

2026

PROJECT PROPOSAL

Improving Email, Scheduling &
Quoting Workflows

Prepared For :
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Overview

Managing enquiries, quotes, scheduling, and follow-ups currently requires a significant amount of manual coordination. This increases the risk of missed work, slows response times, and places ongoing pressure on day-to-day operations.

This proposal outlines a phased, practical approach to reducing that manual load. Each phase focuses on saving time, improving reliability, and supporting growth without adding complexity. The pricing includes all development work, AI-related costs during build, and labour, so there are no hidden build-time charges.

Based on typical time spent managing emails, scheduling, and quoting in similar businesses, the time savings from each phase are expected to offset the cost within a relatively short period. Using conservative assumptions around hours saved per week, the proposed payback period for each phase is often estimated to be within a few months (typically 2–4 months), depending on usage and job volume.

Project Approach

The work is structured in phases to:

- Deliver immediate value, starting with the most time-consuming tasks
- Reduce risk by validating each phase before moving forward
- Allow flexibility to pause or adjust based on what's working in practice

Each phase is designed to improve daily operations on its own.

Scope & Pricing

Phase 1: Email & Job Intake System

Objective

Create a reliable system for handling enquiries and jobs so nothing is missed and less time is spent managing inboxes and admin.

Phase 1.1: Email Intake & Enquiry Management (\$2,860 + GST)

- Centralised handling of incoming emails
- Categorisation of enquiries by urgency and job type
- Linking emails and enquiries directly to jobs
- Drafted responses and follow-up reminders
- Clear visibility of what has been actioned and what still needs attention

Phase 1.2: Job Setup, Invoicing & Workflow Foundations (\$1,860 + GST)

- Integration with Xero to automatically create job records and invoices
- Reduced manual data entry and duplication
- Clear linkage between enquiries, jobs, and invoices
- A structured foundation for scheduling and quoting workflows

Investment

\$4,720 + GST

Outcome

- Faster, more reliable responses to enquiries
- Fewer missed or forgotten jobs
- Typically offsets its cost within 6-10 weeks through reduced time spent managing inboxes, follow-ups, and job tracking.

Phase 2: Scheduling & Job Coordination

Objective

Create clear, shared visibility of upcoming work and reduce the manual effort involved in scheduling and rescheduling jobs.

Phase 2.1: Job Queue & Shared Schedule (\$2,180 + GST)

- A job queue ordered by quote acceptance date
- A shared, viewable calendar accessible by multiple people
- Clear visibility of upcoming work and job timing

Phase 2.2: Intelligent Scheduling & Rescheduling (\$1,680 + GST)

- Assisted rescheduling when jobs move or change
- Intelligent booking support, including grouping jobs by location or job type
- Scheduling considerations for subcontractors, including pressure cleaning

Investment

\$3,860 + GST

Outcome

- Everyone can clearly see what work is coming up and when
- Less time spent coordinating schedules and making changes
- Less disruption when jobs move or change at short notice
- Reduced inefficiencies caused by poor sequencing or missed availability
- Often offsets its cost within 2-3 months by reducing scheduling time, rework, and inefficiencies caused by rescheduling or poor sequencing.

Phase 3: Assisted Quoting Workflow

Objective

Significantly reduce quoting time by automatically identifying required line marking works from plans and site imagery, while maintaining accuracy and pricing control.

Phase 4.1: Plan & Imagery Analysis (Scope Identification) (\$4,980 + GST)

- Automatic recognition of required line marking works from plans and aerial imagery (powered by MetroMap)
- Identification of existing markings, missing lines, and new or changed layouts
- Support for analysing attached plans or site imagery where plans are unavailable
- Clear, structured output of identified works to support quoting

Phase 4.2: Assisted Quoting & Quote-to-Invoice Workflow (\$2,860 + GST)

- A structured quoting calculator allowing manual inputs (e.g. job type, size, markings, scope)
- Assisted quote generation using identified works, job details, and historical pricing
- Consistent quote outputs aligned with your existing pricing approach
- Integration with Xero to support quote-to-invoice workflows
- A system designed to become more efficient as more quotes are created

Investment

\$7,840 + GST

Outcome

- Much faster quoting for jobs with plans or site imagery attached
- Reduced time spent manually reviewing plans and estimating scope
- Greater consistency across quotes, even as job volume increases
- Expected to offset its cost within 3-4 months as quoting time reduces and turnaround speed improves

Ongoing Costs

Ongoing Support & Infrastructure

\$94 per month + GST (Billed monthly or annually)

This monthly cost is fixed and will not increase without discussion and approval.

This includes:

- All ongoing AI usage costs for email handling, scheduling, and quoting
- Hosting and technical infrastructure
- Monitoring to ensure systems continue running reliably
- Minor maintenance to keep integrations functioning

MetroMap & imagery pricing

The AI-assisted quoting workflow will rely on third-party imagery (such as MetroMap). Pricing for this imagery is currently under discussion. If ongoing imagery usage introduces a per-quote or usage-based cost, this will be discussed in advance and agreed before being applied.

At this stage:

- There are no per-use or per-quote AI charges included in this monthly fee
- Any future changes relating specifically to imagery usage would be optional and transparent

Payment Terms

- Each phase is invoiced separately.
- 50% is due once approximately half of the phase scope has been completed, with the remaining 50% due on delivery of the phase.

Assumptions, Timing & Acceptance

- This proposal is based on current discussions and understanding of your workflows
- Any changes to scope will be discussed and approved before proceeding
- Timing will be confirmed at the start of each phase
- Payback estimates are indicative only and based on conservative assumptions around time saved in day-to-day operations.