



AsterVale | Noumi

Customer Evaluation

Proposal and customer-meeting preparation · joint solution assessment

Joint evaluation working session

22 October 2026

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Account Director / Solutions Engineer · Noumi



Evaluation agenda

From the preparation problem to the evidence required for expansion

01 Repeated preparation creates an opportunity

Size the problem and continuity hypothesis

02 Controlled workflows make capability testable

Inspect behavior, artifacts and selection trade-offs

03 Pilot evidence should govern expansion

Validate value, readiness and decision ownership



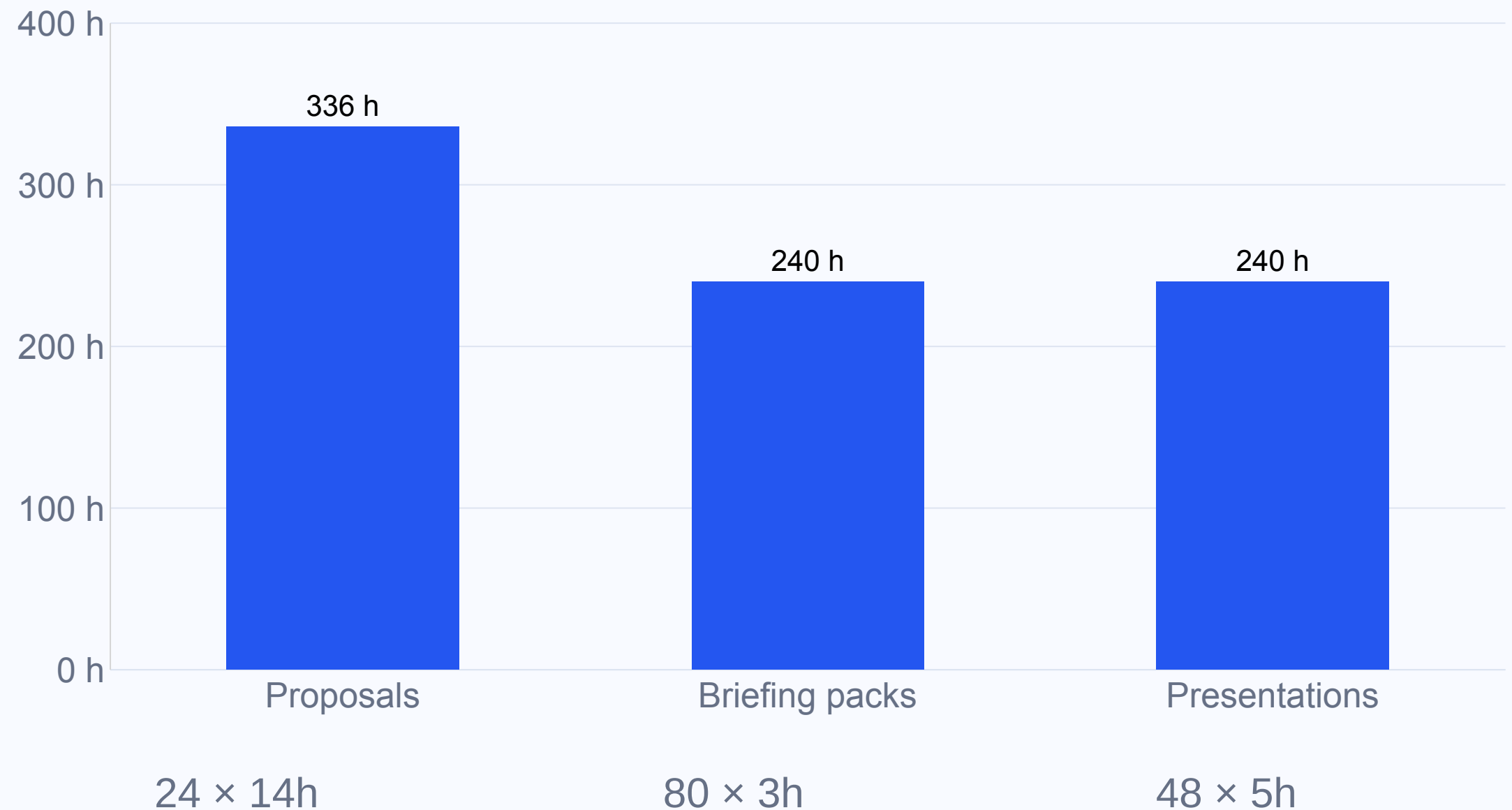
The 60-user cohort spends 816 hours a month on preparation

Monthly preparation workload by work package

816

hours / month

Monthly total for all 60 users
July–September 2026 baseline
Excludes manager review





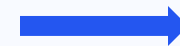
Repeated context assembly is the friction worth testing

Discovery evidence · proposal-to-meeting handoff · no quantified causal attribution

Proposal preparation

Find evidence

Locate approved sources and reconstruct the project context.



Customer-meeting preparation

Find the same context again

The next task may repeat the search and working guidance.

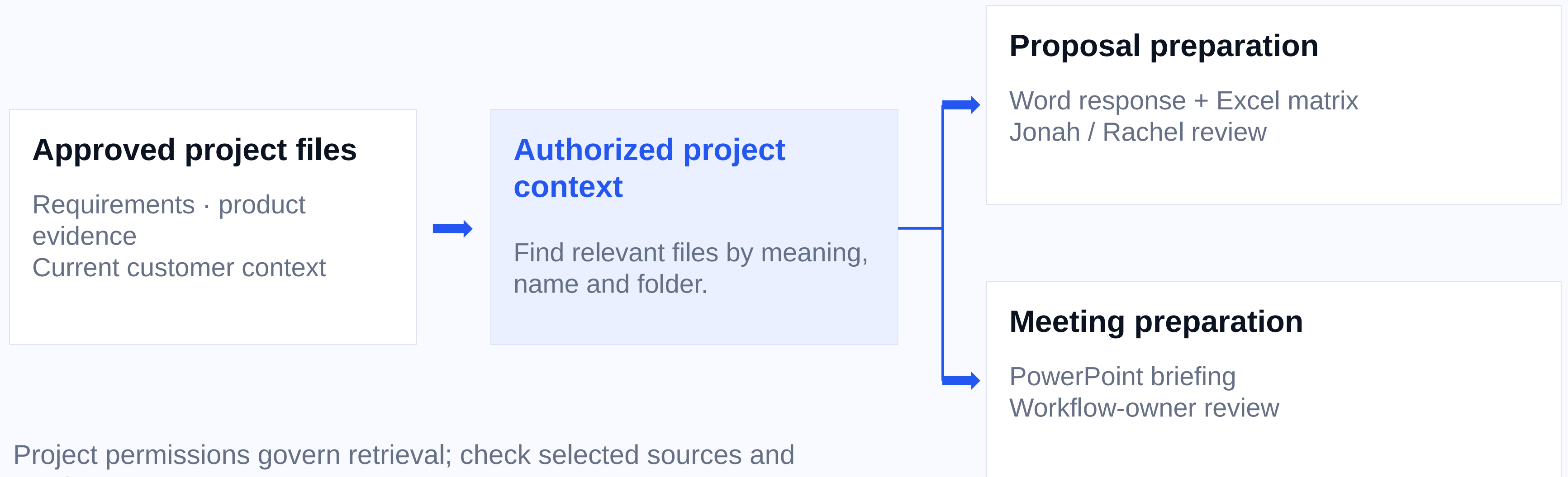
Continuity hypothesis

Reuse relevant, authorized project evidence and scoped preferences across the two tasks. Keep customer facts separate from reusable guidance.



Authorized project context can support both preparation workflows

Noumi Enterprise 2026.3 · file discovery, task execution and review



Project permissions govern retrieval; check selected sources and versions.

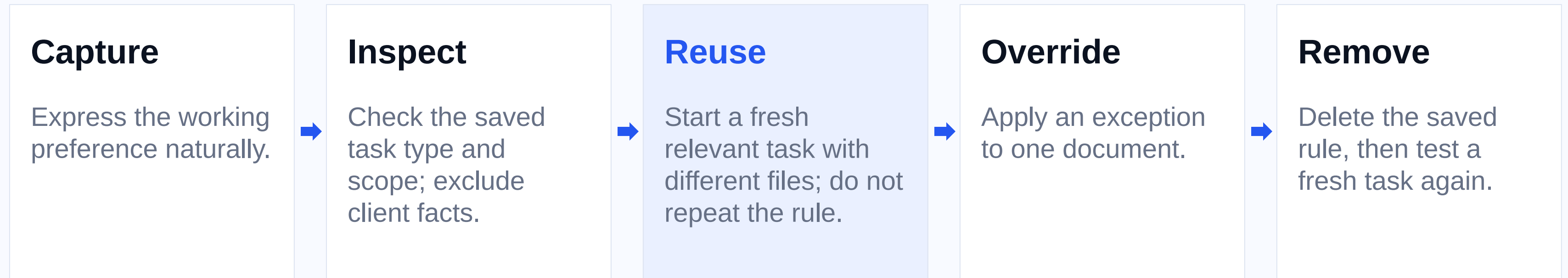
Connector access and output sharing are separate controls.



A fresh task can test whether a working preference was learned

Capture → inspect → reuse → override → remove · client facts remain project evidence

“I’m preparing an internal decision brief. I prefer the recommendation first, then the evidence and open decisions.”



The applied learning record is the evidence of reuse. Current instructions and required customer formats take precedence.



Observable task evidence separates retrieval from learning

Live evaluation sequence · expected behavior, observed result and reviewer decision

Capability	Evidence to observe	Acceptance responsibility
File retrieval	Relevant file titles and versions; required files found; unauthorized source excluded.	Omar / Leila Access and technical checks
Preference learning	Saved scope, active rule and fresh-task reuse without repeating the preference.	Jonah / Rachel Working-format review
Task execution	Drafting, review, corrections, accepted outputs and failed attempts.	Jonah / Rachel Workflow acceptance

A completion indicator records execution status; source selection, learning reuse and output quality require their own checks.



Editable files still require source and format acceptance

Word response · Excel evidence matrix · PowerPoint meeting briefing

Deliverable	Acceptance checks	Format boundary
Word response	Required response IDs and supported claims. Open the document and make a real content edit.	Complex template fidelity must be tested.
Excel evidence / ROI	Inspect formulas and assumptions. Open, recalculate and reconcile figures with the response.	Macros and external links need separate tests.
PowerPoint briefing	Check the storyline and essential assumptions. Edit content and verify the result.	Some embedded graphics may remain images.

Acceptance covers usability, traceable evidence and consistency across the delivered files.

Noumi's workflow fit comes with governance trade-offs

Noumi Enterprise 2026.3 versus Crestline Workbench 6.2 · supplied product documentation

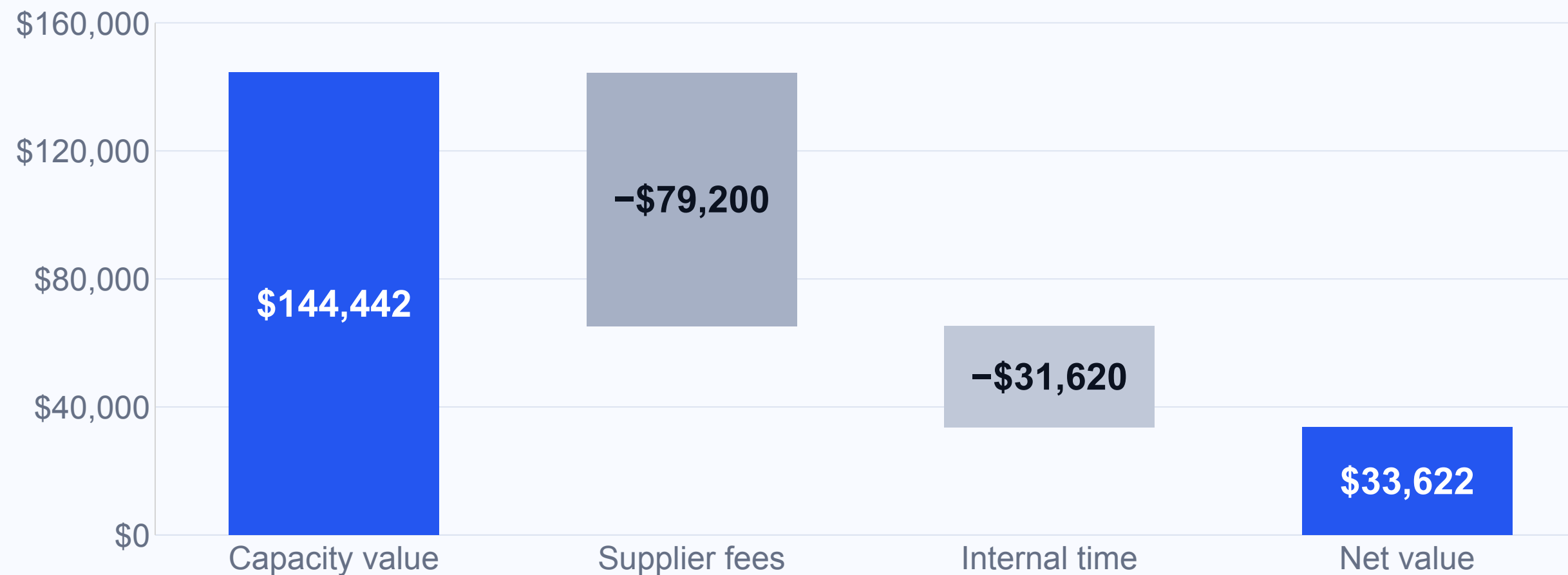
Buying priority	Noumi Enterprise 2026.3	Crestline Workbench 6.2
Project continuity	Retrieves authorized project context across tasks.	Users select sources explicitly for new investigations.
Native file production	Editable Word, Excel and PowerPoint authoring.	DOCX and CSV export; native formula-bearing XLSX and PPTX outside scope.
Governance / provisioning	Configurable SAML; no SCIM. Separate security acceptance is required.	Publication approvals and SCIM are documented.

Mandatory publication governance or automated provisioning can outweigh workflow advantages and change the selection.

The planning case yields \$33,622 of Year 1 economic value

Planning estimate · USD before tax · 1 December 2026–30 November 2027

Capacity value: 1,699.32 hours × \$85/hour



30.3%

economic ROI

Modeled cash savings: \$0
No cash payback
established

Planning assumptions

35% time reduction 70% adoption 100% productive use
Year 1 ramp: 8.5 steady-state-equivalent months



Year 1 breaks even at 76.7% productive use

One-factor sensitivity · reduction, adoption, ramp and economic cost held fixed



76.7%

break-even productive use

75% → -\$2,488

80% → +\$4,734

100% → +\$33,622

**Combined downside: –
\$66,603**

20% reduction · 50% adoption
75% productive use

A bounded pilot should produce the evidence for expansion

Proposed evaluation sequence and conditions for a 60-user rollout

22 October

Working session

Agree the workflow scope, quality rubric and readiness owners before pilot work begins.

Preparation sets the basis for acceptance and measurement.

26 Oct – 20 Nov

Proposed pilot

→ 12 users assess 10 work packages across the two preparation workflows.

Measure preparation, review, corrections and acceptance. Include short and long tasks, missing evidence and failures.

1 December

Target rollout

→ 60 users, subject to pilot acceptance and readiness.

Expand only after accepted quality, a positive refreshed value case, security and commercial approvals, and an executed order.



The next decision is pilot readiness, with named approval owners

22 October 2026 working session · evidence plan before the proposed 26 October start

Decision / evidence	Owners	When
Confirm two workflows, representative packages and acceptance rubric.	Elena / Jonah / Rachel	Before 26 October
Confirm permitted data and access tests; reconcile quote, terms and budget.	Omar / Leila Maya / Victor	Before pilot kickoff
Expand only with accepted quality, a positive refreshed case and recorded approvals.	Jonah / Rachel · Elena / Victor Omar / Leila · Maya	At pilot exit

The \$125,000 evaluation ceiling is planning context; it does not authorize the 60-user purchase.



Thank you