The Cardinal Source

CONFIDENTIAL · BOARD-READY

STAGE 4 · WEST FRONTIER

Deliverable 4 of 4 · Engagement CS-2026-014

Decision Memo

A CCaaS vendor recommendation for Acme Manufacturing – prepared for VP IT, CFO, and the Board IT Subcommittee.

N	E	S	W
STAGE 1	STAGE 2	STAGE 3	STAGE 4
North Star	*East Wind*	*South Spine*	*West Frontier*

ENGAGEMENT	CS-2026-014	DATE ISSUED	September 3, 2026
DECISION BY	September 24, 2026	AUTHORITY	VP, Information Technology
FOR	VP IT · CFO · Board IT Subcommittee	LENGTH	3 pages · 8 min read

RECOMMENDATION

> THE DECISION IN THREE SENTENCES
>
> Sign with **NICE CXone**. Begin migration October 14, 2026. Complete by March 30, 2027.

$3.94M	18.5%	60 days
Five-year total cost of ownership	Savings vs. current run-rate	MasterControl integration in production

21 CFR Part 11 audit-ready by go-live. MasterControl integration delivered via the NICE PS team in production within 60 days of contract signing.

EXECUTIVE SUMMARY

Cardinal Source ran the Cardinal Method end-to-end across 12 weeks. We evaluated 11 CCaaS vendors and scored 6 against a Medical-Device-Manufacturing-weighted rubric (Vendor Scorecard delivered August 12). NICE CXone scored **8.15 of 10**, narrowly ahead of Genesys Cloud at 8.00. The recommendation is NICE CXone – with Genesys Cloud held as a qualified alternative if commercial terms become problematic during contract negotiation.

The recommendation reflects three judgments: (1) NICE CXone's 21 CFR Part 11 implementation is one validation cycle ahead of Genesys, which materially lowers FDA inspection risk in the first 12 months post-go-live; (2) NICE's MasterControl integration depth satisfies the 4-minute call-to-record SLA without third-party integration risk; (3) the five-year TCO premium of ~$48K/year versus Genesys is justified by the regulatory risk reduction.

WHY NICE CXONE — THREE REASONS

1 **21 CFR Part 11 — proven at peer manufacturers**

NICE CXone has three medical-device-manufacturer deployments where the Part 11 validation package was reviewed during FDA pre-inspection without findings. Genesys Cloud has one; the remaining vendors have zero. This is the single highest-weight dimension in our rubric (25%) and the one most directly tied to material Acme regulatory exposure.

2 **MasterControl integration — production-grade, not partner-built**

NICE's MasterControl integration runs in production at two peer manufacturers we reference-checked. Both confirmed sub-3-minute call-to-record latency at full load, well inside Acme's 4-minute SLA target. Five9 and Talkdesk rely on partner-built integrations, adding 6 weeks of implementation risk and a dependency on a third-party integrator we don't control.

3 **AI / voice analytics — the only production-ready offering**

NICE's Enlighten AI suite is in production at peer manufacturers today. Most competitors have announced equivalent capabilities; only NICE has shipped. While Acme's primary use case doesn't require AI / voice analytics in year 1, the analytics roadmap will materially affect quality-system efficiency in years 2–3.

COMMERCIAL TERMS — NEGOTIATED

EXHIBIT 1 — QUOTED VS. NEGOTIATED

5-year value

COMPONENT	QUOTED	NEGOTIATED	5-YR VALUE
Licensing (360 seats)	$118/seat/mo	$96/seat/mo	$2,073,600
Professional services	$640,000	$420,000	$420,000
MasterControl integration	$185,000	$140,000	$140,000
Part 11 validation package	$95,000	Included	$0
Training	$72,000	$48,000	$48,000
Support (Premier tier)	$144,000/yr	$120,000/yr	$600,000
Overage buffer (40 seats)	$118/seat/mo	0 for 6 mo	$201,600
Five-year total			**$3,483,200**

Run-rate at year 3: **$668,160/yr** – inside the Stage 1 target of $671,580.

IMPLEMENTATION PLAN

EXHIBIT 2 — PHASED ROLLOUT

UCCE retained through parallel-run period

PHASE	WINDOW	SITES	RISK
Validation + UAT	Oct 14 – Nov 30, 2026	2 pilot	Medium
Phase 1 — manufacturing	Dec 1 – Jan 31, 2027	24	Low
Phase 2 — clinical affairs	Feb 1 – Feb 28, 2027	18	HIGH
Phase 3 — remaining	Mar 1 – Mar 30, 2027	34	Low
Parallel run + rollback	Through Jun 30, 2027	All	Low

RISK REGISTER

EXHIBIT 3 — KEY RISKS & MITIGATIONS

Likelihood · Impact

RISK	L	I	MITIGATION
Part 11 gap at FDA pre-inspection	Med	High	NICE Part 11 audit package + on-site validation; QA pre-review before Phase 2
MasterControl fails 4-min SLA	Low	Med	30-day burn-in with daily SLA reporting; rollback if SLA misses 2 consecutive days
NICE PS team delays start	Low	Med	Contract includes PS commitment date + $50K/week delay penalty
UCCE end-of-support before complete	Low	High	Cisco extended-support secured through June 2027 as fallback ($28K)
Acme staff capacity, parallel run	Med	Low	NICE PS provides supplementary L1 support during weeks 1–6 of each phase

DECISION REQUEST

We request approval to execute the NICE CXone contract as negotiated. The contract draft is available for legal review. Suggested decision path:

THIS WEEK	**Legal review** of the negotiated contract. Cardinal Source available to walk through provisions.
BY SEP 17	**Board IT Subcommittee** approval.
BY SEP 24	**Contract execution.**
OCT 14	**Implementation kickoff** per the plan in Exhibit 2.

SOURCING RELATIONSHIP DISCLOSURE

FULL TRANSPARENCY

The Cardinal Source receives a residual commission from NICE on this contract — 5.2% of monthly recurring revenue for the duration of the term, totaling approximately **$108,000 per year**. This commission is built into NICE's pricing structure regardless of advisor involvement and is paid by NICE, not by Acme. Full disclosure available on request.

ALTERNATIVE

If contract negotiation with NICE cannot deliver the negotiated terms shown above, or if PS-team capacity creates an unacceptable delay, **Genesys Cloud remains a qualified alternative**. Cardinal Source can re-engage Genesys within 5 business days. Decision authority is retained by the VP, Information Technology.

END OF DECISION MEMO · STAGE 4 OF 4 · END OF DELIVERABLES PACKAGE