

A U T O M A T I O N   P R O P O S A L

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# Hiring Pipeline CRM + Trigger-Based Lead Detection System

*Three Options | One Integrated Platform*

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## Executive Summary

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Based on our discovery conversation on February 19, 2026, GFS Building Maintenance has two distinct operational challenges: streamlining the hiring and workforce management process to reduce manual handoffs, and building a proactive lead generation engine that finds new contract opportunities based on real-world business signals.

This combined proposal presents three options for addressing these challenges. Each option builds on the previous one, and bundling both systems together offers shared infrastructure savings and a discounted project rate.

A formal Statement of Work (SOW) with detailed terms, acceptance criteria, project scope, and data handling commitments will accompany the project agreement separately.

**Prerequisites:** Before build begins, we'll need your payroll system decision finalized and system access credentials for Indeed, DocuSign, and your background check provider.

## The Two Systems

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### System 1: Hiring Pipeline & Workforce Management CRM

A centralized platform that connects every stage of the employee lifecycle — from first application to ongoing performance management. This system integrates your existing tools (Indeed, DocuSign, payroll, background check) and automates the handoffs that currently require manual communication between your VA, Director of Operations, and payroll systems.

- Candidate intake automatically pulled from Indeed into a centralized tracker
- Screening responses scored automatically; unqualified candidates filtered out. Scoring criteria are transparent and defined by you during the audit call — you'll always know why a candidate was flagged or filtered.
- One-click background check initiation (no more photo-of-form workflow)
- DocuSign onboarding fires automatically upon approval
- New hire info pushed to payroll once paperwork is signed
- Inspection results logged per location and per employee
- Failed inspections auto-generate work orders for the next shift
- Repeated failures trigger transition plan alerts with targeted hiring recommendations by region

**Bottom line:** Inspections drive hiring decisions proactively, not last-minute departures. Your job posting spend goes to the regions that actually need it.

## System 2: Trigger-Based Lead Detection

Instead of blasting generic cold emails (which failed with Apollo, Instantly, and List Kit), this system monitors six categories of real-world business events that signal a company needs cleaning services right now or will soon:

- **Government RFP Monitoring** — daily monitoring of SAM.gov + state/local bid platforms across your East Coast markets
- **New Construction Permits** — spot new commercial buildings 6–12 months before they need cleaning vendors
- **Facility Manager Job Changes** — new FMs review all vendor contracts within 90 days of starting
- **Property Sales & Ownership Changes** — new owners rebid all service contracts
- **Competitor Contract Expirations** — public federal data shows when competitors' contracts expire
- **Competitor Complaint Monitoring** — unhappy clients of competitors are already looking for alternatives

**Bottom line:** You reach decision-makers when they're actually evaluating cleaning vendors — not when they're ignoring cold emails. AI-drafted outreach is personalized to each trigger type and goes to you for approval before sending. If the AI generates a draft that misses the mark, you simply edit or reject it — the system never sends anything without your sign-off.

## Proven Results: Similar Builds for Other Clients

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These are real outcomes from automation systems we've built for other small and medium businesses facing the same challenges you described. Each one maps directly to what we're proposing for GFS.

### Hiring & Workforce Management

#### New Hire Onboarding Automation

**Problem:** New hires got inconsistent onboarding. IT scrambled to set up accounts, HR forgot documents, managers were unaware of start dates. New hires sat idle waiting for access.

**Solution:** Offer letter acceptance kicked off the complete sequence — system accounts, benefits enrollment, manager notifications, first-day agenda, building access, and welcome emails. All docs organized in employee folder automatically.

**Result:** 100% onboarding consistency across all new hires. Employees productive from day one. Time-to-productivity reduced by 5 days.

**Relevance to GFS:** Replaces your current manual handoff between Director of Ops, VA, and DocuSign. One trigger starts everything.

#### Interview Scheduling Automation

**Problem:** Coordinating interviews across multiple interviewers required back-and-forth emails. Calendar conflicts discovered after candidate was told a time. Took the recruiter 20 minutes per interview.

**Solution:** System checks availability across all required interviewers, finds optimal time slots, sends calendar invites with candidate info, and handles rescheduling automatically.

**Result:** Scheduling time dropped from 20 minutes to 2 minutes per interview. Saved 15 hours monthly. Zero scheduling conflicts.

**Relevance to GFS:** Automates the coordination between your VA screening candidates and Director of Ops scheduling in-person interviews.

#### Certification & Compliance Tracking

**Problem:** Security company with 45 employees required various certifications that expired at different times. Manual spreadsheet tracking failed. Expired certifications discovered during audits.

**Solution:** Centralized database tracked all certifications with expiration dates. Automated reminders at 90, 60, and 30 days. Manager dashboard showed status for entire team. Prevented scheduling employees with expired credentials.

**Result:** 100% certification compliance for 45-person team. Zero audit violations. Eliminated last-minute training costs.

**Relevance to GFS:** Same approach applies to tracking background check expirations, cleaning certifications, and inspection compliance across your workforce.

## Territory-Based Assignment

**Problem:** New leads came in and someone manually assigned them to reps. Geography got ignored, workload was unbalanced, and response times suffered.

**Solution:** Leads automatically went to the right rep based on geography, expertise, and current workload. Fair distribution with instant notifications.

**Result:** Response time dropped from 6 hours to 5 minutes. Pipeline balanced, conflicts eliminated. Team-wide conversion up 18%.

**Relevance to GFS:** Maps directly to your inspection-driven hiring model — regional performance data drives where new hiring posts go, not guesswork.

## Lead Generation & Sales Pipeline

### Competitor Intelligence Tracking

**Problem:** Prospects mentioned competitors in emails and calls. That intelligence just got lost. No tracking of which competitors appeared most often or win rates against each.

**Solution:** Scanned every communication for competitor names. Tagged opportunities. Reports showed which competitors appeared most and win rate against each. Manager got alerted to trends.

**Result:** Win rate against top competitor improved from 35% to 48%. Saved 2 hours weekly on manual tracking. Better positioning added \$125K annually.

**Relevance to GFS:** Directly powers the Competitor Contract Expirations and Competitor Complaint Monitoring triggers in your lead detection system.

### CRM Lead Scoring

**Problem:** Every lead looked the same in the CRM. Some were ready to buy tomorrow, some were tire kickers. Team treated them all equally and wasted time on the wrong people.

**Solution:** Scored every lead based on company size, budget signals, decision-maker status, and engagement level. Hot leads went to the best reps. Nurture campaigns changed based on score.

**Result:** Qualified opportunities up 30%. Sales cycle 18 days shorter. Win rate jumped from 22% to 31%. Added \$180K in annual revenue.

**Relevance to GFS:** Each of your six lead triggers gets scored by contract size potential, timing urgency, and fit with your service areas — so you pursue the highest-value opportunities first.

## Automated Referral Requests

**Problem:** Best time to ask for referrals is right after delivering great work. But the team always forgot or it felt awkward. So they never asked.

**Solution:** When a project was marked complete, the client got a personalized video thank you plus a simple referral form. Reminder a week later if they hadn't responded.

**Result:** 12 qualified referrals in 90 days. Referrals closed at 35%. A small construction company added \$150K with zero acquisition cost.

**Relevance to GFS:** Your best contracts come from relationships and reputation. Automating referral requests after strong inspection scores turns satisfied clients into your lead generation engine.

## Three Options

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Choose the option that fits your priorities and budget. Each builds on the previous.

### Option A: Hiring Pipeline Only

Best if your immediate priority is streamlining the hiring and inspection process. Lead generation continues as-is through your existing third-party provider and networking.

Item	Amount
Project Build — Hiring Pipeline CRM (3 phases + training)	<b>\$2,000</b>
50% due at start / 50% at completion	\$1,000 / \$1,000
Third-party tools (monthly)	~\$75/mo
Retainer (monthly, starts after 60-day support)	\$200/mo

- Build time: ~3 weeks
- Includes: candidate tracking, onboarding automation, inspection-driven workforce management

### Option B: Lead Detection Only

Best if your immediate priority is finding new contracts and expanding your pipeline beyond the third-party lead provider. Hiring continues to be managed manually by your VA and Director of Ops.

Item	Amount
Project Build — Lead Detection System (3 phases + training)	<b>\$2,000</b>
50% due at start / 50% at completion	\$1,000 / \$1,000
Third-party tools (monthly)	~\$75/mo
Retainer (monthly, starts after 60-day support)	\$200/mo

- Build time: ~3 weeks
- Includes: 6-trigger detection engine, AI lead scoring, pipeline dashboard, outreach drafting, weekly reports

## Option C: Full Platform Bundle (Recommended)

Both systems built on one shared platform. Shared tools reduce your monthly costs, and the bundled project rate saves you \$500 versus buying them separately.

Item	Amount
Hiring Pipeline CRM (if purchased separately)	\$2,000
Lead Detection System (if purchased separately)	\$2,000
Separate total	\$4,000
<b>Bundle Discount</b>	<b>– \$500</b>
<b>Bundled Project Total</b>	<b>\$3,500</b>
50% due at start / 50% at completion	\$1,750 / \$1,750
Third-party tools (monthly, shared infrastructure)	~\$75/mo
Retainer (monthly, starts after 60-day support)	\$300/mo

- Build time: ~4 weeks (parallel development saves time versus sequential builds)
- Shared n8n instance, shared AI layer, shared notification system = lower monthly costs than running two separate stacks
- Combined retainer: \$300/mo instead of \$400/mo (\$100/mo savings ongoing)
- One dashboard for hiring pipeline AND lead pipeline — full operational visibility



## Side-by-Side Comparison

	Option A	Option B	Option C
<b>Project cost</b>	\$2,000	\$2,000	<b>\$3,500</b>
<b>Monthly tools</b>	~\$75	~\$75	<b>~\$75</b>
<b>Monthly retainer</b>	\$200	\$200	<b>\$300</b>
<b>Build time</b>	~3 weeks	~3 weeks	<b>~4 weeks</b>
<b>Hiring automation</b>	✓	—	✓
<b>Inspection &amp; work orders</b>	✓	—	✓
<b>RFP monitoring</b>	—	✓	✓
<b>Trigger-based lead detection</b>	—	✓	✓
<b>AI outreach drafting</b>	—	✓	✓
<b>Bundle savings</b>	—	—	<b>\$500 + \$100/mo</b>

## Why Bundling Saves Money

Both systems share core infrastructure that you only need to pay for once:

- **Automation platform (n8n)** — one instance runs all workflows for both hiring and lead detection (~\$20/mo)
- **AI layer (OpenAI)** — powers lead scoring, outreach drafting, and inspection analysis (~\$15/mo)
- **Data scraping (Apify)** — web scraping credits serve construction permits, job postings, and competitor monitoring (~\$40/mo)
- **Notification infrastructure** — email and SMS alerts for both hiring events and lead notifications through the same channels

Running these separately would mean duplicate subscriptions and duplicate maintenance. The bundle gives you one platform, one retainer, and one point of contact for everything.

You'll also receive a complete dependency map showing every tool, its cost, and its purpose — so you always know exactly what your system runs on.

## Support & Retainer Details

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All three options include the same support structure:

**60-day support period** — begins at project completion; adjustments within scope included at no extra cost.

**Monthly retainer** — begins after the support period; covers maintenance, updates, troubleshooting, and security.

**Scope expansion** — discussed and scoped as add-on projects at agreed rates.

**In scope:** fixing a broken scraper, updating an API connection, adjusting a scoring threshold, resolving integration errors, updating workflow logic within original requirements.

**Out of scope:** adding a new trigger source, building a new dashboard, integrating a new third-party tool, adding new regions or markets, building new workflow categories.

**Acceptance criteria:** Each phase is considered complete when all automations pass end-to-end testing, you've reviewed a live demo, and your team has completed the walkthrough.

*Note: Final costs may be refined after the audit call once we have full visibility into all systems and integrations involved.*

## Data Privacy & PII Handling

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Your employees' personal information and your clients' business data matter. Here's how we protect it:

- All API credentials stored in n8n's encrypted credential vault — never hardcoded in workflows
- Role-based access: your VA sees the candidate pipeline, Director of Ops sees hiring + inspections, you see everything including the lead pipeline
- Employee PII (background check results, SSNs, payroll info) is processed through encrypted connections and never stored in plain text within the automation layer
- AI processing (OpenAI) uses their API, which does not train on your data per their business terms
- System backups are configured to run weekly; workflow configurations are exportable at any time

### Questions We'll Need to Discuss During the Audit Call

The level of data protection we build depends on what information flows through the system. To scope this correctly:

1. Will employee Social Security Numbers or financial information (bank account numbers, tax IDs) flow through the automation, or does that stay within your payroll system?
2. Does your background check provider share full reports (with PII) or just pass/fail results?
3. Do any of your current or target clients require specific data handling certifications or compliance documentation from their vendors?
4. Do you have existing data retention or destruction policies that the automation should respect?

### Options Based on PII Scope

**If PII stays within existing systems (payroll, background check provider):** Standard build. The automation handles names, emails, phone numbers, and job performance data — but sensitive financial and identity data stays where it is. No additional data handling infrastructure needed.

**If PII flows through the automation (SSNs, financial data, full background reports):**

Enhanced build. We add encrypted data handling layers, audit logging for PII access, automatic data purging after defined retention periods, and documentation for compliance reviews. This adds approximately 1 week to the build timeline and may require additional third-party tools for encryption and logging.

We'll determine the right approach during the audit call and include the specifics in the Statement of Work.

## What Gets Delivered

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Every project includes:

- Fully built and tested automation system in your environment
- Live demo and walkthrough with your team (VA, Director of Ops)
- Recorded video tutorial for future reference
- Written user guide (step-by-step for daily operations)
- System documentation (workflow diagrams, integration map)
- Credential and dependency inventory — all documentation and credentials remain yours regardless of retainer status
- 60-day support period

## Next Steps

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Pick the option that fits your priorities. Then:

1. **Schedule an Audit/Research Call** — A 60–90 minute deep dive with you, your Director of Operations, and your VA to map out processes, define target markets, and finalize the scope.
2. **Receive Detailed Scope & SOW** — Based on the audit, I'll provide a formal Statement of Work with refined costs, timeline, integration specifics, acceptance criteria, data handling commitments, and the final tool stack.
3. **Approve & Kick Off** — 50% deposit to begin. Build starts immediately.

This platform is built to grow with your business. Adding new regions, new trigger sources, or additional companies — like a future property management operation — is straightforward within the same infrastructure.

Maurice, these systems are designed to work together — inspections driving your hiring decisions while trigger-based detection fills your sales pipeline with the right opportunities at the right time. I look forward to building this for you and your team.

**Anthony Pinto**

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