 45	Real users live, Microsoft Teams integration via Microsoft Graph, shared project workspace with session handoff, role and data governance.	Accepted with real users working in the system.	USD 30,000 on acceptance
M3 Second Department Wave	Day 70	The second department chosen at kickoff, plus SOP and documentation completion.	Department live and SOP accepted.	USD 30,000 on acceptance
M4 Company Rollout and Handover	Day 90	Remaining in-scope departments, runbooks, admin training, and full source handover in KII's own repository.	Handover accepted and admin training complete.	USD 30,000 on acceptance

CHANGE CONTROL: FIXED-PRICE CHANGE ORDERS ONLY

KII asks in writing. MIOSA returns an impact assessment within 3 business days. KII then chooses one of three paths.

PATH 1 / SWAP

Trade it out

Drop in-scope work of equal size and take the new item instead, at no cost. Nothing is added to the price.

PATH 2 / DEFER

Add it to the roadmap

Put it after Day 90 and plan it as a later phase, quoted separately when KII is ready.

PATH 3 / ADD

Sign a change order

Sign a fixed-price change order and the work starts only after signature. Billed on signature unless the order states otherwise.

AFTER DAY 90, QUOTED SEPARATELY

ACCOUNTING

Accounting system integration and migration, planned as a later phase.

AGENT AUTOMATION

Deeper agent automation where the first 90 days show it is worth it.

OTHER COMPANIES

Optional expansion to other group companies, each under a separate agreement.

Nothing outside the signed scope is started. Messages, meetings, demos, and proposals never expand scope on their own. Dates move when KII dependencies (access, decisions, examples, reviews) are late, by the length of the delay. Nothing after Day 90 is included in the price. Weekly rhythm throughout: a Friday review of 30 to 60 minutes, a written weekly status, and recorded decisions.

KICKOFF CHECKLIST

We are ready to start when these five lines are checked.

One page to close the request. When all five lines carry a date, we confirm the kickoff and begin the first ten days.

ITEM	READY	OWNER	DATE
This information request returned and complete	☐		
Agreement signed once (Exhibits A and B)	☐		
Data Management Plan reviewed	☐		
Access granted for the listed systems	☐		
On-site week dates confirmed	☐		

01 DAY 0

The agreement is signed

Day 0 starts at signature, and Milestone 1 is invoiced at signature.

02 DAYS 0 TO 10

We turn answers into plans

The confirmed answers become the environment plan, the access plan, and the interview schedule.

03 FIRST FRIDAY

The baseline is recorded

The first Friday review records what was confirmed, so nothing is carried in someone's memory.

OPEN ITEMS

ANYTHING STILL OPEN, AND THE DATE YOU EXPECT AN ANSWER

RETURNED BY

NAME AND ROLE

DATE

This request is not signed. It is returned with the information, and it is not part of the agreement.

Send it to: Roberto H. Luna, roberto@miosa.ai. Partial answers are welcome. Send what you have and mark the rest open, and we will close the gaps together on the first Friday review.