VETERAN VECTORS LLC

AUTOMATION PROPOSAL

Onboarding Process Automation

Lead Qualification, Proposals & CRM Integration

Prepared for

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Executive Summary

DAG's process for bringing on new clients works, but it's mostly in Bill's head. There's no standard intake, no qualification step before calls, and every proposal gets written from scratch. That means time spent on tire-kickers, proposals going to people who were never going to sign, and each new engagement starting at zero instead of building on what's worked before.

This proposal covers a complete onboarding system: pre-call qualification, templated proposals, automated follow-up, and CRM integration. The goal is simple. Protect Bill's time for the high-value stuff and make sure no real opportunity gets dropped.

Current State

Based on our February 23, 2026 discovery call:

Lead Source	99% referral-based. Trade shows, roundtables, personal network. Rare cold inbound.
Qualification	None. Bill takes most initial calls regardless of fit or budget.
Discovery Process	Informal. No standard questions. 4-6 week discovery phase for entrants, ad hoc for others.
Proposal Process	Bill writes 1-2 page proposals manually. No templates. No tracking of sent proposals.
Contracts/NDAs	Usually signs the client's versions. Mutual NDAs for most engagements.
Follow-Up	Minimal. Bill intentionally does not chase, but acknowledges leaving money on the table.
Handoff to Team	Informal. Bill brings in the right consultants based on the engagement type.

The Problem

Time Wasted on Bad Fits: Without a pre-call screen, Bill takes calls with people who can't afford DAG or aren't a fit. Even 2-3 wasted calls per month at 30 minutes each adds up fast.

Proposals Written from Scratch: Every proposal starts with a blank page. For a firm that serves three distinct client types, templated proposals with plug-in sections would save hours per deal.

Discovery Is Inconsistent: Without standard questions, the quality of initial assessments depends entirely on which consultant runs it. That's a risk.

No Follow-Up After Proposals: Proposals go out and either get accepted or disappear. A simple follow-up sequence would bring deals back.

Knowledge Disappears: When a similar client type shows up again, there's no record of what worked last time, what questions mattered, or what pricing was used.

Proposed Solution: Onboarding Automation System

Phase 1: Pre-Call Qualification

Before Bill or any consultant gets on a call, prospects fill out a short form that sorts them into the right bucket:

Question	Purpose	Routing Logic
What type of engagement? (Investor/Inventor/Entrant)	Determines which process to follow	Routes to correct discovery template
What is your timeline?	Urgency assessment	Flags urgent requests for priority
Have you allocated budget for consulting?	Budget qualification	Below threshold gets self-service resources
How did you hear about DAG?	Referral tracking	Tags referral source in CRM
Brief description of what you need	Scoping	Pre-populates meeting agenda

If someone doesn't hit the minimum bar, they get an automated response with some resources and an invitation to come back when they're ready. Protects Bill's calendar without burning the relationship.

Phase 2: Automated Discovery Support

Once a lead passes qualification, the system sets up discovery automatically:

For Investors: Auto-generates the NDA, due diligence checklist, data room access request, and standard engagement letter.

For Inventors: Product-market fit questionnaire, tech readiness assessment, and competitive landscape intake form.

For Entrants: Industry background questionnaire, strategic goals worksheet, and market entry readiness checklist.

Everything pre-loads based on the client type from intake. Consultants get a head start instead of starting from zero.

Phase 3: Proposal Generation

After discovery wraps, the system drafts a proposal using templates for each engagement type:

Template Library: Three proposal templates (Investor DD, Inventor Market Analysis, Entrant Market Entry) with sections you can swap in and out.

Auto-Population: Client info, discovery findings, and recommended scope get pulled from the CRM and intake forms. No re-typing.

Pricing Engine: Standard pricing ranges by engagement type with a consultant-hour estimator built in.

One-Click Send: Formatted PDF gets generated and emailed with tracking so you know if they opened it.

Phase 4: Post-Proposal Follow-Up

Day	Action	Channel
Day 0	Proposal sent with personalized email	Email
Day 3	Friendly check-in: 'Had a chance to review?'	Email
Day 7	Value reminder with relevant case study or insight	Email
Day 14	Direct ask: 'Want to hop on a quick call to discuss?'	Email + LinkedIn
Day 30	Final touch: 'Closing this out, reach out anytime'	Email

All follow-ups run automatically but they're written in Bill's voice. If anyone replies, the sequence stops and the assigned consultant gets an alert.

ROI & Hours Saved

Task	Current (hrs/mo)	Automated (hrs/mo)	Hours Saved
Unqualified discovery calls (2-3/mo x 30min)	1-1.5	0	1-1.5
Writing proposals from scratch	4-6	1-2 (review only)	3-4
Preparing discovery documents	3-5	0.5 (review templates)	2.5-4.5
Manual follow-up on sent proposals	2-3	0 (automated)	2-3
Recreating past contract	2-3	0 (template	2-3

Task	Current (hrs/mo)	Automated (hrs/mo)	Hours Saved
terms/pricing		library)	
Briefing consultants on new engagements	2-3	0.5 (auto-briefing)	1.5-2.5
TOTAL	14-21.5	2-3	12-18.5

Financial Impact

Hours Saved Monthly	12-18.5 hours
Value of Bill's Time (@ $100/hr)	$1,200-$1,850/month
Revenue from Recovered Proposals (1/quarter)	$5,000-$15,000+
Revenue from Faster Closes (reduced proposal cycle)	$2,000-$5,000+/quarter
Annual Value	$20,000-$40,000+ in time savings and recovered revenue
Payback Period	Less than 1 month

Investment

Item	One-Time	Monthly
Intake Form & Qualification System	$2,000	—
Discovery Templates (3 client types)	Included	—
Proposal Template Library & Auto-Generation	Included	—
Post-Proposal Follow-Up Automation (n8n)	Included	—
Training & Handoff	Included	—
Ongoing Maintenance Retainer (optional)	—	$350/month
Software (Notion + n8n, client-held)	—	$35-45/month

Payment Structure: 50% up front ($1,000), 50% upon completion ($1,000).

Timeline: 3-4 weeks from contract signing to fully operational.

Retainer: The $350/month retainer covers template updates, workflow maintenance, and up to 3 hours of support per month. Optional if your team prefers to self-manage.

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 Terri to walk through each client type's current intake process and define qualification criteria.

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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