



PRITT INVESTMENT PARTNERS

Build the operating foundation, then prove it inside one department.

A USD 20,000 Phase 1 engagement that turns Pritt's current agents, business knowledge, roles, and one real operating workflow into a governed BusinessOS implementation.

PHASE 1 INVESTMENT

USD 20,000 for the company foundation and one accepted department operating proof.

EXPANSION GATE

Additional departments begin only after real users validate the first workflow and Pritt accepts the result.

THE DECISION IN FRONT OF PRITT

Do not start with nine agents or nine departments. Start by making Pritt's operating model explicit, then prove one complete loop.

30	9	1	\$20K
Approximate people operating across Pritt's company structure.	Executive circles represented by human leaders and specialized AI roles.	Department selected for the first operational proof.	One Phase 1 investment with a single delivery and acceptance record.

The system must know where work lives, who owns it, which context applies, what the expected output is, and how the result returns as evidence.

WHAT PRITT ALREADY HAS

Agents, role concepts, operating knowledge, and executive intent

Those assets are valuable inputs. They are not yet a shared operating system for employees.

WHAT PHASE 1 CREATES

A governed company model and one accepted department workflow

BusinessOS becomes the interface. Optimal Engine becomes the context, memory, policy, and evidence layer.

Recommended pilot: choose Operations or Marketing based on operator commitment, accessible data, visible pain, and a measurable workflow.

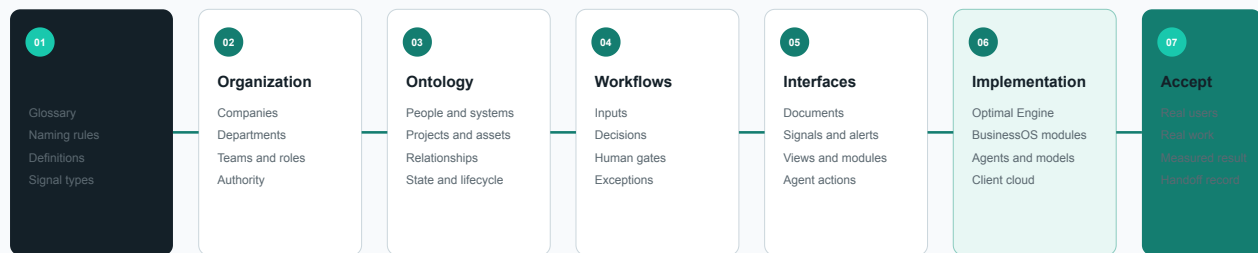
HOW THE ARCHITECTURE BECOMES CORRECT

We define the language of the business before configuring the software that operates it.

IMPLEMENTATION METHOD / DISCOVERY CREATES THE SYSTEM

We cannot architect the right output until we understand the work.

Each stage converts Scott's current operating model into an explicit, testable BusinessOS contract.



WHY DISCOVERY IS INCLUDED

Without the language, structure, work, and output contract, customization is guesswork. Discovery is implementation work.

GLOSSARY

What words mean

Canonical definitions for departments, roles, projects, decisions, risks, documents, signals, and outcomes.

TAXONOMY

How work is classified

Shared types for entities, workflows, documents, signals, statuses, priorities, and operating events.

ONTOLOGY

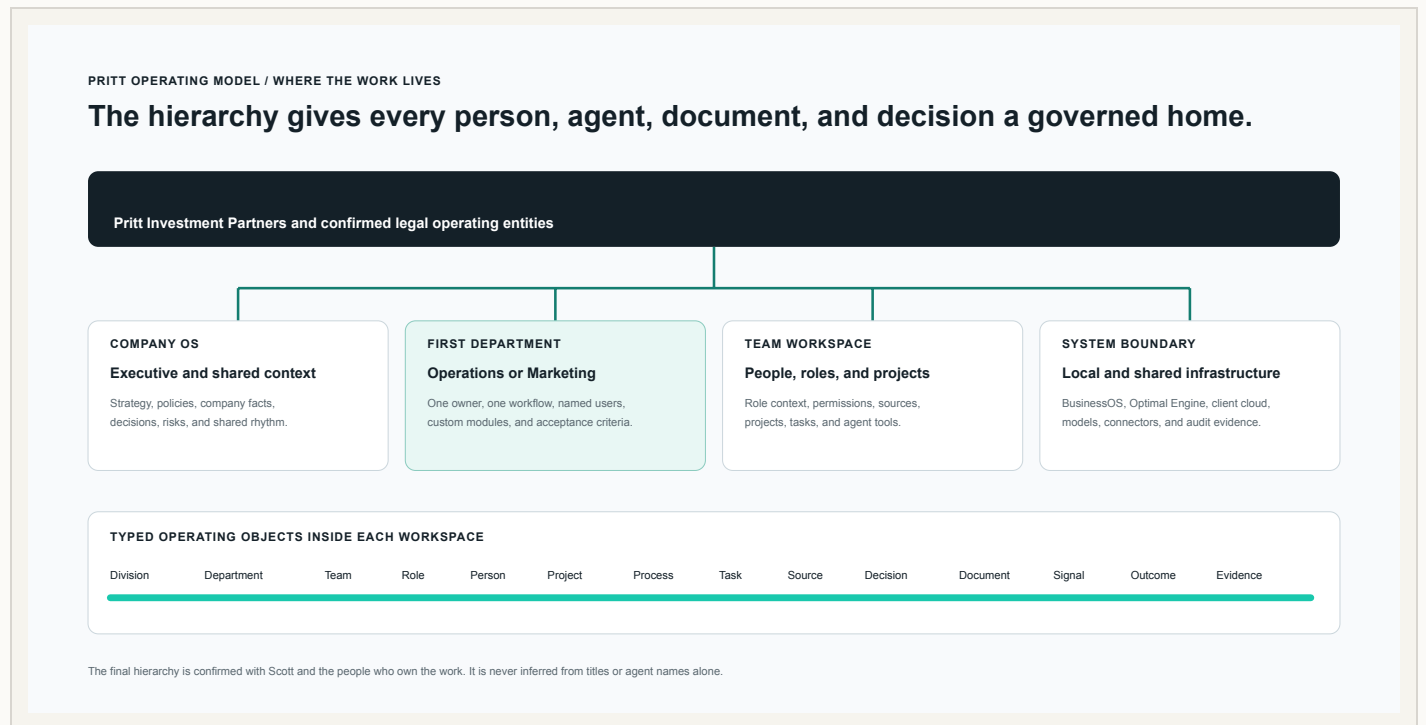
How work relates

Ownership, authority, dependencies, evidence, handoffs, permissions, and relationships between operating objects.

Why this matters: without the language and relationship model, the interface can look complete while agents retrieve the wrong context, act with the wrong authority, or create outputs that nobody owns.

ORGANIZATION TO EVIDENCE

Pritt's company structure becomes an explicit hierarchy, not a collection of prompts and disconnected files.



LAYER	WHAT IT CONTROLS	EXAMPLE
Organization Pritt	Identity, company policies, shared definitions, cloud boundary, and global authority.	Pritt Investment Partners
Workspace Department	Operational context, members, modules, agents, permissions, rhythm, and department memory.	Operations or Marketing
Node Work object	Project, client, asset, workflow, offer, decision, risk, or recurring operating object.	Capital project or campaign
Signal Change or request	What happened, what is needed, who should respond, and what evidence must return.	Approval request or exception
Memory object Accepted knowledge	Facts, decisions, lessons, commitments, and provenance that can safely inform future work.	Accepted investment criterion

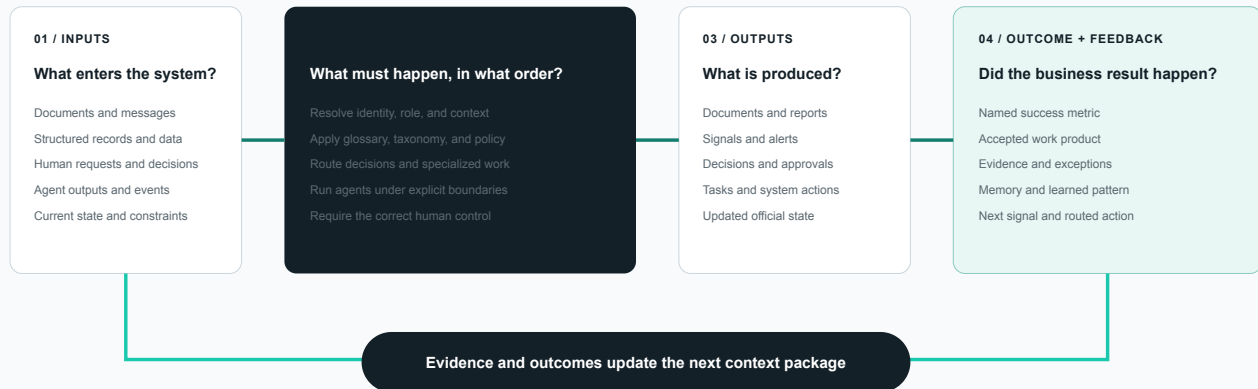
Boundary decision: discovery determines what remains local, what synchronizes to Pritt's cloud, who can see it, and which actions require approval.

FROM INPUT TO LEARNED OUTCOME

Every pilot workflow is designed backward from the outcome Pritt needs to observe.

ONE REAL WORKFLOW / FROM SOURCE TO CONTROLLED OUTCOME

The interface is designed around the work product and the signal a person needs next.



Discovery traces one representative item through this complete loop before the team commits to modules, integrations, or automation claims.

INPUTS

What enters the system

Requests, meetings, email, documents, CRM records, financial data, forms, alerts, and human instructions.

GOVERNED PROCESS

What the system does

Classify, retrieve context, select the agent, apply policy, request approval, execute, and record evidence.

OUTPUTS

What people receive

Documents, decisions, tasks, recommendations, updated records, messages, dashboards, and escalations.

OUTCOME AND FEEDBACK

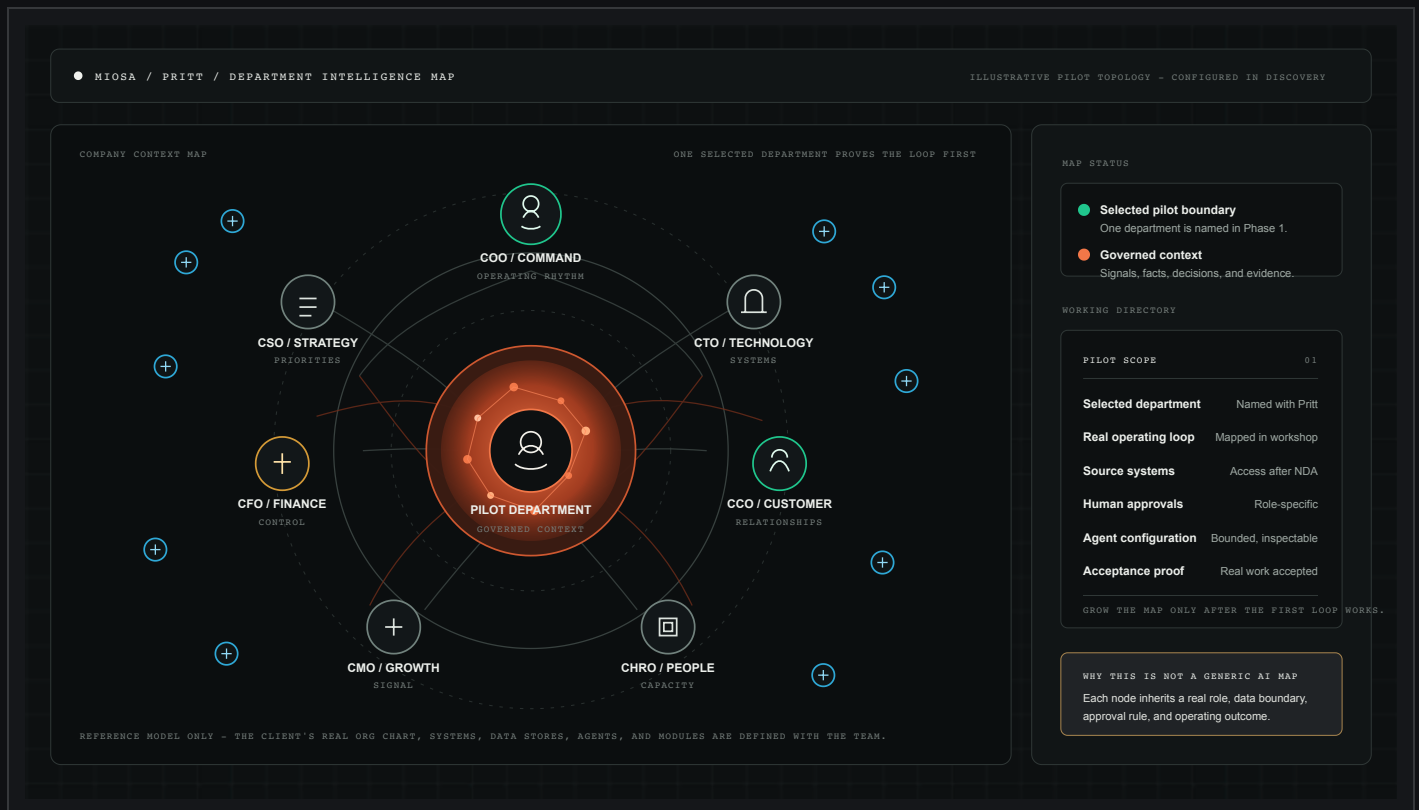
What proves value

Accepted work, corrected assumptions, cycle time, completion, revenue, risk reduction, and reusable memory.

Acceptance principle: a workflow is complete when a named user can produce the expected result, inspect how it happened, correct it, and return the result to the system as evidence.

ONE DEPARTMENT, ONE GOVERNED OPERATING MEMORY

The pilot gives a department a usable second brain connected to real work, not a loose collection of prompts.



What is deliberately not assumed: the selected department, source systems, model provider, integrations, approval model, and final interface are decided with Pritt during the paid discovery workstream.

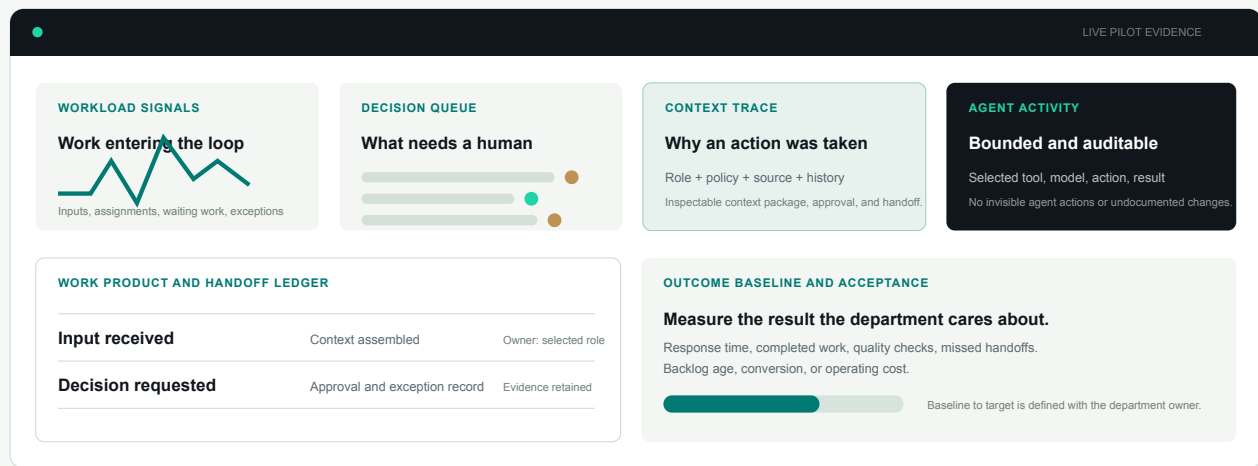
INSPECTION, NOT BLACK-BOX AUTOMATION

The first department should make its operating work more visible before the team tries to scale it.

ILLUSTRATIVE DEPARTMENT PROOF CONSOLE / CONFIGURED DURING DISCOVERY

The client can see the work, the context, and the evidence.

This is not a promise of a fixed dashboard. It shows the kinds of visibility the chosen department can gain after the workflow, roles, and measures are confirmed.

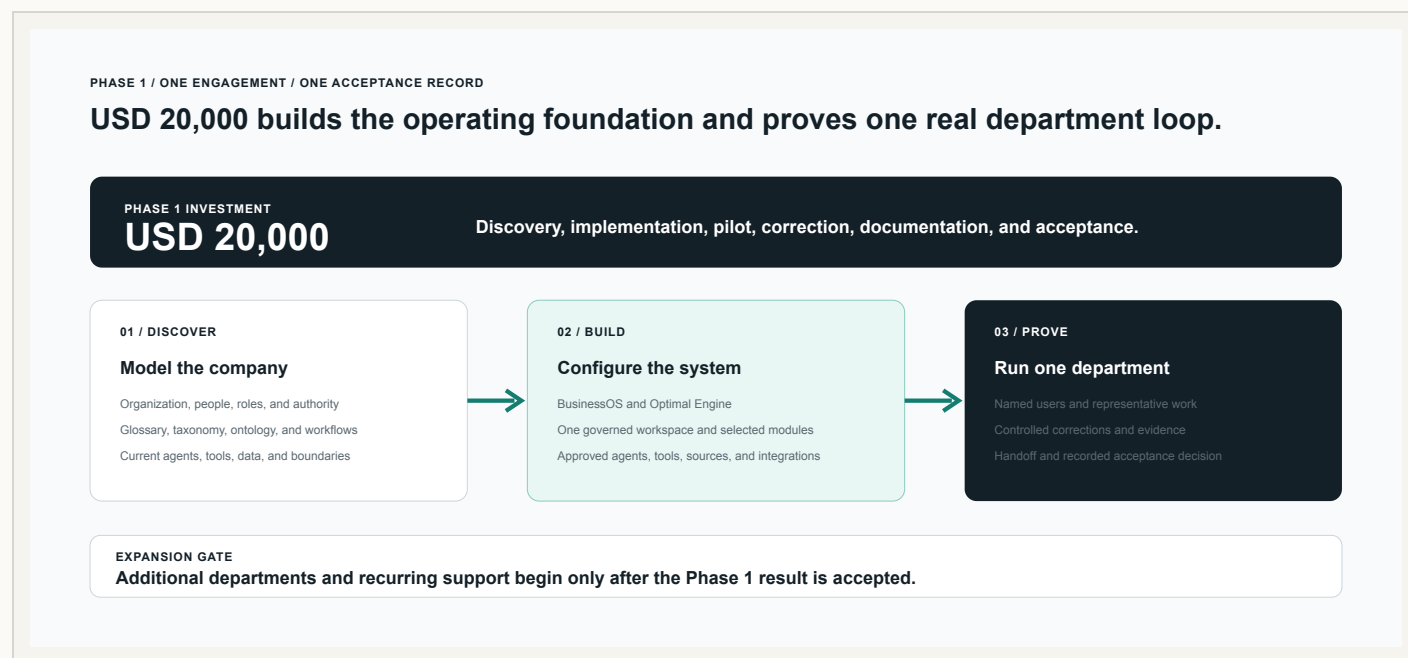


Phase 1 creates this level of inspectability for one chosen department. It does not assume company-wide rollout before the pilot is accepted.

Phase 1 outcome: Pritt receives a configured, inspectable proof for one department with a named outcome, role boundaries, real work evidence, and a clear acceptance decision.

ONE ENGAGEMENT, ONE ACCEPTED FOUNDATION

The USD 20,000 Phase 1 covers discovery, implementation, and one department proof with real users.



DISCOVER

Model the company

Workshops, glossary, taxonomy, ontology, organization and workspace architecture, current-state intake, and boundary decisions.

BUILD

Configure the system

BusinessOS, Optimal Engine, one governed workspace, selected modules, current agents, approved tools, and agreed integrations.

PROVE

Run one department

Named users, real work, controlled corrections, evidence, documentation, handoff, and one recorded acceptance decision.

GATE	EVIDENCE REQUIRED	DECISION
Architecture confirmation During Phase 1	Approved language, hierarchy, workflow model, boundaries, artifacts, and implementation plan.	Confirm the department implementation.
Pilot acceptance Phase 1 completion	Named users complete the agreed workflow and the evidence, permissions, corrections, and handoff are recorded.	Accept, request an in-scope correction, or plan expansion.

Not included unless added in writing: additional departments, unlimited integrations, company-wide migration, third-party fees, cloud consumption, production service levels, and continuing operational support.

OPTIONAL AFTER PHASE 1 ACCEPTANCE

Pritt can own the accepted system directly or retain the team for continuing operation and expansion.

MAINTENANCE AND SUPPORT

**From USD 5,000 /
month**

System health review, dependency updates, incident response during agreed hours, minor corrections, documentation upkeep, and a monthly operating review. Capacity and response targets require a signed support schedule.

OPTIMIZATION AND EXPANSION

**From USD 10,000 /
month**

Everything in maintenance plus active workflow optimization, controlled module enhancements, agent evaluation, data-quality work, analytics, and preparation for additional department implementations.

PRITT-OWNED PATH

Operate internally

- Pritt owns its accounts, credentials, cloud, business data, and accepted artifacts.
- The team completes handoff and documents the operating boundary.
- New work is authorized as a project when needed.

MANAGED PATH

Retain MIOSA x Merydian

- Choose support based on actual operating needs.
- Define capacity, response expectations, exclusions, and renewal terms.
- Review evidence monthly before increasing scope.

No automatic commitment: recurring service begins only after Phase 1 acceptance and a separate written support agreement.

THE NEXT WORKING SESSION

Use one 60-minute meeting to choose the pilot, confirm the inputs, and authorize the statement of work.

00-10	Confirm the business objective	Define the current failure, desired result, urgency, and executive outcome.
10-20	Select the first department	Choose Operations or Marketing and name one workflow with visible value.
20-35	Inspect the current system	Review the org chart, users, agents, tools, sources, examples, and known constraints.
35-45	Set ownership and boundaries	Confirm operators, approvers, data ownership, local and cloud placement, security, and access.
45-55	Confirm delivery and acceptance	Align on scope, exclusions, success evidence, timing, payment schedule, and correction rules.
55-60	Assign immediate actions	Name owners, dates, missing inputs, and the statement-of-work approval path.

PRITT BEFORE THE MEETING

Send the current-state package and confirm attendees.

Propose two meeting times, invite the executive sponsor, department owner, operator, and technical or security owner, and share the materials listed on the next page.

MIOSA X MERYDIAN BEFORE THE MEETING

Prepare the decision agenda and draft implementation boundary.

Review the submitted materials, identify open questions, prepare the draft system map, and convert accepted decisions into the statement of work.

Meeting output: selected department, named workflow, owners, required inputs, system boundary, acceptance criteria, target dates, and the agreed path to signature and kickoff.

FIRST CLIENT WORKING SESSION

Bring the people who own the work, the current system, and one real example from beginning to end.

PRITT SENDS BEFORE THE SESSION

☐ Current organization chart	☐ Department roster and authority
☐ Existing agent commands and soul files	☐ Current tools, systems, and integrations
☐ Sample documents and expected outputs	☐ One workflow with real source material
☐ Security and cloud requirements	☐ Known pain, failures, and success measures

REQUIRED PARTICIPANTS

- Scott as executive sponsor and acceptance authority.
- The selected department owner.
- At least one operator who performs the workflow.
- Pritt's technical or security owner.
- MIOSA architecture lead and Merydian delivery lead.

Working output: one accepted language map, workflow map, boundary map, artifact register, implementation backlog, and decision record.

Reply with two meeting times and the preferred pilot department. The team will confirm the session, review the current-state package, and prepare the decision agenda.

How we move forward: align in the working session, convert the accepted decisions into a signed statement of work, receive the initial payment, and schedule Phase 1 kickoff.