Ovdimnet Customer Implementation Automation - Phase 1

Statement of Work (SOW)

Project Title	Ovdimnet Implementation Process Automation - Phase 1
Prepared For	Ovdimnet
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1. Introduction & Overview

Ovdimnet's current process for implementing new clients on its time management platform is a manual, training-intensive effort requiring significant employee involvement. This project aims to automate this implementation process to improve efficiency, reduce setup time, and minimize the need for extensive employee training. The project will be executed in several phases, with each phase focused on automating a larger part of the process than the last. This document outlines the scope for the initial phase of the project.

2. Project Objectives

The primary objective of Phase 1 is to develop a core AI system capable of automating the most complex part of the implementation: translating a new customer's requirements (Excel format) into the correct system table configurations (JSON format). The goal is not to achieve 100% accuracy initially, but to create a functional system that significantly reduces the manual effort and time required for client implementation, thereby providing a strong foundation for future automation phases.

3. Scope of Work

To achieve the objective for Phase 1, the following tasks will be performed:

- **3.1. Dataset Creation:**
  - **Responsibility: Ovdimnet.**

    - Create a dataset of pairs of customer requirements and system table configurations.
        - Reverse-engineer existing system tables and document the likely customer requirements and answers (e.g., in Excel format) that led to these configurations, creating a dataset of (Requirements, Configuration) pairs.
    - **Number of pairs in the dataset: TBD**
- **3.2. AI Model Development and Training:**
    - **Responsibility: Eden Lumbroso**
    - Utilize the created dataset and pre-defined logical rules to create an AI workflow.
    - The workflow will be designed to take customer requirements as input and generate the corresponding system table configurations (JSON) as output.
- **3.3. System Evaluation:**
    - **Responsibility: Eden Lumbroso**
    - Partition the created dataset into training and testing sets.
    - Rigorously evaluate the AI's performance and accuracy using the testing set that was not used during training.
- **3.4. Iterative Optimization:**
    - **Responsibility: Eden Lumbroso**
    - Based on evaluation results, iteratively refine and optimize the AI system.
    - Optimization techniques may include, but are not limited to:
        - Modifying the AI's logical rules.
        - Adjusting the input/output data formats.
        - Incorporating specialized "role agents" within the AI architecture to handle specific tasks.
    - The cycle of training, evaluation, and optimization (steps 3.2-3.4) will be repeated to achieve the desired performance level.

4. Key Deliverables

The primary deliverables for Phase 1 will be:

- **The Core AI System:** A functional AI system that accepts customer implementation requirements as input and produces the corresponding system table configurations (JSON) as output.
- **The Training Dataset:** The complete dataset of (Requirements, Configuration) pairs created in step 3.1, which can be used for future model enhancements.

5. Project Timeline (Placeholder)

This section outlines the projected schedule and key milestones for the project. Dates

are estimates and may be subject to change based on mutual agreement.

Milestone	Estimated Completion Date
Phase 1 Kick-off	TBD
Dataset Creation (3.1) Complete	TBD
Initial AI Model (3.2) Complete	TBD
First Evaluation Cycle (3.3) Complete	TBD
Phase 1 Final Delivery	TBD

6. Assumptions & Dependencies (Placeholder)

This project's success and timeline are dependent on the following assumptions:

- **Subject Matter Expert Availability:** An Ovdimnet employee with deep knowledge of the implementation process and system tables will be available to answer questions and evaluate the AI's performance.
- **Feedback Timeliness:** Ovdimnet will provide feedback on deliverables and prototypes.

7. Exclusions (Out of Scope)

The following items are explicitly out of scope for Phase 1:

- Development of a customer-facing user interface (e.g., a web form for data entry).
- Direct integration of the AI system into Ovdimnet's live production environment.
- Automation of the initial client communication and question-gathering process.

8. Acceptance Criteria

The core AI system will be considered accepted upon demonstrating its ability to:

- Process a sample set of requirements (from the test data) and generate configurations.
- Achieve a pre-defined accuracy, or, reduce the time for implementing a new customer in a measurable way.

9. Future Phases

The next phases of the project will aim to automate a larger portion of the implementation task in order to improve the company's efficiency further. This will

include:

- Expanding the AI system's capabilities to handle more complex customer's requirements, including special requirements that are not predefined (Phase 2).
- Collecting the customer requirements automatically, perhaps with a specialized chatbot (Phase 3).