# QAI Project Document Pack – Checklist Template

This editable template provides a checklist for post-PoC documentation. It includes Legal/IP, Financial, Operational, and Risk & Compliance sections. Use placeholders {{...}} to customize for each project/client.

## 1. Legal & Intellectual Property (IP)

☐ Non-Disclosure Agreement (NDA)  
Parties: {{Client\_Name}}, {{Startup\_Name}}  
Scope: Confidential data/models/results

☐ IP Ownership Agreement  
Background IP: {{Our\_PreExisting\_IP}}  
Foreground IP: {{Project\_Deliverables}}  
Ownership: {{Startup/Client/Joint}}

☐ Patent Filings / Provisional Applications  
Areas: {{QAI\_Frameworks}}, {{Algorithms}}, {{Tools}}

☐ Technology Transfer Agreement  
Scope: {{Software\_Modules}}, {{Documentation}}, {{Datasets}}  
Restrictions: {{Reuse\_Policy}}

## 2. Financial & Commercial

☐ Master Service Agreement (MSA)  
Contractual relationship, liability, warranties.

☐ Statement of Work (SoW)  
Deliverables: {{Deliverables\_List}}  
Timeline: {{Project\_Timeline}}  
Milestones: {{Milestone\_Plan}}  
Success Criteria: {{Success\_Criteria}}

☐ Pricing & Billing Structure  
Model: {{Fixed/Time&Material/Hybrid}}  
Cost Breakdown: {{Staffing\_Costs}}, {{Cloud\_Costs}}, {{Licensing\_Costs}}  
Payment Schedule: {{Payment\_Terms}}

☐ Accounting / Audit Provisions  
Reporting Frequency: {{Monthly/Quarterly}}  
Audit Rights: {{Client/Independent\_Auditor}}

## 3. Operational & Management

☐ Governance Charter / Steering Committee Terms  
Decision body: {{Committee\_Name}}  
Meeting cadence: {{Weekly/Monthly}}

☐ Resource & Responsibility Matrix (RACI)  
Client-managed: {{Client\_Responsibilities}}  
Startup-managed: {{Startup\_Responsibilities}}  
Shared: {{Shared\_Tasks}}

☐ Data Handling Agreement  
Sources: {{Client\_Datasets}}  
Storage/Access: {{Cloud/OnPrem}}  
Compliance: {{GDPR/HIPAA/PIPEDA}}

☐ Operational Continuity Plan  
Failover: {{Redundancy\_Strategy}}  
Disaster Recovery: {{Recovery\_Objectives}}

## 4. Risk & Compliance

☐ Cybersecurity Checklist  
Standards: {{ISO27001/NIST}}  
Penetration Testing: {{Planned/Required}}

☐ Ethical AI / Quantum Compliance Statement  
Bias Mitigation: {{Bias\_Checks}}  
Explainability Tools: {{Explainability\_Frameworks}}

☐ Insurance Coverage  
Tech Liability (E&O): {{Coverage\_Details}}  
Data Breach Insurance: {{Coverage\_Details}}

☐ Multi-Vendor Coordination (if applicable)  
Clauses: {{Non\_Disclosure}}  
Joint Test Plan/Metrics: {{Client\_Standards}}  
Escrow: {{Yes/No}}

## 5. Internal Startup Preparation

☐ IP Docket – List pre-existing frameworks/tools

☐ Patent Roadmap – Filing timeline for QAI inventions

☐ Governance Model – Org chart for execution team

☐ Cost Sheet – Project cost breakdown & margins

☐ Growth Story – Path from PoC → Pilot → Production → Scale