



Project Intake and Statement of Work Worksheet

Use this fillable worksheet to describe the problem, requested services, environment, security needs, desired outcomes, budget, and timing. Vai-Nova will use it as a starting point for discovery and a formal proposal or Statement of Work.

Important

This worksheet is not a binding contract, quotation, purchase order, or final Statement of Work. Do not include passwords, private keys, production secrets, or regulated data. A signed agreement is required before work begins.

1. CLIENT AND PROJECT INFORMATION

Client legal name ***Project name / working title *****Primary contact name *****Title / role****Email *****Phone****Company location / address****Preferred contact method****Requested start date****Target completion date****One-sentence project objective ***



2. BUSINESS NEED AND DESIRED OUTCOMES

Describe the current problem in business language. A complete technical design is not required.

What problem, delay, risk, or opportunity should this project address? *

How is the work handled today? Include manual steps, systems, workarounds, or pain points.

Who will use, approve, support, or be affected by the system?

What outcomes would make the project successful? *

Urgency

Primary success measure

Known constraints, non-negotiable requirements, or concerns



3. SERVICES AND SOLUTION AREAS

Select all that may apply. Vai-Nova can help narrow the scope during discovery.

AI & AUTOMATION

- | | |
|--|--|
| ☐ Business automation | ☐ Chatbot integration |
| ☐ Company knowledge assistant | ☐ Document processing |
| ☐ Data and API integration | ☐ Custom AI pilot |

INFRASTRUCTURE & DEPLOYMENT

- | | |
|---|---|
| ☐ Private or local AI | ☐ On-premises AI system |
| ☐ Managed colocation | ☐ Hybrid AI infrastructure |
| ☐ AI hardware design and build | ☐ Monitoring and ongoing support |

CYBERSECURITY

- | | |
|--|--|
| ☐ Cybersecurity architecture | ☐ Firewall and network security |
| ☐ Microsoft Active Directory protection | ☐ AI-assisted log intelligence |
| ☐ Encrypted backup and recovery | |

Other requested service or custom idea

4. PREFERRED DEPLOYMENT

- | | |
|--|--|
| ☐ Not sure - help us decide | ☐ Inside our facility / on-premises |
| ☐ Dedicated equipment in colocation | ☐ Hybrid on-premises and remote |
| ☐ Approved cloud integration | ☐ Use or extend existing infrastructure |

Deployment preferences, locations, or restrictions



5. DATA, DOCUMENTS, AND INTEGRATIONS

Do not paste sensitive records into this form. Describe categories, systems, and approximate scale only.

Data or document sources involved

Applications, databases, APIs, email platforms, file stores, or websites to connect

Data sensitivity (select all that may apply)

- | | |
|---|--|
| ☐ Public | ☐ Internal business |
| ☐ Confidential | ☐ Personal information / PII |
| ☐ Financial or payment data | ☐ Health or medical information |
| ☐ Credentials, secrets, or security data | ☐ Other regulated or contractual data |

Approximate data volume / document count

Where the data is stored today

Client data owner / access approver

Retention or deletion requirements

Additional privacy, residency, licensing, or data-use requirements

Default data-use principle

Vai-Nova does not use client data to train a general-purpose or unrelated model without prior written authorization. Project-specific data handling will be documented in the applicable agreement.



6. CURRENT ENVIRONMENT AND SECURITY REQUIREMENTS

Current servers, workstations, operating systems, network, cloud, or colocation environment

Identity platform (AD, Entra ID, other)

Firewall / network security platform

Backup / recovery platform

Monitoring / log platform

Known security concerns, prior incidents, audit findings, or recovery risks

Regulatory, contractual, cyber-insurance, retention, or audit requirements

Acceptable downtime / maintenance window

Recovery objective or critical systems

Access restrictions, approval paths, remote access, or onsite requirements



7. PRELIMINARY SCOPE

Work believed to be in scope *

Known exclusions or work that should remain out of scope

8. PRELIMINARY DELIVERABLES AND ACCEPTANCE

List up to four expected deliverables. Final definitions, dates, and acceptance criteria will be included in the signed SOW.

Deliverable	Description / acceptance criteria	Target date

Client acceptance authority

Requested review period

Acceptance testing, review, or sign-off notes

**9. TIMING, BUDGET, AND COMMERCIAL PREFERENCES**

Total starting budget range

Preferred engagement model

Hardware / licensing budget, if separate

Target decision / approval date

Schedule constraints, blackout periods, procurement lead times, or required milestones

Client-provided staff, access, data, equipment, approvals, facilities, or other responsibilities

Third-party dependencies, vendors, licenses, approvals, or related projects

Onsite work, travel, site access, safety, or scheduling requirements

Vai-Nova budget principle

We prefer a useful, secure, supportable starting point over an oversized build. Discovery may produce pilot, essential, professional, advanced, or custom options with costs separated by category.

**10. RISKS, ASSUMPTIONS, AND CHANGE CONSIDERATIONS**

Known risks, assumptions, unresolved questions, or decisions still needed

Expected changes, optional phases, future expansion, or items to price separately

Additional notes or attachments that will be provided separately

11. ACKNOWLEDGEMENT

☐ I understand this worksheet is for project intake and planning and is not a binding

☐ I have not included passwords, private keys, production secrets, or regulated

Prepared by name *

Title / role

Date

Email

How to submit

Save a copy of the completed PDF and email it to the Vai-Nova project contact listed on the company website. If the form contains sensitive project details, request an approved secure-transfer method before sending.

Thank you for helping us understand the work before we design the system.