

VETERAN VECTORS LLC

AUTOMATION PROPOSAL

Complete Operations Platform

CRM + Onboarding + Gap Analysis | Bundle Proposal

Prepared for

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Executive Summary

This proposal bundles three systems into one platform for DAG. Building them together means they share one data model, one Notion workspace, and one n8n instance. No duplicate data entry. No disconnected tools. Everything flows from first contact through project delivery.

The three pieces: (1) a custom CRM to track every client relationship, (2) an onboarding system to qualify leads, generate proposals, and handle follow-ups, and (3) a gap analysis platform to standardize assessments, automate reports, and build institutional knowledge over time.

Why Combined Is Better Than Separate

One Data Model: One contact record flows from CRM to onboarding to gap analysis. Enter it once, use it everywhere.

One Dashboard: Bill and Terri see everything in one place: pipeline, active projects, assessments in progress, and follow-ups due.

Gets More Valuable Over Time: Each engagement adds data to the CRM and gap analysis database simultaneously. After 12 months, you've got a real intelligence asset.

Cheaper Together: Building all three at once is faster and cheaper because the infrastructure is shared. One n8n instance, one database, one Notion workspace.

One Vendor, One Retainer: One relationship. One bill. No coordinating between three different projects.

What Is Included

System 1: Custom CRM (Notion + n8n)

Deliverable	Details
5 Interconnected Databases	Contacts, Companies, Deals/Projects, Proposals, Activity Log
5 n8n Automations	Meeting logger, proposal follow-up, contact intake, weekly digest, trade show follow-up
Custom Views	Pipeline by client type, consultant workload, proposals pending, follow-ups due
Training & SOPs	Recorded walkthrough, written documentation

System 2: Onboarding Automation

Deliverable	Details
Pre-Call Qualification Form	Automated routing by client type, budget screening, referral tracking
Discovery Templates (3 types)	Investor DD checklist, Inventor PMF questionnaire, Entrant market entry worksheet
Proposal Generator	3 branded templates with auto-population from CRM data
Post-Proposal Follow-Up	5-touch automated sequence in Bill's voice with reply detection
Consultant Briefing Automation	Auto-generated engagement brief when new project starts

System 3: Gap Analysis Platform

Deliverable	Details
Assessment Database	PostgreSQL with structured scoring for all client types
3 Assessment Frameworks	Investor DD, Inventor PMF, Entrant Market Entry with 5-point scoring
6 n8n Workflows	Kickoff, data collection, AI analysis, report draft, comparative lookup, quarterly intelligence
AI-Powered Analysis	Claude AI reviews submissions, generates findings, risk scores, and anomaly flags
Auto-Generated Reports	Branded deliverables produced from assessment data with one click
Historical Comparison	Benchmark current engagements against past assessments

Combined ROI & Hours Saved

Category	Hours Saved/Month	Value (@ \$100/hr)
CRM (client tracking, follow-ups, pipeline)	22-34 hrs	\$2,200-\$3,400
Onboarding (qualification, proposals, discovery)	12-18.5 hrs	\$1,200-\$1,850
Gap Analysis (per engagement, ~2/mo avg)	43-79 hrs	\$4,300-\$7,900
TOTAL MONTHLY SAVINGS	77-131.5 hrs	\$7,700-\$13,150

Annual Financial Impact

Annual Hours Saved	924-1,578 hours
Annual Value of Time Recovered	\$92,400-\$157,800
Revenue from Recovered/Faster Deals	\$10,000-\$50,000+ (conservative)
Total Annual Value	\$100,000-\$200,000+
Total Annual Cost (platform + retainer)	\$11,850-\$15,650
Annual ROI	6-17x return on investment
Payback Period	Less than 1 month

Combined Investment

Item	Individual Price	Bundle Price
CRM Build	\$2,500	—
Onboarding Automation	\$2,000	—
Gap Analysis Platform	\$5,000	—
Individual Total	\$9,500	—
Veteran Discount (30%)	—	-\$2,850
COMBINED SETUP COST	—	\$6,650

Monthly Costs

Item	Individual Retainers	Combined Retainer
CRM Maintenance	\$250/mo	—
Onboarding Maintenance	\$350/mo	—
Gap Analysis Maintenance	\$500/mo	—
Individual Total	\$1,100/mo	—
Bundle Discount	—	-\$350/mo
COMBINED RETAINER	—	\$750/month

Payment Structure: 50% up front (\$3,325), 25% at midpoint (\$1,663), 25% upon completion (\$1,662).

Timeline: 6-8 weeks from contract signing to fully operational (phased rollout).

Retainer: The \$750/month combined retainer covers all three systems: maintenance, optimization, workflow fixes, template updates, AI prompt tuning, and up to 6 hours of support per month. Optional if your team prefers to self-manage.

Implementation Roadmap

Week	Focus	Deliverable
Week 1	Audit call with Bill, Terri, and Christian	Complete data model and process maps
Week 2-3	CRM build + onboarding intake form	CRM operational, qualification form live
Week 3-4	Onboarding templates + proposal generator	Discovery templates and proposal system live
Week 4-5	Gap analysis database + assessment frameworks	Database and scoring frameworks operational
Week 5-6	Gap analysis AI workflows + report templates	Full analysis pipeline operational
Week 7	Integration testing + refinement	All systems connected and tested end-to-end
Week 8	Training, SOPs, and handoff	Full documentation and recorded walkthroughs

Bundle Savings Summary

Setup Savings	\$2,850 (30% veteran discount vs. individual builds)
Monthly Savings	\$350/month (32% discount vs. individual retainers)
First-Year Total Savings	\$7,050
Shared Infrastructure	One Notion workspace, one n8n instance, one database. No duplication.
Unified Support	One retainer covers everything. One point of contact.

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, Terri, and Christian to prioritize the build order and map out the complete data model across all three systems.
- 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?

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