December 3rd, 2024

**Plan for Advancing My Proposed Endeavor in the United States**

**My Proposed Endeavor:**

My proposed endeavor is to develop and implement comprehensive training programs and optimization strategies for process improvement and data-driven decision-making, by integrating affordable technologies powered by artificial intelligence (AI) and robotic process automation (RPA). This initiative aims to save time and resources, enhance competitiveness, and offer employees valuable upskilling opportunities in high-demand tools. The focus will be on supporting American, Latin, and other minority owned, small and medium-sized enterprises (SMEs) in maximizing their operational efficiency and growth potential.

I will do so by leveraging my academic background as a Systems Engineer my experience of over 5 years as a hands-on professional experience in process automation, implementing robotic process automation (RPA) and artificial intelligence (AI) technologies, additionally my tenure as a university professor, in furtherance of my proposed endeavor for the benefit of the United States. My work will continue to support advancements in my field by instilling a data-driven culture within organizations, thereby enhancing accuracy and expediting decision-making processes. I aim to achieve this through peer-reviewed publications and conference presentations that disseminate findings and methodologies relevant to the implementation of these technologies in industry. Through equipping U.S. companies and their workforce with essential digital skills and promoting technological advancements, I intend to bolster their competitiveness in both U.S. and global markets.

**My Plan for Advancing My Proposed Endeavor in the United States:**

I will take the following key steps to advance my proposed endeavor in the United States:

1. **Initial Research and Needs Assessment:** Conduct comprehensive market research to identify specific needs and pain points of U.S. companies, particularly small and medium-sized enterprises within the U.S. This involves surveying potential users, analyzing current service processes, and understanding the unique challenges faced by these companies. This foundational step ensures that the RPA and AI technologies implemented, will be tailored to address specific company issues with their processes and operations effectively. I have already started with research of current literature.
2. **Stakeholder Engagement and Partnerships:** Engage with key stakeholders, including business leaders, technology partners, and industry experts, to gather insights and build collaborative relationships. Establishing partnerships with chambers of commerce, and leading technology firms (such as [AWS Amazon Web Services, Uipath (RPA Tool), BluePrism (RPA Tool), Microsoft (Minimum and/or No code - AI and Automation tools)examples]), will provide the necessary support and resources to drive innovation and ensure the project’s success.
3. **Development and Prototyping:** Utilize my expertise with RPA technologies, cloud computing, and artificial intelligence, to develop initial prototypes of personalized training programs and optimization strategies for process improvement and data-drive decision making. This stage will focus on creating scalable and adaptable technologies powered by AI and RPA technologies that can integrate seamlessly with a company’s existing processes. Continuous iteration and feedback loops will be implemented to refine these prototypes based on user feedback and performance metrics. In my tenure I have supported many global automation RPA development teams in the development and maintenance of automation processes.
4. **Pilot Testing and Optimization:** Implement pilot programs with selected U.S. companies to test the effectiveness of the RPA and AI technology tools in real-world environments. This phase will involve close monitoring, data collection, and analysis to identify areas for improvement. The goal is to optimize the RPA and AI technologies being implemented to ensure they deliver tangible benefits in terms of efficient process improvements and data-drive decision making as well as the training programs being implemented.
5. **Deployment and Scaling:** Once optimized, the specific comprehensive training programs and optimization strategies powered by AI technologies and RPA will be deployed across a broader range of companies. This will be accompanied by comprehensive training programs for human agents to facilitate smooth integration and maximize the benefits of the technologies and processes being implemented. Strategies for scaling the deployment will be developed to ensure widespread adoption and impact.

Since I already have a significant number of interested clients (Rhino Metals Inc, Fox2 Transport LLC, Criterion Trailers LLC, and North Atlantic Ocean Carrier Inc) in my consultant services, I will focus on working with these initial clients according to the established proposal to achieve successful implementation of the methodology and obtain the expected results in a short time.

Once services for these initial clients are completed, follow-up meetings will be scheduled both in advance and on demand to ensure proper follow-up. These meetings could be held remotely or in person.

With the intention of expanding our client portfolio, at the end of the consulting service, we will ask the client for referrals to potential new clients, who could become eventual clients based on the success achieved in the referring company. Similarly, as with the initial clients, the service will be offered to new clients who are not yet familiar with it through proposal meetings.

**Consulting Services**

I will also advance my proposed endeavor through starting my own business as an independent consultant, this will allow me to fully utilize my experience, background, and skillset in the most optimal manner for the fulfillment of my proposed endeavor.

1. The consulting services I will create and offer to my clients are intended to help U.S. small and medium-sized companies adopt cutting-edge technology to improve their internal processes. There is a common misconception that these technologies are very expensive and difficult to implement. This combination of affordable technology and training for current employees positions these companies on the same level as large corporations, thereby enhancing their competitiveness, efficiency and growth potential and that of their employees, and ultimately makes the US more competitive and bolsters economic growth.
2. Part of the services in the first pillar that I would be offering include analyzing current processes with the intention of improving them by eliminating waste and bottlenecks. Once these processes are improved and optimized, if they were suitable candidates for automation, we would proceed to create optimized business processes by integrating affordable technologies powered by artificial intelligence (AI) and robotic process automation (RPA), selecting the best strategy to carry out the automation at the lowest cost and highest efficiency, improving the US companies competitiveness and growth potential.

Part of the services in the second pillar involves developing and implementing training for users with no-code and/or low-code knowledge to effectively use these resources, offering employees valuable opportunities to upskill in high-demand tools, thereby improving their job prospects.

The result of process improvement and current staff training aims to save time and resources. This approach supports small and medium-sized US enterprises (SMEs) to maximize their operational efficiency and growth potential with technologies that enhance their competitiveness. There will be an additional focus on supporting American, Latin, and other minority owned, small and medium sized enterprises in order to maximize their operational efficiency and growth potential.

1. After engaging in discussions with several companies, four have formally expressed interest in my services to improve and automate their current processes using RPA and AI-based technology; these companies are Rhino Metals Inc, Fox2 Transport LLC, Criterion Trailers LLC, and North Atlantic Ocean Carrier Inc.

These initial clients are medium-sized businesses, each with 1-100 employees, operating in various sectors such as manufacturing, distribution, and logistics, Initially, operations will commence in Caldwell, Idaho, as three of these companies are based there, the fourth company is located in Fort Lauderdale, Florida. However, the plan is to expand nationwide in the near future.

To improve the chances of success, we will relocate to the Check above point 3 state of Idaho, where 3 of the 4 interested companies are located. For the fourth client located in Florida, as well as any other new clients, I will temporarily move to their location for the necessary time to conduct a proper evaluation in person, implementation, and follow-up as required.

**Financial Details and Projections**

Below I outline my specific financial projections for my consultancy:

**Income Projections**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| Income | $240,000 | $400,000 | $480,000 | $560,000 | 680,000 |



Notes:

**Operating Expenses**

Below, please see a detailed breakdown of operating expenses:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Expense | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| Legal | $15,000.00 | $16,500.00 | $19,800.00 | $23,760.00 | $28,512.00 |
| Insurance | $13,000.00 | $15,600.00 | $18,720.00 | $22,464.00 | $26,956.80 |
| Rent | $18,000.00 | $19,800.00 | $23,760.00 | $28,512.00 | $34,214.40 |
| Inventory and Supplies | $6,000.00 | $7,200.00 | $8,640.00 | $10,368.00 | $12,441.60 |
| Phones | $5,200.00 | $6,240.00 | $7,488.00 | $8,985.60 | $10,782.72 |
| Utilities | $22,000.00 | $24,200.00 | $26,620.00 | $29,282.00 | $32,210.20 |
| Miscellaneous | $4,500.00 | $5,400.00 | $6,480.00 | $7,776.00 | $9,331.20 |
| Website | $1,800.00 | $2,160.00 | $2,592.00 | $3,110.40 | $3,732.48 |



Notes:

**Financial Documents**

As proof of funds that I will utilize to cover the start-up costs of my endeavor, I am attaching:

* Please list accounts/property that you would utilize for start up costs
* Personal savings of approximately $40,000 ( See Savings statements)
* Property #1, 15596 ft² , estimated value $138132( See Certification)
* Property #2, 10989 ft², estimated value $35000( See Certification)

The initial funding for this endeavor comprises personal savings of approximately $40,000 in cash. Additionally, I possess properties valued at approximately $190,000, which could be utilized as a source of financing if necessary to initiate this business. Given that my proposal is centered around the provision of services, the existing cash savings are adequate to commence the project. The personal investments will help fund part of the operational costs and technology acquisition reducing reliance on external funds and strengthening the financial stability of the consultancy in its early stages.

Furthermore, I would like to emphasize that upon establishing a formal service contract, clients will be required to pay at least 40% of the total plan upfront. This ensures a steady cash flow from the onset. I am delighted to mention that several companies have already expressed written interest in my services, which shows the great value I can add to the U.S., including small and medium-sized enterprises, including those that are minority owned, as well as to the U.S. economy as a whole.

Based on these initial expressions of interest, I projected collaborating with more than six companies in the first year and over ten in the second year. With a projected annual growth rate of no less than 20%.

In summary, I offer the American economy, specifically small and medium-sized enterprises, including those owned by American, Latin, and other minority owners all my practical experience and knowledge in developing and implementing comprehensive training programs and optimizing strategies for process improvement and data driven decision making by integrating affordable technologies powered by AI and RPA. I will provide high-level, specialized assistance to help these businesses compete successfully, increase their productivity, and drive innovation

Supported by my skills in process automation, change management, achievement orientation, humility, and resilience, and backed by my academic and professional background, I have the ability and conviction to develop my project, which will benefit the economy and society of the United States.

Respectfully,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Oscar Jimenez Montero