

# Staged delivery timeline — advisory modernisation (1 page)

Six phases, sequential sign-off gates. **No launch dates claimed** — status: in delivery. Client described only as a Rotterdam accounting office.

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## How delivery works

Each phase ends with an explicit **gate**. The next phase does not start until the client signs off. This keeps risk low for a regulated-adjacent profession where trust and data handling matter.

Phase 01 —gate→ Phase 02 —gate→ Phase 03 —gate→ Phase 04 —gate→ Phase 05 —gate→ Phase 06

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## Phase 01 — Map & scope

**Focus:** Automation Map, scope lock, AVG requirements identified.

**Deliverables:**

- Prioritised plan — what to build first and why
- Explicit assistant boundaries: **qualification only, no tax advice**
- Data inventory — what personal data each component will touch

**Gate:** Signed scope document.

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## Phase 02 — Web foundation

**Focus:** Modern site structure, lead capture, mobile-first UX.

**Deliverables:**

- Staging environment for client review
- Structured enquiry forms (not a generic contact box)
- Architecture ready for assistant embed in Phase 03

**Gate:** Client review of staging site.

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## Phase 03 — Qualification assistant

**Focus:** AI intake layer with hard guardrails.

**Deliverables:**

- Intent routing and structured intake
- No-tax-advice rules enforced in system design
- Test scenarios run in non-production environment

**Gate:** UAT sign-off on assistant behaviour.

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## Phase 04 — Content engine

**Focus:** Draft → human approve → publish pipeline.

**Deliverables:**

- AI-assisted drafts aligned with firm voice
- Approval workflow — nothing publishes without human sign-off

- First approved piece demonstrated in staging

**Gate:** Client approves first published (or publish-ready) piece.

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## Phase 05 — Security & AVG

**Focus:** Data-processing agreement, access model, EU hosting confirmation.

**Deliverables:**

- Verwerkersovereenkomst signed
- Service accounts scoped and documented
- Sub-processors disclosed

**Gate:** AVG signed, access model agreed.

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## Phase 06 — Verify & handover

**Focus:** End-to-end UAT, documentation, optional care plan.

**Deliverables:**

- README and walkthrough
- Log and audit procedure documented
- Optional light monthly care — no lock-in

**Gate:** Client sign-off. Go-live when client is ready — **no pressured launch date.**

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## Status

Item	State
Full scope	Designed
Security & AVG layer	Specified
Staged delivery	<b>In progress</b>
Live outcomes	Reported once live — not claimed today

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## Next step

**Book:** [services.flexgrafik.nl/book-discovery/](https://services.flexgrafik.nl/book-discovery/)

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