Intelligent Choice

STEP 1 · DISCOVER

Phase Schedule 1

Readiness assessment
Meridian Property Management, under the Standard Terms of Trade.

Prepared for

James Hartley

Meridian Property Management

[illegible]

CLIENT CONFIDENTIALITY & ANONYMISATION

This sample document is based on a real client engagement. The organisation and individual names have been changed to protect client confidentiality. The document is published with the client's permission for illustrative purposes.

Intelligent Choice treats client confidentiality and the responsible handling of business information as fundamental to our work.

This Phase Schedule is for **Meridian Property Management**, Phase 1 (Discover), under the Intelligent Choice Standard Terms of Trade. The Phase Fee is [redacted] .

SECTION 01

Parties and agreement

1.1 Client: Meridian Property Management, attention James Hartley. Address: [redacted] .

1.2 Consultant: Intelligent Choice AI Consulting, ABN 78 462 883 855. Address: 2305/103 South Wharf Drive, Docklands 3008, Victoria.

1.3 Governing agreement: this Phase Schedule forms part of the Intelligent Choice Standard Terms of Trade (the Standard Terms). If this Phase Schedule and the Standard Terms conflict, this Phase Schedule prevails for Phase 1 only (clause 17.9).

1.4 Phase history: this is the first Phase. No earlier Phase applies. The Client's decision to proceed with Phase 1 is recorded by signing this Phase Schedule (clause 2.4).

1.5 Defined terms: capitalised terms have the meanings given in the Standard Terms.

SECTION 02

Phase scope

2.1 Purpose. The Discover phase assesses Meridian's business problems, processes, data, people and readiness for AI-enabled workflow change, and produces a Readiness Summary with a recommended direction.

2.2 Objectives. The Readiness Summary will:

- measure the operational load on the people who run maintenance coordination today;
- record the current coordination process, including the rules that are applied but not documented;
- assess data, system and integration readiness, including the property management platform and the spreadsheets in use;
- assess people and change readiness across operations, property management and leadership; and
- compare the candidate directions and recommend one, with the next steps and the decisions needed to proceed.

2.3 Included. The Consultant will:

- conduct structured interviews with the leadership team and the staff who run maintenance coordination;
- review recent real jobs and the current tools, spreadsheets and communication channels;
- review system access and integration options at feasibility level, without testing them; and

- prepare and present the Readiness Summary.

2.4 Excluded. The Discover phase does not include:

- designing the detailed solution, which is Phase 2 (Blueprint);
- building, configuring or testing any software, integration or prototype; or
- vendor selection or contracting with any platform, SMS provider or trade.

SECTION 03

Deliverables

3.1 The Consultant will deliver the following. The Deliverable is provided as a PDF and is subject to clause 5.6 of the Standard Terms (review and acceptance).

- **D1: Readiness Summary.** The findings, the recommended direction, the readiness assessment, the options considered, and the next steps and decisions required.

3.2 Timing. D1 is provided within [illegible] Business Days after the last working session in section 4.

3.3 Versions. The Consultant will provide one review draft and one final version after the Client's comments. Further changes are handled as Change Requests under clause 3.8 of the Standard Terms.

SECTION 04

Timetable

4.1 Working sessions. The Consultant will run the following sessions, scheduled with the Client:

- structured interviews with the managing director, the director and the operations lead, 1 session of up to 60 minutes each, on [illegible];
- walk-through of the current tools, spreadsheets and communication channels, 1 session of up to 90 minutes, on [illegible];
- review of recent real jobs, 1 session of up to 90 minutes, on [illegible]; and
- readout session presenting the Readiness Summary, 1 session of up to 60 minutes, on [illegible].

4.2 Indicative duration. The Phase runs for approximately [illegible] weeks from signing, subject to the Client's availability under section 6.

4.3 Review window. The Client will review D1 within 10 Business Days of receipt, under clause 5.6 of the Standard Terms.

SECTION 05

Phase Fee and payment

5.1 Phase Fee. The Phase Fee for Phase 1 is a fixed fee of [illegible] . It covers the Services and Deliverable in sections 2 and 3, and the working sessions in section 4.

5.2 Invoicing. The Consultant will invoice as follows:

- 50% of the Phase Fee on signing this Phase Schedule; and
- the balance on delivery of D1 in final form.

5.3 Payment. Invoices are payable within 14 days under clause 3.3 of the Standard Terms.

5.4 Third-party costs. No third-party software, licence or data costs are payable under this Phase Schedule. Travel to the Client's premises within the Melbourne metropolitan area is included.

5.5 Changes. Any additional work is charged under clause 3.8 of the Standard Terms.

SECTION 06

Client dependencies and assumptions

6.1 Client dependencies. The Client will:

- make the managing director, the director, the operations lead and the staff member who runs coordination available for the sessions in section 4, within [illegible] Business Days of each request;
- provide read access to recent job records and to the current spreadsheets and communication records used for coordination; and
- make the sponsor available for the readout session in section 4.

6.2 Assumptions. The timetable and fee assume that no build, configuration or live testing is required during this Phase.

6.3 Effect of a missed dependency. If a dependency is not met, the Consultant may adjust the timetable under clause 5.5 of the Standard Terms.

SECTION 07

Acceptance and next step

7.1 Acceptance. D1 is accepted under clause 5.6 of the Standard Terms, either by written acceptance from the Client or by the lapse of the review window without notice.

7.2 Decision on the next Phase. At the readout session, the Client will decide whether to commission Phase 2 (Blueprint) under a separate Phase Schedule. No further Phase is commenced without a signed Phase Schedule (clauses 2.4 and 2.6 of the Standard Terms).

7.3 Stopping. The Client may stop this Phase at any time under clause 2.5 of the Standard Terms. The Client pays for Services performed and Deliverables provided to the date of notice.

SECTION 08

Tools we use

8.1 Tools. Under clause 8.4 of the Standard Terms, the Consultant will put the Client's personal information and Confidential Information only into the following third-party tools in this Phase, which the Client approves by signing this Phase Schedule:

- **Anthropic (Claude), AI assistance.** Used through Anthropic's commercial API, whose terms do not allow Anthropic to train its models on what we send. Data is kept for 30 days. Used for analysis, drafting and summaries, which the Consultant reviews.
- **Google Drive, document storage.** Each client's documents are kept in a folder of their own.
- **Airtable, contact and billing records.**
- **QuickBooks Online, invoicing and accounting.**
- **BoldSign, electronic signing** of this Phase Schedule and the Standard Terms.
- **Titan email (hosted by Hostinger), correspondence.**
- **Fireflies, recording and transcription of sessions,** used for sessions in this Phase. By signing this Phase Schedule the Client agrees in writing to its use (clause 8.3). The voice recording is deleted as soon as the transcript has been created, and the transcript is deleted from Fireflies once it has been saved to the Consultant's records.

8.2 Other tools. The Consultant will not put the Client's personal information or Confidential Information into any other third-party tool without the Client's written approval, and will tell the Client in writing before adding or changing a tool that handles it.

8.3 Recording of sessions. By signing this Phase Schedule the Client agrees in writing to the Consultant recording and transcribing sessions in this Phase using Fireflies. The Consultant will tell every participant before each recording starts. A participant who does not wish to be recorded may choose not to take part in that session. The Consultant will not use any other recording or transcription tool without the Client's separate written approval.

8.4 Records we keep. The Consultant keeps a copy of the final Deliverables and of the signed Agreement documents, including this Phase Schedule and the Standard Terms, as its record of the work done and of what was agreed (clause 8.8 of the Standard Terms).

8.5 Your information and our Privacy Policy. The Consultant's Privacy Policy, published on the Consultant's website, explains in plain words what personal information the Consultant collects, why, where it is kept, who can see it, how long it is kept, and how to ask to see, correct or delete it. The Consultant is not bound by the Privacy Act 1988 (Cth) but is guided by the Australian Privacy Principles (clause 8 of the Standard Terms). In this Phase the Consultant will: (a) collect only the information needed to do the work; (b) tell every participant before a session is recorded; (c) answer a request to see or correct information within 10 days; (d) delete working information within 30 days of the Client asking, except the records kept under clause 8.4; and (e) aim to tell the Client within 48 hours of becoming aware of a privacy incident involving its personal information that is likely to cause harm. If the Client is not satisfied with how its information has been handled, it may raise this with the Consultant in writing.

SECTION 09

Signatures

Signed by the parties' authorised representatives, or accepted electronically under clause 17.7 of the Standard Terms. By signing, the Client approves the third-party tools listed in clause 8.1 and the recording of sessions under clause 8.3.

SIGNED FOR THE CLIENT

FULL NAME	COMPANY	CAPACITY
James Hartley	**Meridian Property Management**	**Authorised Signatory**

Signature	Date

SIGNED FOR THE CONSULTANT

FULL NAME	COMPANY	CAPACITY
Travis Shaw	**Intelligent Choice AI Consulting** ABN 78 462 883 855	**Authorised Signatory**

Signature	Date