



PRITT INVESTMENT PARTNERS

One department first. One complete operating loop. Then expand.

Internal opportunity strategy, delivery architecture, commercial boundary, ownership map, and approval path for the Scott Tripp BusinessOS engagement.

DECISION REQUESTED

Approve one paid department pilot at USD 10,000 and select Operations or Marketing as the proposed starting point.

PREPARED FOR

Bennett, Brody, Jesse, and Roberto
MIO SA internal operating team

WHAT SCOTT DESCRIBED

A multi-company organization already experimenting with agents, but without a governed operating layer for the people, roles, context, and work.

~30	~10	9	1
People across the operating organization discussed on the call.	Current AI users, based on Scott's description.	Executive and department circles in the proposed model.	Department pilot required before any broader rollout.

Scott is not buying another generic chatbot. He is evaluating whether his existing operating concepts, soul files, and agents can become a usable system for real employees.

CONFIRMED INTEREST

Local-first agent work

- Run local models on company computers.
- Reuse existing agent commands and soul files.
- Give staff role-specific operating interfaces.
- Connect shared context without exposing everything.

WHAT IS NOT YET KNOWN

Actual operating requirements

- Legal entities and complete org chart.
- Department boundaries and decision rights.
- Current systems, data, and workflows.
- Security, hosting, integration, and acceptance needs.

Qualification risk: Scott verbally accepted the direction but asked few questions and appeared partially disengaged. Do not treat enthusiasm as proof of budget, urgency, technical fit, or authority. The next session must test all four.

THE OPERATING MODEL

The circles become governed department workspaces, not nine disconnected bots.

ORGANIZATION MODEL / DISCOVERY INPUT

One executive system, eight department workspaces, one governed operating layer



The org chart and operating reality determine the final topology. The diagram is a discovery model, not a claim that every department should be automated at once.

Working hypothesis: Circle 02 Operations and Circle 04 Marketing are the only first-pilot candidates discussed. The org chart determines the final names, nodes, roles, and cross-workspace access.

APPROVED INTERNAL MODEL

Sell a department implementation, not an undefined company-wide transformation.

IMPLEMENTATION PRICE

USD 10,000

Per department. One department is one separately scoped implementation.

COMMERCIAL ITEM	POSITION	BOUNDARY
First department Operations or Marketing	USD 10,000 implementation	One agreed pilot operating loop, configured for named users and roles.
Second department Separate expansion	Additional USD 10,000	Begins only after the first pilot is accepted and separately authorized.
Cloud hosting Client-owned provider	Separate client expense	Pritt selects, owns, and pays the cloud account used for shared services.
Ongoing support Maintenance and iteration	Not included yet	Define after discovery and pilot acceptance. Do not imply unlimited support.
New integrations Systems not validated in discovery	Change request or future phase	Scope, risk, and price are assessed before work begins.

A USD 20,000 conversation is appropriate only if Scott intentionally approves both Operations and Marketing as two separate department implementations.

Do not promise: all nine circles, full enterprise migration, production cloud cost, open-ended agent training, unlimited integrations, or ongoing optimization inside the first USD 10,000.



PHASE 1 EXECUTION

Discovery is part of the implementation.
It is how the team avoids building the
wrong department system.

PHASE 1 / ONE DEPARTMENT

The paid pilot proves one complete operating loop before expansion



COMMENTARY: \$650K

USD 10,000 funds one department implementation. A second department begins only after separate approval.

Acceptance principle: the pilot is complete when named users can execute the agreed operating loop, the role and data boundaries behave correctly, the agent actions are inspectable, and the handoff package records open issues.

PHASE 1 / ONE DEPARTMENT

WHO DOES WHAT

No proposal should leave the team until delivery ownership and Roberto's participation are explicit.

OWNER	ACCOUNTABILITY	BEFORE CLIENT SEND
Bennett Relationship and sales	Own the client thread, schedule discovery, confirm decision process, and prevent unsupported promises.	Confirm buyer, urgency, budget, and next meeting.
Brady Delivery owner to confirm	Own implementation planning, weekly delivery status, and technical handoffs if assigned.	Accept or reject delivery ownership in writing.
Jesse Build owner to confirm	Own module build, integration implementation, test evidence, and issue resolution if assigned.	Confirm capacity and relevant technical competence.
Roberto Architecture and qualification	Provide system architecture, discovery guidance, design review, and implementation consultation within the agreed arrangement.	Define review cadence and compensation if implementation work expands.
Scott / Pritt Client authority	Provide org chart, system's access, sample data, agent artifacts, cloud account, user owners, and timely decisions.	Identify pilot sponsor and department operator.
Delivery lead	Assign one person. Shared ownership without a named lead is not ownership.	
Architecture gate	Roberto reviews topology, role boundaries, data flow, and acceptance criteria before build begins.	
Commercial change	If Roberto becomes a material implementation contributor, revise his compensation before the extra work starts.	
Client communication	Bennett owns one consolidated thread. Technical work is not promised in side messages.	

INTERNAL REVIEW CHECKLIST

Approve the process before approving the promise.

- ☐ Bennett confirms Scott is the buyer or identifies the actual economic decision-maker.
- ☐ Brody and Jesse confirm who owns delivery, implementation, QA, and client updates.
- ☐ The team approves the USD 10,000 per department model and first-pilot boundary.
- ☐ The external draft says Operations or Marketing, not both, unless Scott buys both.
- ☐ The next call is a paid-pilot scoping and discovery session, not another generic demo.
- ☐ Scott provides the company org chart, current system overview, agent commands, and soul files.
- ☐ Pritt agrees to provide and pay for the cloud environment required for team-hosted services.
- ☐ Security, access, audit, data residency, and human approval requirements are recorded.
- ☐ Acceptance criteria and change-control language are attached to the signed scope.
- ☐ No internal risk notes or commercial deliberation are included in the client package.

Release condition: once the team checks every item above, Bennett can send the separate client-facing pilot proposal and schedule the discovery workshop.

The immediate objective is not to sell nine departments. It is to secure one serious department pilot with enough access, authority, and operating evidence to succeed.