AI Automation Proposal for
Root Developments

Win more projects. Run leaner. Build your reputation.

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Executive Summary

The opportunity in front of your business

As Halifax's premiere luxury builder, Root Developments competes on quality, reputation, and relationships. But when your team is on-site managing a $1.5M build, the phone still rings — and every missed call could be the next **$800K–$2M+ project walking away**.

Small boutique builders lose projects not because of their work, but because of slow response times, inconsistent follow-up, and the administrative overhead that comes with running high-end builds. Clients expect a luxury experience from inquiry to handover — and subcontractors need tight coordination to keep jobs on schedule.

AI automation changes that. By handling lead capture, client communication, subcontractor coordination, and reputation management around the clock, your team stays focused on what you do best — **building exceptional homes** — while AI ensures nothing falls through the cracks.

$1M+ Revenue at risk from a single missed lead	**10hrs** Saved per week on admin & coordination	**24/7** Lead capture & client response

* Estimates based on Halifax luxury residential construction market data. Average luxury home build: $800K–$2M+. Actual results may vary based on project volume and market conditions.

Proposed Solutions

Each solution works independently or as part of a complete package

AI Phone Answering & Lead Capture
Never miss a high-value inquiry again

$699
/month
$1,500 setup

An AI-powered phone agent that answers every call when your team is on-site, in meetings, or after hours. Qualifies leads by budget, timeline, and project type. Books consultations, answers FAQs about your services and process, and sends detailed call summaries. One missed call on a $1M+ build is devastating for a boutique builder.

24/7 call answering   Lead qualification   Consultation booking   Call summaries to your phone

Automated Client Communication Hub
Keep clients in the loop without lifting a finger

$499
/month
$1,000 setup

Keeps clients updated throughout their build without manual effort. Weekly progress summaries, milestone notifications ("framing complete," "electrical rough-in done"), schedule change alerts, and a simple client portal where they can see project status and photos. Eliminates the constant "where are we at?" calls and texts.

Automated progress updates   Milestone notifications   Client portal   Fewer interruption calls

Subcontractor Scheduling & Coordination
Fewer no-shows, tighter schedules, less chaos

$399
/month
$750 setup

Automated scheduling confirmations with subs, reminder texts before they're due on-site, delay alerts, and availability tracking. Reduces no-shows and keeps the job moving. Coordinates across trades so scheduling conflicts are caught early — before they cost you days.

Auto-confirm with subs   Reminder texts   Delay alerts   Cross-trade coordination

Lead Qualification & CRM Automation
Instant response, intelligent follow-up

$399
/month
$750 setup

When someone fills out your website contact form or emails, AI responds immediately with qualifying questions — budget range, project scope, timeline, and location. Nurtures leads with follow-up sequences. Tracks every lead in a simple CRM so nothing falls through the cracks. Premium buyers expect fast, professional responses.

Instant inquiry response   Automated follow-up   Lead tracking CRM   Budget qualification

📸 Social Media & Content Automation
Showcase your work without the time commitment

$349
/month
$500 setup

For a luxury builder, Instagram is the #1 marketing channel. AI helps schedule posts from project photos, generates professional captions that match your brand voice, suggests optimal posting times, and maintains a consistent presence. Also manages Google Business Profile updates to boost local visibility. Your portfolio should work as hard as you do.

`Automated post scheduling` `Professional captions` `Google Business updates` `Consistent brand presence`

⭐ Review & Referral System
Build the reputation that wins premium clients

$249
/month
$500 setup

After project completion or key milestones, automated review request sequences go out to clients. Manages a referral program where clients who refer get recognition and perks. Luxury buyers research builders extensively before making contact — your online reputation is your most powerful sales tool.

`Automated review requests` `Referral program` `Reputation management` `Improved local SEO`

📊 Project Analytics Dashboard
Real-time visibility across your entire operation

$349
/month
$1,000 setup

A custom dashboard showing active project budgets vs. actuals, timeline adherence, subcontractor performance metrics, and your lead pipeline — all in one place. Weekly email summaries delivered to you so you always know where things stand. Make data-driven decisions without digging through spreadsheets.

`Budget vs. actuals` `Timeline tracking` `Sub performance` `Weekly email reports`

💡 Why This Matters for Root Developments

You're building luxury homes in Halifax's most sought-after neighborhoods — Northwest Arm, The Cove, Marine Drive, Lower Water. Your clients expect a premium experience at every touchpoint.

These automations ensure that the professionalism of your builds extends to every call answered, every update sent, and every lead followed up on — even when your team is on the job site.

Recommended Packages

Bundle solutions for better value — or start with individual automations

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STARTER

$1,397
/month

$2,500 one-time setup

✔ AI Phone Answering & Lead Capture

✔ Lead Qualification & CRM

✔ Review & Referral System

✔ Email & text support

✔ Monthly performance report

"Never miss a lead, never lose a client"

RECOMMENDED

PROFESSIONAL

$2,295
/month

$4,000 one-time setup

✔ Everything in Starter

✔ Client Communication Hub

✔ Subcontractor Coordination

✔ Social Media Automation

✔ Priority support

✔ Weekly performance reports

"Run your business from the job site"

ENTERPRISE

$2,995
/month

$5,500 one-time setup

✔ Everything in Professional

✔ Project Analytics Dashboard

✔ Custom integrations

✔ Dedicated account manager

✔ Quarterly strategy sessions

"Full command center for your operation"

All packages include a **60-day performance guarantee** — if you don't see measurable improvement, we'll refund your setup fee.
Prices are monthly. Annual plans available at 15% discount.

Implementation Timeline

We work around your schedule — zero disruption to active builds

1 WEEK 1
Discovery & Setup

Map your workflows, understand your project types and client base, configure AI to match Root Developments' tone and process.

2 WEEK 2
Testing & Training

Run AI alongside your team. Quick 30-minute training. Fine-tune responses based on real inquiries and your specific services.

3   WEEK 3

Go Live

Full deployment with monitoring. Daily check-ins during first week live. Adjustments based on real-world performance.

4   ONGOING

Optimize & Scale

Monthly performance reviews, continuous improvement, and expansion recommendations as you see results.

Ready to build smarter?

Book a free 30-minute discovery call. We'll map your biggest operational bottlenecks and show you exactly how AI can help you win more projects and run leaner — no obligation.

Book Your Discovery Call →