

Status: Template. Personalise per recipient before sending. Built on 05_Pilot_Agreement_Scaffold.md. Pricing per 02_Pricing_Sheet_v0.2.md.

For: newly-licensed or sub-30-staff Jersey TCBs where the CCO/MLRO is also the buyer and procurement is a single email thread.

Cover note (email body, ~100 words)

[Name], Per our conversation, here is a scoped pilot: 90 days, £7,500, one success criterion you pick, and a written price for year one so you know what conversion looks like before you sign. RegAlign is built for Jersey TCBs where the CCO does the work, not delegates it. The pilot is deliberately narrow: one workflow, measured properly, no theatre. Two questions before we kick off: (1) do you have a current themed-exam finding or remediation item we should align the pilot to, and (2) is there a board meeting in the next 90 days where outputs would be useful? 20 minutes next week to walk through it?

Proposal body

1. What we are testing

One success criterion, chosen by you from this list:

- **A.** Board pack assembly time reduced by 50%+ vs current baseline.
- **B.** Any JFSC Code paragraph traceable across 12 months in under 10 minutes.
- **C.** Themed-exam remediation closed and evidenced inside the platform.
- **D.** Onboarding-decision audit trail produced for every new client in pilot window.

Pick one. Measured by you, baseline set in week 1.

2. What you get

- Full Standardised tier access for 90 days.
- Configuration of one workflow tied to the chosen success criterion.
- Up to 6 hours of direct founder time across the pilot.
- Security pack: pen test letter, DPIA, BCP outline, sub-processor list.
- Fortnightly written check-in; day 90 structured review.

3. What we ask from you

- A single pilot owner (you or one delegate) with ~90 minutes/week.
- Access to anonymised or synthetic versions of relevant artefacts. Live data acceptable under DPA, not required.
- A written go/no-go at day 90 with reasons.
- Permission to be named as a reference if you convert. No external publicity without separate sign-off.

4. Commercial terms

Item	Amount
Pilot fee (90 days, fixed)	£7,500
Payment	100% on signature
Year-1 conversion price (Standardised tier)	£9,500 (implementation included), held for 30 days post-pilot
Year-2 price (written now)	£9,500 — no uplift in year 2; from year 3, CPI+3%, capped at 7%
Reference-price protection	Pilot fee is not a renewal anchor; future pricing follows the published sheet
Discount available on conversion	Up to 12% (per 03_Discount_Policy.md); floor £8,500

Why the written year-2 price matters. A pilot followed by a "we'll discuss year 2" conversation is the most common way these deals fall apart. The number is here, in writing, so the year-2 conversation is a renewal, not a renegotiation.

5. Exit and continuity

- No mid-pilot exit fee. If you exit before day 90 you keep what you've configured; we provide a 30-day data return.
- 90-day read-only post-exit access for audit purposes.
- Single-founder continuity: source code escrow, named technical successor in BCP, 6-month notice on any material service change. (Same clause as larger pilots — the firm size doesn't change the risk.)

6. Security pack (included)

- Independent pen test letter (CREST-accredited, scope: web app + API, dated within 6 months of pilot start).
- DPIA covering your data flows.
- BCP and DR outline.
- Sub-processor list (≤ 5 named) with DPAs in place.
- PI insurance certificate, indemnity cap stated.
- Lightweight MSA + DPA + pilot SOW (this document) — designed to be signable without external legal review.

7. What this is NOT

- Not free. £7,500 reflects real scope and real founder time.
- Not custom development.
- Not multi-entity. One legal entity.
- Not SOC 2 / ISO 27001 certified — pen test + DPIA is the control framework.

8. Decision and next steps

Step	Owner	Date
Proposal review	[Name]	within 7 working days
Signature	[Name]	by [target date]
Kickoff	Both	within 5 working days of signature
Day 45 informal check-in	Both	+ 45 days

Step	Owner	Date
Day 90 decision	You	+ 90 days

Internal notes (do NOT send)

- £7,500 sits under the £10k psychological line — a small TCB CCO can sign this without board approval at most firms. That's the point.
- The written year-2 price is the single most important clause for this segment. Do not negotiate it away. If they insist on "we'll see" for year 2, the deal will die at renewal — better to lose it now.
- £9,500 conversion sits at the published Standardised anchor. Do not discount below £8,500 even to close. If they need cheaper, this is not a customer.
- Six hours of founder time is the ceiling, not the floor. If the workflow needs more, the success criterion is too broad — narrow it before kickoff.
- Don't offer A through D as a menu in call one. Lead with the criterion that matches the pain they named verbatim.