STEP 3 · PROVE

Phase Schedule 3

Proof of concept
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 3 (Prove), 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 3 only (clause 17.9).

1.4 Phase history: Phase 1 (Discover) was completed under Phase Schedule 1, and the Readiness Summary was delivered on [redacted] . Phase 2 (Blueprint) was completed under Phase Schedule 2, and the Solution Blueprint was delivered on [redacted] . The Client's decision to proceed to Phase 3 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 Prove phase is a time-boxed proof of concept. It tests the highest-value use case from the Solution Blueprint against live or representative data, and gives the Client measured results and a go / no-go recommendation.

2.2 Express provision for build work. Despite clause 4.2 of the Standard Terms, the Consultant will build and configure the proof-of-concept workflow described in this section. The build is limited to the proof of concept and is not a production system.

2.3 Use case under test. The proof of concept tests the maintenance coordination loop from the Solution Blueprint:

- automated trade dispatch by SMS, using the trade channel confirmed in the Blueprint;
- automated follow-up when there is no reply within the defined response window;
- escalation to the backup trade, and to the Client's operations lead, under the escalation criteria in the Blueprint; and
- status write-back to the property management platform, with a log of every message sent.

2.4 Measures. The Consultant will measure the proof of concept against the manual baseline recorded in Phase 1 and Phase 2, including time to dispatch, reply rate, time to escalation, and the number of jobs that required manual intervention.

2.5 Excluded. The Prove phase does not include:

- production deployment, roll-out to all properties, or handover of the system for ongoing operation;
- AI intake triage or automated landlord drafting, which are deferred to a later Phase; or
- vendor contracting, or any integration beyond the anchors confirmed in the Blueprint.

SECTION 03

Deliverables

3.1 The Consultant will deliver the following. Each Deliverable is provided as a PDF, except D3 which is a configured proof-of-concept workflow, and is subject to clause 5.6 of the Standard Terms (review and acceptance).

- **D1: Proof-of-Concept Report.** The measured results against the manual baseline, the issues found, and the limits of what was tested.
- **D2: Go / no-go recommendation.** A recommendation, with the conditions that would apply to a go decision.
- **D3: Proof-of-concept workflow.** The configured workflow and a short operating guide, handed over as documented, not as a production system.

3.2 Timing. D1 and D2 are provided within [illegible] Business Days after the end of the test period in section 4.

3.3 Versions. The Consultant will provide one review draft of D1 and D2, 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 Time-box. The Phase is time-boxed to a maximum of [illegible] weeks from signing. The Consultant will run the following stages, scheduled with the Client:

- set-up of the proof-of-concept workflow, for up to [illegible] weeks, on [illegible];
- live test period of up to [illegible] weeks, covering up to [illegible] real maintenance jobs; and
- review and readout session presenting D1 and D2, 1 session of up to 60 minutes, on [illegible].

4.2 Extensions. If the test period cannot start on time because of a Client dependency, the time-box is extended under a Change Request (clause 3.8 of the Standard Terms).

4.3 Review window. The Client will review D1 and D2 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 3 is a fixed fee of [redacted]. It covers the Services and Deliverables in sections 2 and 3, and the 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 and D2 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. Software subscriptions, SMS message charges and any other third-party costs incurred during the test period are payable by the Client directly, or reimbursed at cost with the Client's prior written approval. Estimated monthly third-party costs: $ [redacted].

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:

- complete the spreadsheet migration and the SMS platform set-up identified in the Blueprint before set-up starts under section 4, or agree a revised timetable in writing;
- provide the Consultant with API credentials and read-write access to the property management platform for the test period;
- make the operations lead and the staff member who runs coordination available for the test period and the review session, within [redacted] Business Days of each request; and
- confirm which real jobs will enter the test period, and maintain the manual process in parallel as a control.

6.2 Assumptions. The timetable and fee assume that the two hard constraints in the Blueprint (SMS-only trade channel; property management platform as system of record) are unchanged, and that the test period involves no more than [redacted] jobs.

6.3 Effect of a missed dependency. If a dependency is not met, the Consultant may adjust the timetable under clause 4.2 or clause 5.5 of the Standard Terms.

SECTION 07

Acceptance and next step

7.1 Acceptance. D1 and D2 are 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 review session, the Client will decide whether to proceed to Phase 4 (Procure), or to commission a production build 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