

KII BUSINESS OS / OPERATIONS FIRST

Make the first 90 days executable, Operations first.

This document turns the proposed engagement into the decisions, access, source material, named owners, and acceptance evidence KII and the delivery team need before implementation starts. Fill it in before kickoff and confirm it in the first Friday review.

90 Days, signature to handover	4 Milestones, USD 30,000 each	1 On-site week in Zurich, included	120 USD thousand total, taxes excluded
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ON-SITE One week in Zurich Included in the price, with travel and lodging covered by MIOSA. Target: the week of October 20, 2026.	RHYTHM Friday review A 30 to 60 minute review, a written weekly status, and recorded decisions.	OWNERSHIP KII owns the platform Source, modules, configuration, and documentation live in KII's own repository.
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How this document is used: KII completes the owner table, the access table, and the policy inputs before kickoff. MIOSA converts the confirmed answers into the environment plan, the access plan, and the acceptance checks for each milestone.

02 Who provides what
03 Named owners before kickoff
04 Systems and access
05 Representative Operations examples
Roadmap, Day 0 to Day 90

06 Department sequence
07 Security and policy inputs
08 Readiness and confirmation

MIOSA LLC. Agency MIOSA is the delivery practice of MIOSA LLC.

WHAT GOOD LOOKS LIKE AT DAY 90

Operations live with real users, a second department live, runbooks and admin training complete, and the full source handed over in KII's own repository.

WHAT WOULD MAKE KII STOP

If the Operations pilot does not earn its place, KII stops after Milestone 1 with no further fees, keeps everything delivered to that point, and MIOSA disposes of KII data as the Data Management Plan states.

TWO SIDES OF ONE ENGAGEMENT

KII brings the business, the access, and the decisions. MIOSA brings the build and the handover.

KII inputs WHAT ONLY KII CAN PROVIDE	MIOSA outputs WHAT MIOSA DELIVERS AND HANDS OVER
One named owner per decision, from the owner table on the next page.	The foundation installed on KII infrastructure, in KII's own data center.
Read-only access to the current systems, through KII-approved methods.	The Operations vertical slice, with the mirror layer and human approval gates.
A small set of real Operations examples: signals, tickets, cases, time entries.	Microsoft Teams integration via Microsoft Graph.
A data center environment for the install, and the internal model endpoint.	A shared project workspace, with session handoff and role-based visibility.
A 30-minute interview slot per team member, and a Friday review slot.	Documentation, the company glossary, SOPs, and runbooks.
The classification and policy decisions that set the handling boundary.	Admin training and full source handover in KII's repository by Day 90.

READ IT IN THIS ORDER Owners, then access, then examples, then the roadmap. Each one unlocks the next.	FILL IT IN BEFORE KICKOFF The owner table, the access table, and the policy inputs are the inputs to the environment plan.	CONFIRM IT ON FRIDAY Every confirmed answer is recorded in the first Friday review and becomes the baseline.
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One line on change control: fixed-price change orders only, never hourly billing. The three paths KII can take when new work appears are set out on the roadmap page.

NAMED OWNERS BEFORE KICKOFF

Every decision has one accountable person, not a committee.

Name the person who owns each decision. Where a decision needs a second signature, the second signature is confirmation, not a second owner. Owners are needed by Day 0 unless the table states otherwise.

ROLE	DECIDES	NAME (FILL IN)	NEEDED BY
Executive sponsor	Confirms scope, milestone acceptance, and any change to dates.	_____	Day 0
Engineering evaluator	Reviews the architecture, integration approach, and technical acceptance.	_____	Day 0
Business and budget owner	Approves the commercial schedule, invoices, and any scope change.	_____	Day 0
Operations owner	Owens the Operations pilot, the workflows, and daily user acceptance.	_____	Day 0
Security and data owner	Approves access methods, data handling, and the Data Management Plan.	_____	Day 0
Teams and Microsoft 365 admin	Grants Microsoft Graph access and confirms tenant policy for the integration.	_____	Day 10
Data center and infrastructure owner	Approves the install environment, the network path, and the internal model endpoint.	_____	Day 10

Escalation: any blocked access or policy decision goes to the named owner with a written 24-hour response path. MIOSA records the ruling in the decision log.

Schedule rule: a delay in these client decisions moves the affected milestone, by the length of the delay. The delivery team will not invent authority, data meaning, or acceptance criteria to preserve a date.

HOW A DECISION GETS MADE AND RECORDED

01 RAISE

In writing, with an owner

Any decision that affects scope, dates, access, or data is raised in writing and pointed at the named owner.

02 RULE

The owner decides

The named owner makes the call. Where a second signature is needed, it is confirmation, not a second owner.

03 ESCALATE

Sponsored within a day

If the owner is blocked or unavailable, the executive sponsor rules within 24 hours of the written request.

04 RECORD

Written into the log

MIOSA writes the ruling into the decision log, and the plan, the dates, and the access all move with it.

ONE OWNER, ONE DECISION

A decision with two owners has none. Naming one person per row is the whole point of the table above.

WHAT BLOCKS A MILESTONE

Missing access, an undecided policy input, or an unconfirmed example. Each one moves the date by the length of the delay.

WHAT DOES NOT BLOCK IT

Silence, a meeting, or a message. None of these create authority, and none of them expand the signed scope.

READ-ONLY MIRROR, THE CURRENT TOOLS KEEP RUNNING

Connect the current systems without disrupting live operations.

MIOSA reads from the current systems through a mirror layer. Nothing writes to a production system without the approval of an authorized KII role. Access type is stated for each system.

SYSTEM	WHAT WE NEED	ACCESS TYPE	OWNER	READY
Autotask	Accounts, contracts, tickets, and time entries for the Operations mirror.	Read-only mirror		☐
KII ERP (in progress)	Current schema, APIs, and a staging environment as it replaces Autotask.	Read-only mirror, API		☐
Ticketing	Ticket sources, status fields, priority rules, and escalation paths.	Read-only mirror		☐
Time billing	Time entries and billing rules tied to tickets and cases.	Read-only mirror		☐
Microsoft Teams via Microsoft Graph	Graph application access to meetings and channels, with tenant consent.	Microsoft Graph API		☐
Repositories	Read access to current code, then a KII-owned target repository for the fork.	Read, then admin on KII repo		☐
Documentation	Existing documentation as it stands, so it is reused and completed, not rewritten.	Read-only		☐
Internal RAG	Current retrieval setup, sources, and embedding approach for reuse.	Read-only, API		☐
vLLM endpoint and model	Endpoint details and the model name that serves operations.	API		☐
Data center environment	Target hosts, network path, storage, and a service account for the install.	Admin, install		☐
Accounting systems (later)	Read-only integration in a later phase. Migration is out of scope for these 90 days.	Read-only, later phase		☐

ACCESS READINESS, GATE BY GATE

01 OWNER

A name per system

Every row above has a named KII owner before the request goes out.

02 REQUEST

Ask the right way

MIOSA requests access system by system, using KII's approved method only.

03 APPROVE

Method confirmed

KII confirms the access path, the credential store, and the scope of each account.

04 GRANT

Read-only by default

Access is granted read-only. Production writes stay behind the approval gate.

05 REVIEW

Rechecked at milestones

Every account is reviewed at each milestone and removed when no longer needed.

Do not send by email: production secrets, shared administrator credentials, or unredacted client data. Credentials are exchanged through KII's approved method and stored under the Data Management Plan.

MEASURE THE SYSTEM AGAINST REAL WORK

Prepare a small set of real examples, then confirm the expected result.

SIGNALS

- ☐ A set of real signals from client environments
- ☐ Expected classification and routing for each
- ☐ Known duplicates and ambiguous cases
- ☐ Thresholds for an urgent signal

TICKETS

- ☐ Open and closed tickets across priorities
- ☐ Examples of priority changes
- ☐ Escalation and handover examples
- ☐ Expected status at each step

CASES

- ☐ Representative cases with owner and history
- ☐ Resolution notes and linked tickets
- ☐ At least one case that went wrong
- ☐ Expected summary for each case

TIME ENTRIES

- ☐ Time entries tied to tickets and cases
- ☐ Billing rules and rounding
- ☐ Examples that are unclear or disputed
- ☐ Expected billing output

A HANDOVER EXAMPLE

- ☐ One task that moves from one person to another
- ☐ The context each person needs
- ☐ Where the context currently lives
- ☐ What full context would include

A CLIENT REPORT

- ☐ One periodic report KII sends to a client
- ☐ Source data and manual steps
- ☐ Review and approval before sending
- ☐ Expected content and layout

How these are handled: examples are read through the mirror layer, stay on KII infrastructure for the KII production platform, and are governed by the Data Management Plan. Where an example is shared with MIOSA for delivery work, it is handled under that plan as well.

ACCEPTANCE ATTRIBUTE	WHAT KII CONFIRMS	OWNER
Correct	What outcome counts as correct, including allowed variance.	_____
Complete	Which fields, evidence, and actions must be present.	_____
Timely	The maximum acceptable response time.	_____
Safe	Which actions require human approval, or are prohibited.	_____

KII confirms these four attributes once, and every milestone is measured against them.

NINETY DAYS, FOUR MILESTONES, ONE RULE FOR ANYTHING NEW

From signature to a governed, owned platform, one department at a time.

DAYS 0 TO 10	ON-SITE WEEK	DAY 30	DAY 45	DAY 70	DAY 90
Mobilize (remote)	Operations audit and install	M1 Operations pilot	M2 Operations live	M3 Second department wave	M4 Company rollout and handover

MILESTONE	DAYS	WHAT IS DELIVERED	ACCEPTANCE	INVOICE
M1 Mobilization and Operations Pilot	Days 0 to 30	NDA and Data Management Plan countersigned, access, environment plan, 30-minute interviews, one on-site week, foundation installed on KII infrastructure, Operations pilot running on mirrored data with human approval gates.	Operations pilot runs on mirrored data with approval gates, confirmed in the Friday review.	USD 30,000 at signature
M2 Operations Live	Day 45	Real users live, Microsoft Teams integration via Microsoft Graph, shared project workspace with session handoff, role and data governance.	Accepted with real users working in the system.	USD 30,000 on acceptance
M3 Second Department Wave	Day 70	The second department chosen at kickoff, plus SOP and documentation completion.	Department live and SOP accepted.	USD 30,000 on acceptance
M4 Company Rollout and Handover	Day 90	Remaining in-scope departments, runbooks, admin training, and full source handover in KII's own repository.	Handover accepted and admin training complete.	USD 30,000 on acceptance

CHANGE CONTROL: FIXED-PRICE CHANGE ORDERS ONLY

KII asks in writing. MIOSA returns an impact assessment within 3 business days: scope, fixed price, and schedule effect. KII then chooses one of three paths.

PATH 1 / SWAP

Trade it out

Drop in-scope work of equal size and take the new item instead, at no cost. Nothing is added to the price.

PATH 2 / DEFER

Add it to the roadmap

Put it after Day 90 and plan it as a later phase, quoted separately when KII is ready.

PATH 3 / ADD

Sign a change order

Sign a fixed-price change order and the work starts only after signature. Billed on signature unless the order states otherwise.

Nothing outside the signed scope is started. Messages, meetings, demos, and proposals never expand scope on their own. Dates move when KII dependencies (access, decisions, examples, reviews) are late, by the length of the delay. After Day 90 is not included in the price: accounting migration, deeper agent automation, and other group companies are each quoted separately. Weekly rhythm throughout: a Friday review of 30 to 60 minutes, a written weekly status, and recorded decisions.

OPERATIONS FIRST, THEN THE NEXT WAVE

One department proves the model, then it spreads on evidence.

WAVE ONE / OPERATIONS

Signals, tickets, cases, time billing

Operations runs through the busiest, most measurable work in the company and every step leaves a record. It is the smallest slice that proves governed shared context in real conditions.

DOCUMENTATION COMPLETION PLAN

30 to 40 percent toward complete, in parallel

- Reuse existing repositories and documentation as they stand.
- Document the Operations workflow as it is mapped on-site.
- Move documentation from about 30 to 40 percent toward complete.
- Company glossary so people and agents use KII's terms.

WAVE TWO / CANDIDATES

Chosen at kickoff

- ☐ Service delivery
- ☐ Sales and client management
- ☐ Administration and finance, excluding accounting migration

The second wave is confirmed in the first Friday review, based on the criteria on the right.

SELECTION CRITERIA

- Enough real signal volume to test the model.
- Systems ready enough to mirror read-only.
- An owner available for the Friday review.
- A measurable acceptance result.
- Low disruption risk to live operations.
- Direct value to the Operations team already live.

Principle: one foundation, then one department at a time. Each wave is accepted before the next begins, so KII always sees a working result before committing more of the organization to it.

WHAT WAVE TWO NEEDS

- A named owner from the department.
- Its systems mirrored read-only.
- Its own representative examples.
- A first Friday review date.

WHAT STAYS THE SAME

- One foundation, one governance model, one glossary.
- The same read-only mirror and human approval gates.
- The same Friday review rhythm.
- The same source handover into KII's repository.

POLICY BEFORE PRODUCTION DATA

State the control, then let the platform follow it.

The platform is governed at three levels: user, role, and data. These inputs define the boundary. MIOSA needs each item in writing before production data enters the system.

INPUT	WHAT KII PROVIDES	OWNER	NEEDED BY
Data classification	Levels, labels, which levels may enter the platform and the mirror, and which data is Restricted Data.		Day 0
Access methods	Approved remote access, network path, and credential handling.		Day 0
Model usage policy	What the internal model on vLLM may handle, and which data may be used with MIOSA's delivery AI tools.		Day 10
Retention	How long data is kept, and what is deleted at the end of the engagement.		Day 10
Incident contacts	Named contacts and the escalation path for a security incident.		Day 0
Client notification requirements	When and how KII's clients are told who handles their data, including Swiss FADP and EU GDPR cross-border disclosure.		Day 10
Swiss FADP and EU GDPR	Data residency, subject access, and deletion obligations that apply to KII and its clients.		Day 10

Fixed by design: the production platform runs on-prem in KII's own data center, and Operations use the internal model served through vLLM. Production data stays on KII infrastructure, and remote access follows KII-approved methods only.

Required before production: the security and data owner approves the access methods, the retention rules, and the model usage policy. Until then, only mirrored data in a controlled environment is used.

Where MIOSA's delivery tools sit: MIOSA's team uses commercial AI services, including United States based providers, so KII data shared with MIOSA may be processed outside Switzerland. The Data Management Plan sets out both zones and the Restricted Data rule.

GOVERNED AT THE USER LEVEL
Each person signs in with their own identity, and sessions are visible to the team according to role.

GOVERNED AT THE ROLE LEVEL
A role decides what a person may see and do, and which actions need an approval gate.

GOVERNED AT THE DATA LEVEL
Classification decides which records and data levels may enter the mirror and the workspace.

READINESS AND CONFIRMATION

Start when the inputs are owned, accessible, and testable.

GATE 1

Before Day 0

- ☐ SOW signed by both parties
- ☐ NDA and Data Management Plan signed
- ☐ All owners named in the owner table
- ☐ Kickoff date set

GATE 2

Before the on-site week

- ☐ Access granted for the listed systems
- ☐ Representative Operations examples prepared
- ☐ On-site dates and location confirmed in Zurich
- ☐ Friday review slot set in the calendar

GATE 3

Before production data

- ☐ Data classification approved, including Restricted Data
- ☐ Access methods and credential handling approved
- ☐ Retention rules approved
- ☐ Model usage policy approved

Readiness item	Ready	Owner	Date
SOW signed by both parties	☐		
NDA and Data Management Plan signed	☐		
Executive sponsor and acceptance authority named	☐		
Access granted for the listed systems	☐		
Representative Operations examples prepared	☐		
On-site week dates and location confirmed	☐		
Friday review slot and escalation path set	☐		

CONFIRMATION	NAME	ROLE	SIGNATURE	DATE
KII				
MIOSA LLC	Roberto H. Luna	Principal Architect and Engagement Lead		

Definition of ready: every critical input has a named owner, an approved access path, and a testable acceptance consequence.