See the signal. Know the next move.

MASTER FULL ACCOUNT INTELLIGENCE BRIEF

Aster Vale & Hart LLP

Comprehensive Account Intelligence | Oct 6, 2026

CONFIDENTIAL | AEG Intelligence



Executive intelligence summary

MASTER records 2 non-closed opportunity records and 6 active/recent signals for this account. Saved account position: Targetprocess first. Terraform environment provisioning and drift across legacy estates is an unvalidated discovery hypothesis. Immediate execution should focus on Prepare Avery Vale Touch #1. Verified signals provide discovery context, but they do not by themselves establish customer pain, budget, authority, or an active project. 6 signal(s) are labeled verified fact.

Current opportunities	Saved signals	Known contacts	Open actions
2	**6**	**173**	**9**
Non-closed saved records	All evidence states retained	Complete directory in appendix	Seller-controlled execution

What matters now

1. Advance the leading saved opportunity

Targetprocess Current Use-Case / Fit Discovery: resolve Business Problem Not Established

2. Use the strongest recent signal as discovery context

AVH hiring - Information Governance Risk & Compliance Attorney. Evidence classification: VERIFIED FACT.

3. Execute the next saved action

Prepare Avery Vale Touch #1 | Due: Sep 30, 2026 2:00 PM UTC

01 / Company and corporate profile

Formed from the merger of Aster Vale & Mercer and Hart Rowan & Cole. Existing IBM relationship includes Targetprocess; broader IBM infrastructure footprint remains to be validated.

Industry	Legal services / law practice	Seller Provided | Sources [5]
Website	https://www.astervale.example	Seller Provided | Sources [5]
Headquarters / footprint	Global / 20+ offices; Chicago office: 1000 Meridian Plaza, Chicago, IL 60600	Seller Provided | Sources [5]
Employee count	1,001-5,000 (LinkedIn company-size range; checked Sep 2026)	Seller Provided | Sources [5]
Revenue	US$2.4 billion (fictional 2025 demo profile)	Seller Provided | Sources [4]
Account tier	Not recorded	Status Not Recorded
Strategic status	Strategic Account	Status Not Recorded
Decision state	unknown	Status Not Recorded
Parent / portfolio owner	No external corporate parent identified	Seller Provided | Sources [3]
Saved solution relevance	Targetprocess first. Terraform environment provisioning and drift across legacy estates is an unvalidated discovery hypothesis.	Status Not Recorded

02 / Strategic business themes

Themes below are deterministic groupings of saved signals by their recorded text. A theme is not proof of an active initiative, budget, or buying decision.

AI, data and governance (4)

- AVH hiring - Information Governance Risk & Compliance Attorney [VERIFIED FACT]

- AVH hiring - People Analytics Listening Analyst [VERIFIED FACT]

- AVH hiring - Senior Payroll Systems Analyst [VERIFIED FACT]

- AVH recruiting Counsel, AI Risk & Compliance [VERIFIED FACT]

Interpretation: this concentration of saved intelligence may warrant discovery in this area; validate relevance with customer stakeholders before treating it as a commercial motion.

Business expansion and change (1)

- AVH announced a New York Midtown campus expansion [VERIFIED FACT]

Interpretation: this concentration of saved intelligence may warrant discovery in this area; validate relevance with customer stakeholders before treating it as a commercial motion.

Cybersecurity and resilience (1)

- AVH disclosed a 2026 data-security incident [VERIFIED FACT]

Interpretation: this concentration of saved intelligence may warrant discovery in this area; validate relevance with customer stakeholders before treating it as a commercial motion.

03 / Technology and existing environment

Technology mentions are extracted only from saved account, opportunity and signal records. A mention does not establish deployment unless the underlying evidence supports that claim.

Technology	Saved-record mentions	Evidence notes
Targetprocess	3	account context / seller context; opportunity / SELLER PROVIDED; opportunity / unknown
Terraform	1	account context / seller context

Known environment gaps

- Decision state is not recorded or remains unknown
- Account tier is not recorded or remains unknown

04 / Opportunity intelligence

Aster Vale & Mercer LLP - Contract Renewal - June 2025

CRM/imported facts - Stage: Won | Status: won | Amount: Not recorded | Close: May 14, 2025

Current objective / next step: Not recorded

MASTER qualification state: Unassessed | Opportunity reality: Unverified | Evidence confidence: Unverified | Buyer commitment: Unverified

Qualification gaps: Business Problem Not Established; Compelling Event / Why-Now Not Established; Economic Buyer Not Mapped; Technical Owner Not Mapped; Procurement Path Not Established; Opportunity Amount Not Recorded; Timing Is Not Evidence-Qualified; Buyer Commitment Is Unverified; Evidence Confidence Has Not Been Assessed; No Next Seller Action Is Recorded

Linked evidence: 0 signals | 0 engagements | 0 open actions | 0 cadences

Aster Vale & Mercer LLP- TargetProcess M2M to Annual Contract

CRM/imported facts - Stage: Won | Status: won | Amount: Not recorded | Close: Jun 26, 2024

Current objective / next step: Not recorded

MASTER qualification state: Unassessed | Opportunity reality: Unverified | Evidence confidence: Unverified | Buyer commitment: Unverified

Qualification gaps: Business Problem Not Established; Compelling Event / Why-Now Not Established; Economic Buyer Not Mapped; Technical Owner Not Mapped; Procurement Path Not Established; Opportunity Amount Not Recorded; Timing Is Not Evidence-Qualified; Buyer Commitment Is Unverified; Evidence Confidence Has Not Been Assessed; No Next Seller Action Is Recorded

Linked evidence: 0 signals | 0 engagements | 0 open actions | 0 cadences

Cyber Resilience / Protected Recovery / Trusted Infrastructure

CRM/imported facts - Stage: Pipeline Creation | Status: open | Amount: Not recorded | Close: Not recorded

Current objective / next step: Secure discovery with CIO/CISO stakeholders and qualify the business problem, urgency, scope, funding, value, and timing.

MASTER qualification state: Unassessed | Opportunity reality: Unverified | Evidence confidence: Unverified | Buyer commitment: Unverified

Qualification gaps: Business Problem Not Established; Compelling Event / Why-Now Not Established; Economic Buyer Not Mapped; Technical Owner Not Mapped; Procurement Path Not Established; Opportunity Amount Not Recorded; Close Date Not Recorded; Buyer Commitment Is Unverified; Evidence Confidence Has Not Been Assessed

Linked evidence: 1 signals | 4 engagements | 0 open actions | 3 cadences

Targetprocess Current Use-Case / Fit Discovery

CRM/imported facts - Stage: Engage | Status: open | Amount: Not recorded | Close: Not recorded

Current objective / next step: Await Elena Rowan referral/introduction to the IBM Targetprocess business or technology owner; then understand current use case and fit. No renewal discussion now.

MASTER qualification state: Unassessed | Opportunity reality: Unverified | Evidence confidence: Unverified | Buyer commitment: Unverified

Qualification gaps: Business Problem Not Established; Compelling Event / Why-Now Not Established; Economic Buyer Not Mapped; Technical Owner Not Mapped; Procurement Path Not Established; Opportunity Amount Not Recorded; Close Date Not Recorded; Buyer Commitment Is Unverified; Evidence Confidence Has Not Been Assessed

Linked evidence: 0 signals | 5 engagements | 0 open actions | 1 cadences

Demo: Aster Vale & Mercer LLP - Contract Renewal - June 2026

CRM/imported facts - Stage: Won | Status: won | Amount: Not recorded | Close: Jun 22, 2026

Current objective / next step: Not recorded

MASTER qualification state: Unassessed | Opportunity reality: Unverified | Evidence confidence: Unverified | Buyer commitment: Unverified

Qualification gaps: Business Problem Not Established; Compelling Event / Why-Now Not Established; Economic Buyer Not Mapped; Technical Owner Not Mapped; Procurement Path Not Established; Opportunity Amount Not Recorded; Timing Is Not Evidence-Qualified; Buyer Commitment Is Unverified; Evidence Confidence Has Not Been Assessed; No Next Seller Action Is Recorded

Linked evidence: 0 signals | 0 engagements | 0 open actions | 0 cadences

05 / Signal intelligence

Each signal follows the same intelligence discipline: WHAT WE KNOW -> WHY IT MATTERS -> WHAT IT MAY MEAN -> WHAT WE DO NOT KNOW -> RECOMMENDED NEXT MOVE -> EVIDENCE / CONFIDENCE.

1. AVH hiring - Information Governance Risk & Compliance Attorney

WHAT WE KNOW
Built In Chicago lists AVH's Information Governance Risk & Compliance Attorney role. The employer job-description text covers client-data review and transfer during attorney departures, Relativity and eDiscovery, protection of privileged and proprietary information, and experience applying AI and analytics to data review. This supports governance discovery; it does not establish a control gap or an IBM project.

WHY IT MATTERS
This is a dated account signal that may be relevant to discovery when corroborated against customer priorities.

WHAT IT MAY MEAN
No saved opportunity hypothesis is recorded.

WHAT WE DO NOT KNOW
The signal does not by itself establish budget, decision authority, technical deficiency, project scope, or buying intent.

RECOMMENDED NEXT MOVE
Use as discovery context and validate relevance before advancing a commercial claim.

EVIDENCE / CONFIDENCE
VERIFIED FACT | Observed: Oct 5, 2026 12:07 AM UTC

2. AVH hiring - People Analytics Listening Analyst

WHAT WE KNOW
Built In Chicago lists AVH's People Analytics Listening Analyst role. The employer job-description text names Qualtrics, Workday Peakon, Workday Reporting, employee listening, and coordination with HRIS and IT on accurate, secure, governed people data. This is supporting hiring intelligence; it does not establish an expansion or an IBM project.

WHY IT MATTERS
This is a dated account signal that may be relevant to discovery when corroborated against customer priorities.

WHAT IT MAY MEAN
No saved opportunity hypothesis is recorded.

WHAT WE DO NOT KNOW
The signal does not by itself establish budget, decision authority, technical deficiency, project scope, or buying intent.

RECOMMENDED NEXT MOVE
Use as discovery context and validate relevance before advancing a commercial claim.

EVIDENCE / CONFIDENCE
VERIFIED FACT | Observed: Oct 5, 2026 12:07 AM UTC

3. AVH hiring - Senior Payroll Systems Analyst

WHAT WE KNOW
Built In Chicago lists AVH's Senior Payroll Systems Analyst role. The employer job-description text describes responsibility for Workday Payroll configuration, testing, payroll controls, automation, and AI adoption within payroll. This is supporting hiring intelligence; it does not establish new platform spend or an IBM project.

WHY IT MATTERS
This is a dated account signal that may be relevant to discovery when corroborated against customer priorities.

WHAT IT MAY MEAN
No saved opportunity hypothesis is recorded.

WHAT WE DO NOT KNOW
The signal does not by itself establish budget, decision authority, technical deficiency, project scope, or buying intent.

RECOMMENDED NEXT MOVE
Use as discovery context and validate relevance before advancing a commercial claim.

EVIDENCE / CONFIDENCE
VERIFIED FACT | Observed: Oct 5, 2026 12:07 AM UTC

4. AVH recruiting Counsel, AI Risk & Compliance

WHAT WE KNOW
Aster Vale & Hart LLP is recruiting a Counsel, AI Risk & Compliance role with responsibilities related to AI evaluation, deployment, and governance.

WHY IT MATTERS
This is a dated account signal that may be relevant to discovery when corroborated against customer priorities.

WHAT IT MAY MEAN
No saved opportunity hypothesis is recorded.

WHAT WE DO NOT KNOW
The signal does not by itself establish budget, decision authority, technical deficiency, project scope, or buying intent.

RECOMMENDED NEXT MOVE
Use as discovery context and validate relevance before advancing a commercial claim.

EVIDENCE / CONFIDENCE
VERIFIED FACT | Observed: Sep 22, 2026 11:34 AM UTC

5. AVH announced a New York Midtown campus expansion

WHAT WE KNOW
Aster Vale & Hart LLP announced a New York Midtown campus expansion.

WHY IT MATTERS
This is a dated account signal that may be relevant to discovery when corroborated against customer priorities.

WHAT IT MAY MEAN
No saved opportunity hypothesis is recorded.

WHAT WE DO NOT KNOW
The signal does not by itself establish budget, decision authority, technical deficiency, project scope, or buying intent.

RECOMMENDED NEXT MOVE
Use as discovery context and validate relevance before advancing a commercial claim.

EVIDENCE / CONFIDENCE
VERIFIED FACT | Observed: Sep 21, 2026 2:20 AM UTC

6. AVH disclosed a 2026 data-security incident

WHAT WE KNOW
Aster Vale & Hart LLP disclosed a 2026 data-security incident.

WHY IT MATTERS
This is a dated account signal that may be relevant to discovery when corroborated against customer priorities.

WHAT IT MAY MEAN
No saved opportunity hypothesis is recorded.

WHAT WE DO NOT KNOW
The signal does not by itself establish budget, decision authority, technical deficiency, project scope, or buying intent.

RECOMMENDED NEXT MOVE
Use as discovery context and validate relevance before advancing a commercial claim.

EVIDENCE / CONFIDENCE
VERIFIED FACT | Observed: Sep 21, 2026 2:20 AM UTC

06 / Signal timeline

Sep 21, 2026 2:20 AM UTC - AVH disclosed a 2026 data-security incident [VERIFIED FACT]

Sep 21, 2026 2:20 AM UTC - AVH announced a New York Midtown campus expansion [VERIFIED FACT]

Sep 22, 2026 11:34 AM UTC - AVH recruiting Counsel, AI Risk & Compliance [VERIFIED FACT]

Oct 5, 2026 12:07 AM UTC - AVH hiring - Information Governance Risk & Compliance Attorney [VERIFIED FACT]

Oct 5, 2026 12:07 AM UTC - AVH hiring - People Analytics Listening Analyst [VERIFIED FACT]

Oct 5, 2026 12:07 AM UTC - AVH hiring - Senior Payroll Systems Analyst [VERIFIED FACT]

07 / Buying committee and organization map

Buying roles below are copied only from saved assignments; job titles are not used to infer buying authority.

Stakeholder	Position	Recorded buying role	Email
Marcus Vale	Associate Director, Infrastructure Engineering	Technical Buyer	mvale@avh.example
Jordan Mercer	Chief Knowledge Officer	Champion	jmercer@avh.example
Evan Hart	CISO	Influencer	ehart@avh.example
Elena Rowan	Contracts Manager	Procurement	erowan@avh.example
Nolan Price	CIO	Executive Sponsor	nprice@avh.example
Adrian Cole	Chief Financial Officer	Economic Buyer	acole@avh.example
Blake Sutton	Not recorded	Procurement	Not recorded
Maya Ellison	Senior Application Integration Engineer	Not Assigned	mellison@avh.example
Avery Vale	Director of Information Security	Not Assigned	avale@avh.example
Cameron Stone	Director, Information Governance Operations	Not Assigned	cstone@avh.example

08 / Individual contact intelligence

Marcus Vale

Position: Associate Director, Infrastructure Engineering | Recorded buying role: Technical Buyer

Contact: mvale@avh.example | Not recorded

Cadence context: Terraform - Aster Vale & Hart LLP - Marcus Vale (hold)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Jordan Mercer

Position: Chief Knowledge Officer | Recorded buying role: Champion

Contact: jmercer@avh.example | Not recorded

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Evan Hart

Position: CISO | Recorded buying role: Influencer

Contact: ehart@avh.example | Not recorded

Recent engagement: Oct 5, 2026 6:33 PM UTC outreach_sent; Sep 30, 2026 6:35 PM UTC outreach_sent; Sep 23, 2026 1:34 AM UTC Historical outreach - exact subject not recorded

Cadence context: Terraform - Aster Vale & Hart LLP - Evan Hart (active); AVH Cyber Resilience - Evan Hart (active)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Elena Rowan

Position: Contracts Manager | Recorded buying role: Procurement

Contact: erowan@avh.example | Not recorded

Recent engagement: Sep 30, 2026 2:36 PM UTC RE: Targetprocess renewal and user ownership; Sep 30, 2026 2:36 PM UTC outreach_sent; Sep 29, 2026 8:59 PM UTC RE: Targetprocess renewal and user ownership

Cadence context: AVH Targetprocess Use-Case Discovery - Elena Rowan (completed)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Nolan Price

Position: CIO | Recorded buying role: Executive Sponsor

Contact: nprice@avh.example | Not recorded

Recent engagement: Oct 5, 2026 6:31 PM UTC outreach_sent; Sep 30, 2026 6:33 PM UTC outreach_sent; Sep 23, 2026 1:34 AM UTC Historical outreach - exact subject not recorded

Cadence context: Terraform - Aster Vale & Hart LLP - Nolan Price (active); AVH Cyber Resilience - Nolan Price (active)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Adrian Cole

Position: Chief Financial Officer | Recorded buying role: Economic Buyer

Contact: acole@avh.example | Not recorded

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Blake Sutton

Position: Not recorded | Recorded buying role: Procurement

Contact: Not recorded | Not recorded

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Maya Ellison

Position: Senior Application Integration Engineer | Recorded buying role: Not Assigned

Contact: mellison@avh.example | Not recorded

Cadence context: Modernize Kafka - Aster Vale & Hart LLP - Maya Ellison (hold)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Avery Vale

Position: Director of Information Security | Recorded buying role: Not Assigned

Contact: avale@avh.example | +13125550142

Cadence context: Modernize Kafka - Aster Vale & Hart LLP - Avery Vale (active)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

Cameron Stone

Position: Director, Information Governance Operations | Recorded buying role: Not Assigned

Contact: cstone@avh.example | Not recorded

Recent engagement: Oct 5, 2026 6:33 PM UTC outreach_sent; Sep 30, 2026 6:36 PM UTC outreach_sent

Cadence context: AVH Cyber Resilience - Cameron Stone (active); Terraform - Aster Vale & Hart LLP - Cameron Stone (hold)

Recommended use: engage according to the saved role and account context; do not infer decision authority from title alone.

09 / Engagement intelligence

Meaningful activity is summarized first; complete engagement/cadence history appears in the appendix. Draft content is not treated as completed activity.

outreach_sent

Making exceptions easier to discuss

Oct 5, 2026 6:33 PM UTC | unknown

outreach_sent

Recovery beyond the system being available

Oct 5, 2026 6:33 PM UTC | unknown

Touch #2 / email

Recovery beyond the system being available | Outcome: sent

Oct 5, 2026 6:33 PM UTC | Recorded completed activity

Touch #2 / email

Evan,

I wanted to check in and see how the merger of systems is progressing from a governance and security standpoint.

I imagine one of the bigger challenges is maintaining clear ownership, consistent controls, and visibility as different platforms, processes, and exceptions are brought together.

How is that coming together for your team so far?

If there’s anything I can do to assist-whether that’s sharing ideas, comparing approaches, or helping think through a specific governance or security challenge-I’d be happy to help.

If it would be useful, we could also set up a brief meeting to talk it through.

Regards,
Jordan | Outcome: sent

Oct 5, 2026 6:33 PM UTC | Recorded completed activity

outreach_sent

Keeping the operating outcome in view

Oct 5, 2026 6:31 PM UTC | unknown

Touch #2 / email

Keeping the operating outcome in view | Outcome: sent

Oct 5, 2026 6:31 PM UTC | Recorded completed activity

outreach_sent

AVH: information governance and recovery priorities

Sep 30, 2026 6:36 PM UTC | unknown

Touch #1 / email

AVH: information governance and recovery priorities | Outcome: sent

Sep 30, 2026 6:36 PM UTC | Recorded completed activity

outreach_sent

AVH: policy checks before infrastructure changes

Sep 30, 2026 6:35 PM UTC | unknown

Touch #1 / email

AVH: policy checks before infrastructure changes | Outcome: sent

Sep 30, 2026 6:35 PM UTC | Recorded completed activity

outreach_sent

AVH: infrastructure delivery controls

Sep 30, 2026 6:33 PM UTC | unknown

Touch #1 / email

AVH: infrastructure delivery controls | Outcome: sent

Sep 30, 2026 6:33 PM UTC | Recorded completed activity

RE: Targetprocess renewal and user ownership

Seller replied to Elena Rowan: attached June IBM Targetprocess contract; explicitly stated no renewal discussion now; requested introduction to the group/owner responsible for IBM Targetprocess to understand current use case and confirm ongoing fit.

Sep 30, 2026 2:36 PM UTC | unknown

outreach_sent

Re: Targetprocess renewal and user ownership

Sep 30, 2026 2:36 PM UTC | unknown

Touch #3 / email

Re: Targetprocess renewal and user ownership | Outcome: sent

Sep 30, 2026 2:36 PM UTC | Recorded completed activity

RE: Targetprocess renewal and user ownership

Hi Jordan, I do not have visibility into Targetprocess usage or plans. I work in procurement and handle the renewal transactions.

If you can send a renewal quote, I can send that on to the stakeholder to confirm.

Thanks, Elena

Elena Rowan
Contracts Manager

T: +1 312 555 0142 | M: +1 847 555 0128 | F: +1 312 555 0190
erowan@avh.example | LinkedIn

Aster Vale & Hart LLP | avh.example
1000 Meridian Plaza | Suite 4000 | Chicago, IL 60600 | USA
IT HelpdeskIT HelpdeskIT Helpdesk
IT HelpdeskIT HelpdeskIT Helpdesk
IT Helpdesk
<!--company-->

From: JORDAN BLAKE <jblake@seller.example>
Sent: Tuesday, September 29, 2026 1:34 PM
To: Rowan, Elena <erowan@avh.example>
Subject: Targetprocess renewal and user ownership

External sender notice: jblake@seller.example. Learn why this is important
CAUTION [shortened]

Sep 29, 2026 8:59 PM UTC | unknown

outreach_sent

Targetprocess renewal and user ownership

Sep 29, 2026 6:34 PM UTC | unknown

Touch #2 / email

Targetprocess renewal and user ownership | Outcome: sent

Sep 29, 2026 6:34 PM UTC | Recorded completed activity

Historical outreach - exact subject not recorded

Historical outreach confirmation; original message body was not reconstructed.

Sep 23, 2026 1:34 AM UTC | unknown

Historical outreach - exact subject not recorded

Historical outreach confirmation; original message body was not reconstructed.

Sep 23, 2026 1:34 AM UTC | unknown

10 / Competitive, partner and ecosystem intelligence

No verified competitive, partner, reseller, systems-integrator, cloud-provider, or procurement-path intelligence is currently saved in the opportunity intelligence records.

11 / Opportunity whitespace

This section separates active saved pursuits from unvalidated seller context; it does not create new pipeline.

Active / saved opportunity areas

- Targetprocess Current Use-Case / Fit Discovery | Engage
- Cyber Resilience / Protected Recovery / Trusted Infrastructure | Pipeline Creation

Saved hypothesis / relevance context

Targetprocess first. Terraform environment provisioning and drift across legacy estates is an unvalidated discovery hypothesis.

Qualification gaps that constrain expansion

- Targetprocess Current Use-Case / Fit Discovery: Business Problem Not Established
- Targetprocess Current Use-Case / Fit Discovery: Compelling Event / Why-Now Not Established
- Targetprocess Current Use-Case / Fit Discovery: Economic Buyer Not Mapped
- Targetprocess Current Use-Case / Fit Discovery: Technical Owner Not Mapped
- Targetprocess Current Use-Case / Fit Discovery: Procurement Path Not Established
- Targetprocess Current Use-Case / Fit Discovery: Opportunity Amount Not Recorded
- Targetprocess Current Use-Case / Fit Discovery: Close Date Not Recorded
- Targetprocess Current Use-Case / Fit Discovery: Buyer Commitment Is Unverified
- Targetprocess Current Use-Case / Fit Discovery: Evidence Confidence Has Not Been Assessed
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Business Problem Not Established
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Compelling Event / Why-Now Not Established
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Economic Buyer Not Mapped
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Technical Owner Not Mapped
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Procurement Path Not Established
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Opportunity Amount Not Recorded
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Close Date Not Recorded
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Buyer Commitment Is Unverified
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Evidence Confidence Has Not Been Assessed

12 / Risks, unknowns and intelligence gaps

- Decision state is not recorded or remains unknown
- Account tier is not recorded or remains unknown
- Targetprocess Current Use-Case / Fit Discovery: Business Problem Not Established
- Targetprocess Current Use-Case / Fit Discovery: Compelling Event / Why-Now Not Established
- Targetprocess Current Use-Case / Fit Discovery: Economic Buyer Not Mapped
- Targetprocess Current Use-Case / Fit Discovery: Technical Owner Not Mapped
- Targetprocess Current Use-Case / Fit Discovery: Procurement Path Not Established
- Targetprocess Current Use-Case / Fit Discovery: Opportunity Amount Not Recorded
- Targetprocess Current Use-Case / Fit Discovery: Close Date Not Recorded
- Targetprocess Current Use-Case / Fit Discovery: Buyer Commitment Is Unverified
- Targetprocess Current Use-Case / Fit Discovery: Evidence Confidence Has Not Been Assessed
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Business Problem Not Established
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Compelling Event / Why-Now Not Established
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Economic Buyer Not Mapped
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Technical Owner Not Mapped
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Procurement Path Not Established
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Opportunity Amount Not Recorded
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Close Date Not Recorded
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Buyer Commitment Is Unverified
- Cyber Resilience / Protected Recovery / Trusted Infrastructure: Evidence Confidence Has Not Been Assessed

13 / Recommended account strategy

The strategy below is assembled only from current saved opportunities, qualification gaps, signals and open actions. It does not create customer facts or pipeline.

1. Execute the next saved seller action

Prepare Avery Vale Touch #1 - Resume the held cadence by reviewing prior engagement context and preparing the next seller-controlled touch. MASTER will not send outreach automatically.

2. Advance Targetprocess Current Use-Case / Fit Discovery

Resolve Business Problem Not Established using customer-confirmed evidence while preserving CRM-owned stage, amount and close date.

3. Advance Cyber Resilience / Protected Recovery / Trusted Infrastructure

Resolve Business Problem Not Established using customer-confirmed evidence while preserving CRM-owned stage, amount and close date.

14 / 30 / 60 / 90-day execution plan

Until M4 Quarterly Account Planning is populated, this section deterministically groups the current saved open actions by due date. It does not invent new commitments.

First 30 days

- Prepare Avery Vale Touch #1 | Due: Sep 30, 2026 2:00 PM UTC | Priority: 85
- Prepare Nolan Price Touch #3 | Due: Oct 7, 2026 2:00 PM UTC | Priority: 85
- Prepare Evan Hart Touch #3 | Due: Oct 7, 2026 2:00 PM UTC | Priority: 85
- Prepare Cameron Stone Touch #3 | Due: Oct 7, 2026 2:00 PM UTC | Priority: 85

Days 31-60

No saved actions in this window.

Days 61-90

No saved actions in this window.

Undated / beyond 90 days

- Review Terraform refresh - Evan Hart | Due: Not recorded | Priority: 80
- Review Terraform refresh - Marcus Vale | Due: Not recorded | Priority: 80
- Review Terraform refresh - Riley Hartwell | Due: Not recorded | Priority: 80
- Review Terraform refresh - Cameron Stone | Due: Not recorded | Priority: 80
- Review Terraform refresh - Nolan Price | Due: Not recorded | Priority: 80

15 / Intelligence collection plan

Collection priorities are derived from current unknowns and qualification gaps, not from newly invented opportunity claims.

1. Resolve Business Problem Not Established for Targetprocess Current Use-Case / Fit Discovery
2. Resolve Compelling Event / Why-Now Not Established for Targetprocess Current Use-Case / Fit Discovery
3. Resolve Economic Buyer Not Mapped for Targetprocess Current Use-Case / Fit Discovery
4. Resolve Technical Owner Not Mapped for Targetprocess Current Use-Case / Fit Discovery
5. Resolve Procurement Path Not Established for Targetprocess Current Use-Case / Fit Discovery
6. Resolve Opportunity Amount Not Recorded for Targetprocess Current Use-Case / Fit Discovery
7. Resolve Close Date Not Recorded for Targetprocess Current Use-Case / Fit Discovery
8. Resolve Buyer Commitment Is Unverified for Targetprocess Current Use-Case / Fit Discovery
9. Resolve Evidence Confidence Has Not Been Assessed for Targetprocess Current Use-Case / Fit Discovery
10. Resolve Business Problem Not Established for Cyber Resilience / Protected Recovery / Trusted Infrastructure
11. Resolve Compelling Event / Why-Now Not Established for Cyber Resilience / Protected Recovery / Trusted Infrastructure
12. Resolve Economic Buyer Not Mapped for Cyber Resilience / Protected Recovery / Trusted Infrastructure
13. Resolve Technical Owner Not Mapped for Cyber Resilience / Protected Recovery / Trusted Infrastructure
14. Resolve Procurement Path Not Established for Cyber Resilience / Protected Recovery / Trusted Infrastructure
15. Resolve Opportunity Amount Not Recorded for Cyber Resilience / Protected Recovery / Trusted Infrastructure
16. Resolve Close Date Not Recorded for Cyber Resilience / Protected Recovery / Trusted Infrastructure
17. Resolve Buyer Commitment Is Unverified for Cyber Resilience / Protected Recovery / Trusted Infrastructure
18. Resolve Evidence Confidence Has Not Been Assessed for Cyber Resilience / Protected Recovery / Trusted Infrastructure
19. Validate account-level gap: Decision state is not recorded or remains unknown
20. Validate account-level gap: Account tier is not recorded or remains unknown

16 / Evidence ledger

References reproduce saved source records. URLs are not rechecked during export. Source inclusion does not automatically verify a claim.

ID	Source	Published	Retrieved	Classification
[1]	https://demo.example/source-01	Jun 2, 2026	Sep 22, 2026	Verified Fact
[2]	https://demo.example/source-02	Jun 16, 2026	Sep 21, 2026	Verified Fact
[3]	https://demo.example/source-03	Aug 4, 2025	Sep 25, 2026	Seller Provided
[4]	https://demo.example/source-04	Jan 26, 2026	Sep 25, 2026	Seller Provided
[5]	https://demo.example/source-05	Not recorded	Sep 25, 2026	Seller Provided
[6]	https://demo.example/source-06	Not recorded	Oct 5, 2026	Verified Fact
[7]	https://demo.example/source-07	Aug 28, 2026	Sep 21, 2026	Verified Fact
[8]	https://demo.example/source-08	Not recorded	Oct 5, 2026	Verified Fact
[9]	https://demo.example/source-09	Not recorded	Oct 5, 2026	Verified Fact

Appendix A / Complete contact directory

Name	Title	Recorded role	Email
Avery Calder	Partner, UK Head of Tax	Not Assigned	Not recorded
Jordan Langley	Senior Help Desk Support Specialist	Not Assigned	Not recorded
Morgan Norwood	Head Co-, Media Entertainment & Sports Partner	Not Assigned	Not recorded
Taylor Fenwick	Head of Private Equity Regulatory Partner	Not Assigned	Not recorded
Riley Cole	Group Global Head, Regulatory Practice	Not Assigned	Not recorded
Avery Vale	Director of Information Security	Not Assigned	contact006@avh.example
Cameron Briar	Senior Director, Financial Planning & Strategy	Not Assigned	contact007@avh.example
Quinn Sloane	Head Co- of The Private Equity Practice Partner	Not Assigned	Not recorded
Parker Rowan	Help Desk Support Analyst	Not Assigned	Not recorded
Hayden Bellamy	Manager, Information Security Risk & Compliance	Not Assigned	Not recorded
Rowan Whitaker	Associate Director, Retirement Plans	Not Assigned	Not recorded
Casey Granger	European Head of Finance and Managing Partner, London	Not Assigned	contact012@avh.example
Marcus Vale	Associate Director, Infrastructure Engineering	Technical Buyer	contact013@avh.example
Reese Fairmont	Senior Manager, Information Security	Not Assigned	Not recorded
Blair Archer	Voice Services Network Engineer	Not Assigned	Not recorded
Devon Merritt	Partner, Founder, Life Sciences Industry Group	Not Assigned	Not recorded
Arden Sutton	Global Co-Head, Energy & Project Finance Practice	Not Assigned	Not recorded
Peyton Larkin	IT Support Analyst	Not Assigned	Not recorded
Emery Raines	Director of Knowledge Management, Litigation	Not Assigned	Not recorded
Kendall Stone	Supervisor, Human Resources Shared Services	Not Assigned	Not recorded
Sawyer Winslow	Senior Manager, Information Technology Integrity & Compliance	Not Assigned	Not recorded
Jules Monroe	Senior Manager, HRIS	Not Assigned	Not recorded
Maren Tolland	Regional Associate Director, Information Technology Services	Not Assigned	Not recorded
Cameron Stone	Director, Information Governance Operations	Not Assigned	contact024@avh.example
Maya Ellison	Senior Application Integration Engineer	Not Assigned	contact025@avh.example
Tessa Ashford	Not recorded	Not Assigned	Not recorded
Nolan Carver	Group In Structured Finance, Clos Alternative Assets & Head of Clos Partner	Not Assigned	Not recorded
Drew Sterling	Senior Systems Engineer	Not Assigned	Not recorded
Ellis Vale	Manager, HRIS	Not Assigned	Not recorded
Alden Lowell	Senior Manager, Information Technology	Not Assigned	Not recorded
Brenna Palmer	Senior IT Trainer	Not Assigned	Not recorded
Callum Mercer	Senior Manager, Information Technology & Office Administrator	Not Assigned	Not recorded
Della Corwin	Principal Network Engineer	Not Assigned	Not recorded
Eamon Kessler	Services Regional Director, Information Technology	Not Assigned	contact034@avh.example
Faye Bexley	Senior IT Support Analyst	Not Assigned	Not recorded
Gavin Bennett	Co- of Hedge Funds Member of The Firm-Wide Management Committee At Aster Vale & Hart Rowan Head	Not Assigned	Not recorded

Name	Title	Recorded role	Email
Hollis Weston	Head Co Securities & Corporate Governance Litigation Group Partner	Not Assigned	Not recorded
Iris Waverly	Head Group Head, Co of Real Estate Practice & of Real Estate (US, Chicago)	Not Assigned	Not recorded
Jonah Ellison	Information Technology Consultant	Not Assigned	Not recorded
Kaia Darrow	Senior Director, Accounting & Finance Systems	Not Assigned	Not recorded
Lena Halden	Senior Director	Not Assigned	Not recorded
Milo Delaney	IT Coordinator	Not Assigned	Not recorded
Nora Hollister	Senior Data Architect	Not Assigned	Not recorded
Owen Crosby	Systems Management Office Chief	Not Assigned	Not recorded
Priya Roswell	Director of Business Development	Not Assigned	contact045@avh.example
Remy Marlowe	Audio Visual	Not Assigned	Not recorded
Soren Hartwell	Director, Network Services	Not Assigned	Not recorded
Talia Keaton	Head of IP Transactions Partner	Not Assigned	Not recorded
Vera Price	Senior Application Integration Engineer	Not Assigned	Not recorded
Wes Redwood	Head of Energy Project Finance Practice Partner	Not Assigned	Not recorded
Zara Hadley	HRIS Analyst II	Not Assigned	Not recorded
Avery Mercer	Director of Employer Brand	Not Assigned	Not recorded
Jordan Corwin	Senior Business Analyst	Not Assigned	Not recorded
Morgan Kessler	January 2016 Senior Counsel & Present August 1991 December 2015 Partner	Not Assigned	Not recorded
Taylor Bexley	Director of Business Development Analytics & Intelligence	Not Assigned	contact055@avh.example
Riley Bennett	Global Co-Head of Restructuring and Insolvency	Not Assigned	Not recorded
Cameron Weston	Help Desk Analyst	Not Assigned	Not recorded
Quinn Waverly	Associate Director, Business Development Private Client, Tax & Benefits	Not Assigned	Not recorded
Parker Ellison	Applied Ai Solutions Analyst	Not Assigned	Not recorded
Hayden Darrow	Information Security Compliance Analyst	Not Assigned	Not recorded
Rowan Halden	Senior Partner	Not Assigned	Not recorded
Casey Delaney	Global Co-Head, Business Restructuring	Not Assigned	Not recorded
Reese Hollister	Vice President, International Business Development	Not Assigned	Not recorded
Blair Crosby	Managing Partner	Not Assigned	Not recorded
Devon Roswell	Global Director, Talent Acquisition Integration & Partners Counsel	Not Assigned	Not recorded
Arden Marlowe	Senior Manager, Data Management & Analytics	Not Assigned	Not recorded
Peyton Hartwell	Telecommunications Technician	Not Assigned	Not recorded
Jordan Mercer	Chief Knowledge Officer	Champion	contact068@avh.example
Emery Keaton	Chairman	Not Assigned	Not recorded
Kendall Price	Office Senior Director, Program Management	Not Assigned	Not recorded
Sawyer Redwood	Senior IT Support Analyst	Not Assigned	Not recorded
Jules Hadley	Health & Life Sciences Associate Director, Business Development	Not Assigned	contact072@avh.example
Maren Calder	Senior Data Architect	Not Assigned	Not recorded
Tessa Langley	System Administrator	Not Assigned	Not recorded
Nolan Norwood	Information Security Engineer	Not Assigned	Not recorded

Name	Title	Recorded role	Email
Drew Fenwick	Head of Technology, Partner Co- & Outsourcing Practice	Not Assigned	contact076@avh.example
Ellis Cole	Netops	Not Assigned	Not recorded
Alden Briar	Associate Director, Service Management	Not Assigned	Not recorded
Brenna Sloane	Associate Director, Information Governance Risk & Compliance	Not Assigned	Not recorded
Callum Rowan	Senior Network Security Engineer	Not Assigned	Not recorded
Della Bellamy	Chief Strategic Counsel	Not Assigned	Not recorded
Eamon Whitaker	Director, Platform Services	Not Assigned	Not recorded
Faye Granger	Technology Services Specialist	Not Assigned	Not recorded
Gavin Fairmont	International Healthcare Mergers & Acquisitions Head	Not Assigned	Not recorded
Hollis Archer	Event Technology Specialist	Not Assigned	Not recorded
Iris Merritt	Application Integration Engineer	Not Assigned	Not recorded
Jonah Sutton	Executive Director	Not Assigned	contact087@avh.example
Kaia Larkin	Global Litigation Practice Leader	Not Assigned	Not recorded
Riley Hartwell	Director, Application Services	Not Assigned	contact089@avh.example
Lena Raines	Director, Business Development, Health & Life Sciences	Not Assigned	contact090@avh.example
Milo Stone	IT Trainer	Not Assigned	Not recorded
Nora Winslow	Partner (Privacy & Cybersecurity)	Not Assigned	Not recorded
Owen Monroe	HRIS Analyst	Not Assigned	Not recorded
Priya Tolland	Managing Director, Strategic Solutions / Aster Vale Discovery	Not Assigned	contact094@avh.example
Remy Ashford	Labor & Employment Litigation Head (US)	Not Assigned	Not recorded
Evan Hart	CISO	Influencer	contact096@avh.example
Soren Carver	Senior Application Integration Engineer	Not Assigned	Not recorded
Talia Sterling	Audio Visual Specialist	Not Assigned	Not recorded
Vera Vale	Strategic Initiatives, Office of The Chair Head of Communications	Not Assigned	contact099@avh.example
Wes Lowell	Accounting Systems Administrator	Not Assigned	Not recorded
Zara Palmer	Partner and General Counsel (Executive Committee)	Not Assigned	Not recorded
Avery Rowan	Senior Accounting & Finance Systems Manager	Not Assigned	contact102@avh.example
Jordan Bellamy	Business Analyst	Not Assigned	Not recorded
Elena Rowan	Contracts Manager	Procurement	contact104@avh.example
Morgan Whitaker	Enterprise Messaging Administrator	Not Assigned	Not recorded
Taylor Granger	Application Integration Engineer	Not Assigned	Not recorded
Riley Fairmont	Senior Manager, Audio Visual Services	Not Assigned	contact107@avh.example
Cameron Archer	Vice President, Employee Benefits & Consultant	Not Assigned	Not recorded
Quinn Merritt	Executive Committee member (former Hart Rowan co-managing partner)	Not Assigned	Not recorded
Parker Sutton	Director of Communications	Not Assigned	Not recorded
Hayden Larkin	IT-Ausbilder	Not Assigned	Not recorded
Rowan Raines	Director, Project Management Office Portfolio & Delivery	Not Assigned	Not recorded

Name	Title	Recorded role	Email
Casey Stone	HRIS Analyst	Not Assigned	Not recorded
Reese Winslow	Associate Director of Events	Not Assigned	Not recorded
Blair Monroe	Senior Help Desk Support Analyst	Not Assigned	Not recorded
Devon Tolland	Database Specialist	Not Assigned	Not recorded
Arden Ashford	Senior Director of Business Development - Transactions, Tax, Employee Benefits & Private Client	Not Assigned	Not recorded
Peyton Carver	Manager, Information Technology	Not Assigned	Not recorded
Emery Sterling	Privacy & Cybersecurity Practice Global Leader	Not Assigned	Not recorded
Kendall Vale	Business Analyst	Not Assigned	Not recorded
Nolan Price	CIO	Executive Sponsor	contact121@avh.example
Sawyer Lowell	Senior Manager, Information Security Governance	Not Assigned	Not recorded
Jules Palmer	Director of Client Experience	Not Assigned	contact123@avh.example
Maren Mercer	IT Technician	Not Assigned	Not recorded
Tessa Corwin	Principal Application Integration Engineer	Not Assigned	Not recorded
Nolan Kessler	□□□□ □□□□□□□□□ □□□□□□□	Not Assigned	Not recorded
Drew Bexley	Global Global Co-Head, Partner, Compliance & Investigations	Not Assigned	Not recorded
Ellis Bennett	Director of Tax & Treasury	Not Assigned	contact128@avh.example
Alden Weston	IT-Spezialist	Not Assigned	Not recorded
Brenna Waverly	Avocat Collaborateur IP and Information Technology. Data Privacy	Not Assigned	Not recorded
Callum Ellison	Library Director	Not Assigned	contact131@avh.example
Della Darrow	Senior Manager, Focused On The Application of Advanced Technology In Business & Industry	Not Assigned	Not recorded
Eamon Halden	Unix Systems Administrator	Not Assigned	Not recorded
Faye Delaney	Global Practice Group Director - Employment & Intellectual Property	Not Assigned	contact134@avh.example
Gavin Hollister	Telecommunications Engineer	Not Assigned	Not recorded
Adrian Cole	Chief Financial Officer	Economic Buyer	contact136@avh.example
Blake Sutton	Not recorded	Procurement	Not recorded
Hollis Crosby	Director of Knowledge Management - M&A and Private Equity	Not Assigned	Not recorded
Iris Roswell	Chief Operating Officer	Not Assigned	Not recorded
Jonah Marlowe	Senior Application Engineer	Not Assigned	Not recorded
Kaia Hartwell	Senior Application Integration Engineer	Not Assigned	Not recorded
Lena Keaton	Manager, Applications Services	Not Assigned	Not recorded
Milo Price	Senior Application Engineer	Not Assigned	Not recorded
Nora Redwood	Network Engineer	Not Assigned	Not recorded
Owen Hadley	Senior Audio Visual Specialist	Not Assigned	Not recorded
Priya Calder	IT Specialist	Not Assigned	Not recorded
Remy Langley	Associate Director Marketing Integrated Campaigns	Not Assigned	contact147@avh.example
Soren Norwood	Applied Ai Solutions Analyst	Not Assigned	Not recorded
Talia Fenwick	SeniorInfrastructureEngineer	Not Assigned	Not recorded
Vera Cole	Director of Knowledge Management	Not Assigned	Not recorded

Name	Title	Recorded role	Email
Wes Briar	Senior IT Support Analyst	Not Assigned	Not recorded
Zara Sloane	Document Management Systems Senior Application Engineer	Not Assigned	Not recorded
Avery Ellison	Responsable Informatique	Not Assigned	Not recorded
Jordan Darrow	Firmwide Database Administrator	Not Assigned	Not recorded
Morgan Halden	Chief Operating Officer	Not Assigned	contact155@avh.example
Taylor Delaney	Head of Commercial Excellence	Not Assigned	contact156@avh.example
Riley Hollister	Information Security Engineer	Not Assigned	Not recorded
Cameron Crosby	Partner and Head of the Restructuring Practice In Paris	Not Assigned	Not recorded
Quinn Roswell	Regional Manager, Information Technology	Not Assigned	Not recorded
Parker Marlowe	Principal Infrastructure Engineer	Not Assigned	Not recorded
Hayden Hartwell	Global Head of Tax	Not Assigned	Not recorded
Rowan Keaton	Associate Director, E-Billing Systems & Operation	Not Assigned	contact162@avh.example
Casey Price	Database Administrator	Not Assigned	Not recorded
Reese Redwood	Senior Applications Engineer	Not Assigned	Not recorded
Blair Hadley	IT & Office Services Coordinator	Not Assigned	Not recorded
Devon Calder	Information Systems Business Analyst	Not Assigned	Not recorded
Arden Langley	Head of German Telecom, Media & Technology Group Partner (TMT)	Not Assigned	contact167@avh.example
Peyton Norwood	Senior Information Security Engineer	Not Assigned	Not recorded
Emery Fenwick	Regional Associate Director, Information Technology Services	Not Assigned	Not recorded
Kendall Cole	Senior Director, Business Opportunities	Not Assigned	Not recorded
Sawyer Briar	Corporate-development lead for MSO and stake-sale exploration (joined July 2025 from Odyssey Investment Partners)	Not Assigned	Not recorded
Jules Sloane	Regional Manager, Information Technology	Not Assigned	Not recorded
Maren Rowan	Global Head, Partner & of Practice (China)	Not Assigned	Not recorded

Appendix B / Complete signal database

AVH hiring - Information Governance Risk & Compliance Attorney

Built In Chicago lists AVH's Information Governance Risk & Compliance Attorney role. The employer job-description text covers client-data review and transfer during attorney departures, Relativity and eDiscovery, protection of privileged and proprietary information, and experience applying AI and analytics to data review. This supports governance discovery; it does not establish a control gap or an IBM project.

Observed: Oct 5, 2026 12:07 AM UTC | VERIFIED FACT

AVH hiring - People Analytics Listening Analyst

Built In Chicago lists AVH's People Analytics Listening Analyst role. The employer job-description text names Qualtrics, Workday Peakon, Workday Reporting, employee listening, and coordination with HRIS and IT on accurate, secure, governed people data. This is supporting hiring intelligence; it does not establish an expansion or an IBM project.

Observed: Oct 5, 2026 12:07 AM UTC | VERIFIED FACT

AVH hiring - Senior Payroll Systems Analyst

Built In Chicago lists AVH's Senior Payroll Systems Analyst role. The employer job-description text describes responsibility for Workday Payroll configuration, testing, payroll controls, automation, and AI adoption within payroll. This is supporting hiring intelligence; it does not establish new platform spend or an IBM project.

Observed: Oct 5, 2026 12:07 AM UTC | VERIFIED FACT

AVH recruiting Counsel, AI Risk & Compliance

Aster Vale & Hart LLP is recruiting a Counsel, AI Risk & Compliance role with responsibilities related to AI evaluation, deployment, and governance.

Observed: Sep 22, 2026 11:34 AM UTC | VERIFIED FACT

AVH announced a New York Midtown campus expansion

Aster Vale & Hart LLP announced a New York Midtown campus expansion.

Observed: Sep 21, 2026 2:20 AM UTC | VERIFIED FACT

AVH disclosed a 2026 data-security incident

Aster Vale & Hart LLP disclosed a 2026 data-security incident.

Observed: Sep 21, 2026 2:20 AM UTC | VERIFIED FACT

Appendix C / Complete opportunity records

Aster Vale & Mercer LLP - Contract Renewal - June 2025

Stage/status: Won | Amount: Not recorded | Close: May 14, 2025
Not recorded

unknown

Aster Vale & Mercer LLP- TargetProcess M2M to Annual Contract

Stage/status: Won | Amount: Not recorded | Close: Jun 26, 2024
Not recorded

unknown

Cyber Resilience / Protected Recovery / Trusted Infrastructure

Stage/status: Pipeline Creation | Amount: Not recorded | Close: Not recorded
Secure discovery with CIO/CISO stakeholders and qualify the business problem, urgency, scope, funding, value, and timing.

SELLER PROVIDED

Targetprocess Current Use-Case / Fit Discovery

Stage/status: Engage | Amount: Not recorded | Close: Not recorded
Await Elena Rowan referral/introduction to the IBM Targetprocess business or technology owner; then understand current use case and fit. No renewal discussion now.

SELLER PROVIDED

Demo: Aster Vale & Mercer LLP - Contract Renewal - June 2026

Stage/status: Won | Amount: Not recorded | Close: Jun 22, 2026
Not recorded

unknown

Appendix D / Complete engagement and cadence history

outreach_sent

Making exceptions easier to discuss

Oct 5, 2026 6:33 PM UTC | unknown

outreach_sent

Recovery beyond the system being available

Oct 5, 2026 6:33 PM UTC | unknown

Touch #2 / email

Recovery beyond the system being available | Outcome: sent

Oct 5, 2026 6:33 PM UTC | Recorded completed activity

Touch #2 / email

Evan,

I wanted to check in and see how the merger of systems is progressing from a governance and security standpoint.

I imagine one of the bigger challenges is maintaining clear ownership, consistent controls, and visibility as different platforms, processes, and exceptions are brought together.

How is that coming together for your team so far?

If there’s anything I can do to assist-whether that’s sharing ideas, comparing approaches, or helping think through a specific governance or security challenge-I’d be happy to help.

If it would be useful, we could also set up a brief meeting to talk it through.

Regards,
Jordan | Outcome: sent

Oct 5, 2026 6:33 PM UTC | Recorded completed activity

outreach_sent

Keeping the operating outcome in view

Oct 5, 2026 6:31 PM UTC | unknown

Touch #2 / email

Keeping the operating outcome in view | Outcome: sent

Oct 5, 2026 6:31 PM UTC | Recorded completed activity

outreach_sent

AVH: information governance and recovery priorities

Sep 30, 2026 6:36 PM UTC | unknown

Touch #1 / email

AVH: information governance and recovery priorities | Outcome: sent

Sep 30, 2026 6:36 PM UTC | Recorded completed activity

outreach_sent

AVH: policy checks before infrastructure changes

Sep 30, 2026 6:35 PM UTC | unknown

Touch #1 / email

AVH: policy checks before infrastructure changes | Outcome: sent

Sep 30, 2026 6:35 PM UTC | Recorded completed activity

outreach_sent

AVH: infrastructure delivery controls

Sep 30, 2026 6:33 PM UTC | unknown

Touch #1 / email

AVH: infrastructure delivery controls | Outcome: sent

Sep 30, 2026 6:33 PM UTC | Recorded completed activity

RE: Targetprocess renewal and user ownership

Seller replied to Elena Rowan: attached June IBM Targetprocess contract; explicitly stated no renewal discussion now; requested introduction to the group/owner responsible for IBM Targetprocess to understand current use case and confirm ongoing fit.

Sep 30, 2026 2:36 PM UTC | unknown

outreach_sent

Re: Targetprocess renewal and user ownership

Sep 30, 2026 2:36 PM UTC | unknown

Touch #3 / email

Re: Targetprocess renewal and user ownership | Outcome: sent

Sep 30, 2026 2:36 PM UTC | Recorded completed activity

RE: Targetprocess renewal and user ownership

Hi Jordan, I do not have visibility into Targetprocess usage or plans. I work in procurement and handle the renewal transactions.

If you can send a renewal quote, I can send that on to the stakeholder to confirm.

Thanks, Elena

Elena Rowan
Contracts Manager

T: +1 312 555 0142 | M: +1 847 555 0128 | F: +1 312 555 0190
erowan@avh.example | LinkedIn

Aster Vale & Hart LLP | avh.example
1000 Meridian Plaza | Suite 4000 | Chicago, IL 60600 | USA
IT HelpdeskIT HelpdeskIT Helpdesk
IT HelpdeskIT HelpdeskIT Helpdesk
IT Helpdesk
<!--company-->

From: JORDAN BLAKE <jblake@seller.example>
Sent: Tuesday, September 29, 2026 1:34 PM
To: Rowan, Elena <erowan@avh.example>
Subject: Targetprocess renewal and user ownership

External sender notice: jblake@seller.example. Learn why this is important
CAUTION: This email came from outside the Firm. DO NOT click on links or open attachments unless you were expecting the email, recognize the sender, and know the content is safe.

Hi Elena,

I□m reaching out regarding Targetprocess at Aster Vale & Hart LLP.

As you look at upcoming acquisition or renewal activity, could you let me know whether there [shortened]

Sep 29, 2026 8:59 PM UTC | unknown

outreach_sent

Targetprocess renewal and user ownership

Sep 29, 2026 6:34 PM UTC | unknown

Touch #2 / email

Targetprocess renewal and user ownership | Outcome: sent

Sep 29, 2026 6:34 PM UTC | Recorded completed activity

Historical outreach - exact subject not recorded

Historical outreach confirmation; original message body was not reconstructed.

Sep 23, 2026 1:34 AM UTC | unknown

Historical outreach - exact subject not recorded

Historical outreach confirmation; original message body was not reconstructed.

Sep 23, 2026 1:34 AM UTC | unknown

Historical outreach - exact subject not recorded

Historical outreach confirmation; original message body was not reconstructed.

Sep 23, 2026 1:34 AM UTC | unknown

Touch #1 / email

Historical outreach - exact subject not recorded | Outcome: sent

Sep 23, 2026 1:17 AM UTC | Recorded completed activity

Touch #1 / email

Historical outreach - exact subject not recorded | Outcome: sent

Sep 23, 2026 1:17 AM UTC | Recorded completed activity

Touch #1 / email

Historical outreach - exact subject not recorded | Outcome: sent

Sep 23, 2026 1:17 AM UTC | Recorded completed activity

Cadence: Modernize Kafka - Aster Vale & Hart LLP - Maya Ellison | Status: hold | Contact: Maya Ellison | Next touch: Not recorded

Cadence: Modernize Kafka - Aster Vale & Hart LLP - Avery Vale | Status: active | Contact: Avery Vale | Next touch: Sep 30, 2026 2:00 PM UTC

Cadence: Terraform - Aster Vale & Hart LLP - Nolan Price | Status: active | Contact: Nolan Price | Next touch: Oct 7, 2026 2:00 PM UTC

Cadence: Terraform - Aster Vale & Hart LLP - Evan Hart | Status: active | Contact: Evan Hart | Next touch: Oct 7, 2026 2:00 PM UTC

Cadence: AVH Targetprocess Use-Case Discovery - Elena Rowan | Status: completed | Contact: Elena Rowan | Next touch: Not recorded

Cadence: AVH Cyber Resilience - Nolan Price | Status: active | Contact: Nolan Price | Next touch: Not recorded

Cadence: AVH Cyber Resilience - Cameron Stone | Status: active | Contact: Cameron Stone | Next touch: Oct 7, 2026 2:00 PM UTC

Cadence: Terraform - Aster Vale & Hart LLP - Cameron Stone | Status: hold | Contact: Cameron Stone | Next touch: Not recorded

Cadence: Terraform - Aster Vale & Hart LLP - Riley Hartwell | Status: hold | Contact: Riley Hartwell | Next touch: Not recorded

Cadence: Terraform - Aster Vale & Hart LLP - Marcus Vale | Status: hold | Contact: Marcus Vale | Next touch: Not recorded

Cadence: AVH Cyber Resilience - Evan Hart | Status: active | Contact: Evan Hart | Next touch: Not recorded

Appendix E / Open action ledger

Prepare Avery Vale Touch #1

Resume the held cadence by reviewing prior engagement context and preparing the next seller-controlled touch. MASTER will not send outreach automatically.

Due: Sep 30, 2026 2:00 PM UTC | Priority: 85 | unknown

Prepare Nolan Price Touch #3

Review replies and activity notes, then prepare the next touch. A saved email draft is not implied.

Due: Oct 7, 2026 2:00 PM UTC | Priority: 85 | unknown

Prepare Evan Hart Touch #3

Review replies and activity notes, then prepare the next touch. A saved email draft is not implied.

Due: Oct 7, 2026 2:00 PM UTC | Priority: 85 | unknown

Prepare Cameron Stone Touch #3

Review replies and activity notes, then prepare the next touch. A saved email draft is not implied.

Due: Oct 7, 2026 2:00 PM UTC | Priority: 85 | unknown

Review Terraform refresh - Evan Hart

Review short draft and account activity; held cadence requires manual activation. No email sent.

Due: Not recorded | Priority: 80 | unknown

Review Terraform refresh - Marcus Vale

Review short draft and account activity; held cadence requires manual activation. No email sent.

Due: Not recorded | Priority: 80 | unknown

Review Terraform refresh - Riley Hartwell

Review short draft and account activity; held cadence requires manual activation. No email sent.

Due: Not recorded | Priority: 80 | unknown

Review Terraform refresh - Cameron Stone

Review short draft and account activity; held cadence requires manual activation. No email sent.

Due: Not recorded | Priority: 80 | unknown

Review Terraform refresh - Nolan Price

Review short draft and account activity; held cadence requires manual activation. No email sent.

Due: Not recorded | Priority: 80 | unknown

Appendix F / Methodology, confidence and export audit

Classification discipline: VERIFIED FACT, SELLER PROVIDED, HYPOTHESIS, CONFLICT, UNKNOWN and DO NOT ASSERT labels are preserved when present. Titles are not used to infer buying authority. Signal presence is not treated as customer pain, budget, project, or buying intent. CRM/imported opportunity facts remain authoritative. MASTER recommendations remain advisory and seller-controlled.

Export ID: demo0001-0000-4000-8000-000000000001
Account ID: demo0002-0000-4000-8000-000000000002
Generated UTC: 2026-10-06T01:57:16.400097+00:00
Input snapshot SHA-256: 0000000000000000000000000000000000000000000000000000000000000000
Template: master-full-account-intelligence-brief-v2.1
Export contract: master-dual-intelligence-export-v1
Route: authenticated deterministic saved-data PDF export; no model call
Saved data were read sequentially; this is not a transactional database snapshot.