

Welcome Email Sequence — 90-day Pilot

This document is the canonical source for the 5-touch Pilot onboarding email sequence. All emails sent from adam@panguard.ai (Founder, signed personally — not from `noreply@`). Reply-to set to adam@panguard.ai for personal handling.

Replace `{{tokens}}` at send time. Each email is human-reviewable before send (no auto-send). Wire-payment Customers (Path B) get the same sequence but timed from wire receipt, with a separate Path B Day-0 invoice-issued email inserted at SOW signature.

Total emails:

- **0 — Invoice issued** (Path B only)
- **1 — Welcome / Day 0** (Stripe charged OR wire received)
- **2 — Day 7 — Tech lead onboarding done**
- **3 — Day 30 — First evidence pack draft + halfway check-in**
- **4 — Day 60 — Findings report + Enterprise scoping invitation**
- **5 — Day 90 — Exit packet + decision moment**

Email 0 — Invoice issued (Path B only)

From: adam@panguard.ai **To:** `{{customer_email}}` **Cc:** billing@panguard.ai **Subject:** PanGuard Pilot SOW `{{sow_number}}` — invoice issued, your 90 days start now

Hi `{{customer_first_name}}`,

Thanks for signing the Pilot SOW. The 90-day clock starts today, `{{effective_date}}`.

Attached: Stripe invoice `{{invoice_number}}` for USD \$25,000, payable Net-30 by `{{net_30_date}}`. Wire instructions are on page 2 of the invoice PDF.

While the wire is in flight, two things happen on our side **today**:

1. Your workspace at https://app.panguard.ai/w/{{workspace_slug}} is provisioned. Magic-link login will arrive in a separate email.
2. I'll book a 45-minute kickoff call with you and your nominated technical lead. Please reply with: (a) tech lead's name + email, (b) two 45-min slots in the next 7 business days, (c) your preferred regulatory framework (one of: EU AI Act / NIST AI RMF / ISO 42001 / OWASP Agentic / OWASP LLM).

What I need from you in the first 10 business days:

- Access to one (1) target deployment environment (VPC / on-prem / airgap)
- Framework selection (per above)
- Tech lead introduction

Until the wire arrives, I'm working on:

- Engine deployment runbook tailored to your target environment

- Rule pack drafting for your specific deployment

Reply to this email or text me at +886 [redacted]. I'm in Taipei time; office hours 09:00-20:00 GMT+8 weekdays, best-effort weekends.

Adam Lin Founder & CEO · PanGuard AI, Inc. Delaware C-Corp · adam@panguard.ai

7-day refund right applies from {{effective_date}}, per <https://panguard.ai/legal/refund>.

Email 1 — Welcome / Day 0

From: adam@panguard.ai **To:** {{customer_email}} **Cc:** (tech lead if known) **Subject:** Welcome to PanGuard Pilot · Day 1 of 90 · {{customer_org}}

Hi {{customer_first_name}},

You're in. Your workspace is live: https://app.panguard.ai/w/{{workspace_slug}}.

Three logins to claim:

1. **Workspace** — magic link arriving in a separate email. Sets up your password-less auth.
2. **Slack Connect** — invitation arriving within 24h. This is our shared channel for the next 90 days.
3. **GitHub** — if you want commit access to your custom rule pack repo, send me your GitHub username.

Your 90-day timeline

Day	What happens
0	Today. Workspace live. Slack Connect invitation.
2-7	Kickoff call (45 min). Framework selection. Environment access.
8-21	Engine deployment. Rule pack drafting.
22-35	Rule pack trial finalised. SIEM webhook configured.
36-60	Production monitoring. Weekly office hours. Evidence pack draft.
61-75	Evidence pack finalised. Benchmark report delivered.
76-90	Day-90 exit packet. Decision moment: Enterprise upgrade OR clean exit.

Your 6 deliverables (per Pilot SOW Section 2):

1. ATR engine deployment in your environment
2. Custom rule pack (50-100 rules for your deployment)
3. Sample compliance evidence pack (your framework)
4. SIEM webhook integration template
5. Senior engineering office hours (6 hr/wk; tracker visible in workspace)
6. Day-90 exit packet + working session

Your homework this week

1. Pick your regulatory framework (one of: EU AI Act / NIST AI RMF / ISO 42001 / OWASP Agentic / OWASP LLM). Reply with your pick.
2. Name your technical lead (the person I'll work with day-to-day). Cc them on your reply.
3. Confirm target deployment environment (VPC region / on-prem details / airgap if applicable).

Things you can already do today, before the kickoff:

- Read the published whitepaper: <https://panguard.ai/legal/security>
- Open the sample evidence pack: <https://panguard.ai/evidence-pack> (this is the format you'll get)
- Try the Community CLI: `npx @panguard-ai/panguard-scan@latest scan ~/.claude/skills` (works locally, zero setup)

If anything is unclear, reply. I read every email personally.

Adam Lin Founder & CEO · PanGuard AI, Inc. adam@panguard.ai · +886 [redacted]

Your 7-day refund right (per <https://panguard.ai/legal/refund>) runs through {{day_7_date}}. Use it without explanation if Day 7 feels wrong.

Email 2 — Day 7 check-in

From: adam@panguard.ai **Subject:** Day 7 check-in · {{customer_org}} Pilot

Hi {{customer_first_name}},

Day 7. Quick check on whether we're on track or whether you need to use the 7-day refund right (today is the last day).

What's done:

- ☒ Workspace provisioned
- ☒ Kickoff call held ({{kickoff_date}})
- ☒ Framework selected: {{framework}}
- {{checkbox_state}} Tech lead onboarded: {{tech_lead_name}}
- {{checkbox_state}} Environment access confirmed: {{environment_target}}

What's in flight:

- Engine deployment runbook drafted. ETA Day 14.
- Rule pack candidates picked: {{rule_count}} rules from the {{ruleset_filter}} category. Final pack at Day 21.

What I need from you this week:

- {{if_no_tech_lead}} Tech lead introduction (deadline Day 10 per SOW Section 7.1)
- {{if_no_environment}} Environment access (deadline Day 10 per SOW Section 7.2)

7-day refund window closes EOD today. If anything has felt off — onboarding tempo, security disclosures, the Slack channel — reply and tell me directly. The 7-day right is there exactly for this.

Adam

Email 3 — Day 30 halfway check-in

From: adam@panguard.ai **Subject:** Day 30 milestone · evidence pack draft + halfway check-in

Hi {{customer_first_name}},

Day 30 of 90. We're a third of the way.

Delivered this month:

1. Engine deployed in {{environment_target}} — smoke test passed {{smoke_test_date}}
2. Rule pack v1: {{rule_count}} rules, tagged for {{ruleset_filter}}. Benchmark report attached.
3. SIEM webhook for {{siem_target}} — test event verified {{webhook_test_date}}

Attached: draft compliance evidence pack mapped to {{framework}}. This is a draft — final version at Day 75. Open it, check the SHA-256, give feedback on:

- Are the {{framework}} control mappings sufficient for your auditor?
- Does the evidence narrative read the way your GRC team expects?
- Anything missing for your audit cycle?

Engineering office hours used this month: {{hours_used}} of {{hours_budgeted}} hours.
{{narrative_on_hours}}

Next 30 days:

- Day 36-60: production monitoring against your environment
- Day 45: mid-pilot working session (45 min)
- Day 60: findings report

If you want to start the Enterprise scoping conversation, this is the time. The \$25K Founding Customer credit applies to Y1 Enterprise if you upgrade. Just reply "scope it" and I'll book 60 min.

Adam

Email 4 — Day 60 findings + Enterprise scoping

From: adam@panguard.ai **Subject:** Day 60 findings report · Enterprise scoping window opens

Hi {{customer_first_name}},

Day 60. Two-thirds done. Attached: findings report from 30 days of production monitoring.

Highlights:

- {{events_total}} events processed
- {{threats_detected}} threats detected ({{critical_count}} critical, {{high_count}} high)
- {{actions_taken}} response actions executed (per your runbook)
- {{novel_findings}} novel attack patterns observed (rule submissions queued for upstream)

Engineering office hours used: {{hours_used_60d}} of {{hours_budgeted_60d}}.
{{narrative_on_hours}}

Enterprise scoping window

The natural decision point is Day 90, but the scoping work itself takes 2-3 weeks. So if you're leaning toward upgrade, this is when we should start.

Three Enterprise paths from where you are now:

1. **Same scope, full year** — \$250K Y1 Enterprise (minus \$25K Founding Customer credit = \$225K net)
2. **Multi-environment** — adds 2-3 deployment environments + framework expansion = \$350K Y1 Enterprise (minus credit = \$325K)
3. **Migrator Pro standalone** — convert your existing Sigma / YARA / Splunk / CodeQL rule library to ATR with signed evidence pack output — \$500K-2M per year, scoped per your rule library size

If you want any of these, reply "scope it" and I'll send the Enterprise SOW draft within 5 business days.

If you're leaning toward clean exit at Day 90, that's also fine — Day-90 exit packet will include migration instructions for your team to operate ATR independently on the MIT licence.

Adam

Email 5 — Day 90 exit packet

From: adam@panguard.ai **Subject:** Day 90 exit packet · {{customer_org}} Pilot

Hi {{customer_first_name}},

Day 90. We made it. Attached: the final exit packet.

What's inside:

1. Final findings report (PDF) — full 90-day production summary
2. Final compliance evidence pack (PDF + JSON + manifest with SHA-256 + HMAC)
3. Custom rule pack v3 — finalised, {{final_rule_count}} rules, your-branch in the ATR repo
4. SIEM webhook config snapshot
5. Engineering hours ledger — final accounting of the 78-hour budget
6. Recommended migration paths (Enterprise upgrade OR clean exit, with instructions for each)

Decision moment

Per SOW Section 11, you have three options:

1. **Upgrade to Enterprise** — Y1 SOW draft attached. \$25K Founding Customer credit applied. Sign by {{day_120_date}} to keep the credit.
2. **Pilot extension** — only if Founding Customer slots remain (currently {{founding_slots_remaining}} of 3 remain).

3. **Clean exit** — workspace remains accessible for 30 days for data export.

Public acknowledgement (opt-in only)

If you're willing to be named as a Founding Customer publicly — case study, logo on /atr/adopters, quote on /pricing — please reply with written consent. Otherwise we keep the engagement confidential.

Working session

Whichever path you pick, let's book the Day-90 working session. 45 minutes, your tech lead, your GRC lead optional. Reply with two slots in the next 5 business days.

Thanks for being one of the first three. This Pilot shaped what PanGuard is now.

Adam

Notes for sender (internal)

- **All emails sign as Adam personally** — no "team@" or "noreply@" voice. Founder-first.
 - **Path B Customers** receive Email 0 + Email 1 on the same day (Effective Date), even before wire receipt. Email 1 explicitly notes that some deliverables (2.3 evidence pack, 2.6 exit packet) are gated on wire receipt.
 - **Refund email** (during 7-day window) is handled separately. Template at `06-Refund-Email-Template.md` (TBD).
 - **Sentry / SIEM webhook templates** for the technical content: linked from inside each email, not pasted inline (keeps email small).
 - **No marketing footer.** No "follow us on LinkedIn" links. This is enterprise correspondence.
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