

Choose one workflow to evaluate

Companies I Canada | Tailorable proposal framework | 19 October 2026 | Version 2.0

Documents waiting for review, information entered twice, or AI use without clear ownership: start with one process your team can describe and assess.

We map the steps, systems and review points before proposing an implementation. Your team receives a defined scope, evidence to assess it and a clear choice about the next step.

Prepared for

Company [Legal name]

Team and process owner [Names and roles]

Province, sector and working language [To confirm]

Workflow and systems [To confirm]

Proposal reference [Reference]

Begin with a workflow discussion

- Describe the most recent problem, the current workaround, volumes and exceptions. Include the person who owns the process and a technical contact.
- Bring an anonymized or synthetic example if available. We confirm whether more discovery is needed or whether a defined implementation can be proposed.
- A discussion does not start a paid project or a recurring service. Each stage requires its own agreed scope and authorization.

Commercial terms are specific to your project

Scope, document and sample languages, schedule, price, currency, taxes, third-party costs and support will be agreed in a project-specific proposal. This framework contains no Canadian price quotation or fixed delivery commitment.

Discuss a workflow hello@dezotech.com · dezotech.com

Find the starting point that fits your team

Situation to confirm	Delivery to consider	Evidence to review
Professional services: documents arrive through several channels and need checking or approval.	Map one document workflow; assess existing tools or test document processing with human review.	A sample with known references, uncertain fields, review steps and an exception log.
Two applications require repeated entry or manual reconciliation.	Define one handoff or reconciliation between the two systems, subject to interface access.	Field mapping, test records, duplicates, discrepancies, failures and recovery.
One team already uses AI but ownership and permitted data are unclear.	Inventory uses and tools, define responsibilities and exercise practical controls in one use case.	A usable approval path, named owners, an exception record and a change or incident exercise.

Synthetic example: a document review queue

A professional-services team receives a document with a required field missing. The workflow prepares the available information, flags the gap and routes the item to a named reviewer. The reviewer corrects, returns or approves it before the next action. This is an illustration, not a client case or a measured result.

Use what is already available

We first confirm what your current applications can do, what their licences permit and which interfaces are available. Configuring an existing tool may be sufficient. Custom processing is considered when a specific need remains.

Next step

Choose one situation and identify the process owner, the systems and a representative example. We use these to define the smallest useful delivery and the evidence your team needs to assess it.

Agree the delivery and acceptance evidence

Discovery, when the process or feasibility is unclear

Delivery: a process map, inputs and exceptions, data and interface dependencies, risks, baseline assumptions and a recommendation. **Acceptance:** the agreed process is covered, sources and assumptions are identified, and the decision can be examined by your team. A recommendation to wait or stop can be a valid outcome.

Document workflow evaluation

Delivery: an agreed sample and test plan, reference data checked by people, configured test workflow, human review and exception handling, evaluation report and handover. **Acceptance:** the plan is executed, the sample and critical fields are covered, and errors, review effort and consumption are visible. A test that does not meet a target can still provide the evidence needed to stop or revise.

Existing-tool configuration or a two-system handoff

Delivery: the defined workflow or data exchange, permissions, rules, logs, exception path, test records and operating instructions. **Acceptance:** agreed scenarios run, records match the named source, duplicates and failures are handled in the tested conditions, and the team can demonstrate recovery.

AI governance for one team

Delivery: an inventory of agreed uses and tools, owners, data rules, approval and review steps, incident and change procedures, and a practical exercise. **Acceptance:** the team uses the controls in one agreed case and records an exception and its follow-up. Wider organizational monitoring, a legal opinion or certification requires a different scope.

Sample size, document types and languages, fields, systems, users, environments, training, test targets and revision rounds are agreed before work starts. These are not unlimited services. No performance improvement or accuracy level is promised by this framework.

Keep evaluation, production and support separate

Stage	Decision and completion evidence	What is agreed separately
Evaluate	Review the map or pilot report and decide to proceed, revise or stop.	Sample, metrics, test environment, evaluation cost and permitted data.
Prepare production	Confirm the validated scope, access, operating volume and responsibility for exceptions.	Production configuration, tests, transition and rollback, training, stabilization and corrective terms.
Operate	Assign owners and use logs, limits and recovery instructions.	Optional support, monitoring responsibility, coverage, hours, response terms, exclusions and extra work.

A pilot is not production

A document pilot runs in a controlled test environment. Production requires a separate decision and delivery scope. An existing-tool implementation and a custom production implementation are alternative paths for the same work; the same delivery is not billed twice. A system-handoff scope states whether deployment is already included.

Support is an explicit choice

No recurring plan is activated automatically. If support is selected, the agreement identifies the start event, provider and client responsibilities, service window and time zone, capacity, reporting, escalation, response commitments, fees, authorization for extra work and exit notice. A response target is distinct from a resolution commitment.

Handover and an exit path

The agreement identifies source code and configurations to be delivered, editable documentation, export formats, credentials, licence restrictions and rights of use. Client-controlled accounts are preferred. Proprietary platforms may limit portability; those dependencies need to be visible before selection.

Each stage has its own value and authorization. Completing a paid evaluation does not require purchasing production or ongoing support.

Make data and operating responsibilities explicit

Before data access

- Identify the client process owner and the person responsible for privacy and security review. Confirm province, sector, data categories, permitted purpose and instructions.
- Agree providers, subprocessors where applicable, processing and storage locations, cross-border flows, access roles, retention, deletion or return, and incident contacts.
- Confirm document languages, sample quality, reference data and the people who can review it. Use minimized, authorized data; do not assume production records can be shared.
- Decide whether the client needs a specific review or assessment before proceeding. Requirements depend on the project and need appropriate client review.

During delivery

Dezotech: perform the selected scope, record decisions, restrict agreed access, test the workflow, communicate dependencies and deliver the agreed artifacts.

Client: supply authorized data, rules, licences and access; make staff available for review; approve tests and activation; retain responsibility for business and professional decisions.

Existing providers: API availability, connector rights, limits and changes are dependencies to confirm.

Language and local requirements

English is the working language of this framework. Confirm the language of the proposal, contract, documents, samples, training and support before engagement. For a project involving Québec, confirm French-language needs and applicable requirements before issuing the project-specific documents. French delivery is not confirmed by this framework.

Limits of the proposal

This framework does not promise a compliance certification, legal determination, Canadian-only data residency or autonomous professional decision. Any location requirement must be assessed against the actual service architecture and contract. Relevant people review uncertain outputs and consequential actions.

No client relationship, public case study, endorsement or measured commercial outcome is represented by the synthetic examples in this document.

Complete the project-specific proposal

Select only the delivery your team needs. The fields below must be completed and agreed before signature or work begins.

Decision	Terms to record
Selected scope	[Workflow, stage, deliverables, exclusions, sample and operating limits]
Acceptance	[Scenarios, reference data, critical fields, metrics, reviewers, review period and corrections]
Schedule	[Milestones, prerequisites, start conditions, activation window and stabilization]
Service price and currency	[Amount, currency, taxes, invoicing milestones, payment terms and validity]
Third-party costs	[Licences, hosting, AI/OCR usage, units, limits, account owner and estimates]
Optional support	[Selected or declined; scope, fees, start event, window, time zone, capacity and exit]
Languages and data	[Document/sample languages, training/support language, providers, processing locations and retention]
Handover and change	[Code and documentation rights, exports, restrictions, authorized changes and closure terms]

Identify the parties and owners

Client [Legal name, registered address, tax details and authorized signatory]

Service provider [Confirmed contracting legal entity, registered details and authorized signatory]

Process, technical and acceptance contacts [Names, roles and contact details]

Compare the full commitment

Record one-time services, optional recurring support and third-party costs separately, then state the agreed total and period. Identify estimates and usage-based amounts. No currency conversion, automatic renewal or implied support is created by this framework.

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