

● SAMPLE DELIVERABLE

EXECUTIVE AI ADVISORY · BUILD OVERSIGHT

Implementation Oversight Brief

Whoever builds — my delivery partners or your team — I stay accountable for the outcome. This brief covers the client-document-intake automation (Last Rev, \$52K fixed SOW): where the build stands, what I pushed back on, and the gates it must clear before go-live.

PREPARED FOR

Meridian & Frost, PLLC
Marcus Bell · Dana Whitfield

DATE

June 27, 2026
Ahead of the Jul 29 gate review

PREPARED BY

Brad Taylor
Fractional Chief AI Officer

Build snapshot

Last Rev is my delivery partner on this build. That is exactly why this brief exists: when the builder is my own firm, you should get a stricter reviewer, not a softer one. The build is on plan for the August go-live, subject to the three gates on page 3.

MILESTONE	OWNER	DATE	STATUS
Karbon connector — document-request sync, per-user permissions	Last Rev	May 30	● Done
SafeSend integration — organizer delivery and receipt tracking	Last Rev	Jun 20	● Done
Organizer-status dashboard — what's outstanding, per client, per admin	Last Rev	Jul 11	● In progress
UAT — 5 admin staff run a full organizer cycle on live data	Devon Marsh	Jul 21–25	● Scheduled
Go-live gate review — go/no-go against the page-3 gates	Brad · Marcus	Jul 29	● Scheduled

What I pushed back on this month

Rejected — the service-account shortcut

Last Rev proposed reading client documents through a single service account to save integration time. Rejected: a service account sees everything, so the system could surface documents to an admin who has no business seeing them. Per-user, permission-aware retrieval is non-negotiable, even though it added four days to the connector. It still landed May 30.

Deferred (my recommendation) — e-signature chasing

Adding e-signature chasing to v1 costs +\$9K and +3 weeks, pushing go-live into September — extension season, the worst month to change the intake process. I recommended deferring it to v1.1 in November. The decision sits with Marcus, due Jul 22.

\$0 change order — the rework was their miss

The SafeSend receipt-status sync missed amended organizers, a case named in the SOW spec. Last Rev asked to treat the rework as a change request; I held them to the fixed SOW. It was in spec, so it's theirs — no cost to you, no change to the ship date.

The three go-live gates

All three must be green at the Jul 29 review or the system does not touch client tax data in August. No partial credit.

§7216 consent executed

Refreshed consent language live before any client tax-return information flows through the system. Counsel's draft lands Jul 3; partner sign-off folds into the Jul 8 vote.

Dropbox migration complete

The one partner team still on a personal Dropbox migrates to SharePoint by Jul 31 (Tom Osei owns it). Until then, that team's folders stay excluded from every integration.

UAT pass — zero Tier 3 exceptions

Five admin staff process a full organizer cycle, Jul 21–25, with zero instances of Tier 3 data reaching anywhere it shouldn't. One exception restarts the clock.

Acceptance criteria — checked at the gate review, not after

- Every document request is traceable — who asked, what arrived, when, per client.
- Per-user permissions verified by test — proven with a test account, not asserted: no access to the client, no documents.
- Rollback plan documented — one page: how intake returns to fully manual within a day.
- DLP rules cover the new path — the M365 rule extends to intake.
- Training material ready before go-live — done in UAT week.

If a gate slips, the go-live moves

September is off the table — that's extension season, the worst possible month to change how documents come into the firm. A slipped August means an October go-live. I would rather tell you that on July 29 than have you discover it in September.

Why this document exists. You should never have to referee between strategist and builder. Every pushback on page 2 is written down where you can check it. Separation of duties isn't a courtesy — it's the product.

About this sample

This is build oversight on an advisory retainer: milestones, written pushback, and go/no-go gates the client can hold me to — even when the builder is my own delivery partner. Meridian & Frost is a fictional composite client; the oversight discipline is exactly what you'd get.

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