

VETERAN VECTORS LLC

AUTOMATION PROPOSAL

Gap Analysis Platform

Standardized Assessment & AI-Powered Deliverables

Prepared for

Bill Daggett, Co-Founder & Managing Director

Terri Lewis, Office Manager
Delta Advisory Group (DAG)

Prepared by

Anthony Pinto, Founder

Veteran Vectors LLC
anthony@veteranvectors.io

February 23, 2026 | CONFIDENTIAL

Executive Summary

DAG's whole value is telling clients what's real and what's not in UAS. For investors, that means scrubbing data rooms and checking tech claims. For entrants, it's a structured discovery process that ends with a go/no-go call. Right now, all of that analytical work happens ad hoc with no standard framework, no data that persists after the engagement, and no way to compare findings across clients.

This proposal covers a gap analysis platform built on n8n and PostgreSQL that standardizes how DAG runs assessments, automates data collection and analysis, and produces professional deliverables with one click. It's modeled on a similar platform I built for a defense consulting firm that does organizational gap analyses for DoD.

Current State

Assessment Process	Ad hoc. 'MSU ops' (Making Stuff Up) based on experience. No standard questionnaire or framework.
Data Storage	Past contracts in a folder. No structured database of findings, recommendations, or outcomes.
Report Generation	Manual. Each consultant compiles findings independently.
Cross-Engagement Learning	Nonexistent. No way to compare or reference prior assessments for similar client types.
Team Coordination	Informal. Bill assembles the right people and they 'attack it' together.
Client Deliverables	Go/no-go recommendations with sector breakdowns. Written manually each time.

The Problem

No Repeatable Method: DAG has done dozens of assessments, but each one starts fresh. There's no capture of what questions to ask, what red flags matter, or what data points drive the best decisions.

Quality Depends on Who's Running It: Without a standard framework, the quality of an assessment varies by consultant. A structured approach keeps output consistent no matter who's assigned.

No Comparison Data: When an investor asks 'How does this company compare to others you've evaluated?', there's no data to pull from. That's a missed opportunity.

Reports Built from Scratch: Every deliverable gets written manually. A templated system could produce first drafts automatically from the data you've already collected.

Data Disappears After Each Engagement: Assessment data could be incredibly valuable for trend analysis, sector intelligence, and DAG's own positioning. Right now it's gone after each project.

Proposed Solution: Gap Analysis Platform

A structured assessment system that captures what DAG already knows and automates the workflow. Built on the same architecture I deployed for a defense consulting firm doing DoD gap analyses.

Platform Architecture

Component	Technology	Purpose
Assessment Database	PostgreSQL	Stores all assessment data, scores, findings, and recommendations in structured format
Data Collection	n8n Forms + Notion	Configurable questionnaires for each assessment type (Investor DD, Inventor PMF, Entrant Market Entry)
Analysis Engine	n8n + Claude AI	Processes responses, flags anomalies, generates preliminary findings and risk scores
Report Generator	n8n + Document Templates	Produces branded PDF/DOCX deliverables from assessment data automatically
Dashboard	Notion or Grafana	Real-time view of active assessments, historical comparisons, and sector trends
Collaboration Hub	Notion	Consultant workspace for notes, document sharing, and task assignments per engagement

Assessment Frameworks by Client Type

Investor Due Diligence Framework

Assessment Area	Key Questions	Scoring
Technology Readiness	TRL level? IP protected? Tested in operational environment?	1-5 scale
Market Viability	Addressable market? Competitive landscape? Regulatory path?	1-5 scale
Team Assessment	Technical depth? Industry experience? Gaps in leadership?	1-5 scale
Financial Health	Revenue real? Burn rate sustainable? Assumptions reasonable?	1-5 scale

Assessment Area	Key Questions	Scoring
Regulatory & Compliance	FAA pathway clear? ITAR/export considerations? Certifications?	1-5 scale
Go/No-Go Recommendation	AI-generated summary with sector-by-sector breakdown	Composite score

Inventor Product-Market Fit Framework

Assessment Area	Key Questions	Scoring
Problem Validation	Real problem? Who feels it? How do they solve it today?	1-5 scale
Solution Fit	Does technology actually solve it? Better than alternatives?	1-5 scale
Market Size	TAM/SAM/SOM in UAS? Growth trajectory?	1-5 scale
Competitive Position	What exists? Differentiation? Defensibility?	1-5 scale
Go-to-Market Path	Which sector first? Channel strategy? Timeline to revenue?	1-5 scale
12-Month Roadmap	AI-generated market entry plan with milestones	Composite

n8n Workflow Automations

Workflow	Trigger	Output
Assessment Kickoff	New engagement created in CRM	Generates assessment workspace, assigns questionnaires, notifies consultants
Data Collection	Questionnaire submitted	Validates responses, stores in PostgreSQL, flags incomplete areas
AI Analysis	All sections complete	Claude AI reviews data, generates preliminary findings, risk scores, and anomaly flags
Report Draft	Analysis approved by consultant	Auto-generates branded deliverable from templates with data, charts, and recommendations
Comparative Lookup	Manual trigger	Pulls similar past assessments for benchmarking current engagement
Quarterly Intelligence	End of quarter	Generates sector trend report from aggregated assessment data across all engagements

ROI & Hours Saved

Task	Current (hrs/engagement)	Automated (hrs/engagement)	Hours Saved
Setting up assessment framework for new engagement	4-8	0.5 (select template)	3.5-7.5
Data collection and organization	6-10	1-2 (review submissions)	5-8
Analysis and finding compilation	8-15	2-3 (review AI findings)	6-12
Report writing and formatting	6-10	1-2 (review auto-draft)	5-8
Cross-referencing past engagements	2-4	0 (automated lookup)	2-4
TOTAL PER ENGAGEMENT	26-47	4.5-7.5	21.5-39.5

Financial Impact

Hours Saved Per Engagement	21.5-39.5 hours
Engagements Per Quarter (estimated)	3-6
Quarterly Hours Saved	64.5-237 hours
Value of Consultant Time (@ \$100/hr avg)	\$6,450-\$23,700/quarter
Additional Revenue from Faster Delivery	Shorter cycles = more engagements per quarter
Data Asset Value	Compounding: each assessment makes the database more valuable
Payback Period	Pays for itself in 1-2 engagements

Investment

Item	One-Time	Monthly
Gap Analysis Platform Build	\$5,000	—
Assessment Frameworks (3 client types)	Included	—
n8n Automation Workflows (6 workflows)	Included	—
AI Analysis Integration (Claude API)	Included	—

Item	One-Time	Monthly
Report Template Design (branded)	Included	—
Database Setup & Migration	Included	—
Training & Handoff	Included	—
Ongoing Maintenance Retainer (optional)	—	\$500/month
Software (n8n + Claude API, client-held)	—	\$50-75/month

Payment Structure: 50% up front (\$2,500), 50% upon completion (\$2,500).

Timeline: 4-6 weeks from contract signing to fully operational.

Retainer: The \$500/month retainer covers database maintenance, template updates, AI prompt optimization, and up to 4 hours of support per month.

Reference: Defense Consulting Gap Analysis Build

This platform is based on a system I built for a defense consulting firm that runs organizational gap analyses for DoD and defense contractors. Here's what that engagement looked like:

Their Problem: Fragile Excel-based system with 10+ Power Automate flows, no version control, manual report compilation, and no way to put it on classified networks.

What I Built: Complete rebuild on n8n + PostgreSQL with real-time event data collection (50+ simultaneous users), AI comment analysis, and automated report generation.

Scale: Platform designed to work on unclassified, Secret (SIPRNet), and TS/SCI (JWICS) networks using containerized architecture.

DAG's platform would be a commercially-focused version of this same architecture. No classified network requirements needed.

Case Studies & Track Record

Here's what we've built for other consulting firms and professional services companies.

Defense Consulting Firm

Industry: Defense consulting and organizational gap analysis for DoD and defense contractors.

The Problem: Their gap analysis system ran on Excel with 10+ disconnected Power Automate flows, no version control, and no way to deploy on classified networks. If one person was out, the whole system stopped.

What We Built: Complete gap analysis platform on n8n and PostgreSQL. Replaced manual survey compilation, automated real-time data collection for 50+ simultaneous users, and added AI-powered comment analysis with auto-generated reports.

The Result: Eliminated single-operator dependency. Report generation went from days to minutes. Platform is deployment-ready for classified networks.

National Insurance FMO

Industry: National field marketing organization, 80+ employees, supporting independent insurance agents.

The Problem: No centralized process documentation or automation across departments. Lots of manual work that didn't need to be manual.

What We Built: Comprehensive operational assessment identifying automation opportunities across agent onboarding, compliance tracking, and internal communications.

The Result: Identified \$100K+ in potential annual savings through workflow automation and process fixes.

AI Talent Marketplace Startup

Industry: AI-powered talent marketplace connecting founders with specialized talent.

The Problem: Manual LinkedIn outreach eating 30+ hours/month per profile with inconsistent follow-up and no content pipeline.

What We Built: Automated multi-profile LinkedIn outreach with CRM tracking, Loom video personalization, and a full AI content pipeline for blog posts and social media.

The Result: Cut 108-151 manual hours/month down to 9-13 hours/month. That's review and approvals only. Projected 3-4x more qualified conversations.

Overall Numbers

Clients Served	40+ across defense, insurance, recruiting, real estate, and AI startups
Client Retention	100%
Hours Saved	150+ hours of monthly savings across client base
Annual ROI	\$100K+ annual ROI generated for clients
Background	Navy veteran, submarine nuclear engineer, Naval Academy '14

Why Veteran Vectors

Veteran to Veteran: I'm a Navy guy. Submarines, nuclear engineering, Naval Academy '14. I get how military-adjacent businesses operate and what it takes to build systems that don't break when it matters.

Built for Small Teams: We work with companies that have 2-20 people. Not enterprise deployments. Every system is custom-built for exactly what you need. Nothing extra.

You Own Everything: Notion and n8n are your accounts. If we part ways, you keep it all. No vendor lock-in.

Defense Industry Experience: We have active engagements with defense consulting firms building classified-ready platforms. We understand NDAs, security requirements, and the sensitivity of your client relationships.

Process First, Tools Second: We don't just install software. We help you define the process, then automate it. That's why the automation actually sticks.

Next Steps

To move forward:

- 1. Review:** Share this proposal with Christian and your team for feedback.
- 2. Audit Call:** Schedule a 45-60 minute audit call with Bill and his lead consultants to map out the assessment methodology for each client type and define the data model.
- 3. Approve:** Confirm scope and sign the Statement of Work.
- 4. Kickoff:** 50% payment to begin. We start building within 48 hours of contract signing.

Ready to get started?

Anthony Pinto | anthony@veteranvectors.io | Veteran Vectors LLC