Michael Kinder & Sons

Fractional AI Integrator and Program Lead

RFP Response

Submitted by: The Net Effect | 9536-6621 Quebec inc.
André Barsalou, Principal
andre@theneteffect.ca | +1 514 582 1389

1. Executive Summary

Michael Kinder & Sons has invested in a strong core technology stack across project management, accounting, business development, estimating, field operations, and reporting. The opportunity is not to replace those systems. The opportunity is to connect them more consistently, reduce the manual workflows sitting between them, and introduce AI in a way that produces measurable results without security or adoption risk.

TNE proposes to serve as MKS's Fractional AI Integrator and Program Lead for a 9-month engagement, translating business objectives into a prioritized AI roadmap, governing tool deployment safely, launching pilots, measuring results, and scaling only what proves value.

The engagement covers all eight RFP workstreams: BD, Marketing, Estimating, Operations, Accounting, HR, Governance, and Change Management. Every workstream is assessed in Month 1. Priority determines sequence, not exclusion.

Program Investment at a Glance
Standard option: $81,000 USD over 9 months | Higher-Touch: $103,500 USD over 9 months
Break-even: recovered PM and admin capacity across active projects
Primary value levers: pursuit speed, PM visibility, estimating confidence, admin cycle-time reduction
Optional success component: up to $7,500 USD tied to documented outcomes at 90 days, 6 months, and 9 months

The immediate risk for MKS is not a lack of AI options; it is departments independently evaluating tools, accumulating overlapping subscriptions, and building workflows nobody governs. TNE's 9-month engagement addresses that risk as the first operating cycle of a broader 12–24 month AI and workflow roadmap: assess the full scope, govern tool deployment, prioritize high-value pilots, scale what proves value, and sequence the remaining workstreams with owners, budget, and dependencies.

If a pilot does not prove value at 90 days, TNE stops it and redirects capacity to the next priority. No workstream is scaled without documented evidence against agreed baselines.

TNE's approach: governance before tools, pilots before transformation, adoption before handoff. That is what separates a program that sticks from one that generates deliverables nobody uses.

The program is designed to increase net profit through recovered capacity, faster pursuit cycles, and reduced manual overhead, without requiring proportional headcount growth.

2. TNE Approach

2.1 Workflow before tools. AI cannot fix unclear workflows. TNE maps how work moves through MKS before recommending any tool.

2.2 Governance before scale. No AI tool is deployed into confidential workflows without defined data access rules, human oversight, and system-of-record boundaries.

2.3 Pilots before transformation. The first 90 days launch high-confidence pilots, measure actual results, and scale only what proves value.

2.4 Adoption before handoff. SOPs, training, role clarity, and adoption tracking are built into the core program, not added after the fact.

3. Engagement Model

André Barsalou and LP Bellier are the core delivery leads. Femi Badejo, Audrey Medaino-Tardiff, Jason Glover, Tim O'Brien, and Craig Hurst are engaged based on phase and pilot scope.

	Standard	Higher-Touch
Monthly retainer	**$9,000 USD/month**	**$11,500 USD/month**
9-month total	$81,000 USD	$103,500 USD
Weekly capacity (blended)	5–12 hours/week	8–15 hours/week
Pilots	3 pilots, 2 scaled use cases	Up to 4 pilots, up to 3 scaled use cases
Steering	Monthly	Bi-weekly + monthly
Additional scope	Standard pilot and reporting scope	Expanded stakeholder interviews, training, Procore, accounting, or recruiting depth

Both options include the full program structure. The Standard option is designed to be sufficient for the first operating cycle. The Higher-Touch option is appropriate if MKS wants to pull Accounting, Recruiting, or deeper Procore work into the active 9-month window. Tool subscriptions are passed through at cost with prior MKS approval. No markup.

4. Program Roadmap

	Month 1	Months 2–3	Months 4–6	Months 7–9
Focus	Strategy and governance	Pilot launch and validation	Scale validated use cases	Stabilize, expand, finalize
Deliverables	AI strategy, governance framework, use-case backlog, pilot plan	3 pilots, playbooks, ROI report, 12-month scale plan	2 use cases in production, SOPs, training materials	Final report, lessons-learned repo, 12-month roadmap
Reporting	Weekly + month-end update	Weekly + monthly + 90-day ROI review	Weekly + monthly steering	Weekly + monthly + quarterly review

Month 1: Strategy, Governance and Pilot Selection

KEY ACTIVITIES

- Executive alignment and department workflow interviews
- Systems and data architecture mapping
- AI tool request inventory and security review
- Pilot selection with KPI and success-criteria definition
- Human-in-the-loop requirements defined for each candidate workflow

DELIVERABLES BY DAY 30

- 1-page AI Strategy aligned to MKS business objectives
- 12–24 month AI and workflow roadmap
- AI Governance Framework: data use, tool approval, IP protection, access controls, human oversight
- Systems and Data Architecture Map
- Prioritized Use Case Backlog
- Pilot Plan with owners, KPIs, risk level, and expected value

By Day 30, MKS Will Know

- Which AI use cases are worth piloting now
- What data can be safely used and under what conditions
- Who owns each approved pilot and what success is measured against
- What the full 12–24 month roadmap looks like with sequencing and dependencies

TNE's Recommended Pilot Sequence

- Pilot 1: Pursuit Intelligence & CRM Augmentation: upstream, lower risk, follows the job-flow logic of the RFP, aligns with TNE's strongest immediate AI proof. Starting here improves the quality of what enters estimating and operations before AI is introduced deeper into project controls or accounting.
- Pilot 2: PM Operational Visibility / Procore + Sage Intelligence. MKS has Sage 300 replicated into SQL with Power BI connected; the infrastructure exists. Evaluated and activated in Month 1 if the data model supports reliable job-cost, schedule, and risk signals.
- Pilot 3: Estimating / Takeoff Optimization: high upside, higher QA requirements. AI-assisted output must be benchmarked against existing workflows before adoption.

Month 1 pilot selection scores each use case against business value, data readiness, adoption readiness, security risk, time-to-impact, and downstream leverage. Each use case is classified as Stop, Wait, Pilot, or Scale. Final selection confirmed after discovery and stakeholder interviews.

Months 2–3: Pilot Launch and Validation

RECOMMENDED FIRST 90-DAY PILOTS

Pilot 1: Pursuit Intelligence & CRM Augmentation

Create an early, lower-risk AI win upstream in MKS's revenue engine.

- Pursuit Go / No-Go Scorecard: AI-assisted, human-reviewed qualification framework assessing fit, risk, estimator workload, and strategic value before committing BD and leadership time
- CRM opportunity summaries and next-best-action prompts. Platforms include HubSpot, GoHighLevel (GHL), and Salesforce; integration approach confirmed in Month 1 based on MKS's active CRM stack
- AI-assisted RFP response drafting with brand voice guardrails
- Historical RFP pattern review and win rate analysis
- Pipeline analytics to improve sales forecasting accuracy and identify pipeline gaps

Pilot 2: PM Operational Visibility / Procore + Sage Intelligence

Reduce PM time navigating job cost and project status. Build on MKS's existing Sage 300 / SQL / Power BI infrastructure.

- PM portfolio dashboard and job cost variance visibility
- Risk indicators for schedule, budget, change orders, RFIs, and submittals
- Procore operational alerts: daily log summaries, RFI and submittal drafting support, and AI-assisted meeting minute capture and summarization
- AI-assisted submittal review support and procurement tracking linked to schedule and closeout
- Lessons-learned capture structured to feed back into BD pursuit intelligence and Estimating

Pilot 3: Estimating and Takeoff Optimization

Evaluate AI-assisted estimating tools against MKS's current workflow. Preserve estimator judgment throughout.

- Side-by-side review of existing takeoff workflow
- AI-assisted takeoff evaluation on selected scopes with accuracy benchmarking
- Bridge to Sage Estimating compatibility review
- AI-assisted bid package drafting with human QA checklist
- Historical cost intelligence and outlier detection against past project data
- AI-generated specification review for scope gaps, exclusions, and risk items
- AI-generated scope of work narrative from estimate and drawings
- Scenario modeling: best, likely, and worst-case assumptions with validation

FULL RFP SCOPE SEQUENCING

All eight RFP workstreams are covered in this engagement. Every workstream is assessed and roadmapped in Month 1. BD, Estimating, and Operations are sequenced first because they produce the fastest measurable ROI and establish the governance foundation required before Accounting and HR automation can be deployed safely. Accounting and HR are active workstreams in this program; their sequencing reflects readiness and dependency, not deferral.

RFP Scope Area	9-Month Coverage	Likely Timing
Strategy & Governance	Full coverage: AI roadmap, governance model, tool approval, KPI framework, reporting cadence	Month 1, then ongoing
Business Development	First-wave pilot: lead qualification, CRM summaries, go/no-go scoring, pursuit intelligence, proposal drafting	Months 1–3, scale Months 4–6 if validated
Marketing / Pursuit	Included in BD pilot: brand voice guardrails, RFP pattern review, proposal generation support	Months 1–3, scale Months 4–6 if validated

Estimating	First-wave pilot: AI-assisted takeoff evaluation, spec review, bid package support, accuracy benchmarking	Months 1–3, scale Months 4–9 if QA thresholds met
Operations / Procore	Covered in PM Visibility pilot: job cost alerts, Procore summaries, RFIs, submittals, risk signals	Months 1–3; deeper coverage Months 4–9
Accounting	Month 1 assessment and roadmap: invoice/PO cycle, coding, approvals, month-end, controls	Months 4–9; Higher-Touch or post-9-month roadmap
HR / Recruiting	Month 1 assessment and roadmap: screening, scheduling, recruiting analytics, pay benchmarking	Months 4–9 under Higher-Touch; otherwise post-9-month
Change Management	Full coverage: playbooks, SOPs, training, adoption metrics, quarterly value reviews	Throughout engagement

DELIVERABLES BY DAY 60

- 3 pilots launched
- Quick-reference playbooks
- Initial user training
- Adoption tracking baseline
- Preliminary time-savings measurements

DELIVERABLES BY DAY 90

- 90-day ROI Report: time saved, cost avoided, risk reduction, revenue proxy analysis
- Scale, Stop, or Replace recommendations per pilot
- Updated 12-month scale plan

Months 4–6: Scale Validated Use Cases

- Minimum 2 scaled use cases in production
- SOPs and role clarity documents
- Training materials and adoption log

Months 7–9: Stabilization and Long-Term Roadmap

- Final Program Report
- 12-month scale roadmap with budget, owners, and milestones
- Lessons-learned repository and cross-functional feedback loop
- Hiring and ownership role recommendations if operational bottlenecks or program gaps justify

5. Security, Governance and Change Management

Governance Framework

TNE treats AI governance as an operating requirement. The framework established in Month 1 covers:

- Approved and prohibited tools
- Data categories and access levels
- Human-in-the-loop approval points
- Confidential project data handling
- Customer-facing content review requirements
- Estimate and quantity validation requirements
- IP protection and tool evaluation standards, including data retention policies, training-use restrictions, access controls, and export/delete requirements
- Data flow and storage documentation
- System-of-record boundaries

Every AI tool requires written MKS approval from IT or the designated MKS approver before any client data is processed. TNE will not intentionally store MKS confidential data in unapproved environments.

What TNE Will Not Do

- Upload confidential MKS data into any AI tool not approved in writing

- Recommend AI where workflow automation, reporting improvement, or process redesign is the more honest answer
- Scale a pilot without documented evidence of adoption and measurable value
- Propose a static tool stack while the AI market is actively changing
- Bypass human review for estimating outputs, financial recommendations, or customer-facing content

Risk Controls

Risk	Control
AI hallucination or inaccurate output	Human-in-the-loop review required for all estimates, customer-facing content, and financial recommendations before any output is acted on
Confidential data exposure	Approved tool list maintained; no tool processes MKS confidential data without prior written approval
Low user adoption	Pilot user groups, quick-reference playbooks, SOPs, and role clarity documentation built for every scaled workflow
Scope creep	Month 1 prioritization defines scope; all additions require written approval before work begins
AI platform changes mid-engagement	Adaptive roadmap; pilots validated before scale; no single-platform dependency

Change Management and Adoption

The program treats adoption as a deliverable, not an afterthought. Every pilot includes a structured change management layer:

- Workflow owner identification and role clarity documentation for every scaled workflow
- Pilot user groups, quick-reference playbooks, and hands-on training sessions delivered before each rollout
- Adoption metrics tracked monthly: active users, time-savings measurements, error rate reduction, and workflow completion rates
- Quarterly value reviews with roadmap adjustments, including stop/replace decisions where adoption is not achieved

The goal is workflows that hold without requiring every employee to become an AI expert.

6. Reporting Cadence

Weekly Working Session

Status, blockers, decisions, and next-week priorities. Primary contact: Brad Hauke.

Monthly Steering Update

One-page update covering progress, risks, decisions needed, and value indicators. Distributed to Brad Hauke and Jason Rice.

Quarterly Value Review

ROI review against baseline, roadmap adjustment, and go/stop/scale decisions. Includes Doug Kinder or designated ownership representative.

7. Team and Time Allocation

Team Member	Role	Engagement Use	Responsibilities
André Barsalou	Program Lead	Core delivery lead	Client relationship, executive alignment, governance, prioritization, roadmap ownership, change management, leadership reporting
Louis-Philippe Bellier	AI & Automation Specialist	Core technical lead	AI tool assessment, data and system architecture, pilot build support, automation design, security and governance

Femi Badejo, PMP, CISM	Delivery Lead	Delivery support	Milestone tracking, session coordination, training facilitation, playbook writing, status reporting
Audrey Medaino-Tardiff	Professional Services & Information Lead	Documentation / SOP support	SOPs, information architecture, training materials, process documentation
Jason Glover, SDC Partners	Procore Implementation Advisor	Advisory as needed	Procore workflow review, implementation feasibility, pilot design, integration planning
Tim O'Brien	Strategic Advisor	Advisory as needed	Construction technology strategy, industry positioning, change management
Craig Hurst	Strategic Advisor	Advisory as needed	Vendor landscape, construction technology ecosystem, program strategy
Accordant Company	GL / Accounting Advisory	Advisory as needed	Sage 300 CRE accounting workflow review, AI readiness for accounting workstream, integration planning
Extended Specialist Network	Technical and Domain Specialists	Engaged per pilot and workstream	TNE maintains a working network of vetted technical specialists across AI development, construction software integration, data engineering, automation scripting, and workflow design. Specialists are engaged directly by TNE on a task basis as pilot scope and technical requirements demand. All work is delivered under TNE program governance and quality standards.

TNE manages team allocation internally within the selected blended weekly capacity. The Standard option provides 5–12 hours/week blended; the Higher-Touch option provides 8–15 hours/week blended. Individual involvement varies by phase, pilot selection, and technical requirements.

Team Biographies

ANDRÉ BARSALOU, PRINCIPAL AND PROGRAM LEAD

Principal of The Net Effect. Leads technology governance, ERP advisory, workflow optimization, and digital transformation engagements for construction and industrial firms in Canada and the US. Work spans fractional CTO advisory, SOP program design, AI and automation integration, and implementation planning for firms ranging from specialty contractors to commercial general contractors. Leads all client engagement and delivery on the MKS program.

LOUIS-PHILIPPE BELLIER, AI AND AUTOMATION SPECIALIST

Head of Growth at Pinax, where LP built and governed AI-assisted lead qualification pipelines, marketing automation workflows, and recruiting automation programs with human-in-the-loop validation. Prior to Pinax, LP spent several years at Inovision working across 300 to 700 companies in construction and adjacent industries on growth operations, digital workflow, and automation. At TNE, LP has contributed to digital transformation and workflow engagements for construction contractors across Canada. Brings 1,000+ digital projects since 2008 across workflow automation, CRM, M365, Power BI, enterprise integration, and AI tool evaluation. Leads all technical delivery and AI build work on the MKS program.

FEMI BADEJO PMP CISM, DELIVERY LEAD

Project manager and business analyst with experience in architecture, engineering, and construction technology integration. Holds PMP and CISM certifications and is Scrum Master Certified. Delivered onsite and remote training and adoption work for QMMS's Ontraccr optimization over an extended engagement. Supports delivery coordination, milestone tracking, and training facilitation on TNE programs.

AUDREY MEDAINO-TARDIFF, PROFESSIONAL SERVICES AND INFORMATION LEAD

Holds a Master of Information from the University of Toronto. Applied experience in information architecture, process documentation, digital governance, and professional services delivery. Contributes SOP development, training material preparation, and information architecture on client programs.

JASON GLOVER, SDC PARTNERS, PROCORE IMPLEMENTATION ADVISOR

President of SDC Partners, a construction technology consulting firm specializing in Procore implementation, customization, and training. Every SDC team member comes from an operational construction background. Contributes Procore-specific pilot design, workflow review, and integration planning.

TIM O'BRIEN, STRATEGIC ADVISOR

Over 25 years in construction, starting as founder of Brick Drive Paving Ltd. in Whistler BC. Led digital transformation programs for construction firms including QMMS and Core Site Solutions, with deep experience in change management, platform adoption, and SOP governance. Contributes construction technology strategy, vendor relationships, and advisory support to the MKS program.

CRAIG HURST, STRATEGIC ADVISOR

Decades of experience in digital adoption and IT project development combined with direct construction industry background. Led construction technology engagements for firms including Fairway Electrical Services and DeMarco Construction. Deep knowledge of the Canadian ConTech ecosystem, vendor landscape, and implementation methodology. Contributes strategic program input and vendor intelligence.

ACCORDANT COMPANY, GL AND ACCOUNTING ADVISORY

Accordant is one of the largest Sage Construction software providers in the Eastern US, with dedicated coverage across Indiana and the Midwest. The team includes CPAs, MBAs, and professionals with direct construction industry experience. Accordant has supported over 5,000 organizations since 2005 across Sage 300 CRE, Sage Intacct Construction, and Sage 100 Contractor. On the MKS program, Accordant contributes Sage 300 CRE accounting workflow review, AI readiness assessment for the accounting workstream, and integration planning for invoice, PO, and month-end automation pilots.

8. Relevant Experience

The four case studies below cover construction implementation depth, program leadership, technology strategy, and AI workflow governance: the four dimensions MKS is evaluating.

These examples are not presented as identical AI transformation projects. They show the operating pattern MKS is buying: structured discovery, workflow mapping, tool evaluation, stakeholder adoption, SOPs, governance, and phased implementation. That methodology matters because MKS is not only selecting tools; it is selecting a partner to help decide which AI use cases to pursue, which to wait on, which to pilot, and which to scale.

Case Study 1: QMMS, Construction Software Optimization and Adoption

Quality Millwright & Machine Services, Edmonton AB. Industrial specialty contractor, 25 employees. Tim O'Brien and Femi Badejo, 18+ months active engagement.

- Scope: Ontraccr optimization across scheduling, dispatch, workflow management, and field operations; workflow mapping and redundancy elimination; onsite and remote engagement; biweekly training sessions; SOP documentation; ongoing support framework
- Tools: Ontraccr, QBO, Monday.com
- Outcome: Reduced duplicate data entry across estimating, PM, and billing workflows; supported staff adoption across field and office teams; 18+ months of active delivery and optimization
- Reference: Munsoor Mirza, CEO. mmirza@qmillwright.com

"We found them to be consummate professionals. With their help and knowledge, we were able to realize the outcome we wanted and selected a system that we feel will work for us."

Case Study 2: Core Site Solutions, Change Management and Technology Implementation

Tim O'Brien lead. Multi-phase program covering planning, deployment, go-live support, and ongoing optimization.

- Phase 1: Change management strategy, leadership alignment, training program design, data mapping and migration preparation
- Phase 2: Software configuration and deployment, API integrations, data migration and validation, SOP documentation, testing and go-live support
- Phase 3: Post-go-live monitoring, performance optimization, dashboards and reporting, transformation roadmap
- Outcome: Multi-phase delivery covering change management, software deployment support, SOP documentation, training, and an ongoing optimization roadmap
- Reference: Glenn Dawson, Core Site Solutions. glenn@coresitesolutions.com

Case Study 3: Fairway Electrical Services, Construction Technology Strategy, SOPs, and Implementation Planning

Craig Hurst lead. $10M+ revenue electrical contractor, 57 field staff, commercial, industrial, and institutional projects.

- Scope: Full construction technology stack evaluation and platform recommendation; estimating tool integration (McCormick, FastEst); SOP creation across org chart; change management plan execution; role-by-role training program; CRM selection and configuration; digital marketing strategy; cybersecurity plan and COR compliance roadmap
- Tools: TradeTraks, QBO, McCormick, FastEst, Pipeline CRM

- Outcome: Construction technology roadmap with implementation timelines, SOP framework, change management and training plan, and fractional CIO recommendation
- Reference: Jason Herd. jason@tradetraks.ca

Case Study 4: Pinax, AI Workflow Governance, Lead Qualification, Recruiting Automation

LP Bellier, Head of Growth. Growth-stage technology company.

- BD and lead qualification: Built and governed AI-assisted lead qualification workflows covering inbound and outbound pipelines with structured validation loops to prevent data pollution and hallucination. Phased approach: manual review, then semi-automated with human oversight, then fully automated with ongoing quality controls
- Marketing automation with guardrails: Managed over-automation risk, designed data flow schemas documenting every node in the automation chain, established consent and attribution boundaries
- HR and recruiting automation: Built structured recruiting funnel automation with human validation before full deployment; 7–8 interns, average 9-month tenure
- AI governance: Established hallucination and data pollution controls, defined human oversight requirements, approval checkpoints, and escalation paths
- Outcome: Operationalized a staged automation model across BD, marketing, and recruiting, with human validation, approval checkpoints, and governance controls before broader deployment
- Reference: Daniel Keyes, Co-Founder and CEO. daniel@pinax.network

Broader Construction Portfolio and Team Depth

TNE's construction and industrial portfolio includes advisory and implementation engagements across mechanical contracting, excavation, electrical, drywall and ceilings, GC operations, and environmental/civil contracting. Additional relevant examples include DeMarco Construction (Ottawa GC, Procore selection and implementation advisory), Econo Wall & Ceilings (active SOP governance and Fractional CTO, 46 SOPs across 6 departments), and Canadian Mechanical Specialty (full SOP ecosystem delivery). Jason Glover and SDC Partners bring direct Procore implementation experience covering GCs and specialty contractors across Canada.

LP Bellier's construction sector exposure extends beyond TNE engagements. At Inovision, LP worked across 300 to 700 companies in construction and adjacent industries on growth, digital operations, and automation. That background, combined with his AI governance work at Pinax and technical delivery across 1,000+ digital projects, is what makes the TNE team unusual: construction sector depth and live AI governance experience in the same technical lead. Most firms responding to an engagement like this have one or the other.

9. Commercial Terms

All pricing is fixed. No variable fees, no markup on pass-through costs.

	Standard	Higher-Touch
Monthly retainer	**$9,000 USD/month**	**$11,500 USD/month**
9-month total	$81,000 USD	$103,500 USD
Weekly capacity (blended)	5–12 hours/week	8–15 hours/week
Pilots	3 pilots, 2 scaled use cases	Up to 4 pilots, up to 3 scaled use cases
Steering	Monthly	Bi-weekly + monthly
Additional scope	Standard pilot and reporting scope	Expanded stakeholder interviews, training, Procore, accounting, or recruiting depth

Milestone	Trigger	Bonus (USD)
90-day: 2 of 3 pilots meet defined KPI targets	Documented time savings or adoption threshold, agreed by end of Month 1	$2,500
6-month: 2 use cases in production with measured outcomes	Measured against baseline established in Month 1	$2,500

9-month: defined user adoption threshold on scaled tools	Threshold defined at pilot launch, documented monthly	$2,500
Maximum success component	All three milestones achieved	**$7,500**

No milestone payment is due without documented evidence against agreed baselines.

Commercial Summary

- Liability capped at fees paid in the three months preceding the claim
- Monthly fees non-refundable once the period commences
- Scope changes require written approval before work begins
- Deliverables owned by MKS upon full payment; governing law: State of Indiana
- Disputes resolved by AAA Commercial Arbitration, single arbitrator, Allen County Indiana or virtual

Full legal terms including confidentiality, IP, client responsibilities, force majeure, and dispute resolution are provided in Appendix A.

10. Key Assumptions

- MKS provides reasonable access to stakeholders and relevant systems throughout the engagement
- Pilot priorities are finalized after the first 30 days of discovery
- Data quality and access delays directly affect pilot scope and timing; delays caused by MKS constraints are subject to adjustment
- Human review remains mandatory for estimating outputs, financial recommendations, and customer-facing content
- MKS should expect approximately 3–5 hours per week from the primary internal lead during active discovery and pilot build phases, plus 1–2 hours per week from department leads during active pilot phases

11. References

Reference 1: Quality Millwright & Machine Services

- Name: Munsoor Mirza
- Title: CEO
- Company: Quality Millwright & Machine Services, Edmonton AB
- Relationship: Ontraccr optimization and adoption, 18-month engagement
- Contact: mmirza@qmillwright.com

Reference 2: Core Site Solutions

- Name: Glenn Dawson
- Title: Contact
- Company: Core Site Solutions
- Relationship: Change management and technology implementation, multi-phase program
- Contact: glenn@coresitesolutions.com

Reference 3: Fairway Electrical Services

- Name: Jason Herd
- Title: President
- Company: Fairway Electrical Services, Baden Ontario
- Relationship: Full construction technology strategy and implementation
- Contact: jason@tradetraks.ca

Reference 4: Pinax

- Name: Daniel Keyes
- Title: Co-Founder and CEO
- Company: Pinax
- Relationship: AI workflow governance, BD pipeline automation, marketing guardrails, recruiting automation. LP Bellier served as Head of Growth.
- Contact: daniel@pinax.network

12. Compliance Matrix

Quick reference mapping each RFP requirement to its location in this response.

RFP Requirement	TNE Response Location
Executive summary of approach (max 2 pages)	Section 1: Executive Summary
Relevant case studies with outcomes	Section 8: Relevant Experience
Team bios and time allocation	Section 7: Team and Time Allocation
Proposed 90-day plan	Section 4: Program Roadmap, Month 1 through Day 90
12-month scale approach	Section 4: Full RFP Scope Sequencing table and Month 9 deliverables
Project plan and cadence	Section 4: Milestone Table; Section 6: Reporting Cadence
Security posture and data handling	Section 5: Security, Governance and Change Management
Pricing and assumptions	Section 9: Commercial Terms; Section 10: Key Assumptions
References	Section 11: References
30-day: AI strategy and governance deliverables	Section 4, Month 1 deliverables
60-day: 3 pilots launched with playbooks	Section 4, Months 2–3 deliverables
90-day: ROI report and scale recommendations	Section 4, Day 90 deliverables
At least 2 scaled use cases by Month 6–9	Section 4, Months 4–6 and 7–9 deliverables
Change management and adoption plan	Section 5: Change Management and Adoption

13. Why TNE

Alternative	Their Edge	Why TNE Wins
AI platform firm or agency	Polished demos. Fast deployment. Strong AI product depth.	Deploying tools fast is not the same as deploying them well. Firms that move to implementation before governance create adoption failures and data exposure. TNE starts with the workflow, the ownership, and the controls. MKS gets AI that holds up operationally, not a demo that impresses for 30 days.
Procore implementation partner	Deep Procore expertise. Platform-specific experience. Familiar territory for MKS.	A Procore partner may naturally view the opportunity through a Procore-first lens. TNE adds independent program leadership. Jason Glover and SDC Partners are named on this engagement as independent Procore advisors.
Microsoft / Power BI shop	Strong data layer. M365 depth. Reporting capability.	MKS already has Sage 300 in SQL with Power BI connected. What MKS does not have is the operational layer connecting BD, estimating, PM, accounting, and field workflows. TNE builds that layer.
Construction ERP or Sage consultant	Deep system-of-record knowledge. Accounting depth.	The gap at MKS is not inside Sage. It is between systems: how estimates move to project startup, how PM job cost

		connects to leadership visibility, how BD data informs pursuit strategy.
Large consulting or technology firm	Brand recognition. Structured methodology. Enterprise model.	MKS gets the principal and the technical lead in every session. The people who scope the engagement are the people who execute it.

Construction judgment plus AI governance, in the same team

Most firms responding have one or the other. TNE brings a principal with direct construction operations experience and a technical lead who has governed AI workflows, automated BD pipelines, and built recruiting automation in live production environments. That combination is uncommon in the market and is the core reason TNE is well suited to this engagement.

Independent and adaptive

TNE does not resell software. Recommendations are not shaped by platform certifications, vendor partnerships, or subscription referral fees. The program is built around pilots, validation, and an adaptive roadmap, not a static implementation contract. TNE can tell the difference between a genuine AI use case and a connector with a marketing layer. MKS will not be sold AI where automation is the honest answer.

Senior-led, construction-literate

MKS gets the principal and the technical lead in every session. The people who scope the engagement are the people who execute it. TNE has evaluated hundreds of SaaS platforms since 2008, before AI was attached to every product pitch. That depth is what the program is actually being hired to provide. TNE supports MKS as a US-client engagement; tool selection is driven by fit, security, governance, and business value.

MKS owns all client-specific workflows, documentation, and outputs produced during the engagement. TNE retains ownership of its pre-existing methodologies and frameworks.

9536-6621 Quebec inc. (The Net Effect) | André Barsalou, Principal | andre@theneteffect.ca | +1 514 582 1389

Agreement and Acceptance

By signing below, both parties agree to the terms of this engagement as outlined in this proposal and in the full legal terms provided in Appendix A.

The Net Effect, 9536-6621 Québec inc.

Authorized signature:

André Barsalou, Principal

Date: _____

Michael Kinder & Sons, Inc., Accepted by

Authorized signature:

Name: _____

Title: _____

Date: _____

Questions prior to signing: andre@theneteffect.ca | +1 514 582 1389

Appendix A: Full Legal Terms

1. Accuracy

TNE will perform services using professional judgment based on information provided by MKS. The quality of deliverables depends on the accuracy and completeness of information, data, and system access provided by MKS.

2. Confidentiality

Both parties agree to hold the other's confidential information in strict confidence and not to disclose it to third parties without prior written consent. This obligation survives termination of the engagement.

3. Liability

TNE's total liability under this engagement is capped at the fees paid in the three months immediately preceding the event giving rise to the claim. This cap does not apply in cases of wilful misconduct or fraud.

4. Payment

All fees are fixed as stated in this proposal. Invoices are due upon receipt. A 2% monthly interest rate applies to balances unpaid after 14 days of the invoice date.

5. Scope Changes

Any changes to the agreed scope of work must be documented in writing, including by email, before additional work begins. Verbal scope changes are not binding on TNE.

6. Engagement Commitment

Once a monthly engagement period commences, fees for that period are non-refundable. The engagement may be paused for up to 10 business days by mutual written agreement. If MKS does not respond to TNE communications for 30 consecutive days, the engagement month is deemed complete and deliverables are accepted. TNE may exit with 14 days written notice if invoices remain unpaid after two billing cycles.

7. Client Responsibilities

MKS agrees to provide reasonable access to relevant systems, data, and personnel; to designate a primary point of contact with authority to provide approvals; to review and provide feedback on deliverables within agreed timelines; and not to move TNE-delivered pilot workflows from test or limited-use environments into broader confidential-data workflows without completing the agreed validation and approval steps.

8. Force Majeure

Neither party shall be held liable for delays or failures in performance resulting from circumstances beyond their reasonable control, provided the affected party gives prompt written notice.

9. General

Deliverables produced under this engagement become the property of MKS upon full payment of all fees for the applicable month. Until full payment is received, deliverables are licensed to MKS for internal use only. TNE retains ownership of its proprietary tools, methodologies, and frameworks. This engagement will be conducted virtually. Travel expenses, if any, require written pre-approval. This agreement is governed by the laws of the State of Indiana. Upon execution, this proposal constitutes the entire agreement between MKS and 9536-6621 Quebec inc. (The Net Effect), superseding all prior discussions and agreements.

10. Dispute Resolution

Any dispute arising out of or relating to this agreement shall be resolved by binding arbitration administered by the American Arbitration Association under its Commercial Arbitration Rules. Arbitration shall be conducted by a single arbitrator. Proceedings may be conducted virtually or, if in person, in Allen County, Indiana. The arbitrator's decision shall be final and binding. Each party bears its own legal fees and costs unless the arbitrator determines a claim was frivolous or brought in bad faith. Nothing in this clause prevents either party from seeking injunctive relief in a court of competent jurisdiction to prevent irreparable harm pending arbitration.