

# AI Consulting Assessment

**TechCorp Inc.**

Prepared by Farzad Bayat

## EXECUTIVE SUMMARY

Discussed manual data entry inefficiencies in marketing workflow. Identified 20 hours/week waste affecting 5 team members. CFO has budget concerns. Client interested in custom workshop solution.

## LEAD INFORMATION

**Name:** Sarah Johnson

**Company:** TechCorp Inc.

**Role:** VP of Marketing

**Date:** December 10, 2025

## CONSULTANT BRIEF

High-value lead with clear pain point and budget authority. Strong fit for 2-day workshop focusing on automation and AI integration for marketing workflows.

## AI CAPABILITIES IDENTIFIED

- ROI calculation
- cost analysis
- executive memo generation
- custom syllabus creation
- Process automation

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## KEY OUTCOMES & NEXT STEPS

### Next Steps:

- This will show exactly what we'll cover in the workshop

#### OPERATIONAL WASTE DETECTED

Based on our analysis of **Manual data entry in marketing workflow**, your current process is costing you:

**\$260,000 / Year**

This waste covers the cost of the workshop in < 0.5 months.

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## EXECUTIVE BRIEFING

TO: CFO

FROM: Sarah Johnson, VP of Marketing

DATE: 12/10/2025

SUBJECT: Business Case for AI Optimization Workshop

### EXECUTIVE SUMMARY:

We are currently losing approximately 20 hours/week on manual data entry in the Marketing workflow. This equates to an estimated annual waste of \$260,000.

### PROPOSED SOLUTION:

Engagement with F.B/c Consulting for a 2-Day Implementation Workshop.

### INVESTMENT vs RETURN:

Cost: \$12,000 (One-time)

Projected Savings (Year 1): \$260,000

Payback Period: < 3 Months

### RISK MITIGATION:

Unlike generic tools, F.B/c specializes in Local/Private LLMs, ensuring no client data leaves our servers. Implementation is hands-on with our team, reducing technical risk.

### RECOMMENDATION:

Approval to book immediate slot for next month to stop the operational bleed. The workshop pays for itself in under 3 months, with ongoing annual savings of \$260,000.

## CUSTOM WORKSHOP SYLLABUS - MARKETING AUTOMATION

### Day 1: Understanding AI for Marketing

- Introduction to Local/Private LLMs for marketing
- Automating data entry workflows
- Integrating AI with current marketing stack
- Hands-on: Building your first automation

### Day 1: Implementation Planning

- Architecture design for your use case
- Security and compliance considerations
- Team enablement and training plan
- ROI tracking and measurement

### Day 2: Building Solutions

- Live build: Data entry automation
- Testing and validation
- Deployment strategies
- Troubleshooting and optimization

#### Day 2: Going Live

- Production deployment
- Monitoring and maintenance
- Scaling to other workflows
- Next steps and follow-up support

### COMPETITIVE GAP ANALYSIS

**Your Current State:** Manual processes, exploring AI but not implemented

**Competitors:** TechLeader Inc., InnovateCorp, DigitalFirst Solutions

#### Gap Analysis:

Market leaders in your industry have already implemented AI automation, reducing operational costs by 40-60%. Your competitors are gaining efficiency advantages while you continue manual processes. The gap widens each month without action.

### PROPOSAL & NEXT STEPS

#### Recommended for TechCorp Inc.: AI Strategy Workshop

Workshop provides immediate hands-on training for team while addressing specific pain points. Lower investment than full consulting engagement.

**Investment:** \$10,000-\$15,000 (Estimated)

**Expected ROI:** 300% first year ROI with payback period of 2.3 months

[Approve This Plan](#)

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