

# Project Proposal

## Proactive WhatsApp AI Bot for Boost Lifestyle

Prepared for: Aamir Arabi | Owner, Boost Lifestyle

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## 1. Summary

This proposal outlines the development and deployment of a Proactive WhatsApp AI Bot for Boost Lifestyle, a B2B and D2C brand in the computer accessories space. The bot will serve as a smart assistant to automate customer interactions, streamline B2B engagement, manage CRM workflows, and provide real-time business insights via WhatsApp.

By integrating with your existing systems like Shopify, Google Sheets, and your CRM, this solution will transform WhatsApp into a powerful business operations and marketing tool.

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## 2. Goals

The key goals for Boost Lifestyle's WhatsApp AI Bot are:

- **Automate Order Management:** Enable customers and B2B partners to place and track orders directly via WhatsApp.
- **Enhance CRM & Lead Capture:** Capture new leads, tag them by product interest, and manage returning customers efficiently.
- **Broadcast & Marketing Automation:** Send Meta-compliant, segmented broadcasts for restocks, product launches, and offers.
- **Returns & Warranty Automation:** Streamline the RMA and warranty claim process through a chatbot workflow.
- **Real-Time Analytics:** Deliver management insights, alerts, and KPIs via WhatsApp for quick decision-making.

- Recover Abandoned Carts: Use smart nudges and product suggestions to convert lost sales.
  - B2B Custom Pricing: Identify B2B customers and present partner-specific pricing and credit management options.
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### 3. Deliverables

- WhatsApp AI Bot integrated with Shopify, Google Sheets & CRM
  - Automated order placement, tracking, and confirmations
  - CRM lead capture, personalization, and tagging
  - Returns & warranty automation workflows
  - B2B segmentation with credit, pricing, and restock tools
  - WhatsApp broadcast & follow-up engine (restocks, sales)
  - Lucky Draw and referral tracking module
  - Real-time analytics for inventory, sales, and customer KPIs
  - Human-agent escalation system with full chat history
  - Future scalability for Instagram, voice, and web chat
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### 4. Timeline

Phase	Duration
Setup & Core Integration	1 week
Automation & Advanced Logic	2 weeks
Testing, Training & Delivery	2 weeks

Total Estimated Time	5 weeks
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## 5. Workflow Overview

The WhatsApp AI Bot will work through automated n8n workflows, integrated with:

- Shopify – for product data, stock, orders, returns
- Google Sheets – for CRM, tagging, and campaign data
- WhatsApp Business API – for real-time customer interaction

Example flow:

1. Customer or B2B partner sends a WhatsApp message
2. Bot identifies user (new or returning)
3. Options shown: track order, place new order, request invoice, warranty claim, etc.
4. Data is fetched from Shopify or CRM, then delivered to the user
5. Responses, leads, and history are logged for future use
6. Management receives periodic analytics or alerts directly in WhatsApp

Custom JavaScript nodes will power advanced functions like:

- Sentiment analysis
  - Referral & Lucky Draw logic
  - Multi-language replies
  - Personalized follow-ups
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## 6. Risks

Risk	Mitigation
WhatsApp API policy changes	Ongoing compliance with Meta policies; alternate channels planned
Data privacy (GDPR or customer info leakage)	Secure API access; minimal data retention; opt-in workflows
Shopify rate limits or API failures	Built-in retry and fallback mechanisms
Complexity of CRM workflows	Modular workflow testing + documentation

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## 7. Requirements from Boost Lifestyle

To ensure smooth development and deployment, we'll need:

- Admin access to Shopify store (for API setup)
  - Access to Google Sheets and CRM structure
  - WhatsApp Business API setup (or registration assistance)
  - Branding or message tone preferences for customer replies
  - Sample customer/test data for QA
  - One contact person for weekly check-ins and approvals
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## 8. Payment Terms

All payments will be made after full delivery of the solution, including testing, documentation, and handover.

No upfront or milestone-based payment is required.

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## 9. Technical Note and Suggestion

While this proposal leverages the open-source automation tool **n8n** for workflow management, it is worth noting that a **custom-built conversational AI agent** developed as a standalone application using a backend framework (e.g., Node.js or Python) and a messaging middleware may offer improved long-term performance, flexibility, and integration depth.

A custom architecture would reduce dependencies, allow full control over logic, enable tighter security, and be more scalable for complex business processes. This route can be considered for a future phase or as an alternative direction based on project growth.

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### Next Step

Once the proposal is approved, we will proceed with the following:

1. Confirm API access for Shopify, Google Sheets, and WhatsApp Business.
2. Schedule a brief kickoff meeting to align on timelines and expectations.
3. Begin Phase 1: Setup and Core Integrations.

### Let's Build Something Powerful

This bot isn't just a tool — it's a digital operations manager built into WhatsApp. With automation, intelligence, and personalization, Boost Lifestyle will elevate customer experience, grow sales, and optimize backend processes.