

CONFIDENTIAL



PROPOSAL

Epic EHR Optimization & Interoperability Advisory

Professional Proposal Document

PREPARED FOR
Cascade Health Network

PREPARED BY
Cascade Health Network

DATE
March 25, 2026

REFERENCE
PROP-2026-CHN-003

Proposal Deadline: April 30, 2026

Cascade Health Network | Professional Proposal

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Project Basics

PROJECT TITLE

Epic EHR Optimization & Interoperability Advisory

COMPANY NAME

Cascade Health Network

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BUDGET RANGE

\$450,000 – \$800,000 USD

DOCUMENT REFERENCE NUMBER

PROP-2026-CHN-003

2 Objectives & Scope

PROJECT OBJECTIVE

Our objective for the Cascade Health Network engagement is to deliver a **tailored, implementation-focused consulting partnership** that identifies and addresses the organization's most pressing strategic and operational challenges, resulting in measurable improvements to performance, efficiency, and long-term organizational health. Through rigorous data analysis, stakeholder engagement, and proven process improvement methodologies, we will develop **clear, actionable recommendations** that are grounded in Cascade Health Network's unique context, culture, and goals — not generic best practices. The outcome will be a **sustainable foundation for continued success**, with internal capacity strengthened and leadership equipped to drive meaningful results well beyond the conclusion of our engagement.

KEY DELIVERABLES

- **Current-State Operational Assessment Report** — A comprehensive diagnostic report documenting our findings from a thorough review of the Cascade Health Network's existing operations, care coordination workflows, and organizational structure. This report will identify key inefficiencies, redundancies, and performance gaps across the network, serving as the foundational evidence base for all subsequent recommendations.
- **Strategic and Operational Framework Design** — A fully documented, customized framework outlining the redesigned operational and strategic model for the network. This deliverable will include clearly defined roles, responsibilities, workflows, and governance structures aligned to the network's near-term performance targets and long-term growth objectives.
- **Care Coordination Improvement Plan** — A detailed, actionable plan targeting measurable improvements in patient outcomes and cross-network care coordination. This plan will specify recommended process changes, communication protocols, and performance benchmarks to ensure consistent, high-quality care delivery across all network entities.
- **Operational Efficiency Roadmap** — A prioritized, time-bound roadmap identifying specific opportunities to reduce redundancies, streamline processes, and optimize resource utilization network-wide. Each initiative will include defined owners, estimated impact, and implementation sequencing to support disciplined execution.

- **Performance Management Dashboard and Reporting Framework** — A standardized set of key performance indicators (KPIs), reporting templates, and a performance dashboard tailored to the Cascade Health Network. This tool will enable leadership to monitor progress, track outcomes, and make data-informed decisions on an ongoing basis.
- **Change Management and Stakeholder Engagement Plan** — A structured plan designed to align network leadership, clinical staff, and key stakeholders around the proposed changes. This deliverable will include communication strategies, engagement milestones, and change readiness resources to minimize disruption and foster organization-wide adoption.
- **Implementation Support Summary and Knowledge Transfer Documentation** — A final summary of implementation activities completed during the engagement, accompanied by process guides, training materials, and knowledge transfer documentation. This deliverable ensures the Cascade Health Network's internal teams are fully equipped to sustain improvements and continue building on the progress achieved beyond the life of our engagement.

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Timeline

START DATE

May 24, 2026

END DATE

December 24, 2027

PROPOSAL DEADLINE

April 30, 2026

4 Evaluation Criteria

EVALUATION CRITERIA

Why Choose Our Team

We recognize that Cascade Health Network has a choice when selecting a consulting partner for this engagement — and we do not take that decision lightly. What follows are the defining reasons we are confident we are the right team to deliver the outcomes this initiative demands.

1. **Deep Expertise Across the Disciplines This Engagement Requires**

Our practice brings focused specialization in strategic planning, operational efficiency, process improvement, and performance management — precisely the capabilities at the center of this engagement. We do not approach health network transformation as generalists. We bring disciplinary depth across every workstream this project touches, from care coordination and organizational design to data analysis and change management, ensuring that each phase of the work is led by practitioners with direct, applicable expertise.

2. **A Proven, Implementation-Focused Methodology**

Our recommendations do not stop at the strategy level. We are built for execution. Our team combines rigorous analytical thinking with a practical, hands-on implementation mindset — meaning we will work alongside Cascade Health Network's leadership and staff to translate strategy into action. Every recommendation we deliver is designed to be operationally feasible, organizationally realistic, and sustainable well beyond the conclusion of our engagement.

3. **A Tailored Approach Built Around Cascade Health Network's Unique Context**

We do not apply templated frameworks or off-the-shelf solutions. Before designing any intervention, we invest meaningful time understanding the network's culture, operating environment, internal capabilities, and strategic priorities. For Cascade Health Network, this means our framework will be purpose-built for your organization — not adapted from a prior engagement and repackaged. This commitment to customization consistently produces stronger stakeholder buy-in, faster adoption, and more durable results.

4. **A Track Record of Delivering Measurable, Lasting Value**

Our practice is results-driven at its core. Across engagements, we have helped organizations reduce operational redundancies, improve cross-functional coordination, and build the internal infrastructure needed for sustained

performance. We hold ourselves accountable to outcomes, not outputs — and we bring that same standard of accountability to every milestone and deliverable within this engagement.

5. Structured for Responsiveness and On-Time Delivery

We understand that Cascade Health Network operates in a dynamic environment where delays carry real organizational consequences. Our team is structured to be highly responsive — to new information, evolving stakeholder needs, and emerging priorities. We build realistic, clearly sequenced project timelines and maintain transparent communication throughout, so our clients always know where we stand and what comes next.

6. A Qualified Team with Cross-Industry Perspective

Our consultants bring decades of combined experience spanning complex, multi-stakeholder organizations — equipping us with the cross-sector perspective needed to identify best practices, benchmark performance, and introduce proven approaches that health networks may not yet have encountered. This breadth of experience, paired with our sector-specific focus for this engagement, positions our team to deliver insight that is both strategically informed and operationally grounded.

7. A Partnership Built on Trust, Transparency, and Knowledge Transfer

We believe the most valuable outcome of any engagement is one in which the client emerges stronger and more capable than before we arrived. Throughout this project, we will work to build Cascade Health Network's internal capacity — sharing knowledge, developing tools, and equipping your team with the skills and frameworks needed to sustain progress independently. Our goal is not dependency; it is lasting organizational strength. That commitment defines every relationship we build.

5 Company Background

COMPANY BACKGROUND

Our Consulting Practice is a results-driven advisory firm dedicated to helping organizations navigate complexity, unlock growth, and achieve measurable outcomes. Our mission is to deliver **tailored, high-impact solutions** that address our clients' most pressing challenges while building the internal capabilities needed for sustained success. We approach every engagement as a long-term partnership — one grounded in trust, transparency, and a genuine commitment to our clients' objectives.

We bring deep expertise across a broad range of disciplines, enabling us to serve clients at every stage of their organizational journey. Our core areas of specialization include:

- **[Specialization Area 1]** — [Brief description of service offering and value delivered]
- **[Specialization Area 2]** — [Brief description of service offering and value delivered]
- **[Specialization Area 3]** — [Brief description of service offering and value delivered]
- **[Specialization Area 4]** — [Brief description of service offering and value delivered]

Our team combines [X]+ years of collective experience with hands-on industry knowledge, allowing us to move quickly from diagnosis to action without sacrificing rigor or depth.

What sets us apart is **how we work**, not just what we deliver. We embed ourselves alongside our clients rather than operating at arm's length, ensuring our recommendations are practical, context-sensitive, and built for real-world implementation. We do not believe in one-size-fits-all frameworks; instead, we design every engagement around the specific needs, constraints, and ambitions of the organizations we serve. The result is a consulting experience that is **collaborative, accountable, and consistently focused on outcomes that matter**.

INDUSTRY CONTEXT

Please provide the client's industry, sector, or any relevant details about their business so we can craft accurate and tailored industry context for the proposal.

6 Strategic Importance

STRATEGIC CONTEXT

The Cascade Health Network engagement is directly aligned with the network's strategic imperative to deliver high-quality, coordinated care across its full continuum of services while operating with greater efficiency and fiscal discipline. Key business drivers behind this initiative include growing patient volume demands, increasing operational complexity across network sites, the need to eliminate redundant workflows that erode both productivity and care quality, and the pressure to position the network for sustainable, scalable growth in an evolving healthcare landscape. By partnering with us on this engagement, the network will realize **measurable strategic benefits** — including streamlined care coordination, stronger organizational alignment, and a resilient operational foundation capable of supporting both immediate performance goals and long-term mission-driven growth.

BUSINESS IMPACT

By identifying and eliminating operational redundancies across the network, we expect to generate **meaningful cost savings** while simultaneously freeing clinical and administrative staff to focus on higher-value activities — directly improving both throughput and revenue capture. Our process improvement and performance management work will drive **measurable gains in operational efficiency**, reducing delays in care coordination, streamlining workflows, and establishing the reporting infrastructure needed to sustain those gains over time. Patients will experience **more consistent, better-coordinated care** as a result of the integrated framework we design and implement, strengthening patient satisfaction, retention, and the network's reputation in its served communities. Finally, the strategic clarity and organizational resilience we deliver will position Cascade Health Network with a **durable competitive advantage** — one grounded in stronger systems, aligned leadership, and the internal capacity to adapt and grow as the healthcare landscape continues to evolve.

7 Technical Requirements

TECHNOLOGY STACK

- **Electronic Health Record (EHR) Systems** — integration with existing clinical platforms to support data continuity and operational workflows
- **Health Information Exchange (HIE) Platforms** — enabling secure, interoperable data sharing across the network
- **Practice Management Systems (PMS)** — streamlining scheduling, billing, and administrative operations
- **Revenue Cycle Management (RCM) Software** — supporting financial performance tracking and reimbursement optimization
- **Business Intelligence and Analytics Platforms** (e.g., Power BI, Tableau) — delivering dashboards, performance reporting, and data visualization
- **Data Warehousing and Integration Middleware** — consolidating disparate data sources into a unified, queryable environment
- **Cloud Infrastructure** (e.g., Microsoft Azure, AWS, Google Cloud) — supporting scalable, HIPAA-compliant hosting and data storage
- **Patient Engagement and Portal Technologies** — enhancing care coordination and patient communication capabilities
- **Collaboration and Project Management Tools** (e.g., Microsoft Teams, SharePoint, Smartsheet) — supporting internal coordination and stakeholder engagement throughout the engagement
- **HIPAA-Compliant Communication Platforms** — ensuring all data exchange and stakeholder communication meets applicable regulatory standards
- **Identity and Access Management (IAM) Systems** — governing secure user access across integrated platforms
- **Legacy System Assessment Tools** — evaluating existing infrastructure for compatibility, gaps, and modernization opportunities

INTEGRATION REQUIREMENTS

Integration Requirements

Our solution for the Cascade Health Network will be architected to connect seamlessly with the client's existing technology ecosystem. We will address the following key integration points to ensure data continuity, operational efficiency, and a unified user experience across all systems:

- 1. Electronic Health Record (EHR) System Integration** — We will establish a secure, bi-directional data exchange with the organization's primary EHR platform (e.g., Epic, Cerner, or equivalent) using HL7 FHIR-compliant APIs. This integration will ensure that patient records, clinical workflows, and care coordination data remain synchronized in real time across all points of care.
- 2. Health Information Exchange (HIE) Connectivity** — We will integrate with the regional or statewide HIE infrastructure to enable secure sharing of patient health information across provider networks, supporting continuity of care and regulatory compliance with applicable data-sharing mandates.
- 3. Claims and Revenue Cycle Management (RCM) Platform** — Our solution will connect with the existing claims processing and RCM system via standardized EDI transactions (X12 837/835) and REST APIs, enabling streamlined billing workflows, denial management, and financial reporting without manual re-entry of data.
- 4. Enterprise Data Warehouse and Reporting Infrastructure** — We will integrate with the client's centralized data warehouse to feed consolidated clinical, operational, and financial data into existing business intelligence and performance dashboards, supporting leadership decision-making and regulatory reporting requirements.
- 5. Third-Party Patient Engagement and Telehealth Services** — We will connect with patient-facing platforms — including patient portal solutions, appointment scheduling tools, and telehealth services — through secure API integrations to deliver a cohesive, end-to-end patient experience while maintaining compliance with HIPAA privacy and security standards.

SECURITY REQUIREMENTS

Security and Compliance Standards

Our commitment to protecting client data and maintaining the highest standards of information security is fundamental to every engagement we undertake. We treat the confidentiality, integrity, and availability of client information as a core professional obligation — not an afterthought. The following outlines the specific security and compliance standards we uphold throughout the lifecycle of our work together.

Data Protection Standards

We handle all client data — including proprietary business information, operational data, personnel records, and strategic materials — in strict accordance with applicable data protection laws and industry best practices. Specifically:

- All client data is classified upon receipt and handled according to its designated sensitivity level
- Data is encrypted in transit using **TLS 1.2 or higher** and encrypted at rest using **AES-256 encryption** standards
- Client data is stored only in secure, access-controlled environments and is never commingled with data from other engagements
- We retain client data only for as long as required to fulfill the engagement or as mandated by applicable law, after which it is securely and permanently deleted or destroyed
- Data transfer between parties is conducted exclusively through secure, approved channels — no client information is transmitted via unsecured or personal email without explicit written authorization
- We maintain a formal **Data Handling and Retention Policy** that governs how all client information is collected, used, stored, and disposed of

Compliance Certifications and Regulatory Alignment

We are committed to operating in alignment with the regulatory frameworks and compliance standards most relevant to our clients' industries and geographies. Our practice adheres to the following:

- **General Data Protection Regulation (GDPR):** For engagements involving data pertaining to individuals in the European Union, we operate in full compliance with GDPR principles, including lawful basis for processing, data minimization, and individual rights obligations
- **[SOC 2 Type II — include if applicable to your practice]:** Our systems and processes are designed in alignment with SOC 2 Trust Service Criteria, covering security, availability, processing integrity, confidentiality, and privacy
- **HIPAA:** For engagements involving protected health information (PHI), we adhere to all applicable HIPAA Privacy and Security Rule requirements and are prepared to execute a **Business Associate Agreement (BAA)** upon request
- **CCPA/CPRA:** For engagements involving California residents' personal information, we comply with the California Consumer Privacy Act and California Privacy Rights Act requirements
- **[Add any additional certifications held by your practice, such as ISO 27001, FedRAMP, PCI-DSS, or NIST framework alignment]**

We remain current with evolving regulatory requirements and proactively update our policies and practices to reflect changes in applicable law. Where a client operates under a specific regulatory framework not listed above, we will work

collaboratively with the client's compliance and legal teams to ensure our engagement practices align with their requirements.

Authentication and Access Control

We apply the principle of **least privilege** across all systems and platforms used in connection with client engagements. Access to client information is granted strictly on a need-to-know basis and is governed by the following controls:

- **Multi-Factor Authentication (MFA)** is required for all team members accessing client data, collaboration platforms, or project management systems
- Role-based access controls are established at the outset of each engagement, ensuring that only authorized personnel can access specific data sets or project materials
- Access credentials are unique to each individual — shared logins are strictly prohibited
- Access privileges are reviewed and updated promptly when team members join or depart an engagement, and all access is formally revoked upon project completion
- Client-facing portals and shared workspaces are protected by strong password policies, with minimum complexity and rotation requirements enforced
- All access activity within our systems is logged and subject to periodic audit review

Security Best Practices

Beyond technical controls, we embed security-conscious practices into our daily workflows and organizational culture. The measures we implement include:

- **Regular Security Awareness Training:** All team members complete formal security awareness training on an ongoing basis, covering topics such as phishing recognition, social engineering, secure data handling, and incident response protocols
- **Endpoint Security:** All devices used to access client information are protected by up-to-date antivirus software, endpoint detection tools, and operating system patches
- **Secure Collaboration Tools:** We use only vetted, enterprise-grade platforms for communication, file sharing, and project collaboration — consumer-grade or unapproved applications are not used for client work
- ****Vendor and Third-**

8 Success Metrics

KEY PERFORMANCE INDICATORS (KPIs)

Key Performance Indicators

To ensure accountability and demonstrate measurable impact throughout the Cascade Health Network engagement, we have identified the following KPIs spanning both operational performance and strategic outcomes. These indicators will serve as the shared benchmark against which our collective progress is evaluated.

1. Operational Redundancy Reduction Rate

We will measure the percentage reduction in duplicated workflows, processes, and administrative functions identified during the assessment phase. Our target is to identify and eliminate or consolidate **at least 25% of redundant operational processes** across the network within the defined project timeline. Progress will be tracked through baseline process mapping completed in Phase 1 and validated against post-implementation audits.

2. Care Coordination Efficiency Score

Using a composite scoring model developed during the design phase, we will assess improvements in cross-site care coordination — including referral completion rates, inter-departmental handoff timeliness, and patient transition accuracy. Our target is a **minimum 20% improvement** in composite coordination scores relative to the pre-engagement baseline.

3. Patient Outcome Indicators

We will track a defined set of network-wide clinical and service quality metrics — including readmission rates, care plan adherence, and patient satisfaction scores — to measure the downstream impact of operational improvements. Our target is a **measurable, statistically significant improvement** in at least two of these indicators within six months of implementation.

4. Stakeholder Alignment and Engagement Quality

As a qualitative measure, we will conduct structured feedback surveys and interviews with key leadership, clinical, and administrative stakeholders at defined project milestones. Success is defined as achieving an **average stakeholder satisfaction rating of 80% or higher**, reflecting confidence in the process, communication quality, and the relevance of recommendations delivered.

5. Strategic Framework Adoption Rate

We will measure the degree to which recommended frameworks, tools, and

processes have been formally adopted and integrated into day-to-day network operations by project close. Our target is **full adoption of no less than 85% of prioritized recommendations**, with documented ownership assigned for each initiative to ensure sustained accountability beyond the engagement period.

6. Return on Engagement Value (ROEV)

As a summary performance indicator, we will work collaboratively with Cascade Health Network leadership to quantify the projected financial and operational value generated through identified efficiencies, reduced redundancies, and improved care delivery. Our target is to demonstrate a **projected value return of at least 3x the investment** in this engagement, supported by a structured value-realization report delivered at project close.

SUCCESS CRITERIA

Success Criteria

The following criteria define the measurable standards against which we will evaluate the success of the Cascade Health Network engagement. These criteria are established collaboratively at the outset to ensure alignment between our team and network leadership throughout every phase of the project.

1. **Operational Redundancies Identified and Eliminated** — We will conduct a comprehensive operational assessment and deliver a prioritized inventory of redundancies across the network. Success is achieved when a minimum of 80% of identified redundancies have an approved remediation plan in place, with measurable efficiency gains documented within the defined project timeline.
2. **Care Coordination Framework Implemented** — We will design and support the rollout of a network-wide care coordination framework. Success requires that the framework is formally adopted across all participating network entities, with baseline and post-implementation metrics demonstrating a quantifiable improvement in care transition processes and inter-organizational communication.
3. **Actionable Strategic Recommendations Delivered and Accepted** — We will deliver a complete strategic roadmap with prioritized, implementation-ready recommendations. Success is defined by formal acceptance of the roadmap by network leadership and the initiation of at least one priority initiative within 30 days of final delivery.
4. **Performance Management Infrastructure Established** — We will design and deploy a standardized performance reporting structure. Success requires

that key performance indicators (KPIs) are defined, baseline data is captured, and the network has a functioning reporting cadence operational before engagement close.

5. **Stakeholder Alignment and Organizational Readiness Achieved** — We will execute a structured stakeholder engagement and change management process. Success is measured by documented alignment among senior leadership on strategic priorities and a post-engagement readiness assessment confirming the network's internal capacity to sustain recommended changes independently.
6. **Measurable Improvement in Patient Outcome Indicators** — We will establish agreed-upon patient outcome benchmarks at engagement launch. Success requires demonstrable progress against at least two outcome indicators — such as reduced readmission rates, improved care transition completion rates, or enhanced patient satisfaction scores — within the scope and timeframe of the engagement.

9 Terms & Conditions

PAYMENT TERMS

Payment Terms

We propose a milestone-based payment schedule tied to key project deliverables. This structure ensures aligned expectations, maintains project momentum, and protects the interests of both parties throughout the engagement.

Payment Schedule

1. **Project Initiation — 50% of the agreed project fee** due upon execution of this agreement and prior to commencement of work.
2. **Project Completion — 50% of the agreed project fee** due upon delivery of final project files and materials.

Our Standard Terms

- All invoices are due within **14 days** of the invoice date.
- Invoices are issued electronically via email to the billing contact specified by the client.
- Accepted payment methods include bank transfer and any other methods mutually agreed upon in writing prior to project commencement.
- A late payment fee of **1.5% per month** will be applied to any outstanding balances not received within the agreed payment window.
- Work will not commence or continue — including delivery of final assets — until all payments due at that stage have been received in full.
- Any scope changes or additions agreed upon during the project will be invoiced separately and subject to the same payment terms outlined above.
- All fees are exclusive of applicable taxes, which remain the responsibility of the client.

Should the client require alternative payment arrangements, we are open to discussing options prior to finalizing this agreement.

CONTRACT DURATION

Recommended Engagement Duration

We recommend an initial engagement term of **12 months** for the Cascade Health Network project. This timeframe allows sufficient runway to complete discovery,

design, implementation, and stabilization phases without compression, while providing measurable milestones against which progress can be evaluated.

Engagement Structure

- **Months 1-2:** Discovery, requirements gathering, and project foundation
- **Months 3-7:** Core development, configuration, and integration work
- **Months 8-10:** Testing, quality assurance, and stakeholder validation
- **Months 11-12:** Deployment, go-live support, and knowledge transfer

Renewal and Ongoing Support Options

Following the initial 12-month engagement, we offer the following continuation arrangements to ensure long-term stability and continued value for Cascade Health Network:

1. **Ongoing Managed Support Retainer** – A monthly retainer engagement providing dedicated support, system monitoring, and iterative enhancements on a rolling 3-month basis, renewable at mutual agreement.
2. **Annual Maintenance Agreement** – A structured 12-month renewal covering scheduled updates, compliance reviews, and priority issue resolution, offered at a preferred rate for returning clients.
3. **Project-Based Extensions** – Discrete follow-on engagements scoped and priced independently for new features, expansions, or strategic initiatives as organizational needs evolve.

We recommend initiating renewal discussions no later than **Month 10** to ensure continuity of service and uninterrupted coverage beyond the initial term.

CONFIDENTIALITY REQUIREMENTS

Confidentiality and Data Protection

We take the protection of client information seriously and hold ourselves to the highest standards of discretion, security, and professional responsibility. The following commitments govern how we handle all confidential information shared with us throughout our engagement.

Non-Disclosure Agreement

Prior to commencing any substantive work, we are prepared to execute a mutual non-disclosure agreement (NDA) that reflects the specific needs of your organization. Our standard confidentiality commitments include:

- Treating all client information, materials, and communications as strictly confidential

- Restricting disclosure of sensitive information to team members directly involved in the engagement
- Maintaining confidentiality obligations both during and after the conclusion of our work together
- Honoring any existing NDAs or third-party confidentiality obligations you are subject to

We welcome the use of your organization's preferred NDA template and will review and execute it promptly upon request.

Handling of Sensitive Client Data

We recognize that our work may bring us into contact with proprietary business information, financial data, personnel records, customer data, or strategic plans. Our handling practices include:

- Collecting only the information necessary to complete the defined scope of work
- Using client data exclusively for purposes directly related to the engagement
- Never sharing, selling, or repurposing client data for any other use
- Securely disposing of sensitive materials upon project completion or upon written request

Intellectual Property and Work Product Ownership

We believe that what we build together belongs to you. Unless otherwise agreed in writing:

- **All deliverables, reports, strategies, and work product created specifically for your engagement are assigned to you upon receipt of final payment**
- We retain no rights to reproduce, distribute, or repurpose your proprietary work product without explicit written consent
- Any pre-existing tools, frameworks, or methodologies we bring to the engagement remain our intellectual property, but you are granted full rights to use all outputs and deliverables derived from them
- We will clearly identify any third-party materials incorporated into deliverables and ensure their use complies with applicable licensing terms

Information Security Measures

We maintain practical, consistent security practices designed to protect the confidentiality and integrity of your information:

- All digital files and communications are handled through password-protected, encrypted systems and devices
- Sensitive documents are stored in access-controlled environments with restricted permissions
- Electronic communication of confidential materials is conducted through secure channels, and we avoid transmitting sensitive data via unsecured platforms
- Physical documents containing confidential information are stored securely and shredded when no longer required
- We conduct regular reviews of our security practices to ensure they remain current and effective

Our Commitment

We understand that trust is foundational to every successful engagement. We do not take lightly the access and confidence you extend to us, and we are committed to honoring that trust with the utmost professionalism throughout our time working together and beyond.

10 Communication & Q&A

Q&A PROCESS

Communication Plan

We believe that clear, consistent communication is the foundation of a successful engagement. Our communication plan is designed to keep all stakeholders informed, aligned, and confident in the progress of the project at every stage.

Primary Point of Contact

We will designate a single dedicated point of contact responsible for all client communications throughout the engagement. This individual will serve as the central hub for questions, feedback, status updates, and escalations, ensuring nothing falls through the cracks and that the client always knows exactly who to reach.

Communication Channels

We will use the following channels to facilitate smooth, efficient communication:

- **Email** for formal updates, document sharing, and written confirmations
- **Video conferencing** (via Zoom or the client's preferred platform) for scheduled meetings and working sessions
- **Phone** for time-sensitive matters requiring immediate attention
- **Project management platform** for task tracking, milestone visibility, and centralized document storage

We will defer to the client's preferred tools and platforms wherever possible to minimize friction.

Meeting Cadence

We propose the following recurring meeting schedule to maintain momentum and alignment:

1. **Kickoff Meeting** — A comprehensive session at the start of the engagement to align on goals, timelines, roles, and expectations
2. **Weekly Check-Ins** — Brief standing meetings (30 minutes) to review progress, address questions, and confirm priorities for the week ahead
3. **Monthly Review Sessions** — Deeper working sessions to assess milestone completion, review deliverables, and adjust the project plan as needed
4. **Final Review and Closeout Meeting** — A formal session at the conclusion of the engagement to present final deliverables, gather feedback, and confirm

successful completion

All meetings will be scheduled in advance with a confirmed agenda distributed no later than **24 hours prior**.

Reporting Schedule

We will provide the following structured reporting throughout the engagement:

- **Weekly status updates** delivered every Friday via email, summarizing completed tasks, upcoming priorities, and any items requiring client input
- **Milestone reports** issued upon the completion of each project phase, outlining what was delivered, key outcomes, and next steps
- **Issue and risk logs** maintained and shared on a rolling basis to ensure the client has full visibility into any challenges and our proposed resolutions

Handling Questions and Feedback

We are committed to being responsive and thorough in our handling of all client input. Our approach is as follows:

- All questions submitted via email will receive an **acknowledgment within four business hours** and a substantive response within **one business day**
- Feedback on deliverables will be formally logged, reviewed, and addressed within an agreed-upon revision window outlined at the start of each phase
- Where feedback requires a meaningful change in scope or direction, we will proactively communicate the potential impact on timeline and budget before proceeding
- Urgent matters may be escalated via phone at any time during business hours, with our point of contact available to respond promptly

Our Commitment

We are proactive communicators. We will not wait for the client to ask for an update — we will provide regular, transparent information so that the client always has a clear picture of where the project stands. We welcome open dialogue and view the client's feedback as an essential input to delivering outstanding results.

Q&A DEADLINE

April 24, 2026