

# OUTPUT 4 — ROADMAP SKELETON

This is the structural outline used to assemble the full Strategic AI Infrastructure Roadmap after discovery.

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## I. Executive Summary

- Current State: fragmented systems, inconsistent CRM use, manual operations, slow follow-ups.
  - Desired State: 30% more volume with the same team; business runs without owner fire-fighting.
  - Core Friction: CRM adoption failure, routing gaps, TC overload, owner becoming the bottleneck.
  - Core AI Opportunities: automated intake, follow-up, ops admin offload, delivery automation, agent accountability.
  - 12-Month Outcome: predictable growth, unified systems, lower owner load, scalable workflows.
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## II. Diagnostics (Cross-Role)

### A. Lead Flow

- Slow response time, no automated routing, dropped leads.

### B. Sales & Conversion

- CRM inconsistencies, no sequences, limited analytics, manual follow-up.

### C. Operations

- Duplicate entry, no integrations, manual reporting, data scattered.

### D. Delivery / Contract-to-Close

- Delayed handoffs, TC overload, inspection scheduling chaos, buyer document delays.

### E. Owner Bottlenecks

- Approvals, escalations, coaching, tech decisions — all sitting on the owner.

## F. Volume Failure Points

- Response collapse, overloaded TC, weakened client communication, lost deals.
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## III. High-Leverage AI Systems

1. AI Lead Intake & Routing Layer
  2. AI Follow-Up Engine
  3. AI Ops Automation Layer
  4. AI Delivery Automation Layer
  5. AI Accountability Layer
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## IV. Systems Architecture (Before → After)

### Before

- Sheets, Zillow CRM, MLS manual entry, text threads, DocuSign, QuickBooks, no source of truth.

### After

- Unified CRM + AI intake + AI follow-up + automated contract-to-close + integrated reporting.
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## V. 30-Day Quickstart Plan

### Phase 1 — Design

- Routing rules
- Sequence mapping
- TC automation triggers

### Phase 2 — Build

- CRM restructuring
- Automations
- Messaging templates

## Phase 3 — Activate

- Agent training
  - Monitoring
  - Adjustments
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## VI. 60-Day Expansion Plan

- Predictive analytics
  - MLS + QuickBooks integrations
  - Automated vendor scheduling
  - Referral + past-client nurture sequences
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## VII. KPI Dashboard

- Lead response time
- Follow-up compliance
- Pipeline velocity
- Deal fall-off reasons
- Agent activity consistency
- Client update frequency