



Strat AI



# BETA JUMPSTART

## Sprint Proposal

**7 days. One workflow.**  
**10+ hours back per week - guaranteed.**

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# WHO THIS IS FOR

- ◆ **Industries:** Real Estate & Finance (U.S.)
- ◆ **Beta Priority:** Commercial Real Estate (CRE) Brokerages · Mortgage Brokerages & Lenders
- ◆ **Firm Size:** 5–50 employees (sweet spot: 8–30); \$1.5M–\$50M+ revenue. Firms above 50 employees with multiple broken workflows are a better fit for our Custom Infrastructure Build.
- ◆ **Primary reader:** Founder, CEO, Managing Director, or Principal - someone who feels the pain and can approve \$3K without a committee
- ◆ **Day-to-day partner:** Operations/ COO or Sales Lead
- ◆ **Tech stack (required):** Google or Microsoft 365; CRM (HubSpot, Salesforce, Pipedrive, or Sheets/ Notion); Calendly; DocuSign; Make/ Zapier
- ◆ **Fit filter:** Must have a qualified tech stack (active CRM + Google/Microsoft 365 + scheduling + e-sign). Brand-new

# EXECUTIVE SUMMARY

You're losing deals and hours to onboarding delays, document chaos, and manual follow-ups. The Beta Jumpstart Sprint removes your #1 bottleneck in 7 days-built on your existing stack (Google/Microsoft 365, HubSpot/Salesforce/Pipedrive, Calendly, DocuSign, Make/Zapier). If it's not working within 30 days, we support it until it is-or refund you.

- ◆ Founder-led audit to pinpoint the highest-ROI workflow.
- ◆ Specialist build that's robust, documented, and easy to own.
- ◆ Support-then-refund guarantee tied to Day-7 acceptance.

**Before → After (Representative) - Doc collection:** 12–15 days → 4–6 days - Team time saved: 10–15+ hrs/week - Chaser emails: –70%



# YOUR CURRENT CHALLENGES

Most CRE firms juggle dozens of deals monthly, hundreds of files, and multiple reps touching each deal - a perfect storm for missed steps and delays for clients/borrowers.








## Select the ones that fit

- Manual document collection slows deals; constant back-and-forth with clients/borrowers.
- Onboarding delays create drag and risk losing hot opportunities.
- Inconsistent follow-up causes leads to slip through the cracks.
- No centralized dashboards; leaders lack real-time pipeline/KPIs.
- Pipeline & stage visibility is weak; stuck deals go unnoticed.
- Scheduling back-and-forth & no-shows waste time and hurt conversion.
- Compliance/accuracy risks from manual copy-paste and filing.
- Other: \_\_\_\_\_



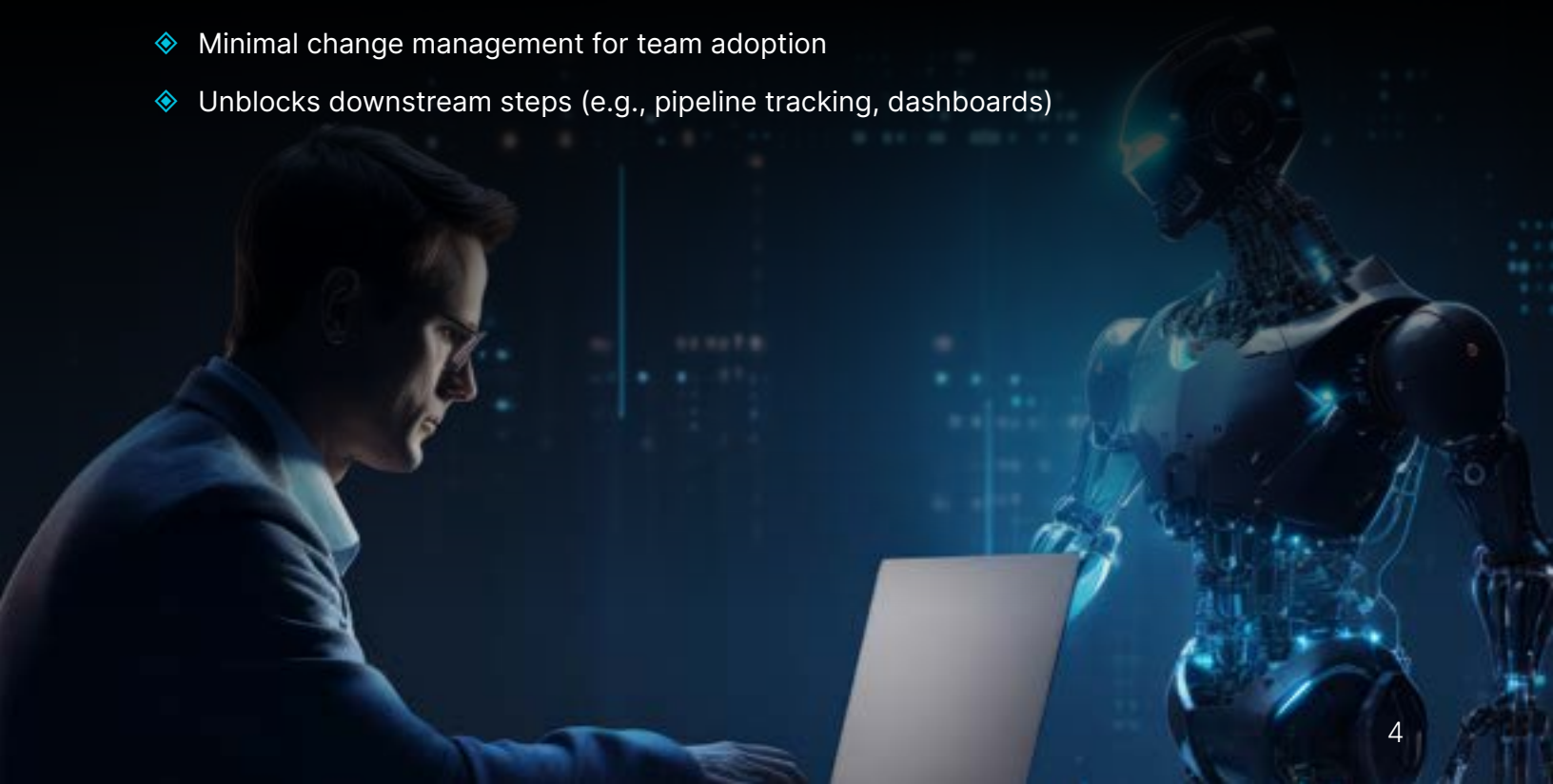
# RECOMMENDATION - YOUR BETA WORKFLOW

Select one (or specify "Other")

-  **Smart Document Collection** - Portal + reminders; zero chasing
-  **Executive Dashboards** - Real-time pipeline & KPIs in one view
-  **Lead Follow-Up** - 5-minute first response; multi-channel (email/SMS/VM)
-  **Onboarding Timeline** - Forms, foldering, and timeline tracking
-  **Team Accountability** - Daily outreach tracker & leaderboards
-  **Scheduling & No-Show Recovery** - Confirmations, reminders, rebook flows
-  **Pipeline/Deal Tracking** - Auto stage updates from rep/client actions
- Other: \_\_\_\_\_

## Why this first

- ◆ Fastest ROI based on current bottleneck
- ◆ Minimal change management for team adoption
- ◆ Unblocks downstream steps (e.g., pipeline tracking, dashboards)



## Targets (fill during discovery)

Metric	Baseline	Target	Notes
Hours saved / week			

**Standard thresholds:** See Success Metrics & Acceptance Criteria for default KPI levels used to judge success.

**Built on your stack:** Google/Microsoft 365 · HubSpot/Salesforce/Pipedrive · Calendly · DocuSign · Make/Zapier



# WHAT YOU GET IN 7 DAYS

- ◆ **End-to-end build:** config, testing, SOPs, and a training video for one selected workflow
- ◆ **Training & Handoff (summary):** 60-minute live session for stakeholders (optional +30 min), recorded; window Mon–Fri, 8:00 a.m.–6:00 p.m. CT. Includes SOP (editable PDF), Admin runbook, Loom(s), and Access & Handoff checklist.
- ◆ **Adoption support:** Week-2 light support via email (responses within 1 business day; up to 2 total hours related to the delivered workflow)
- ◆ **Zero rip-and-replace:** built on your stack (Google/Microsoft 365, HubSpot/Salesforce/Pipedrive or Sheets/Notion, Calendly, DocuSign, Make/Zapier)

## Deliverables

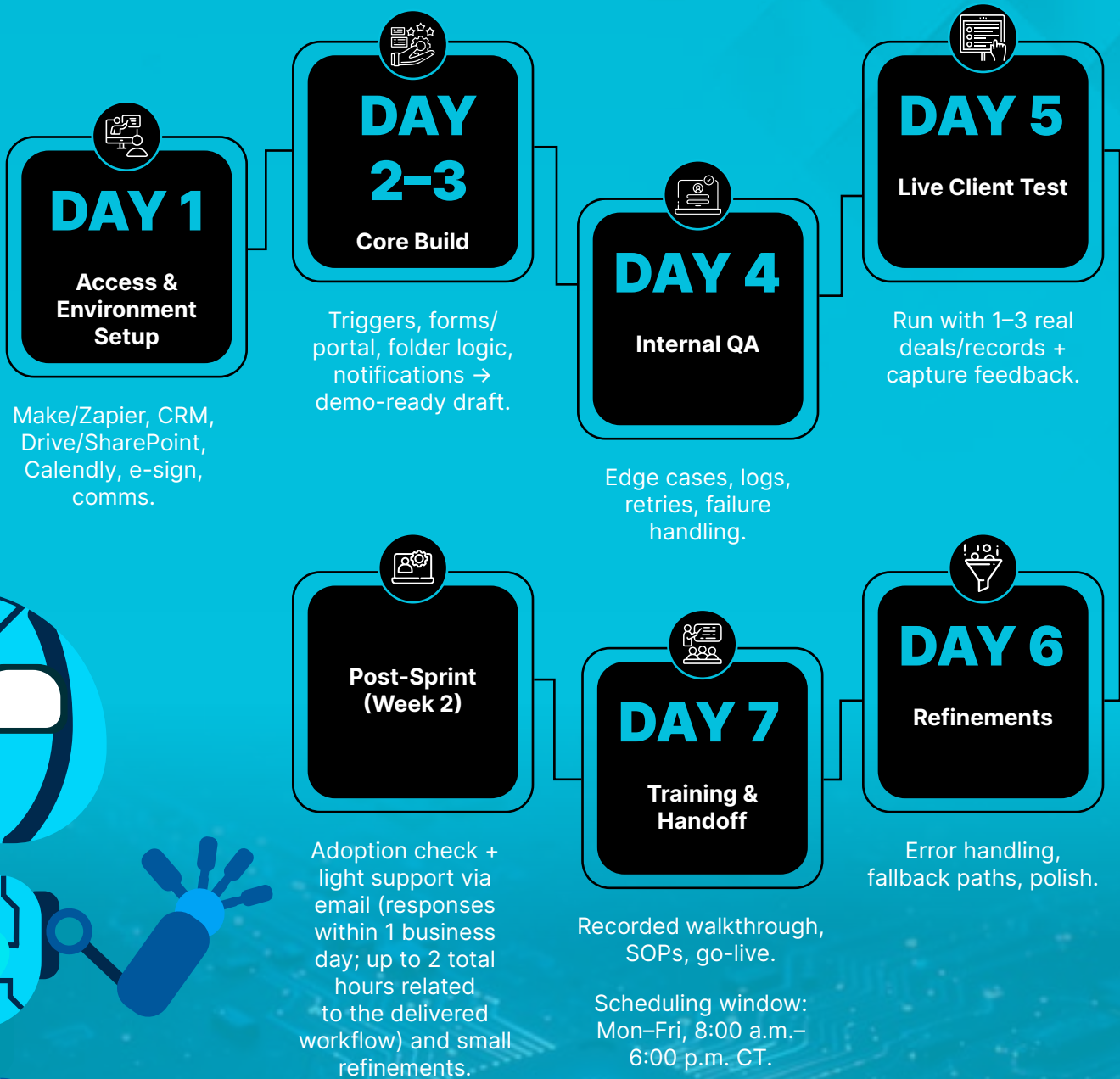
- ◆ Deployed automation (prod)
- ◆ Recorded training (Loom/Meet)
- ◆ SOP (editable PDF) + Admin runbook
- ◆ Access & Handoff checklist

## What's not included

- ◆ Net-new CRM migrations, multi-brand branching/white-labeling, or custom UI apps/components
- ◆ Cross-department rollouts beyond the one selected workflow
- ◆ Third-party subscription/usage fees (e.g., SMS/voice credits)
- ◆ Legal policy drafting (see Terms)



# 7-DAY SPRINT TIMELINE



# SUCCESS METRICS & ACCEPTANCE CRITERIA



## Default KPIs

- ◆ **Hours saved:** 10–15+ / week (reduced chasing, filing, status checks)
- ◆ **Reliability:**  $\geq 95\%$  success on happy-path runs

## Day-7 Acceptance Test (sign-off requirements)

- ◆ At least 1 live run succeeds end-to-end in your environment
- ◆ SOP reviewed with the owner/admin (they can find logs, handle errors, and run the fallback)
- ◆ Training completed (recording shared)

**Note:** Workflow-specific targets appear in Workflow → Mini KPI Targets below.

## WORKFLOW → MINI KPI TARGETS

1. **Smart Document Collection** → Median doc cycle time ↓ 50–67%; missing-items chaser volume ↓ 70%
2. **Executive Dashboards** → Time to weekly report ↓ 90%; data freshness same-day
3. **Lead Follow-Up** → First-response time < 5 min; stalled lead reactivation +15–30%
4. **Onboarding Timeline** → Time to completed onboarding ↓ 40–60%; NIGO/return rate ↓ 30–50%
5. **Team Accountability** → Daily activity compliance  $\geq 90\%$ ; bookings per rep +10–25%
6. **Scheduling & No-Show Recovery** → No-show rate ↓ 25–40%; time-to-first call ↓ 30–50%
7. **Pipeline/Deal Tracking** → Stage-stuck deals ↓ 30–50%; time-in-stage variance ↓ 20–35%

## INTEGRATIONS & ACCESS REQUIRED

- ◆ **Identity & Storage:** Google Workspace / Microsoft 365 (Drive/SharePoint)
- ◆ **CRM:** HubSpot / Sheets / [Other]
- ◆ **Scheduling:** Calendly / [Other]
- ◆ **E-sign:** DocuSign / [Other]
- ◆ **Automation:** Make / Zapier
- ◆ **Comms:** Gmail/Outlook + optional SMS/voice tools
- ◆ **Security:** Least-privilege access; revoke tokens post-handoff on request.

## TRAINING & HANDOFF

- ◆ See summary in What You Get in 7 Days. We deliver a 60-minute live training (optional +30 min) within Mon–Fri, 8:00 a.m.–6:00 p.m. CT; recording shared the same day.
- ◆ Materials provided: SOP (editable PDF), Admin runbook, Loom(s).
- ◆ For post-handoff actions, see the Next Steps checklist.

## INVESTMENT & START DATE

### Beta Pricing - Founding Rate

We run a limited number of 7-day sprints per week. Reserve your slot to lock in the \$2,999 flat Beta founding rate. Price moves to \$3,499 after the second Sprint closes.

**\$2,999 flat (Beta). Full payment due before Day 1. Limited sprints/week.**

- ◆ **Reserve now:** [Reserve My Sprint](#)
- ◆ **Start Date:** Confirmed once payment & access assets are received
- ◆ **Refund handling:** If the guarantee is invoked, refunds are issued to the original method within 5–10 business days
- ◆ **Payment options:** Stripe (card/ACH). W-9 available on request.



## GUARANTEE (RISK-FREE)

If the workflow doesn't meet Acceptance Criteria within 30 days, we optimize at no cost; if not, full refund. Guarantee requires: active tech stack on Day 1, a designated internal contact available for kickoff, and client participation in the Day 7 training and acceptance session.

## NEXT STEPS

1. **Approve & Sign** this proposal
2. **Reserve your Sprint** - pay in full at the Stripe link above
3. **Book onboarding** - schedule your 30-min access & planning call
4. **Start Date confirmed once payment received**

## Post-Handoff Checklist

- Revoke builder access
- Transfer admin email/password manager entry
- Deliver Data Deletion Checklist (on request)



# THE VISION: STRAT AI COMMAND CENTER (NEXT PHASE)

Your Beta win is step one. The full Command Center connects 7 workflows into one cockpit:

- ◆ Multi-channel lead follow-up (email/SMS/VM drops)
- ◆ Auto-scheduling & no-show recovery
- ◆ Rep accountability & leaderboards
- ◆ Client onboarding (forms, folders, timelines)
- ◆ Smart doc collection (checklists, uploads, reminders, auto-filing)
- ◆ Pipeline & deal tracking (CRM stages from rep/client actions)
- ◆ Centralized executive dashboards (pipeline, KPIs, activity, SLAs)

**Founding-client credit:** Apply your \$2,999 toward the Command Center if you proceed within 14 days of handoff.

## TERMS & ASSUMPTIONS

### Scope Limits (Beta)

- ◆ One workflow comprising up to 3 triggers, 20 steps, and 3 integrations
- ◆ Includes 1 client form/portal and (if selected) 1 dashboard page
- ◆ Week-2 light support: asynchronous via email; responses within 1 business day; up to 2 total hours
- ◆ Additional changes are quoted via change order

### Dependencies - You Provide

- ◆ Admin access to selected tools (Google/Microsoft 365, CRM, Calendly, DocuSign, Make/Zapier)
- ◆ 1-3 pilot records for testing
- ◆ A day-to-day owner and timely feedback within 24-48 hours
- ◆ SMS credits or third-party fees if SMS/voice is used
- ◆ Delays pause the sprint clock

## Scheduling & Reschedules

- ◆ One reschedule permitted with 48-hour notice; additional or late reschedules incur a \$250 fee

## Alerting

- ◆ **Failure notifications:** Email by default; SMS optional at setup

## Security, Data & Compliance

- ◆ Least-privilege access; upon request we'll revoke tokens at handoff
- ◆ Provide a simple data-deletion checklist upon request
- ◆ Client retains ownership of all data; Strat AI retains templates & generalized IP
- ◆ Compliance: Client remains responsible for legal/compliance (e.g., TCPA for SMS/voice, PII retention, e-sign policies). We configure tools; we do not provide legal policy.

## Provider Quotas & Throughput

- ◆ Workflow throughput may be constrained by third-party quotas (e.g., email send limits, Make/Zapier rate limits). We design around them, but they are outside our control.

## Acceptance & Payment

- ◆ **Acceptance:** Success criteria agreed before build; sign-off after Day 7 training
- ◆ **Payment:** Full payment due before Day 1 via Stripe (card/ACH)
- ◆ **Refunds:** If guarantee triggers, refunds go to original method within 5–10 business days
- ◆ **Scheduling:** Sprint start date confirmed upon payment and access readiness

## Outcomes - Representative Targets

- ◆ Metrics are representative targets based on similar builds; actual results depend on baseline data quality, client responsiveness, and tool limits