

Advisory Commercialization Architecture Sprint

Prepared for Thomson Reuters Tax & Accounting

Date: March 14, 2026 · **Contact:** Paul Miller · **Industry:** Tax & Accounting Software · **Type:** Enterprise

THE OPPORTUNITY

Design the commercialization layer that converts Ready to Advise and Practice Forward outputs into consistently scoped, priced, signed, and expandable engagements. Target: demo-ready prototypes for Advisory Symposium, June 2-4, 2026.

SELECTED SERVICES

Architecture Sprint

\$95,000

30-day fixed-fee design exercise. Deliverables: workflow map, pricing logic model, 3 demo journeys, data/security architecture, sponsor memo, exec deck, buy/partner/build decision brief, pilot SOW.

Proposal & Pricing Pilot (6-Month)

\$250,000

Guided discovery, pricing calculator, proposal generation, scope/out-of-scope logic, change-order v1, engagement memory lite, light analytics. Sandbox deployment. Advisory Symposium as first live milestone.

INVESTMENT SUMMARY

ENGAGEMENT PRICING

Architecture Sprint

Base fee (30 days) \$95,000

Sprint Total \$95,000

6-Month Pilot

Kickoff \$40,000

Monthly (x6) \$35,000

Pilot Total \$250,000

Engagement Total

\$345,000

Sprint Credit Applied: -\$95,000 (100% if pilot signed within 15 business days)

Net if bundled: \$250,000

SCOPE DEFINITION

This engagement includes: problem and opportunity definition with measurable success metrics, current-to-future workflow map showing integration with existing Thomson Reuters advisory products, pricing engine specification, scope and change-order taxonomy, engagement memory specification scoped to commercial workflow, three live demo journeys suitable for Advisory Symposium presentation, data boundary and security posture memo, internal sponsor memo with 5-slide executive deck and buy/partner/build decision brief, and pilot SOW with concrete success metrics for binary go/no-go decision.

This engagement explicitly excludes: production deployment, source-code transfer, production-data access, OEM or licensing agreements, exclusivity arrangements, embedded payment processing, broad knowledge-management systems, enterprise-scale controls, and any commitment to pilot, acquire, or grant exclusivity. All data used in Phase 1 is synthetic or anonymized.

ENGAGEMENT TIMELINE

Phase	Dates	Milestone
Sprint	Mid-Mar – Mid-Apr	Readout: workflow, pricing, 3 demos

Phase	Dates	Milestone
Symposium	June 2–4	Live prototype demos · 400 attendees
Decision	Q4 2026	Pilot readout · Commercial decision

ENGAGEMENT STRUCTURE

Phased: Sprint followed by Pilot with 100% sprint credit applied within 15 business days

PAYMENT TERMS

Sprint: 50% at kickoff, 50% at readout delivery.

Pilot: \$40,000 kickoff + \$35,000/month × 6 months.

No-Regret Clause: Sprint deliverables are retained by Thomson Reuters Tax & Accounting regardless of pilot decision.
