

Working together

What I need to get started, and how I handle your information

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This covers two things a new engagement raises immediately: the access and people I need in place, and what happens to your information once I have it.

Part one — What I need from you

A seat inside your environment

A company laptop, or access to a virtual desktop you control. This is the cleanest arrangement for both of us, and it is what I would ask for by default. Work on your equipment lease portfolio then happens on your device, inside your network, under your security policy — and the question of your data sitting on an outside consultant's machine does not arise at all.

Access to whatever AI platform you have standardized on. Most large companies now run a closed-tenant assistant and restrict anything else, which is sensible. I use these tools for one thing only — processing your own documents, principally abstracting lease schedules and reconciling invoices. I do not need them for research or anything outside your four walls, so whichever platform you have is fine. I will learn it.

Your AI usage policy, early. Specifically: what is permitted for confidential contract documents, and what the approval path is for an exception. This shapes the delivery timeline, so it is better raised in week one than discovered in month two.

Identity and access

An email address on your domain. Something like `brad.johns@yourcompany.com`. This is partly practical — lessors and dealers take correspondence from a company address seriously in a way they do not from an outside consultant — and partly a control. Every communication I have with a lessor on your behalf is then created, stored and retained inside your own systems, where you can see it, search it and keep it after I am gone.

Access to the company directory, so I can find the right person at a site without routing every question through your sponsor.

A dedicated mailbox — `equipment-leasing@yourcompany.com` — on your server, with lessors instructed to copy every invoice and notice to it. This becomes the single front door for the portfolio. It sits in your tenant, not mine; your retention policy applies to it; and if the engagement ends, the mailbox and everything in it stays exactly where it is.

A document repository

A SharePoint or Dropbox folder, owned by you, where your teams deposit master lease agreements, schedules, amendments, invoices and asset lists, and where I return completed work. Your repository, your permissions, your audit trail.

People

I need a named person in each of these, not a distribution list. They are not full-time roles — most will spend an hour or two in the first month and very little after that.

Function	What I need from them
Executive sponsor	Authority to direct the change in invoice routing when we get there
Accounts payable	How lease invoices arrive, route and pay today; the eventual change to that routing
Accounting	The lease population they currently carry, and what their determination requires
Treasury / Finance	Credit, covenant and structure context; the commercial relationship with lessors
Fleet / Operations	What is actually in the field, where it moved, and what condition it is in
Procurement / Sourcing	Existing supplier agreements and any sourcing calendar
IT / Security	Access provisioning, your vendor security review, your AI usage policy, and any data residency requirements

Systems and data

Direct read access to the relevant ERP modules where your entitlements allow it — exports work, but data is recorded inconsistently across most organizations and seeing the source saves weeks of reconciliation. Otherwise, periodic exports of:

- The fixed asset registry
- Depreciation expense and accruals by owned asset
- The same for leased assets, including any separate lease accounting system
- Rental and lease equipment expense at invoice level
- Copies of lease and rental invoices

I do not need access to your transportation management system, your HR systems, or anything outside the equipment lease program.

A note on timing: provisioning a device and accounts for an outside party commonly takes two to six weeks at a large company, and sometimes requires setting me up in your contingent worker system first. Worth starting on signature rather than at kickoff, because the portfolio record cannot begin until the documents can be reached.

The platform

The lease administration platform is licensed **in your name**, by you, and passed through to you at cost — I take no margin on it and you see the invoice. I hold administrator access on your instance. Your sponsor is named as a co-administrator from day one, so you can change or revoke my access yourself, without going through me or the vendor.

Part two — How I handle your information

What I hold

Lease contracts, schedules and amendments. Lessor invoices. Asset registers and site locations. The general ledger coding that applies to lease payments. Correspondence with lessors and dealers.

What I never hold

Bank account details, payment credentials, or any ability to move money. I reconcile and approve invoices; your accounts payable team executes every payment. This is a deliberate design choice, not a limitation — it means no engagement of mine ever requires you to extend payment authority outside your organization.

I also do not take write access to your ERP, employee personal data beyond ordinary business contact details, or any information unrelated to the equipment lease program.

Where the work happens

Building the portfolio record means reading your source documents. Reconciling an invoice means comparing that invoice against the contract and the payment stream. Until the lease platform can do that comparison inside itself — the vendor expects that capability for equipment portfolios in 2027 — that processing happens somewhere, and it is worth being explicit about where.

In order of preference, and I am happy with any of them:

1. Entirely inside your environment. You issue the laptop and give me access to your own AI platform. Nothing about your portfolio ever leaves your control, there is no outside subprocessor to assess for my part of the work, and your existing policies simply apply. This is what I would ask for first.

2. Your tenant, my device. I work in your SharePoint and your Microsoft 365 with the account on your domain, so documents stay under your governance, your retention and your access logs, with nothing stored locally.

3. My own environment. An encrypted machine and tools under commercial terms, where customer data is not used to train models by default. The working pattern is **extract, process, return, delete**:

1. I extract only the fields the task requires — not whole systems, not whole mailboxes.

2. I process that extract on an encrypted machine.
3. The result is written back to your platform instance and your repository, which are the authoritative record.
4. The working extract is deleted once the task is complete, and in any event within sixty days.

Nothing accumulates. There is no second copy of your portfolio living on my side, because the authoritative copy is the platform instance you own.

4. Your own cloud. If you would rather the model ran inside your own infrastructure, Claude is available through Amazon Bedrock and Google Vertex AI under your existing agreement with that provider. That works, though in practice option one is simpler for everyone.

What I will not do is work around a restriction. If your policy does not permit confidential contract documents in a particular tool, tell me and we will use one it does permit, or do that step by hand and price it accordingly.

Who else touches it

Under option one this question largely falls away: the only tools involved are your own, under your own agreements. The list below applies where I am working in my own environment.

Provider	What for	Terms
The lease administration platform	System of record	Named in the proposal. Licensed by you, in your name; your data and documents remain yours and export in full
An AI service, where you have not provided one	Document abstraction, reconciliation, reporting	Commercial terms — customer data is not used to train models by default
Microsoft	Your own tenant, where the mailbox and repository sit	Your agreement, not mine

That list is complete, and I will tell you before it changes. The lease platform sits on it either way, because it is the system of record whichever way we work — and it is licensed in your name.

One accountable person. I do the work on your portfolio. I am the single point of contact and the single point of accountability, and that does not change. The person who learns your portfolio does not rotate off it every nine months, which is not something a firm can promise you.

If the practice grows to the point where I bring in support, I will tell you before anyone is engaged on your account, and tell you who they are. Anyone working on your portfolio is bound by the same confidentiality obligations I am, holds access narrowed to the specific task — the platform allows permissions to be set by role and by field — and works under my supervision. Accountability for the work stays with me and is not delegated.

If you are not comfortable with that, we will talk it through. If I cannot address your concern, the engagement is cancelable, as it is at any point you are not satisfied and I am unable to put it right.

Your portfolio is never handed to a firm or to a vendor's labor pool. Anyone who works on it is a named individual, working in the United States or Canada, engaged by me under the same obligations I owe you.

Separation between clients

Each client's work is kept separate at every layer: a separate platform instance that you own, a separate document repository that you own, separate working folders, and separate project workspaces in the tools I use. Your information is never pooled with another client's for any purpose.

Market knowledge I have built over thirty years travels with me, as it does for any practitioner. Your rates, your counterparties, your contract terms and your pricing do not — not in a model, not in a benchmark, not in a sentence to someone else.

At the end

Whenever the engagement ends, and for whatever reason:

- The platform instance, the records and the documents are already yours — nothing has to be handed back, because nothing was ever held somewhere you could not reach.
- Your sponsor removes my administrator access.
- I delete my working copies and confirm in writing that I have done so.
- The written procedures stay with you, maintained as the program ran rather than written at the end.

The only thing it costs you is finding someone else to run the program.