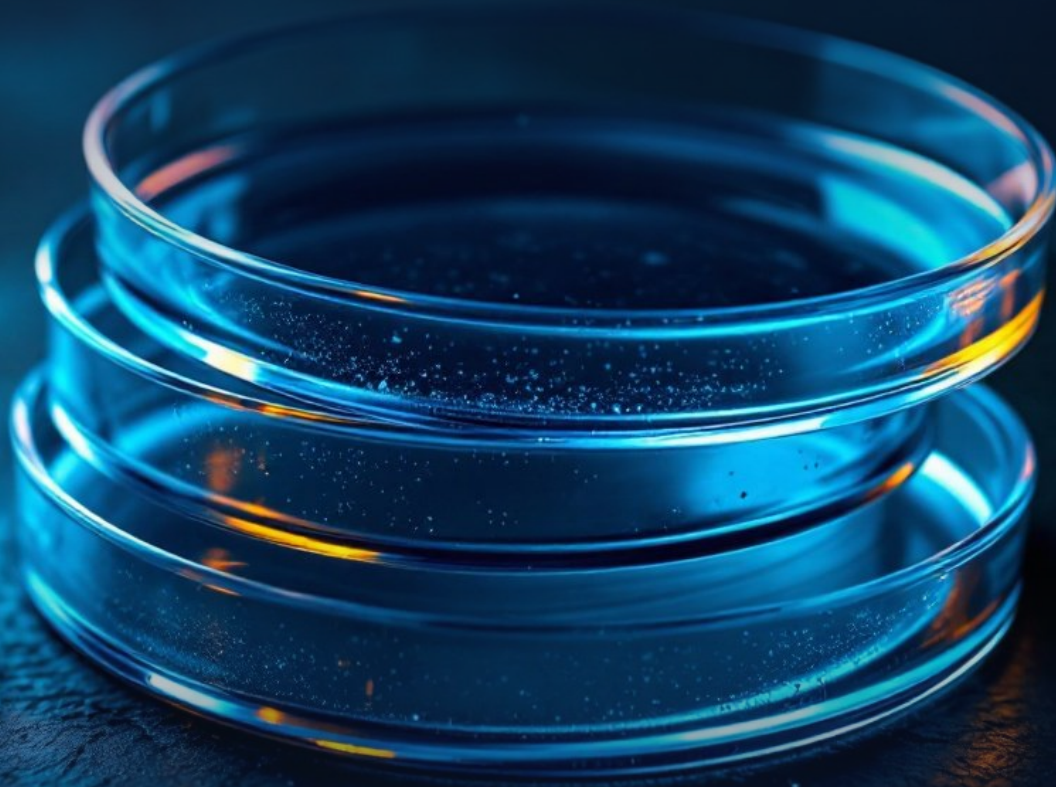




SAMPLE ENGAGEMENT REPORTS

Sample Engagement Reports

Reading guide to the eight reports · prepared for Copperwick Therapeutics, Inc.

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April 2, 2026 · A six-week AWS cost engagement

SAMPLE DELIVERABLE

This is a sample deliverable. Copperwick Therapeutics, Inc. is a fictional company: its people, programs, products, accounts, and figures are invented for this sample, and any resemblance to a real company, person, program, or medicine is coincidental. AWS prices are list prices from the AWS Price List API retrieved on October 13, 2026, and from the public AWS Price List bulk API on October 17, 2026; Spot prices are 30-day means for September 14 to October 14, 2026.

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What these reports are

These are the eight reports a client receives from Vantalect’s six-week AWS cost engagement, written for one client so you can read them as a single story. Weeks two and six each have two. They are samples. **Copperwick Therapeutics, Inc. is fictional. Its people, programs, products, accounts, and figures are invented for this sample, and any resemblance to a real company, person, program, or medicine is coincidental.** The company, its 48 in-scope AWS accounts, every resource, every finding, every dollar, and every person in them are simulated to show the form and depth of the work. A web search on October 17, 2026 found no company or medicine by this name.

Copperwick is the third sample client, chosen to be different from the first two. StrataForge Robotics is a large enterprise with a mature FinOps team, and Seatlark is a mid-market company in the middle of a migration. Copperwick is an mRNA medicines company whose research estate sits beside **GxP-validated systems**, where every change goes through change control and some savings have to wait. That changes what a cost engagement can promise, and it changes how you read the results.

- **The method.** Each report delivers exactly what its week promises on the engagement’s page at vantalect.com, in the same order, with the prescriptive change for every finding: what to change, where, how to verify it, and how to roll it back.
- **The prices.** Every resource is costed at AWS list prices from the AWS Price List API (October 13, 2026); the prices that table lacks come from the public AWS Price List bulk API (October 17, 2026). Copperwick has a private pricing agreement that takes 6% off eligible usage, so savings and the guarantee’s gate are stated net of it, and list-price figures appear only as context.

- **The numbers agree.** One generator builds the estate and runs the engagement from fixed seeds. The week-two roadmap reconciles to the dollar with what the handover reports as in place, still to do, and declined, and the week-six measurement is made on Copperwick’s Cost and Usage Report, on the same changes the roadmap listed.

The client

Copperwick Therapeutics, Inc. develops mRNA medicines that make a patient’s own cells produce a missing or faulty protein. It was founded in 2012, is publicly traded, has 2,400 employees, and works from Durham, North Carolina. It has one approved medicine, a Phase 3 program (Basalt), a Phase 1/2 program (Feldspar), and a research platform in machine learning, lipid nanoparticle design, cryo-EM, and genomics. Its AWS organization has 212 accounts; the engagement covers 48 of them: research computing, the scientific data platform, lab sandboxes, clinical development, and the GxP manufacturing and quality systems.

Copperwick’s in-scope AWS estate as the engagement found it.

Measure	Copperwick
AWS accounts in the organization	212
Accounts in the engagement	48 (11 validated, 6 qualified infrastructure)
In-scope AWS bill at the start of the engagement, per month, at list	\$1,623,688
The same, after the 6% private pricing discount	\$1,526,267
Annualized, after the discount	\$18,315,196
Spend a year earlier (February 2025), per month, at list	\$1,318,400
Existing commitment	A three-year Compute Savings Plan, \$150 an hour, fully used
Private pricing agreement	July 1, 2024 to June 30, 2027, \$27 million a year committed

The in-scope bill grew from \$1,318,400 in February 2025 to \$1,589,100 in January 2026 as the machine-learning team took on p4d training instances and cryo-EM processing moved to AWS. The board asked for a cost review before the fiscal 2027 budget and before the private pricing

agreement comes up for renewal. The CIO wanted an outside view of research computing. The head of quality wanted assurance that a cost project would not put a validated system out of its validated state. The engagement started with her rules.

The engagement

The Optimization's first two weeks are the Analysis, so \$35,000 is everything Copperwick paid. A client can also buy the Analysis alone, for \$25,000; Copperwick did not.

Engagement	Dates	Fee	Second half of the fee depends on
AWS Cost Analysis & Optimization: the Optimization	Monday, February 23, 2026 to Thursday, April 2, 2026	\$35,000	annualized savings in place at week six, measured on the Cost and Usage Report, of at least \$105,000

What it found and put in place

Every savings figure below is net of Copperwick's 6% private pricing discount, because that is what the bill falls by. The share of the bill is the same on either basis.

- **The bill:** \$1,623,688 a month at list (\$19,484,251 a year), \$1,526,267 a month after the discount.
- **Identified:** \$4,310,044 a year, 23.5% of the bill, across 36 findings, priced as 41 changes. At list the same findings are \$4,585,154 a year.
- **In place at week six:** 22 changes worth \$2,526,309 a year at the Analysis's estimates. Copperwick's Cost and Usage Report measured \$2,401,346 of it (13.1% of the bill; 95.1% of the estimates). S3-4 is in place but cannot be measured until May 11, so it counts for \$0 toward the gate and is reported separately.
- **Counted for the guarantee:** \$2,436,540. It adds L-4, approved at the readout and later reversed, counted at its estimate of \$35,194, as the terms say. The gate is \$105,000, and the count clears it by \$2,331,540. The counted figure decides the gate only.
- **What Copperwick paid, and what it returned:** \$35,000 in total (the Analysis is the Optimization's first two weeks; \$25,000 applies only if the Analysis is bought alone). The measured \$2,401,346 a year repays it in about 5 days and nets \$2,366,346 in the first year.
- **Still to do, with owners and dates:** \$1,192,737 a year in 13 approved changes that wait on a clinical freeze, a manufacturing campaign, change control, a disaster-recovery test, or the next cryo-EM campaign, and \$436,118 a year in 4 changes the owners declined at the readout, with the trigger that reopens each.
- **What a CFO should read first:** the GxP section of report 1, the change paths in report 2, and the commitment decision in report 5. Copperwick bought one commitment during the engagement, sized around the private pricing agreement.

One number that is deliberately not a saving

Copperwick's 2026 plan adds about \$260,000 a month to the bill. The guardrails built in week five should make that growth land cheaper than the past year's growth did, and the reports size it: \$250,000 to \$410,000 a year. It is cost avoidance, not measured, not counted toward the gate, and not a saving on the bill. There is no "before" on the Cost and Usage Report for a workload that has not been built. Every report that mentions it says so.

The eight reports

The eight reports and this guide, in the order a sponsor receives them.

Report	Date	Week	Delivers	Read it for	Pages
Cost 1: Spend Baseline and Inventory	February 27, 2026	1	Deliverable 1	12 months of spend, the February run rate by service, the 48 accounts with their GxP status, the four GxP ground rules, the freeze calendar, and the private pricing agreement	29
Cost 2: Cost Analysis and Savings Roadmap	March 5, 2026	2	Deliverables 2 to 6	36 findings, priced as 41 changes from the AWS price list, each classed by its GxP change path, ranked, and given a prescriptive change	60
Cost 3: Analysis Sponsor Readout	March 6, 2026	2	Deliverable 7	The number, what change control and the freezes allow, and the decisions made in the room	14
Cost 4: Quick Wins Applied	March 13, 2026	3	Deliverables 8, 11, and 12	Waste, idle GPUs, schedules, gp3, gateway endpoints, logging, and the data lake, change by change, and the change the CISO reversed	24
Cost 5: Rightsizing and Commitments	March 20, 2026	4	Deliverables 9 and 10	Spot for genomics, the Lustre cutover, the GxP val schedule, and the commitment decision	23
Cost 6: Architecture Changes and Guardrails	March 27, 2026	5	Deliverables 11 and 13	9 guardrails, the data-class lifecycle standard, the deferred GxP change requests, and the cost-avoidance model	28
Cost 7: Week-Six Savings Measurement	April 1, 2026	6	Deliverable 14	Every change measured on the Cost and Usage Report, net of the discount, and the gate	22
Cost 8: Handover Playbook and Monthly Cost Review	April 2, 2026	6	Deliverable 15	The remaining roadmap with owners and dates, the GxP change-request calendar, the commitment plan for the 2027 renewal, and the guardrail register	28

How to read savings under validated systems

Three things differ from an ordinary estate, and each shapes a report.

- 1. A research bill tracks experiments, not seasons.** The bill rises when a training fleet, a microscope, or another sequencing run arrives. Cost per genome, per campaign, and per training run says more than month over month, so the reports normalize where the science allows it.
- 2. The change path decides when a saving lands.** Rule 1 sends a non-GxP change through the platform team's normal process. Rule 2 makes a like-for-like, reversible change in qualified infrastructure a GxP standard change: a ticket, an installation checklist, and notice to QA. Changes that run from the qualified log-archive and security-tooling accounts take this path too, and a qualified account's research resources take Rule 1. Rule 3 sends everything else in a validated system to the GxP change advisory board, which meets on Tuesdays. Rule 4 is a freeze, which stops every change in its scope with no exception for cost. Every finding carries its class.
- 3. A saving is worth 6% less in cash than it looks at list.** Under the private pricing agreement, a dollar saved at list is worth \$0.94 in cash, so the reports state savings net of it.

The GxP result in brief. Of the 41 changes priced, 15 touch validated or qualified systems, worth \$709,873 a year at the estimates, net of the discount. 4 are in place by week six (\$190,678), 8 are approved and scheduled (\$349,550), 2 were declined (\$134,451), and 1 was approved and later reversed (\$35,194). The dollars are sums of the rounded rows in report 2. The validated systems' own lines are about 8.7% of the bill, so a small share there is expected, and the reports say so rather than inflating it. Records keep their retention: no finding deletes, shortens, or weakens a GxP record, an audit trail, or a backup of a validated system.

The calendar is part of the finding. The clinical systems (`clin-sce-prod`, `clin-sce-val`, `clin-cdr-prod`, `clin-biomarker-prod`) freeze from March 2 to April 24, the manufacturing systems (`gmp-lims-prod`, `gmp-mes-prod`, `gmp-cds-prod`, `gmp-historian-prod`) from March 16 to March 27, and the other waits are in the table. Development accounts, the GMP val environments, and clinical operations are in no freeze. Report 8 carries the same dates.

The approved changes still to do after week six, with the date each can move and what it waits on.

Change	Earliest date	Waiting on
F-3, B-3	April 6	The next cryo-EM campaign
N-1b, S3-3	April 14	Approved change requests (S3-3 with a documented retrieval test)
S3-1b	April 20	The tar job's second pass
G-1	April 20	The molecular dynamics benchmark
S3-5	April 21	The disaster-recovery test
S-3b, E-2b	April 27	Topline: S-3b by change request, E-2b as a standard change
B-1b	May 11	Biomarker pipeline revalidation
R-3	May 18	The LIMS release, with operational qualification regression
R-4	June 15	The MES maintenance window after the periodic review
R-2	June 22	After the post-topline analyses, by change request

What is real and what is not

A sample, not a case study

Copperwick Therapeutics, Inc., its people, its accounts, and its findings are fictional, and no client data appears anywhere in these reports. Vantalect never cites a client's findings, with or without the client's name.

- **Real:** AWS list prices as retrieved on October 13, 2026 and October 17, 2026; AWS service behavior, limits, and CLI calls as documented that week; the frameworks the quality rules cite, 21 CFR Part 11 and GAMP 5; the engagement's weeks, deliverables, meetings, fees, and guarantee as published at vantalect.com.
- **Simulated:** the company, the estate, every utilization metric, every finding, every decision an owner made, every GxP procedure and approval, and every measured result, generated from fixed seeds so they never change between builds.
- **Not implied:** that any real organization has these findings, or that a different estate would show the same savings. The guarantee's gate is \$105,000 of annualized savings measured on the client's own Cost and Usage Report; it promises no particular result beyond that.

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