

Fit Call Brief

This is the working document for your 30-minute fit call. We complete it together on the call — the blanks are the point. It ends in one of four decisions: one of three engagements, or a straight no.

COMPANY	DATE	ON THE CALL

1 Where you are

Ten minutes. Your report already did most of this work.

READINESS SCORE AND TIER (FROM YOUR REPORT)

AI TOOLS IN USE TODAY — SANCTIONED OR NOT

WHERE SENSITIVE BUSINESS AND CUSTOMER DATA COULD BE REACHING THOSE TOOLS

VENDORS WITH A SIGNED DPA / VENDORS WITHOUT ONE

WHO OWNS AI DECISIONS TODAY

2 The target workflow

The one or two manual workflows that cost the most. Common candidates in your industry are listed below the blanks — yours may not be on the list.

WORKFLOW

VOLUME PER MONTH	HOURS PER MONTH	LOADED COST PER MONTH (\$)

WHAT ONE ERROR COSTS

COMMON CANDIDATES Data entry and re-keying between systems · Document preparation · Customer communications · Reporting and reconciliation

3 Constraints

What the automation must survive, not what it must do.

REGULATORS AND AUDITORS IN PLAY

SYSTEMS IT MUST WORK INSIDE

DATA THAT NEVER LEAVES THE BOUNDARY

4 Success in 90 days

One outcome, one number, one name. If we cannot fill this section in, that is the answer.

THE OUTCOME, IN ONE SENTENCE

BASELINE TODAY

THE NUMBER THAT PROVES IT

WHO VERIFIES IT

5 Fit decision

Checked together at the end of the call.

- ☐ **AI Readiness Assessment** \$12,000 · 2–3 weeks · usage policy, vendor risk review, prioritized roadmap, one live automation deployed
- ☐ **Embedded fCAIO** \$24,000 per 90-day S.A.F.E. Cycle · proof-or-pause clause
- ☐ **Advisory Retainer** \$4,500 per month
- ☐ **Not a fit right now** Why:

NEXT STEP

BY WHEN
