

# AliceHQ

Design Partner Opportunity (NZ/AU)

**Conversations -> Actions -> Receipts**

## What AliceHQ does

AliceHQ connects voice/SMS/chat/email to your existing systems and completes workflows end-to-end, then generates auditable receipts for every outcome (what happened, when, why, and what action was taken).

## Why it matters

Most teams do not fail because they cannot talk to customers/candidates. They fail because actions do not happen reliably: scheduling, follow-ups, routing, system updates, and handoffs. AliceHQ closes those gaps with proof.

## Typical workflows (choose 2-3)

- Intake + qualification
- Scheduling + rescheduling + reminders
- Follow-up + re-engagement
- Escalation / warm transfer for edge cases

## Receipts (proof, not promises)

Each receipt includes: timestamp, channel, entity ID, intent, extracted fields, action taken, outcome, and transcript link.

## Design Partner Program

- Term: 6 months
- Scope: 2-3 workflows + 1 integration target + receipts feed + exception queue
- Cadence: weekly iteration + KPI reporting
- Fee: NZ\$50k-\$150k (plus platform usage; bundling available)

## Next step

15-minute demo + 30-minute workflow mapping call.

# AliceHQ

Design Partner Program (NZ/AU)

**Conversations -> Actions -> Receipts**

AliceHQ is an intent-driven conversational engine (voice/SMS/chat/email) that completes operational workflows and generates auditable receipts for every outcome.

## The problem

- Slow response times and drop-off
- Scheduling overhead and no-shows
- Inconsistent follow-up
- Missed or delayed system updates
- No single source of truth for what happened

## The solution: AliceHQ

AliceHQ connects to your existing stack and runs 2-3 workflows end-to-end, with guardrails and a full audit trail.

## Typical workflows (choose 2-3)

- Intake + qualification
- Scheduling + rescheduling + reminders
- Follow-up + re-engagement
- Escalation / warm transfer (for edge cases)

## Receipts (proof, not promises)

Every automated action produces a receipt including: timestamp, channel, entity ID, intent detected, key fields captured, action taken, outcome + next step, and links to transcript and destination record (where applicable).

## Engagement structure

- Term: 6 months
- Scope: 2-3 workflows + 1 integration target + receipts + exception queue + audit logging
- Cadence: weekly iteration loop + measurable KPI reporting

## Included in the program

- Demo tenant + production tenant setup
- Receipts feed + receipt detail view
- Exception queue and human-in-the-loop routing

- Guardrails (calling windows, throttling, opt-out/suppression)
- 1 integration target (calendar + one system of record via API/webhook/export)
- Weekly iteration loop + KPI reporting
- Rollback plan + change control

### **Not included (unless scoped separately)**

- Multiple system integrations in the first phase
- Replacing an existing contact centre stack
- Custom UI rebuilds across an entire platform
- Fully autonomous decisions for high-risk cases (these route to the exception queue)

### **Timeline**

- Weeks 0-2: discovery + workflow design + success metrics
- Weeks 3-6: build + integration + staging test
- Weeks 7-10: controlled production pilot + tuning
- Weeks 11-24: expand + harden + rollout plan

### **Success metrics (agreed upfront)**

Examples:

- Median time-to-first-response
- Conversion to scheduled outcomes
- No-show reduction (if scheduling)
- Human hours saved/week
- Exception rate + resolution time
- Data completeness in the destination system

### **Commercials**

- Design Partner Fee: NZ\$50k-\$150k (6 months)
- Platform usage: volume-based (bundled option available)

### **Decision path**

- Demo + workflow mapping
- Confirm scope + metrics + stakeholders
- Sign SOW-Lite and start Weeks 0-2 discovery
- Controlled production pilot from Week 7

### **Next step**

15-minute demo + 30-minute workflow mapping call.

# AliceHQ

## Security, Privacy & Compliance Summary (Pilot-Ready)

### Purpose

AliceHQ is designed for safe, auditable automation. We prioritize controlled execution, clear escalation, and traceability (receipts) over opaque autonomy.

### Data handling

- Processes inbound/outbound messages and call transcripts as required to execute configured workflows.
- Captures structured fields (e.g., contact details, availability, intent classification) based on configured workflows.
- Stores receipts (timestamp, action, outcome, transcript link) to support auditability.

### Access control

- Role-based access is enforced for administrative functions (e.g., tenant configuration, policy settings).
- Tenant separation: each tenant's data and receipts are logically isolated.

### Auditability (Receipts)

- Every automated action generates a receipt capturing who/what/when, triggering context, action taken, outcome, and next step.
- Receipts support operational audit, QA, and exception review.

### Human-in-the-loop & exceptions

- Uncertain or high-impact cases are routed to an exception queue for review/approval.
- Escalation paths (warm transfer/on-call routing) are configurable per tenant.

### Retention & deletion

- Retention periods can be configured per tenant policy.
- Where deletion is required, receipts can preserve minimal proof metadata while redacting sensitive content (policy dependent).

### Guardrails

- Calling windows and throttling prevent spammy behavior.
- Opt-out and suppression lists are enforced to respect user preferences and regulations.

## Deployment & monitoring

- Pilot deployments include controlled rollout, logging, and rollback procedures.
- Reliability measures include idempotency keys and deduplication to prevent repeated actions.

# AliceHQ

## Statement of Work (SOW-Lite) - Design Partner Program

**Parties:** AliceHQ (Provider) and {{Partner Name}} (Partner)

**Term:** 6 months starting {{Start Date}}

### 1. Scope

AliceHQ will implement 2-3 workflows and 1 integration target to complete operational actions and generate receipts.

Workflows (finalize in discovery):

- Workflow 1: {{Intake + qualification}}
- Workflow 2: {{Scheduling + reminders}}
- Workflow 3: {{Follow-up / escalation}} (optional)

Integration target:

- Calendar: {{Google/M365}}
- System of record: {{ATS/CRM/helpdesk}} via {{API/webhook/export}}

### 2. Deliverables

- Demo tenant + production tenant configuration
- Receipts feed + receipt detail view
- Exception queue + human review routing
- Guardrails: calling windows, throttling, opt-out/suppression
- KPI reporting cadence + weekly iteration loop
- Rollback plan + change control process

### 3. Timeline

- Weeks 0-2: discovery + workflow mapping + success metrics
- Weeks 3-6: build + integration + staging test
- Weeks 7-10: controlled production pilot + tuning
- Weeks 11-24: expand + harden + rollout plan

### 4. Success metrics

Partner and AliceHQ agree upfront on 3-5 KPIs (examples):

- Median time-to-first-response
- Conversion to scheduled outcomes
- No-show reduction (if applicable)
- Human hours saved/week

- Exception rate + resolution time
- Completeness of records in system of record

## 5. Commercials

- Design Partner Fee: NZ\$ $\{\{Amount\}\}$  (payment schedule:  $\{\{Upfront\ or\ monthly\}\}$ )
- Platform usage: NZ\$ $\{\{Amount\}\}$ /month (volume-based; bundled option available)

## 6. Responsibilities

Partner provides:

- A single accountable owner for approvals
- SME time (1-2 hours/week)
- Access to test/sandbox environments and required credentials
- Prompt decisions on workflow policies and escalation rules

AliceHQ provides:

- Implementation, integration, and tuning
- Weekly progress updates and KPI reporting
- Support for controlled rollout and production hardening

## 7. Change control

Any request outside scope (additional integrations, additional workflows, major UI build) will be estimated and approved separately.

## 8. IP and confidentiality

- AliceHQ retains product IP and platform components.
- Partner retains ownership of its data.
- Both parties agree to confidentiality regarding proprietary information.

## Sign-off

Provider: \_\_\_\_\_ Date: \_\_\_\_\_

Partner: \_\_\_\_\_ Date: \_\_\_\_\_