

VETERAN VECTORS LLC

AUTOMATION PROPOSAL

Custom CRM Build

Notion + n8n Automation for DAG

Prepared for

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Executive Summary

DAG has built a solid UAS consulting business on Bill's reputation and 20 years of drone industry know-how. That works when you're small. But with 15+ contractors working across the country and business growing past what you planned for, tracking clients and projects through memory and scattered folders is a problem waiting to happen. Deals are slipping through the cracks, follow-ups aren't happening, and if Bill gets sick for a week, nobody knows the full picture.

This proposal covers a custom CRM built in Notion with n8n automations that gives DAG full visibility into every client relationship, from first contact through project delivery. No bloat. No HubSpot complexity. Just what you actually need.

Current State

Based on our February 23, 2026 discovery call, here is where DAG stands today:

CRM System	None. Previously tried HubSpot and an AI-based CRM; neither stuck.
Client Tracking	Bill tracks relationships from memory. Consultants track their own leads independently.
Proposal Tracking	No centralized view of proposals sent, pending, or won/lost.
Project Status	No formal system. Bill and individual consultants manage status ad hoc.
Contact Database	No unified database. Contacts scattered across email, LinkedIn, and memory.
Follow-Up Process	Minimal intentional follow-up. Bill acknowledges leaving contracts on the table.
Team Size	2-4 W2 employees, ~15 1099 contractors across the country.

The Problem

DAG's referral model works because of Bill's reputation. But without a system to capture that knowledge, you've got real risk:

Single Point of Failure: If Bill is out for a week, nobody else knows the full picture of what's active, what's pending, or who needs a follow-up. That's a problem.

Lost Revenue: Bill said it on the call. Proposals go out without follow-up. Contracts get left on the table. Even one recovered deal per quarter pays for this entire system.

Consultant Visibility: With 15+ contractors working on their own, there's no way for Bill or Terri to see the full pipeline across the team.

No Historical Record: When a past client comes back 18 months later, there's no record of what was done, what was quoted, or who was involved.

Proposed Solution: Custom Notion CRM + n8n Automation

What You Get

A CRM built specifically for how DAG actually works. Three client types (Investors, Inventors, Entrants), automated follow-ups, and a weekly pipeline digest so Bill and Terri always know what's going on. All in Notion, all automated with n8n.

CRM Database Structure

Database	Purpose	Key Fields
Contacts	Every person DAG interacts with	Name, company, type (investor/inventor/entrant), source, assigned consultant, last contact date
Companies	Organizations linked to contacts	Company name, industry, size, website, relationship status
Deals/Projects	Active and past engagements	Client, type, status (discovery/proposal/active/complete), value, consultant, start/end dates
Proposals	Sent proposals and their status	Client, date sent, amount, status (draft/sent/reviewing/won/lost), follow-up date
Activity Log	All interactions logged	Date, contact, type (call/email/meeting/trade show), notes, next action

n8n Automations

Automation	Trigger	What It Does
Meeting Logger	Calendar event completed	Creates activity log entry, updates last contact date, prompts for notes and next actions
Proposal Follow-Up	3 days after proposal sent	Sends reminder to Bill/consultant if proposal has not been responded to. Escalates at 7 and 14 days.
New Contact Intake	Form submission or email	Creates contact record, links to company, assigns default consultant, sends welcome sequence
Weekly Pipeline Digest	Every Monday 8am	Sends Bill and Terri a summary: active deals, proposals pending, follow-ups due this week

Automation	Trigger	What It Does
Trade Show Follow-Up	Manual trigger post-event	Creates contact records for all new connections, assigns follow-up tasks with 48-hour deadline

ROI & Hours Saved

Conservative estimates based on DAG's current team size and engagement volume:

Task	Current (hrs/mo)	With CRM (hrs/mo)	Hours Saved
Searching for client info (email, memory, folders)	8-12	1-2	7-10
Manually tracking proposal status	4-6	0 (automated)	4-6
Remembering follow-ups and next steps	5-8	0 (automated reminders)	5-8
Updating Terri on pipeline status	3-5	0 (weekly digest)	3-5
Onboarding new contacts after trade shows	4-6	1 (bulk import)	3-5
TOTAL	24-37	2-3	22-34

Financial Impact

Hours Saved Monthly	22-34 hours
Value of Bill's Time (@ \$100/hr)	\$2,200-\$3,400/month
Value of Terri's Time (@ \$50/hr)	\$150-\$250/month
Monthly Value of Time Recovered	\$2,350-\$3,650
Revenue from 1 Recovered Deal/Quarter	\$5,000-\$15,000 (estimated)
Payback Period	Less than 1 month

Investment

Item	One-Time	Monthly
CRM Build (Notion databases, views, dashboards)	\$2,500	—

Item	One-Time	Monthly
n8n Automation Build (5 workflows)	Included	—
Training & Handoff (recorded walkthrough + SOPs)	Included	—
Ongoing Maintenance Retainer (optional)	—	\$250/month
Notion Subscription (client-held)	—	\$10-20/month
n8n Subscription (client-held)	—	\$25/month min

Payment Structure: 50% up front (\$1,250), 50% upon completion (\$1,250).

Timeline: 2-3 weeks from contract signing to fully operational.

Retainer: The \$250/month retainer covers ongoing maintenance, workflow fixes, optimization, and up to 2 hours of support. Entirely optional if your team is comfortable managing the system independently.

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 map out CRM fields, views, and automation rules for DAG.
- 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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