FULLY SYNTHETIC / NOT A REAL CUSTOMER ENGAGEMENT

AI/SaaS ADOPTION DECISION & IMPLEMENTATION READINESS SUPPORT | APPENDIX

Limited Pilot Implementation Plan

This fully synthetic sample defines the initial configuration, four-week limited pilot, evaluation, stop and recovery procedures, and handover that would follow approval for a fictional AI meeting-notes SaaS.

IMPLEMENTATION STATUS

Prerequisites Open / Not Started

Because the start conditions and customer representative approval are incomplete, no account has been created, no configuration has been changed, no data has been submitted and no pilot has been run. This plan is intended for use only after approval.

Document Control

Customer	Illustrative Company K8	**Prepared by**	Future Stack
Product	Illustrative Product A / Team-S	**Scope**	8 seats / 4 weeks
Document ID	FS-S06-SYN-PLAN-001	**Related report**	FS-S06-SYN-REPORT-001
Version	1.0 / Public sample	**Reference date**	2026-08-14 (JST)
Status	Public sample / Not for execution	**Distribution**	Corporate website | Fully synthetic sample

Service Scope and Responsibilities

Role	Responsibility	Decision authority
Future Stack	Requirements structuring, configuration design, question and evidence control, pre-start review, pilot support, evaluation, operating procedures and handover	Recommendations and records only
Customer representative	Approval of contracts, purchases, spending, use scope, start, stop and publication	Final approval
Customer administrator	Creation and configuration of the customer-owned account, user administration, and collection of logs and evidence	Customer environment administration
Vendor	Evidence-supported responses on plan conditions, pricing, regions, retention, features and support	Product-specification responses

Future Stack does not contract, purchase, spend or grant final approval on the customer's behalf. External transmission or operation of the customer environment may occur only after explicit approval of the target, authority and execution scope.

01 Initial Configuration and Pre-Start Review

Configuration begins only after vendor responses, paid-versus-free status, the spending limit, data boundaries and start approval are complete. Unverified screen names or feature names are not inferred.

1. Confirm conditions	2. Approve	3. Configure	4. Pre-start review	5. Start decision
Pricing, contract, regions, retention, features	Spending, scope, owners, start	Account, access, sharing, cost controls	Synthetic data, deletion, logs, recovery	Evidence review and representative approval

Initial Configuration Checklist

No.	Task	Configuration or verification	Evidence	Status
1	Confirm vendor conditions	Review evidence-supported responses to VQ-001–007, 009 and 010	Responses and quotation	PREREQUISITES OPEN
2	Resolve spending and contract branch	Approve either paid or free status, the tax-inclusive cap, and billing start and end	Approval record	PREREQUISITES OPEN
3	Create workspace	Customer-owned account, one workspace and 8 fixed seats; no mid-pilot changes	Account record	NOT STARTED
4	Roles and access	1 administrator + 7 users, 0 external guests and 0 public links	Access register	NOT STARTED
5	Sharing and export	External sharing disabled; export limited to approved synthetic outputs	Configuration record	NOT STARTED
6	Cost controls	Verify usage display, alerts, hard cap and disabled automatic additions	Screen and specification	PREREQUISITES OPEN
7	Data boundaries	Confirm processing and storage regions, retention, deletion and permitted exports	Specification and procedure	PREREQUISITES OPEN
8	Synthetic test set	Prepare the specified 20 cases using fictional participants and non-confidential topics	Test inventory	NOT STARTED
9	Pre-test deletion and recovery	Verify suspension, access revocation, log preservation and confirmed deletion	Pre-test record	PREREQUISITES OPEN
10	Start decision	After evidence for every start condition is reviewed, the customer representative separately approves the pilot start	Start approval	AWAITING APPROVAL

Permitted Inputs

- Generated meeting scripts
- Fictional participant names
- Non-confidential synthetic topics

Prohibited Inputs

- Customer, employee, personal or confidential data
- Authentication, payment or production data or exports
- Unapproved recordings, meetings or external sharing

For a real product, operating procedures would be written from vendor-verified screens. This synthetic version does not invent menu labels or configuration names.

02 Four-Week Execution and Evaluation Plan

Execution Schedule

Period	Objective	Primary activities	Deliverable or evidence
Pre-start	Readiness review and start decision	Review every start condition, access, data boundary, cost control, and deletion and recovery procedure	Start-decision record
Week 1	Controlled start	Begin with a small number of synthetic meetings; observe completion status, elapsed time and usage logs	Execution log and issue register
Week 2	Stability and operational review	Reconcile failures, cancellations, timeouts, retries, credit consumption and rework time	Interim review
Week 3	Quality evaluation	Evaluate required fields, owners, due dates, unsupported action items and prohibited data	Synthetic evaluation sheet
Week 4	Closure and decision	Stop or close the pilot; reconcile access, data and final billing; decide whether to continue	Closure record and decision memo

Candidate Acceptance Criteria for the Synthetic Pilot

ID	Candidate criterion	Measurement evidence	Status
PT-01	At least 18 of the specified 20 cases complete without manual re-upload	Processing log	Awaiting approval
PT-02	Median time to usable output is 10 minutes or less	Timestamp log	Awaiting approval
PT-03	100% of pilot users complete the data-boundary checklist	Checklist	Awaiting approval
PT-04	0 prohibited-data events and 0 unauthorized access, sharing or export events	Incident and access logs	Awaiting approval
PT-05	At least 95% required-field capture and 0 unsupported decisions or action items	Synthetic evaluation sheet	Awaiting approval
PT-06	0 owner or due-date errors and median rework time of 5 minutes or less	Evaluation sheet and work log	Awaiting approval
PT-07	Spending remains within the approved cap after vendor conditions are confirmed	Usage and billing logs	Prerequisites open

Daily Review

- Processing status and credit movement
- Prohibited data and unauthorized access
- Unexpected charges, sharing or exports
- Issues, owners and due dates

Weekly Review

- Interim acceptance-criteria results
- Cost, usage and spending cap
- Unresolved vendor questions
- Recommendation to continue, change or stop

Change Control

Proposed change	Treatment	Approval
Seats, period or spending cap	Fixed in the current scope. Record the reason, cost and risk, then re-estimate before any change.	Representative and procurement
Data, sharing or export scope	Obtain security or privacy review and new evidence before the change.	Representative and responsible function
Evaluation criteria	Do not relax criteria after seeing results. Apply an approved change only to a subsequent trial.	Representative

The thresholds are fully synthetic proposals awaiting customer representative approval, not measured results or guarantees of product performance. They must not be adjusted opportunistically during the pilot.

03 Stop, Recovery and Handover

Stop Conditions and Immediate Response

Stop condition	Immediate response	Evidence retained	Restart condition
Prohibited data detected	Stop new uploads, isolate the affected item, and stop unapproved processing and sharing	Incident log	Cause and boundary confirmed
Unexpected charge or credit depletion	Stop new processing, preserve usage and processing status, and ask the vendor	Billing and usage logs	Cause and cap confirmed
Unauthorized user, guest, public link or external sharing	Revoke access, stop sharing and reconcile the access register	Access-change record	Roles reapproved
Export outside the approved scope or deviation from role standards	Stop exports and preserve the affected file and activity logs	Export and audit logs	Scope reapproved
Required vendor response withdrawn or condition changed	Return the decision to on hold and reassess cost, contract and data conditions	Change notice and difference record	Reverification complete

Recovery and Restoration Procedure

Step	Action	Owner	Completion evidence
1	Stop new uploads, automated processing, pilot access and sharing	Customer administrator	Stop time and final access register
2	Preserve synthetic test logs, usage and billing evidence	Customer administrator / Future Stack	Evidence index
3	Perform only vendor-confirmed deletion and export procedures	Customer data owner	Deletion and export record
4	Reconcile unused credits, refunds and final billing	Customer procurement / finance	Billing-reconciliation record
5	Record unresolved questions and restart conditions	Future Stack / pilot owner	Updated issue register

Closeout Deliverables and Handover

Prepared by Future Stack

- Confirmed configuration and access register
- Vendor responses and condition differences
- Pilot results, issues and evaluation records
- Evidence index for stop, deletion and billing reconciliation
- Decision memo and customer-admin operating procedure

Decided by the Customer

- Production rollout or termination
- Contracts, purchases and spending
- User, data and sharing scope
- Operating owner and support contact
- Evidence retention and internal or external disclosure

Approval Record

Approval subject	Name and role	Date	Status or exception
Plan, spending and data boundaries	Example field (complete in a real engagement)	—	Prerequisites open / Awaiting approval
Pilot start	Example field (complete in a real engagement)	—	Awaiting approval

This document does not constitute implementation results, a product-performance assessment, an audit, certification, or legal, security, privacy, accounting or tax advice. It is a public sample; a completed field in the illustrative scenario does not approve a contract, purchase, expenditure or production rollout.