RE-IN-ESSENCE

OPERATING PACK · PRODUCT AND ENGINEERING

# Edge to Core

## Operating Pack. The reference manual for running the system set out in the Edge to Core white paper.

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> **A note on thresholds and targets:**
>
> Gate times, tripwire limits, and targets in this pack are baseline starting points to adjust to your own engineering setup. The full financial model and external research sit in the companion white paper.

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Start with the white paper for the commercial and architectural rationale. This pack is the day-to-day manual for running the system: who owns each step, how fast each gate moves, and how the tickets are set up. Customer-specific Edge work is always owned and supported by the customer, or by PS under a separate SoW, never out of the Core R&D budget.

# 1. Role cards

## Edge builder

| | |
|---|---|
| **Who** | PMs, domain leads and forward-deployed engineers, as part of their existing role. |
| **Does** | Builds discovery prototypes at the Edge, in the sandbox, on Enabler APIs and synthetic data. Registers each one at Gate 0. |
| **Decides** | How to build inside the sandbox; what to try next week. |
| **Never decides** | Whether a prototype enters Core or becomes customer-specific Edge work; anything that crosses a tripwire. |
| **Measured on** | Time from signal to first customer session; prototypes registered at Gate 0; Promotion Packs complete at Gate 2. |

## PM or domain lead

| | |
|---|---|
| **Does** | Writes the Edge Card at Stage 1, runs the pilot with the builder, and leads Core prep and the Stage 7 cutover. |
| **Decides** | The target metric; the split between Core and Enabler configuration at Core prep, with the Tech Lead. |
| **Measured on** | Pilots with a target metric met; customers moved to Core within 30 days of release. |

## Edge Steward · about 0.5 FTE

| | |
|---|---|
| **Who** | A staff engineer or delivery lead. |
| **Does** | Clears Gate 1 within 2 working days, tracks the day-30 and day-90 dates, runs the weekly tripwire check and raises Tripwire Alerts. |
| **Decides** | Whether a prototype is contained (Gate 1); when a tripwire has fired. |
| **Never decides** | How the prototype is coded internally. The Steward checks sandbox isolation and data boundaries, not code quality. |
| **Measured on** | Gate 1 inside 2 working days; tripwires raised within 1 working day of the condition; no pilot past day 90 without Gate 2. |

## Core Tech Lead · about 0.3 FTE

| | |
|---|---|
| **Does** | Runs the Architecture Review, designs the Enabler APIs, and requires a named human on every Core merge. |
| **Decides** | Sole sign-off on the technical verdict (*Adopt, Refactor, or Rebuild* for Core; *Isolate* for Customer-specific work). Joint voter with Product and Commercial at Gate 2. |
| **Never decides** | Cannot unilaterally block or approve a feature at Gate 2. Commercial routing is a joint decision. |
| **Measured on** | Verdicts inside 5 working days; Refactor estimates against actuals; escaped defects in Core. |

## Gate 2 triad

| | |
|---|---|
| **Who** | Product, Tech and Commercial (or PS). |
| **Decides** | Within 3 working days: Promote to Core, Customer-specific work at the Edge (customer-run, or PS under a separate SoW), or Retire. |
| **Never decides** | How a feature enters Core. Product and Commercial cannot overrule a Rebuild verdict into Adopt. |

## Core engineer

| | |
|---|---|
| **Does** | Builds promoted features to production standards and maintains the Enabler APIs. Regardless of how much code AI generates, a named engineer signs off and takes accountability for every merge. |
| **Never does** | Maintain customer-specific Edge workflows. If a Core engineer outside the Edge pod gets pulled in to fix a pilot more than twice, it automatically triggers a Tripwire Alert. |
| **Measured on** | Escaped defects; review time by tier; Enabler APIs delivered. |

## Professional Services team

| | |
|---|---|
| **Who** | A dedicated pod, separate from Core R&D, funded by customer contracts. |
| **Does** | Builds and maintains custom workflows over the Enabler layer for clients on full-cost contracts. |
| **Measured on** | PS margin against the 20%+ target; contracts reviewed each year. |

# 2. Gates, tripwires and service levels

Five gates (G0–G4) plus the Architecture Review. Gate 2 and the Architecture Review together take 3–8 working days.

| Gate | Question | Owner | Time (proposed) | Outcomes |
|---|---|---|---|---|
| **G0 Register** | Who owns this, and when is the day-30 review? | Edge builder | 15 minutes | Logged in EDGE with its day-30 and day-90 dates |
| **G1 Containment** | Is it isolated to the sandbox and Enabler APIs? | Edge Steward | Up to 2 working days | Cleared for pilot, or fix the boundary |
| **G2 Commercial routing** | Promote to Core, keep at the Edge as customer-specific work, or retire? | Product, Tech and Commercial | Up to 3 working days | Promote to Core; Customer-specific work; Retire |
| **AR Architecture Review** | How does it enter Core, or how is it isolated for PS? | Core Tech Lead alone | Up to 5 working days | Adopt, Refactor or Rebuild; Isolate |
| **G3 Release** | Does it pass its risk-tier checks, with a named owner? | Core Tech Lead, or PS lead for custom work | Sprint cadence | Core GA, or handed to the PS or customer SLA |
| **G4 Cutover** | Is the free pilot closed and billing or migration live? | PM with the CS or PS lead | 30 days after G3 | On a Core licence, or under a customer-specific SoW |

## The seven tripwires

An uncontracted pilot enters Gate 2 within 3 working days of crossing any one of these.

1. A second customer asks for it.
2. It needs SSO, audit logs or a security review.
3. It reads or writes Core platform data outside an approved Enabler API.
4. It touches personal data (PII) or contractually sensitive commercial data.
5. More than 50 users or 3 departments use it.
6. A customer asks to put it in an SLA, renewal or order form.
7. Time limit or support drag: it reaches day 90 since Gate 0 (following a day-30 check), or Core engineers outside the Edge pod are pulled in to fix it more than twice.

## Service levels

| Item | Level (proposed) | Owner |
|---|---|---|
| **Gate 0 registration** | 15 minutes | Edge builder |
| **Gate 1 containment** | Up to 2 working days | Edge Steward |
| **Tripwire acknowledged** | 1 working day | Edge Steward |
| **Gate 2 opened after a tripwire** | Within 3 working days | Edge Steward |
| **Gate 2 decision** | Up to 3 working days | Gate 2 triad |
| **Architecture Verdict** | Up to 5 working days | Core Tech Lead |
| **Day-30 review** | At day 30 after Gate 0 | PM or domain lead |
| **Gate 4 cutover** | 30 days after Gate 3; custom users on contract by day 31 | PM with CS or PS lead |
| **Edge support to pilot customers** | Business hours, best effort, stated on the Edge Card; no Core SLA | Edge builder |
| **Customer-specific work support** | Handled per the PS contract SLA; never routed to the Core support desk. | PS pod or customer |

# 3. Sub-processes, stage by stage

## 3.1 Signal and Gate 0

| Step | Action | Description | Owner |
|---|---|---|---|
| **1** | Check Core first | If Core or existing Enabler configuration already does it, the answer is configuration or training, not a prototype. | PM or domain lead |
| **2** | Write the Edge Card | The customer problem, the target metric, the 1–2 pilot customers and the data class. | PM or domain lead |
| **3** | Register | Log the card in EDGE with an owner, the day-30 review and the day-90 date. 15 minutes. | Edge builder |

## 3.2 Edge build and Gate 1

| Step | Action | Description | Owner |
|---|---|---|---|
| **1** | Sandbox | Isolated environment, Enabler APIs and synthetic data. No Core production data. | Edge builder |
| **2** | Build | Build with AI in short loops. Code in the company repository, no secrets in code or prompts. | Edge builder |
| **3** | Gate 1 | Confirm data and tenant isolation within 2 working days, or send it back to fix the boundary. | Edge Steward |

## 3.3 Edge pilot and tripwires

| Step | Action | Description | Owner |
|---|---|---|---|
| **1** | Run the pilot | 1–2 customers use it for 1–4 weeks. Weekly demo; the experiment log records each change. | Edge builder and PM |
| **2** | Tripwire check | Weekly check of every live pilot against the seven tripwires. | Edge Steward |
| **3** | Day-30 review | Keep piloting, send to Gate 2 early, or retire. | PM or domain lead |
| **4** | Raise the alert | When a tripwire fires, raise a Tripwire Alert and open Gate 2 within 3 working days. | Edge Steward |
| **5** | Assemble the Promotion Pack | Walkthrough, acceptance tests, data model, usage, shortcuts, proposed layer, prompts and logs. | Edge builder and PM |

## 3.4 Gate 2 and the Architecture Review

| Step | Action | Description | Owner |
|---|---|---|---|
| **1** | Gate 2 | Decide Promote to Core, Customer-specific work or Retire within 3 working days. Record the reasoning. | Gate 2 triad |
| **2** | Retire | Shut down the sandbox, return or delete pilot data per the Edge Card, and close the ticket. | PM or domain lead |
| **3** | Architecture Review | Assign the risk tier, inspect the codebase, and issue the signed verdict (*Adopt, Refactor, or Rebuild* for Core; *Isolate* for Customer-specific work) within 5 working days. | Core Tech Lead |
| **4** | Price the customer-specific route | Quote the PS SoW at full cost, to a 20%+ margin, or agree customer self-serve on Enabler APIs. | Commercial or PS lead |
| **5** | Tell the customer | Explain the route and the timeline the same week. | PM or domain lead |

## 3.5 Core prep, Core build and Gate 3

| Step | Action | Description | Owner |
|---|---|---|---|
| **1** | Core prep | The prototype is the functional spec. Record the split between Core and Enabler configuration, and the non-functional requirements. 2–5 days. | PM and Core Tech Lead |
| **2** | Build | Write automated tests against the acceptance criteria first. Target roughly 3 days for an Adopt or light Refactor, and up to 4 weeks for a full Tier 3 Rebuild. | Core engineers |
| **3** | Prototype check | PM signs off that the Core build matches the proven prototype workflow, against the same tests. | PM or domain lead |
| **4** | Gate 3 | Passes its risk-tier checks with a named human on every merge, at sprint cadence. | Core Tech Lead |

## 3.6 Rollout, cutover, Gate 4 and run

| Step | Action | Description | Owner |
|---|---|---|---|
| **1** | Plan the cutover | List who moves to Core and Enablers and who keeps a custom workflow. | PM with CS or PS lead |
| **2** | Switch | Pilot customers get 30 days to switch as part of their licence tier. | PM with CS |
| **3** | Contract the rest | Customers keeping a custom workflow sign a PS maintenance schedule or take it on self-serve by day 31. | Commercial or PS lead |
| **4** | Gate 4 | Close the free pilot sandbox; billing or migration live, within 30 days of Gate 3. | PM with CS or PS lead |
| **5** | Run | Core runs it multi-tenant. customer-specific Edge work is run by the PS pod or the customer, with an annual cost review. | Core Tech Lead, or PS lead |

# 4. Risk tiers and AI governance

| Risk tier | Scope | Typical verdict | Sign-off |
|---|---|---|---|
| **Tier 1 · Low** | UI views, read-only reports, Enabler field and naming configuration | Adopt, or a light Refactor | Automated CI, one peer review and a named owner |
| **Tier 2 · Medium** | Multi-tenant business logic, Enabler webhooks, external integrations | Refactor or Rebuild | Multi-tenant isolation tests and a senior engineer's sign-off |
| **Tier 3 · Critical** | Auth and permissions, billing ledgers, core schema migrations, personal-data pipelines | Rebuild in Core | Principal architect and security sign-off, and a rollback drill |

### AI at the Edge

| Rule | Why |
|---|---|
| Any AI build tool, writing to the company repository | Keeps Adopt and Refactor possible |
| No Core production data in the sandbox | Data isolation is the primary security boundary. |
| No secrets in prompts or code | Prompts and generated code are stored and shared |
| Prompts and generation logs kept with the experiment log | Gives the Core Tech Lead visibility into shortcuts and edge cases during the Architecture Review. |

### AI in Core

Every merge into Core requires a named human owner, with review depth matched to the risk tier (T1, T2, or T3). Automated agents are blocked in CI/CD from merging code, approving pull requests, lowering a risk tier, running production database migrations, or modifying secrets and access policies. Each week, the Core Tech Lead runs a 30-minute review clinic to inspect any escaped defects from AI-assisted PRs, catch mislabelled risk tiers, and roll out one practical improvement to shared prompts or automated checks.

# 5. Ticket schema

Five spaces: EDGE for pilots, GATE for decisions, CORE for engineering work, PS for customer-specific Edge work, and the existing DESK for support. Every object links to its parent, and the Edge Card ID travels with the feature from Gate 0 to the desk.

| Object | Space | Key fields | Statuses |
|---|---|---|---|
| **Edge Card** | EDGE | Owner, Customer, Target metric, Pilot customers, Data class, Repository, Edge Steward, Day-30 review, Day-90 date | Registered → Contained (G1) → In pilot → Tripped → Routed (Core / Customer-specific work / Retired) |
| **Experiment log** | EDGE | Week, Change, Reason, Customer reaction | Open → Closed with the Edge Card |
| **Tripwire Alert** | EDGE | Tripwire type, Detected by, Detection date, Evidence | Raised → Acknowledged → Gate 2 opened |
| **Promotion Pack** | GATE | Walkthrough link, Acceptance tests, Data model, Usage, Shortcuts list, Proposed layer, Prompts and generation logs | Draft → Submitted → Accepted for Gate 2 |
| **G2 Decision** | GATE | Route, Rationale, Commercial terms, Owner | Pending → Decided |
| **Architecture Verdict** | GATE | Risk tier, Verdict, Core and Enabler split, Refactor list, Estimate, Signer | In review → Signed |
| **Core Epic** | CORE | Design, Enabler configuration, Security review, Risk tier | Standard Core workflow |
| **Cutover Plan** | CORE | Customers to Core, Customers to customer-specific work, Migration, Sandbox close date | Planned → Migrated → Verified → Closed |
| **Customer-specific SoW** | PS | Maintained by, Contract value, Margin target, Enabler APIs, Annual review | Quoted → Signed → Live → Reviewed |
| **Support parent** | DESK | Linked parent | Existing desk workflow |

# 6. Meetings

| Meeting | Purpose | Who | Cadence · length | Output |
|---|---|---|---|---|
| **Edge demo** | Show the pilot customer what changed | Edge builder, PM, customer | Weekly · 30 min | Experiment log entry |
| **Tripwire check** | Check every live pilot against the seven tripwires | Edge Steward, PMs | Weekly · 15 min | Alerts raised, or none |
| **Gate 2** | Promote to Core, Customer-specific work or Retire | Product, Tech, Commercial | On trigger · up to 3 working days | G2 Decision |
| **Architecture Review** | Risk tier and verdict | Core Tech Lead | On trigger · up to 5 working days | Signed verdict |
| **AI review clinic** | Escapes, wrong tiers, one improvement | Core Tech Lead, engineers | Weekly · 30 min | Standard updated |
| **Board metrics review** | The four board metrics | Leadership | Monthly · 45 min | Board pack; threshold changes |

# 7. Board metrics

| Metric | Target (proposed) | Source in the tickets |
|---|---|---|
| **Unfunded silent promotions** | 0 | Code in production with no Core Epic past Gate 3 and no Customer-specific SoW |
| **Edge conversion split** | About 25% Core, 10% customer-specific work at the Edge, 65% retired | G2 Decision routes |
| **Gate time compliance** | >90% within 2 / 3 / 5 working days (G1 / G2 / AR) | Edge Card, G2 Decision and Architecture Verdict timestamps |
| **PS margin against SaaS gross margin** | PS margin 20%+; SaaS gross margin 80%+ | customer-specific SoWs and finance |

# 8. The 90-day checklist

| Window | Tasks | Exit milestone |
|---|---|---|
| **Days 1–30 · Amnesty and triage** | 1. Announce a no-blame prototype amnesty.<br>2. Log every shadow script and live prototype in EDGE as an Edge Card.<br>3. Name the part-time Edge Steward.<br>4. Agree the seven tripwires and their thresholds, in writing.<br>5. Name the Gate 2 triad. | Every live prototype visible; no unlogged code touching production databases. |
| **Days 31–60 · Enablers and PS pricing** | 1. Stand up the Edge sandbox.<br>2. Ship the first three Enabler APIs.<br>3. Publish the PS rate card for customer-specific Edge work.<br>4. Create the EDGE, GATE, CORE and PS spaces and ticket types (Sections 5 and 10).<br>5. Run the first Gate 2 and Architecture Reviews in full. | The first 3 pilots routed inside the gate times; Sales and PS hold the contract terms. |
| **Days 61–90 · Risk tiers and cutovers** | 1. Enforce the three risk tiers on Core merges, with tier labels in CI.<br>2. Run the first Stage 7 cutovers, to the standard Core release or to customer-specific SoWs.<br>3. Publish the first monthly board pack.<br>4. Review which thresholds were wrong, and change them in writing. | No unfunded custom code in Core R&D; the first monthly board pack published. |

# 9. Templates

## Edge Card

| Field | Content |
|---|---|
| **Feature and customer** | |
| **Owner** | Name |
| **Customer problem** | In the customer's words |
| **Target metric** | One measurable outcome |
| **Pilot customers** | 1–2, named |
| **Data class** | Synthetic · customer test data · other |
| **Sandbox and repository** | |
| **Edge Steward** | Name; Gate 1 cleared on (date) |
| **Dates** | Gate 0 · day-30 review · day 90 |
| **Data at retirement** | Returned · deleted · migrated |

## Promotion Pack

| Field | Content |
|---|---|
| **Walkthrough** | Recorded, under 15 minutes |
| **Acceptance tests** | Linked; mapped to the target metric |
| **Data model** | One page, current |
| **Usage** | Users, departments, frequency, issues |
| **Shortcuts taken** | Every one, listed |
| **Proposed layer** | Core · Enabler · Edge |
| **Prompts and generation logs** | Linked |

## G2 Decision record

| Field | Content |
|---|---|
| **Route** | Promote to Core · Customer-specific work at the Edge (customer-run, or PS under a separate SoW) · Retire |
| **Reasoning** | |
| **Commercial terms** | In the licence tier · PS contract · customer self-serve |
| **Owner and dates** | |
| **Signed** | Product · Tech · Commercial |

## Architecture Verdict

| Field | Content |
|---|---|
| **Risk tier** | 1 · 2 · 3 |
| **Verdict** | Adopt · Refactor · Rebuild (Core route) · Isolate (customer-specific route) |
| **Core and Enabler split** | |
| **Refactor list** | Each item with an estimate |
| **Signed** | Core Tech Lead, date |

# 10. Jira ticket templates

One template per ticket object in the schema (Section 5). Set up the EDGE, GATE, CORE and PS spaces alongside the existing DESK, with one issue type per object. Every ticket carries the Edge Card ID and links to its parent.

The same templates are supplied as a CSV for Jira's CSV importer (edge-to-core-jira-templates.csv): one row per ticket type, with Issue Type, Space, Summary, Description, Labels, Components, Workflow and one column per custom field. Create the custom fields first, then map the columns at import. Every lifecycle ticket carries the e2c label, so one filter finds them all.

## 10.1 Edge Card

| | |
|---|---|
| **Issue type · space** | Edge Card · EDGE |
| **Parent link** | — |
| **Summary pattern** | [EDGE] {Customer} · {Feature} · review {YYYY-MM-DD} |
| **Description skeleton** | Customer problem, in the customer's words:<br>Target metric:<br>Pilot customers (1–2):<br>Data class: synthetic · customer test data · other:<br>Sandbox and repository:<br>Day-30 review date · day-90 date:<br>What happens to data at retirement: returned · deleted · migrated: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Owner**: User<br>**Customer**<br>**Target metric**: Text<br>**Pilot customers**: 1–2<br>**Data class**: Select<br>**Repository**: URL in the company organisation<br>**Edge Steward**: User<br>**Day-30 review**: Date<br>**Day-90 date**: Date |
| **Labels** | e2c · edge · gate-g0 |
| **Component** | Signal |
| **Workflow** | Registered → Contained (G1) → In pilot → Tripped → Routed (Core / Customer-specific work / Retired) |
| **Definition of done** | – Registered in 15 minutes: owner, target metric, day-30 and day-90 dates set.<br>– Gate 1 cleared by the Edge Steward within 2 working days: sandbox and Enabler APIs only.<br>– On close: route recorded (Core, Customer-specific work or Retired). |

## 10.2 Experiment log

| | |
|---|---|
| **Issue type · space** | Experiment log · EDGE |
| **Parent link** | Edge Card |
| **Summary pattern** | [LOG] {Edge Card ID} · week {n} |
| **Description skeleton** | What changed this week:<br>Why:<br>Customer reaction at the demo:<br>Prompts and generation logs (link): |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Week**: Number<br>**Change**: Text<br>**Reason**: Text<br>**Customer reaction**: Text |
| **Labels** | e2c · edge · experiment-log |
| **Component** | Edge pilot |
| **Workflow** | Open → Closed with the Edge Card |
| **Definition of done** | – One entry after each weekly demo.<br>– Prompts and generation logs linked.<br>– Closed only when the Edge Card closes. |

## 10.3 Tripwire Alert

| | |
|---|---|
| **Issue type · space** | Tripwire Alert · EDGE |
| **Parent link** | Edge Card |
| **Summary pattern** | [TRIPWIRE] {Edge Card ID} · {tripwire} |
| **Description skeleton** | Tripwire that fired:<br>Evidence (usage export, CRM tag, request record, incident):<br>Detected by and date: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Tripwire type**: Second customer · SSO, audit logs or security review · Core platform data outside an approved Enabler API · personal data (PII) or contractually sensitive commercial data · more than 50 users or 3 departments · SLA, renewal or order form · time limit or support drag: day 90 since Gate 0 (following a day-30 check), or Core engineers outside the Edge pod pulled in to fix it more than twice<br>**Detected by**: User or automation<br>**Detection date**: Date<br>**Evidence**: Text and links |
| **Labels** | e2c · edge · tripwire |
| **Component** | Edge pilot |
| **Workflow** | Raised → Acknowledged → Gate 2 opened |
| **Definition of done** | – Acknowledged by the Edge Steward within 1 working day.<br>– Gate 2 opened within 3 working days of the tripwire.<br>– Promotion Pack ticket created and linked.<br>– Edge Card moved to Tripped. |

## 10.4 Promotion Pack

| | |
|---|---|
| **Issue type · space** | Promotion Pack · GATE |
| **Parent link** | Tripwire Alert |
| **Summary pattern** | [PACK] {Edge Card ID} · {Feature} · proposed {Core \| Enabler \| Edge} |
| **Description skeleton** | Walkthrough (recorded, under 15 minutes):<br>Acceptance tests (linked; mapped to the target metric):<br>Data model (one page, current):<br>Usage: users, departments, frequency, issues:<br>Shortcuts taken (every one):<br>Proposed layer: Core · Enabler · Edge:<br>Prompts and generation logs (linked): |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Walkthrough link**: URL<br>**Acceptance tests**: URL<br>**Data model**: URL<br>**Usage**: Text<br>**Shortcuts list**: Text<br>**Proposed layer**: Core · Enabler · Edge<br>**Prompts and generation logs**: URL |
| **Labels** | e2c · gate · promotion-pack |
| **Component** | Gate 2 |
| **Workflow** | Draft → Submitted → Accepted for Gate 2 |
| **Definition of done** | – All seven items present.<br>– Assembled by the Edge builder and PM.<br>– Accepted for Gate 2 by the triad. |

## 10.5 G2 Decision

| | |
|---|---|
| **Issue type · space** | G2 Decision · GATE |
| **Parent link** | Promotion Pack |
| **Summary pattern** | [G2] {Edge Card ID} · {Promote to Core \| Customer-specific work \| Retire} |
| **Description skeleton** | Route: Promote to Core · Customer-specific work at the Edge (customer-run, or PS under a separate SoW) · Retire:<br>Reasoning:<br>Commercial terms: in the licence tier · PS contract · customer self-serve:<br>Owner and dates:<br>Signed: Product · Tech · Commercial: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Route**: Promote to Core · Customer-specific work · Retire<br>**Rationale**: Text<br>**Commercial terms**: Select<br>**Owner**: User |
| **Labels** | e2c · gate · gate-g2 |
| **Component** | Gate 2 |
| **Workflow** | Pending → Decided |
| **Definition of done** | – Decided within 3 working days.<br>– Reasoning recorded; signed by Product, Tech and Commercial.<br>– Promote to Core or Customer-specific work: Architecture Verdict ticket created.<br>– Retire: Edge Card closed and pilot data returned, deleted, or migrated per the Edge Card.<br>– Customer told the outcome the same week. |

## 10.6 Architecture Verdict

| | |
|---|---|
| **Issue type · space** | Architecture Verdict · GATE |
| **Parent link** | G2 Decision |
| **Summary pattern** | [VERDICT] {Edge Card ID} · {Adopt \| Refactor \| Rebuild \| Isolate} |
| **Description skeleton** | Risk tier: 1 · 2 · 3:<br>Verdict: Adopt · Refactor · Rebuild (Core route) or Isolate (customer-specific route):<br>Split between Core and Enabler configuration:<br>Refactor list (each item with an estimate):<br>Estimate:<br>Signed: Core Tech Lead, date: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Risk tier**: 1 · 2 · 3<br>**Verdict**: Adopt · Refactor · Rebuild · Isolate<br>**Core and Enabler split**: Text<br>**Refactor list**: Text<br>**Estimate**: Person-days<br>**Signer**: User |
| **Labels** | e2c · gate · verdict · gate-ar |
| **Component** | Architecture Review |
| **Workflow** | In review → Signed |
| **Definition of done** | – Signed by the Core Tech Lead within 5 working days.<br>– Tier 3 work is always Rebuild in Core.<br>– Not overruled by Gate 2: a Rebuild is never changed to Adopt. |

## 10.7 Core Epic

| | |
|---|---|
| **Issue type · space** | Core Epic · CORE |
| **Parent link** | Architecture Verdict |
| **Summary pattern** | [EPIC] {Feature} · {verdict} · from {Edge Card ID} |
| **Description skeleton** | Core design, and the Enabler configuration it exposes:<br>Non-functional requirements:<br>Security review (Tier 2 and 3):<br>Links: Promotion Pack · G2 Decision · Architecture Verdict: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Design**: URL<br>**Enabler configuration**: Text<br>**Security review**: URL<br>**Risk tier**: 1 · 2 · 3 |
| **Labels** | e2c · core · gate-g3 |
| **Component** | Core build |
| **Workflow** | Standard Core workflow |
| **Definition of done** | – Gate 3: passes the checks for its risk tier at sprint cadence.<br>– Tests written from the acceptance criteria first.<br>– Every merge has a named human approver and a tier label.<br>– PM signs off that the Core build matches the proven prototype workflow. |

## 10.8 Cutover Plan

| | |
|---|---|
| **Issue type · space** | Cutover Plan · CORE |
| **Parent link** | Core Epic |
| **Summary pattern** | [CUTOVER] {Feature} · {customer} |
| **Description skeleton** | Customers moving to Core and Enablers:<br>Customers keeping a custom workflow (PS contract or self-serve by day 31):<br>Data migration and verification:<br>Pilot sandbox close date: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Customers to Core**: List<br>**Customers to customer-specific work**: List<br>**Migration**: Text<br>**Sandbox close date**: Date |
| **Labels** | e2c · core · cutover · gate-g4 |
| **Component** | Rollout and cutover |
| **Workflow** | Planned → Migrated → Verified → Closed |
| **Definition of done** | – Gate 4 within 30 days of Gate 3.<br>– Pilot customers switched within 30 days, or on a PS or self-serve contract by day 31.<br>– Free pilot sandbox closed. |

## 10.9 Customer-specific SoW

| | |
|---|---|
| **Issue type · space** | Customer-specific SoW · PS |
| **Parent link** | G2 Decision |
| **Summary pattern** | [CUSTOMER-SPECIFIC] {Customer} · {Feature} · {PS pod \| self-serve} |
| **Description skeleton** | Maintained by: PS pod · customer's own team on Enabler APIs:<br>Contract value a year and margin target (20%+, priced at full cost):<br>Enabler APIs used:<br>Annual review date: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Maintained by**: PS pod · customer self-serve<br>**Contract value**: EUR a year<br>**Margin target**: 20%+<br>**Enabler APIs**: List<br>**Annual review**: Date |
| **Labels** | e2c · ps · customer-specific |
| **Component** | Run and optimise |
| **Workflow** | Quoted → Signed → Live → Reviewed |
| **Definition of done** | – Isolate verdict signed.<br>– Contract signed before the pilot sandbox closes.<br>– No Core R&D time booked to it.<br>– Annual review: keep, reprice, or move the customer to Core. |

## 10.10 Support parent

| | |
|---|---|
| **Issue type · space** | Support parent · DESK |
| **Parent link** | Core Epic or Customer-specific SoW |
| **Summary pattern** | [DESK] {Customer} · {Feature} |
| **Description skeleton** | Customer-facing thread:<br>Known issues:<br>Runbook (link):<br>Links: Core Epic or Customer-specific SoW · Edge Card ID: |
| **Fields** | **Edge Card ID**: Required on all linked tickets<br>**Linked parent**: Issue link |
| **Labels** | e2c · desk |
| **Component** | Run and optimise |
| **Workflow** | Existing desk workflow |
| **Definition of done** | – Carries the Edge Card ID.<br>– Core features go to the Core desk; customer-specific issues go to the PS pod or the customer, not to Core. |

RE–IN–ESSENCE

The full thesis: Closing the Delivery Discount →

https://www.reinessence.tech/research/closing-the-delivery-discount

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