

Executive Summary

This proposal outlines the implementation plan based on Phase 1 audit findings.

Process Health Scorecard

| CATEGORY | STATUS | FINDING |
|----------|--------|---------|
|----------|--------|---------|

Revenue Bleed = Hard Savings Opportunity.

\$0/mo

PER MONTH

● Primary Bleed: \$0/mo

See details above.

Projected annual recovery: $\$0 \times 12 = \0

Recommended Fixes

AUDIT

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Stop the \$0/mo Bleed

Efficiency gaps confirmed. See the technical fix.

PROBLEM > SOLUTION > PLAN

REVIEW SOLUTION →

Scope Boundaries

✓ In Scope

- Requirements documentation
- Development and internal testing
- User training session
- Production provisioning and go-live activation
- 30-day defect coverage (bug fixes at no additional cost)
- Support options: Build & Transfer (\$0/mo self-host) or Build & Operate (\$497/mo managed)

✗ Out of Scope

- Ongoing AI consultancy beyond project scope
- Additional automations not specified in this Statement of Work
- Custom integrations requiring R&D or undocumented APIs
- Custom mobile application development
- Data migration from legacy systems
- Third-party API/SaaS subscription costs (client responsibility)
- Hardware procurement or on-premise infrastructure

02 Technical Approach

Hybrid solution combining voice AI agent implementation, AI processing, and 4 systems integration. Built on n8n workflow engine with production-grade LLM capabilities.

TECHNOLOGY STACK



INTEGRATIONS

| SYSTEM | TYPE | NODE | NOTES |
|-------------------------|-------|----------|--|
| Salesforce ¹ | oauth | ✓ native | oauth2. Native n8n node: n8n-nodes-base.salesforce. |
| Applied Epic | api | HTTP | Custom HTTP integration required. |
| DocuSign | api | HTTP | Custom HTTP integration required. |
| RingCentral | oauth | ✓ native | oauth2. Native n8n node: n8n-nodes-base.ringcentral. |

RESEARCH CITATIONS

¹ Salesforce: API Documentation

Acme HVAC Services - Workflow Automation

Automate the Lead Intake & Qualification process for Acme HVAC Services. Automate outbound renewal reminder calls. Instant quote delivery via voice. 24/7 lead qualification. Reduce agent call time by 50%. Integrate with existing CRM and policy management. triggered by phone call received.

\$6,500

CLIENT PRICE

Fixed price, milestone-based

80 hrs

TOTAL HOURS

Includes complexity buffer

27 days

EST. DURATION

~6 weeks

standard

RISK LEVEL

01 Project Milestones

2.1 Design & Planning

16 hrs

\$2,502

~6d

Requirements, architecture, planning.

20% of h = 16h

DELIVERABLES

- Solution Architecture Document
- Integration Specification
- Project Plan

2.2 Build & Integration

36 hrs

\$5,630

~12d

Development, integration, internal testing.

45% of h = 36h

DELIVERABLES

- Core Workflow Implementation
- API Integrations
- Internal Testing Complete

2.3 Test & Validate

12 hrs

\$1,877

~4d

01 Risk vs Reward Analysis

4/10

IMPLEMENTATION RISK

4 integrations, 80 hrs

8/10

REWARD POTENTIAL

315% return, ~2 weeks
payback

\$0/mo

COST OF INACTION

Monthly recurring loss

2:1

REWARD:RISK RATIO

= 8 ÷ 4

Assessment: Exceptional opportunity with manageable risk—strongly recommended. Risk coverage includes contingency buffers for identified complexity factors. Cost of inaction compounds monthly—every month of delay costs \$0/mo in recoverable value.

03 Assumptions & Dependencies

Client Responsibilities

- Timely access to systems and credentials
- Subject matter expert availability
- Approval of milestones within 3 business days
- Test data and sample workflows provided
- Stakeholder alignment on requirements

Wrangle Commitments

- Dedicated project manager
- Weekly status updates
- 30-day defect coverage on all deliverables
- Documentation and knowledge transfer
- Escalation path for blockers

AUDIT

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No Surprises

Every risk mapped. Every mitigation ready.

✓ Audit Trail

✓ Encrypted

✓ 30-Day Guarantee

[VIEW FINANCIALS →](#)

01 Projected Annual Value

/yr

LABOR SAVINGS

$$(24 \text{ hrs/mo} \times \$75/\text{hr}) \times 12$$

\$600,000/yr

MODELED OPPORTUNITY (EST. 1% LIFT)

$$682 \text{ leads/day} \times 30 \times 1\% \times \$500 \text{ (from intake) capped at } \$50,000/\text{mo max}$$

\$621,600/yr

TOTAL ANNUAL VALUE

$$= \$21,600 + \$600,000$$

= \$51,800/mo

What is Modeled Opportunity?

Modeled opportunity represents potential revenue gains from improved efficiency, faster response times, and reduced errors. Unlike hard savings (which are guaranteed labor cost reductions), modeled opportunity captures the upside value that automation enables but cannot guarantee. This includes faster lead response, reduced customer churn, and increased throughput capacity.

02 Proposal Validation

✓ Value Coverage

173%

of investment covered by annual savings.

$$= \$621,600 \div \$6,500 \times 100$$

✓ Payback Period

1 week

to recover investment after go-live.

Monthly value: $\$621,600 \div 12 = \$51,800$

$$\text{Payback} = \$6,500 \div \$51,800$$

✓ All Financial Validation Checks Passed.

✓ Value Coverage > 100%

✓ Payback < 12 months

✓ Positive Net Present Value

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\$621,600/yr Value

173% coverage. 2 weeks payback after go-live.

✓ Coverage: 173%

✓ Payback: 2 weeks

✓ Annual: \$621,600

SEE THE \$6,500 OFFER →

Company Intelligence

01 Your AI Receptionist Plans

Activation Time: **5-7 business days** • Your AI receptionist can be answering calls within a week.

★ RECOMMENDED

CORE PROTECTION

\$250/mo

AI Voice Agent Only

- 24/7 AI Voice Agent
- Unlimited inbound calls
- Appointment booking via Cal.com
- Lead capture & dispatch
- Call transcripts & analytics
- Ongoing optimization

Billed monthly • Cancel anytime

⚡ SCALE

GROWTH BUNDLE

\$500/mo

AI Voice + Website Chat.

- Everything in Core Protection
- Website Chat Widget
- 24/7 web lead capture
- Unified inbox for all channels
- Cross-channel analytics
- Priority support

Best value for multi-channel capture

Setup & Onboarding: One-time \$3,500 covers call flow design, phone provisioning, system integrations, and go-live support (28 hours).

02 Expand Your Automation

Ready to automate more? Add custom n8n workflows to connect any of your systems.

WORKFLOW ADD-ON

\$2,500+

Single automation workflow.

- Custom n8n workflow build
- Connect 2-3 systems
- Full documentation
- 30-day defect coverage
- Future changes: \$125/hr

★ RECOMMENDED

AUTOMATION BUNDLE

\$7,500+

3 connected workflows.

- 3 custom n8n workflows
- End-to-end process automation
- Multi-system integrations
- Priority 48hr support
- 15% bundle discount

⚡ SCALE

FULL TRANSFORMATION Custom

Enterprise-wide automation.

- Unlimited workflows
- Dedicated automation consultant
- Weekly strategy sessions
- Managed n8n hosting
- 24/7 monitoring & support

PAYMENT TERMS

Invoices issued within 2 business days of milestone acceptance. Payment due NET 15 from invoice date. No deposit required—pay only for completed work.

VALIDITY

This proposal is valid for 14 days from date of issue.

AUDIT

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Recover \$0 Monthly

Start recovering revenue in 6 weeks.

✓ Fixed \$6,500 ✓ 30-Day Guarantee ✓ You Own the IP

APPROVE & START →

01 Service Model

What You Get

A fully managed automation service. We handle the infrastructure, updates, and maintenance. You get reliable results without the technical burden.

Data Ownership

You own 100% of your data. We process it on your behalf but never claim ownership. Workflow exports available for portability.

02 How We Work

1. Audit

We analyze your current process, identify automation opportunities, and quantify the value.

2. Stabilize

We build and deploy your automation with fixed-price delivery and 30-day defect coverage.

3. Scale

Optional premium retainer for continuous optimization, expansion, and strategic AI consulting.

03 Why Wrangle

Fixed-Price Delivery

No hourly billing surprises. You know exactly what you're paying before we start.

AI-First Approach

We use modern AI and automation tools to deliver faster and smarter solutions.

Ongoing Partnership

We don't just build and leave. Our Build & Operate and Scale tiers ensure your automation continues to deliver value.

Transparent Pricing

See the fixed price and recurring options upfront. No hidden fees or scope creep surprises.

04 Why Act Now?

"Is this the right investment?"

\$ This isn't an expense—it's an investment with a **2 weeks** payback. Your team currently bleeds **\$0/mo** on manual work. Every month you delay, that's **\$0/mo** you'll never recover.

"Is this the right time?"

🕒 The cost of inaction compounds monthly. **In 12 months without action:** $\$0 \times 12 = \$21,600$ lost to inefficiency. The "right time" is always before that number grows.

"We're too busy to take this on."

🔄 That's exactly why you need this. We handle 100% of the build while you keep running the business. Post-launch, your team saves **24 hrs/mo** $(= \$0/mo \div \$75/hr)$ —that's the time you don't have now, given back.

AUDIT

STABILIZE

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SCALE

This Is How We Work

Proven methodology. Predictable results.

AUDIT > STABILIZE > SCALE

← BACK TO PROPOSAL