AWC Findings & Recommendations Engineering Assessment

DevHawk

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Summary Recommendations

Client has great builder energy across leadership and equally real risk: multiple people building apps independently with PII in unvetted databases, no shared infrastructure, and a Salesforce org that failed 49% of health scan tests.

Secure & Stabilize

Stand up shared infrastructure (GitHub,Postgresql, Auth via Microsoft Entra, audit logging) before apps go live. Security scan showed a few medium severity issues to remediate

Ship Unified Hub V1

Freeze scope, deploy automatedQA testing,and launch to users by end of April. First impressions determine adoption – make a good (not-buggy) impression.

Migrate Off Salesforce

Connectintegrationstonew unifiedportal one-by-one, making Salesforce redundant over time. New shared infra makes SF redundant - money spent remediating it is wasted.

Scale & Differentiate

Build the unifiedportal, bring analytics andreporting in-house, expand FP+A tools, and deploy AI agents that can do real work with human-in-the-loop safeguards.

What I'd Do in Your Shoes

Triage & Foundation (Days 1–30)

1. Stand up shared infrastructure: GitHub org,PostgreSQL with RLS enabled, SSO via Microsoft Entra ID, centralized audit logging
2. Freeze new app build scope — define V1 feature set, deploy automated QA (Playwright), ship to users by end of next month
3. Migrate all Replit apps to proper hosting with CI/CD pipelines, lowering risk once users are onboard
4. Install guardrails to enable high quality code generation for new apps
5. Establish weekly sprint cadence across all builders (Claude/Replit users in your org)

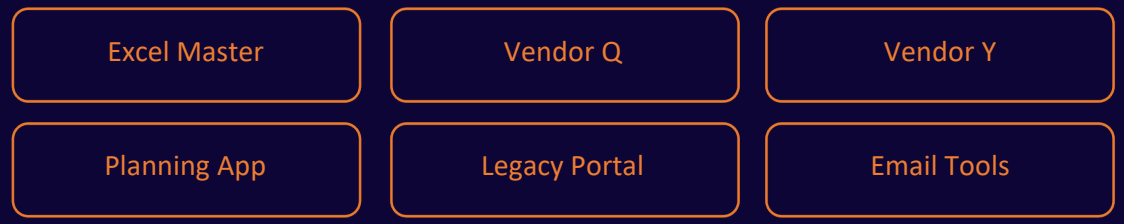
Ship & Scale (Day 30 – Year End)

6. Phased launch of unified client portal,in-house analytics, internal planning model, supply chain alerts
7. Salesforce migration: JotForm → internal forms (Month 2), then sync ERP, QuickBooks, Fireflies, Box with unified portal to enable user migration
8. Deploy single-purpose AI agents (data validation, meeting intelligence, QuickBooks classification) with read-only access + human-in-the-loop buffer API

Client Tech – Current State

EXISTING INTEGRATIONS

EXISTING STANDALONE APPS



Salesforce isthe hub
All data flows through Salesforce, but the org failed 49% of health scan tests

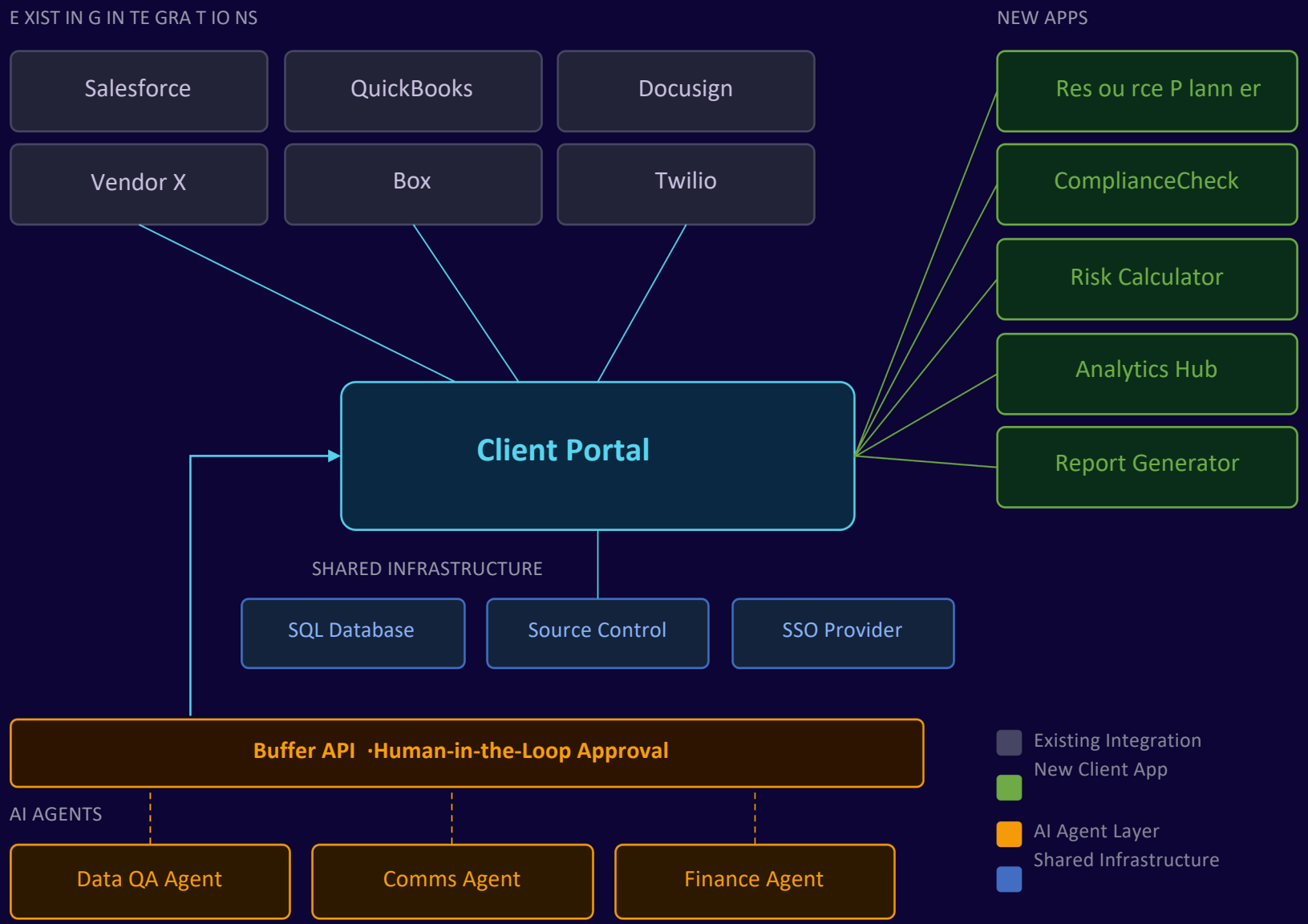
Standalone apps with PII risk
Multiple people building apps independently with PII in unvetted databases

No shared infrastructure
NoSSO,no shared database, no source control, no CI/CD pipeline

No QA or testing
Changes go directly to production with no automated testing or deployment pipeline

- Existing Integration
- Standalone App (no shared infra)

Client Tech – Future State



Existing Integration
New Client App
AI Agent Layer
Shared Infrastructure

ClientPortal replaces Salesforce
Single source of truth with row-level security, SSO, and audit logging

Purpose-built apps
Resource Planner,Compliance Check, Risk Calculator,and Analytics Hub—all on shared infrastructure

Replace Point Solutions
Vendor X, Form Tool A, and Vendor Y can all likely be replaced

AI agents with guardrails
Read-only access to live systems. All write ops queued through Buffer API for human approval

Replaced / Retired:

- Vendor Q
- Vendor Y
- Form Tool A
- Salesforce

Tech Recommendations

Shared Services Architecture

•Commonacross allapps: **SSOprovider** (SSO + MFA), **SQL database** with RLS, **source control** (source control + CI/CD via Actions)

•Move production hosting to **cloud hosting** — AI dev tools is excellent for prototyping but not for PII workloads

Development Workflow

- Builderskeep buildinginAIdev tools, another builder in AI coding tools — but every change commits to source control, tests run automatically, and deployment goes through a pipeline
- **QA automation is non-negotiable** — every user-facing workflow gets an automated test to prevent the “40 steps back” problem

AI Model Strategy

- Standardize frontier AI model for architecture/analysis, lighter models for routine coding; AI dev tools and AI coding tools for production

•**Verification for financial data** — cross-check AI-generated output using a separate model or deterministic validation before publishing

What You Don’t Need

- **No Full-time CTO ordevteam** — the product lead is the product visionary, the Factory’s architect + product owner provide guardrails, and Fraction adds the production layer
- **No Salesforce investment** — no admin, developer, or consultant beyond short-term migration support; off Salesforce within 9 months

How DevHawk Can Help

Client Provides

Product Ownership
Domain experts who understand priorities, acceptance criteria, and business value of product features

DevHawk Software Factory Provides

Agentic Engineering Direction

Product team continues leveraging AI tools like Replit+Claude to build. Fraction team takes on additional builds to accelerate

Software Architecture + Guidance

Solution architect builds Claude rules to guide agentic build and architecture, and reviews output for quality

QA Automation

AI-powered test generation and automated regression testing – needed as human QA can’t keep up

DevOps, Infrastructure + Monitoring

Deployment automation, infrastructure optimization and production monitoring

Secure Deployment & Orchestration of Agents

Safe, reliable deployment and coordination of AI agents in production with human-in-the-loop gates