AI workflow assessment and MCP pilot plan

Prepared for: [CLIENT / BUYER / ROLE]
Prepared by: Suede AI
Version: [VERSION]
Issue date: [DATE]
Status: Editable proposal template; tailor to the named buyer and approve client-specific scope and terms before issue.

Executive summary

[CLIENT] needs a practical way to improve [RECURRING WORKFLOW] while keeping [ACCOUNTABLE OWNER] in control of [BUSINESS DECISION]. Today, [OBSERVED BOTTLENECK] creates [BUYER-CONFIRMED COST OR DELAY]. Suede AI will map representative work, identify the data and permission requirements, and deliver a bounded pilot plan with testable outputs. [BUYER] can use the plan to approve implementation, assign an owner and judge the result against a shared acceptance checklist.

Investment and approval

Complete the fields below for this client. Confirm scope, dates and terms with the client before issuing the proposal.

Field	Client-specific entry	Approval
Engagement fee and currency	[FEE] [CURRENCY]	Client-specific approval required before issue.
Payment schedule and taxes	[PAYMENT MILESTONES; TAX TREATMENT]	Client-specific commercial approval required.
Third-party usage budget	[APPROVED PROVIDERS; SPEND CAP; BILLING OWNER]	Client approval required before paid calls or subscriptions.
Proposed start and delivery dates	[START DATE] / [REVIEW DATE] / [DELIVERY DATE]	Confirm after access, inputs and owners are agreed.
Review window and correction process	[REVIEW WINDOW] / [CORRECTION WINDOW]	Client-specific acceptance procedure requires approval.
Agreement and procurement	[SOW/AGREEMENT REFERENCE; AUTHORISED SIGNATORIES; PROCUREMENT STEPS]	Commercial owner and client approve the governing agreement.
IP, confidentiality and data terms	[OWNERSHIP/LICENCE; CONFIDENTIALITY; DATA PROCESSING; RETENTION; DELETION]	Confirm with the client and accountable legal/privacy owners.
Validity, cancellation and support	[PROPOSAL VALIDITY; CANCELLATION; POST-DELIVERY SUPPORT]	Client-specific terms require approval.

Proposed scope

Assessment and implementation-ready pilot plan for [NAMED WORKFLOW], [SYSTEMS] and [BUSINESS UNIT]. Building or deploying the pilot is an optional separately approved work package.

Discovery inputs

- Name the sponsor, process owner, technical owner, security reviewer and person who accepts the deliverables.
- Provide representative work items, current instructions, exception examples, source-system names and the approved completion condition.
- Record the current handling time, frequency, error/rework pattern and waiting points when measured; label unmeasured estimates.
- Identify allowed data classes, regions, providers, tools, network paths and access approvers.
- Choose the pilot output and the business decision it should support; list decisions reserved for a person.

Deliverables and acceptance

Current-state workflow map

Document triggers, inputs, people, systems, handoffs, exceptions and completion conditions for the agreed workflow.

Acceptance: The process owner walks a representative work item and an agreed exception through the map and confirms that ownership and handoffs match the current process.

Suitability and dependency register

Assess rule clarity, input readiness, judgment requirements, integration feasibility and recovery needs. Rank candidate improvements using the buyer-agreed criteria.

Acceptance: Each recommendation names its supporting observation, prerequisites, accountable owner and decision needed before implementation.

MCP and tool contract plan

Specify the proposed client/server boundary, tool names and schemas, read/write permissions, authentication owner, error handling and audit events for the selected connection.

Acceptance: The technical owner can trace a proposed tool call from request to allowed data, returned result and failure response. Sensitive actions have a named approval point.

Pilot specification and handover

Provide the proposed scope, sample inputs, expected outputs, acceptance checklist, operating owner, recovery procedure and implementation estimate inputs.

Acceptance: The sponsor and technical owner can make an implementation decision from the specification; unresolved questions have an owner and next action.

Phased delivery

The schedule fields are proposed. Client-specific approval is required before dates become commitments.

Discover and observe

[PROPOSED DISCOVERY WINDOW; confirm with client]

Walk representative tasks with the process owner, capture current instructions and agree on the business decision.

Exit criterion: Client confirms the workflow boundary, stakeholders, evidence inputs and completion condition.

Assess and specify

[PROPOSED ANALYSIS WINDOW; confirm with client]

Review readiness and tool permissions; draft the workflow map, dependency register and pilot contract.

Exit criterion: Technical owner reviews the proposed connection and exception path; sponsor selects the pilot recommendation.

Review and hand over

[PROPOSED REVIEW WINDOW; confirm with client]

Review the deliverables against the agreed acceptance checklist and record corrections or implementation decisions.

Exit criterion: Deliver the accepted assessment pack, open-decision register and next implementation scope.

Responsibilities

- Suede AI: Lead discovery, inspect approved examples, produce the assessment pack, document observed facts and present the pilot plan.
- Client sponsor/process owner: Provide representative examples, confirm the process and prioritization criteria, assign an operating owner and review the deliverables.
- Client technical/security owner: Approve access and providers, supply safe test accounts where needed, review tool permissions and confirm production-change requirements.

Access and data handling

- Begin with redacted work samples and read-only access. Use synthetic inputs for demonstrations when they cover the required behavior.
- Client grants the minimum scoped access for named reviewers; credentials stay in approved secret stores and out of reports, prompts and source control.
- Agree provider routing, retention, region and data-processing requirements before client data enters a model or external system.
- Record intended tool behavior and observed authorization separately. Validate write actions and approval controls within an explicitly authorized implementation scope.
- Confirm the handover location, access revocation and deletion date in the approved data terms.

Assumptions and dependencies

- The client can identify the workflow owner and provide examples representative of the selected process.
- Access requests, procurement reviews and unresolved policy questions receive a named owner; schedule changes follow their actual resolution dates.
- Production deployment, ongoing operations, additional workflows and custom integration builds require an approved work package with their own acceptance checks.
- Value estimates use client-approved baseline inputs and assumptions. The assessment delivers a decision and specification; measured operational results follow implementation and observation.

Change control

Either party can request a change in writing. Suede AI records the requested output, affected systems, acceptance checks, cost and delivery impact. The client sponsor and Suede AI commercial owner approve the revision before that work starts. The current approved scope continues while the change is reviewed.

Relevant proof and personal credentials

The recorded MCP client made five protocol requests, discovered nine tools, retrieved a named workflow and verified the unknown-skill error. [source: MCP demonstration results, 2026-10-21]

Proof layer: Local protocol demonstration against pinned public server source.

Inspect this working example · Read the dated result

These records belong to Jason Colapietro. Each item retains the issuer's award type. Course badges, academy accreditation, training module badges and learning path trophies describe personal training; company relationships have their own evidence records.

- Claude Academy / Anthropic: Building with the Claude API. Course completion badge; issued 2026-10-19. Issuer verification [source: issued credential inventory, verified 2026-10-21]
- Claude Academy / Anthropic: Introduction to Model Context Protocol. Course completion badge; issued 2026-10-20. Issuer verification [source: issued credential inventory, verified 2026-10-21]
- Claude Academy / Anthropic: Model Context Protocol: Advanced topics. Course completion badge; issued 2026-10-20. Issuer verification [source: issued credential inventory, verified 2026-10-21]
- Microsoft Learn: Integrate MCP Tools with Azure AI Agents. Training module achievement badge; issued 2026-10-21. Issuer verification [source: issued credential inventory, verified 2026-10-21]

Questions for the buying team

Does this assessment include a deployed agent?

The base scope delivers the workflow map, readiness findings and pilot specification. An implementation package can build the selected connection after its outputs, access and acceptance checks are approved.

Can the team estimate return on investment?

We can model value from buyer-approved task frequency, handling time, rework and operating cost. The model records its assumptions; a delivered pilot supplies the measurements for comparison.

Next step

Bring [NAMED WORKFLOW], a representative input and the person who owns the result. Use the scoping conversation to confirm the assessment boundary, access route, acceptance criteria and client-specific investment.

Book a scoping conversation · Email Suede AI · +1 (561) 401-0518

Reference sources

- AI Workflow Assessment scope
- Suede AI operations
- Suede AI qualifications and working proof
- Issued personal training records
- Recorded demonstration results
- Pinned Suede Creator Skills MCP server
- Recorded examples and inspection guide