



Unlocking A New Era of Innovation and Efficiency

# AI & Automation: Transforming the Future of BBB

# Contents

- BBB Goals, Objectives and AI Strategy
- AI & Financial Projections
- Risks & Mitigation Management
- AI & Automation Timeline & MVP
- AI Development Lifecycle & Execution Plan
- AI Agents Comparison – Build vs. Buy vs. Outsource
- Systems & Models

Goals, Objectives and AI Strategy

# BBB Goals 2025-2026

# GOAL

- Net AB of 250 by EOY 2025
- Net AB of 1,250 by EOY 2026

*Hawai'i Trip!*



# OBJECTIVES

## 1. Implement quick wins

- Solutions with **low, short-term LOE**, with potential **high ROI**.
- Solution that **can scale with minimal LOE** (i.e., via expansion, integration with large scale solution, migration to large scale solution, or dissolution).

## 2. Implement longer-term wins

- **Sustainable** solutions with medium, longer-term LOE + **repeatable ROI**.
- **Sustainable** solutions that are **scalable and adaptable** to market changes.



Projected Growth, Costs, and Risk Management

# AI & Financial Projections

# AI & Automation: Key Financial Metrics

## Projected Net Growth:

- AI and automation is known to drive a **3–5x net growth multiplier**.

## P&L Projections:

- Est Total Rev: \$5.8M (527 net AB goal of 2025)
- Est Upfront AI cost: > \$2M
- Recurring AI costs: > \$200K/year

## Break-Even Analysis:

- AI implementation pays for itself in **18.5 months** (approximately **1.5 years**).

## Sales ROI:

- AI increases Sales pipeline velocity by 1.5-2x.
- AI increases conversion rate by 10-20%.

## Marketing ROI:

- AI improves CAC-to-revenue ratio by 2-3x.
- AI leads to more targeted campaigns, reducing wasted spend.
- Higher customer acquisition at lower cost.

## Revenue Uplift:

- Revenue uplift from AI can add an additional \$1.8M in revenue.

See Monday.com AI Financial Projection Calculations



Risk Identification and Mitigation Strategies

# Risks & Mitigation

# AI & Automation: Risks & Mitigation

## Data Quality & Sourcing Issues:

- **Risk:** Inaccurate or incomplete data.
- **Mitigation:** Prioritize data cleaning and implement data quality controls.

## AI Adoption & Implementation Delays:

- **Risk:** AI implementation takes longer, especially due to integration challenges.
- **Mitigation:** Set realistic timelines and monitor progress closely.

## Market Conditions & External Factors:

- **Risk:** Economic shifts, competition, or market demands can affect AI solution performance.
- **Mitigation:** Monitor trends continuously and diversify strategies.

## Company Outdated SOPs:

- **Risk:** Difficulty adopting AI solutions or new automation tools due to outdated SOPs.
- **Mitigation:** Modernize SOPs, move to an Agile adoption, and provide AI training.

## Customer Reliance on Social Proof:

- **Risk:** Customers place more value on social proof than trust badges or certifications.
- **Mitigation:** Brand repositioning and AI-driven personalization and education.

## Customer Resistance to AI:

- **Risk:** Customers reluctant to engage with AI-driven solutions.
- **Mitigation:** Educate customers and offer hybrid models.

See [Monday.com AI Risks & Mitigation Strategies](#)



## AI & Automation Timeline

# Timeline & MVP

# AI Project Objective 2025-2026

## Implement Quick Wins...

### Workstream Systems Optimization

- How: Migrate all workstreams to AI-Powered Systems by Q3
- Outcome: More efficient workflows -> more processed leads = more conversions/Net ABs

### AI SDR Agent SaaS\*

- How: Pilot AiSDR SaaS integration by Q2
- Outcome: 2-way integration with HubSpot CRM can optimize sales process = more conversions/Net ABs

### Small-scale Knowledge DB

- How: Build Knowledge DB and use with existing pre-trained LLMs as foundation by end of Q3
- Outcome: Personalized information for AI agents and communication = more customer engagement and satisfaction

### AI Custom Marketing Agent\*

- How: Pilot a custom-build Marketing Agent by end of Q2, early Q3.
- Outcome: Personalized, targeted marketing to resonate with customers -> higher acquisition = more conversions/Net ABs

*[Scaled MVP Milestone Completion]*

*\*See "Build vs. Buy vs. Outsource" page*

# AI Project Objective 2025-2026

## And Sustainable Wins through AI

### Sustainable, Scalable, High Quality Data Storage

- How: Start build of Datalake, Data warehouse and semantic layer end of Q2-Q3
- Outcome: More knowledge and wisdom for LLMs and AI Agents to source

*[MVP Milestone Completion]*

### Workstream Systems Automation

- How: Improve UI/UX and integrate IPA/RPA by end Q3-Q4
- Outcome: More efficient workflows -> more processed leads = more conversions/Net ABs

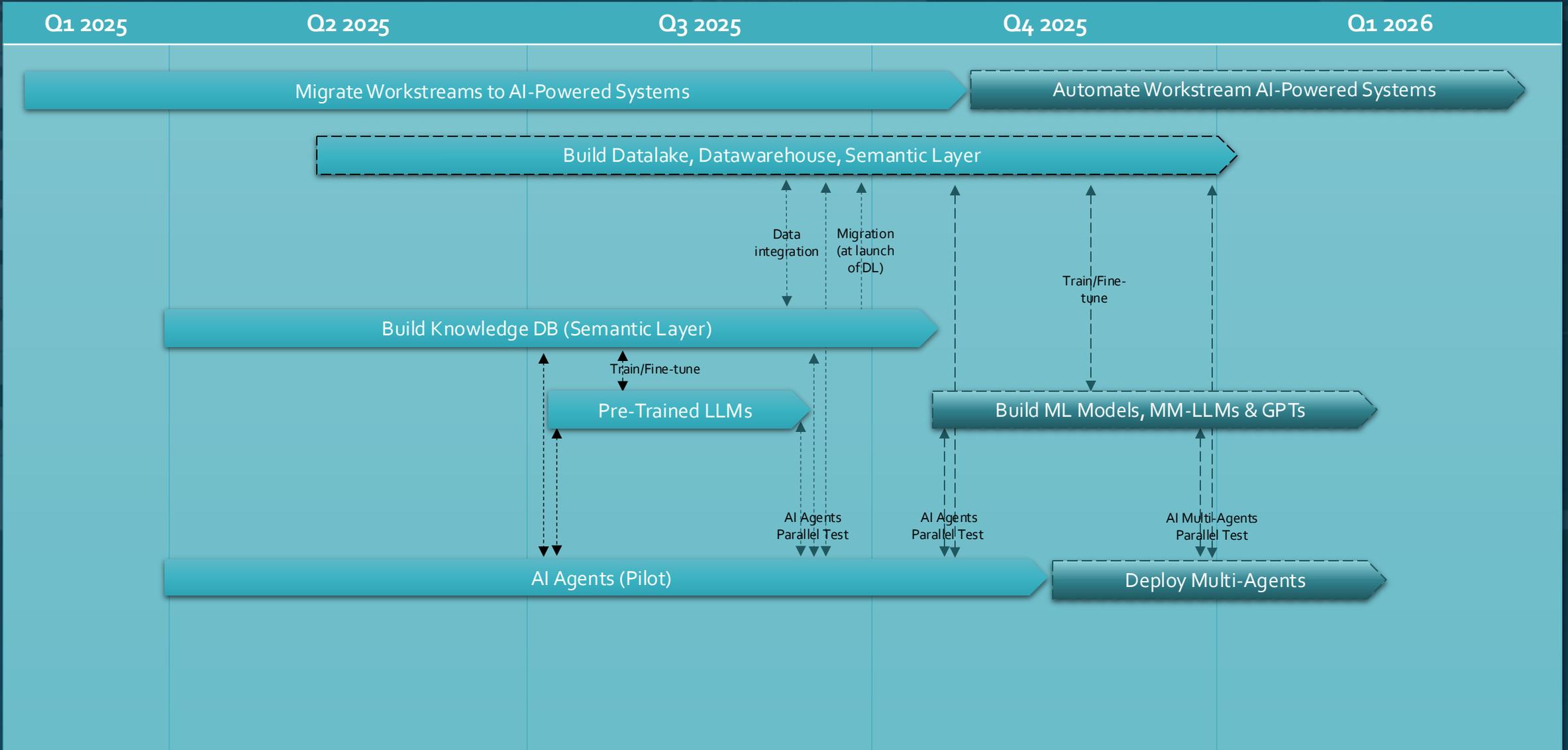
### Business-tailored ML, LLM and GPT Models

- How: Build custom ML Models, MM-LLMs, MM-GPTs and fine tune with quality data by Q3-Q1 2026
- Outcome: NLP processing of more accurate data, resulting in hyper-personalization, real-life-like model reasoning

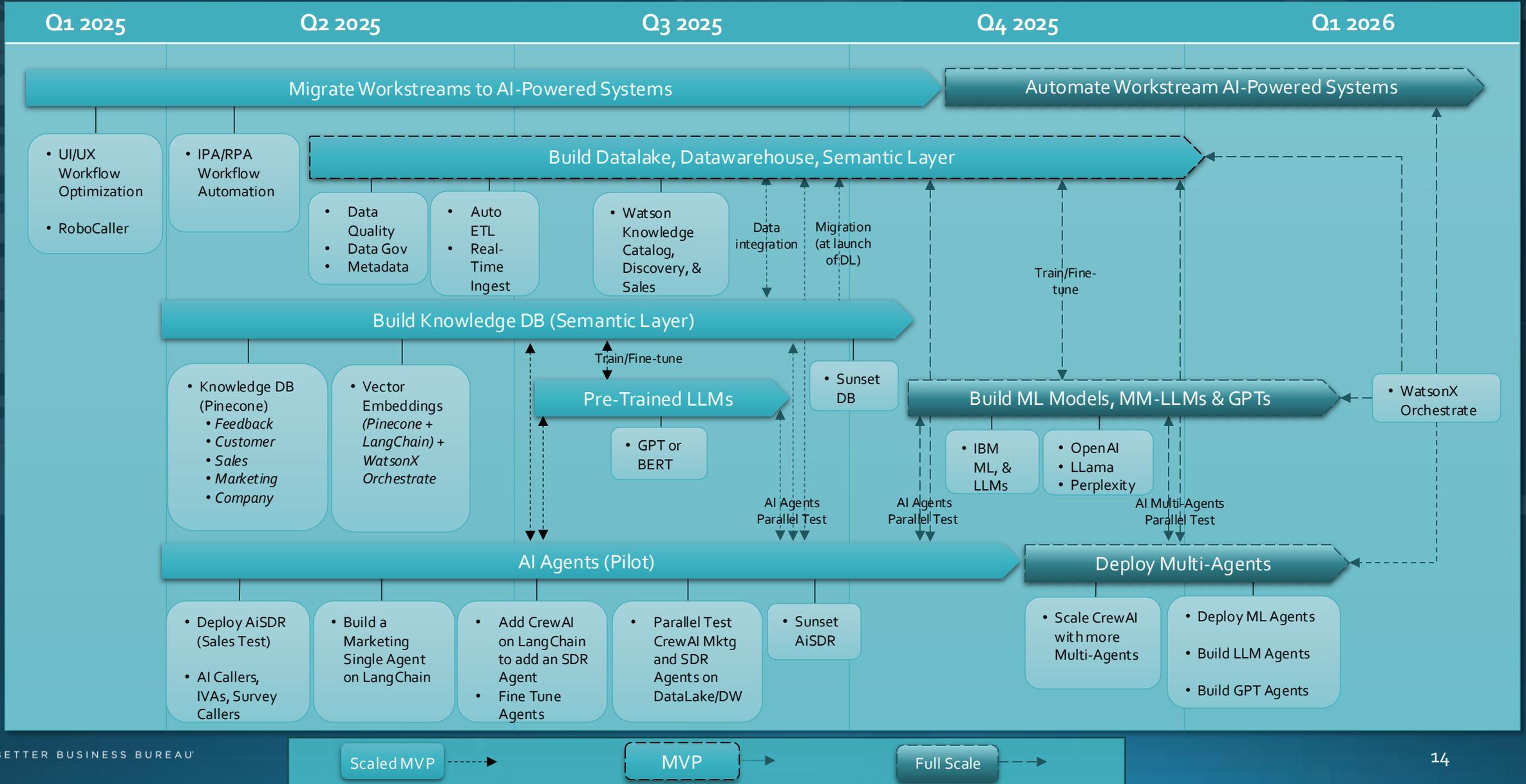
### Business-tailored Multi-Agents

- How: Build custom Multi-Agents trained with business-tailored models and quality data by Q3-Q1 2026
- Outcome: Better data sources, NLP processing = efficient AI reasoning models, resulting in exponential net AB growth

# AI & Automation Timeline 2025 - 2026



# AI & Automation Timeline 2025 – 2026 (Detailed)



# Timeline Full Scope Details

- Migrate all workstreams to HubSpot and BAW by Q3 [MVP Q4, Scaled Q4].
- Deploy 3P AI SDR SaaS (AiSDR) that can integrate with CRM/HubSpot in early Q2 [MVP mid-Q2, Scaled mid-Q2].
  - Dependency: HubSpot ingest full list of leads from BAW.
- Build Knowledge DB (Semantic Layer) – document, artifacts from Sales, Marketing, Customer, Company in Q2 [MVP Q2-Q3, Scaled Q2-Q3].
  - Use pre-trained LLMs with Knowledge DB and Fine-Tune.
  - Connect AiSDR with Knowledge DB and pre-trained LLMs.
  - Build Marketing single agent using LangChain and connect with Knowledge DB and LLMs.
  - Build an SDR agent by adding Crew.AI on LangChain, train on AiSDR, connect with Knowledge DB and LLMs, then sunset AiSDR.
- Integrate WatsonX Orchestrate for automation at Crew.AI agent launch in Q2-Q3 [MVP Q2-Q3, Scaled Q3-Q4].

## [Scaled MVP Milestone Completion]

- Start Datalake, Datawarehouse, Semantic Layer Project (Snowflake) mid-Q2 [MVP early Q3].
- Integrate Knowledge DB with Datalake, Datawarehouse in early Q3 [MVP mid-late Q3].
- Parallel test AI Agents and LLMs with Datalake/Database and Knowledge DB in Q3 [MVP late Q3].
- Migrate Knowledge DB to Datalake/Datawarehouse (dependency on test passing) late Q3 [MVP mid-Q4].
- Integrate WatsonX Orchestrate for automation on-going as features and functions get introduced in Q2-Q3 [MVP Q3-Q4].
- Sunset Knowledge DB (dependency on migration) end of Q3 [MVP Mid-Q4].

## [MVP Milestone Completion]

- Build custom ML Models, Multi-Modal LLMs, Multi-Modal GPTs in early Q4-end of Q4.
- Start automating workstream systems with UI/UX design and more RPA in early Q4.
- Parallel test Custom ML Models, LLMs, GPTs and Single Agents with Datalake/Datawarehouse in early Q4.
- Build and deploy multi-agents mid-Q4.
- Parallel test Multi-Agents with Custom ML Models, LLMs, GPTs with Datalake/Datawarehouse late-Q4.
- Optimize workstream systems with LLMs, Multi-Agents late Q4-Q1 2026.
- Integrate WatsonX Orchestrate for automation late Q4-Q1 2026.

**Model  
Evaluation &  
Monitoring**

**Model  
Deployment**

**Iteration &  
Tuning**

**Pilot**

**Problem  
Identification**

**Data  
Collection**

**Model  
Training**

**Model  
Transfer**

AI Development Lifecycle & Management

# Execution Plan

# Execution Approach

Dual-track strategy, also known as dual path, where implementation starts from top-down and bottom-up at the same time, executing parallel processes.

## 1. Top-down execution

- Focuses on addressing high-level objectives and strategic goals.
- Focuses on delivering results quickly to show progress and build momentum.

## 2. Bottom-up execution

- Focuses on foundational work and optimization of infrastructure, systems and processes.
- Focuses on long-term success and sustainable solutions.

# Execution Approach Application

Dual-track strategy, also known as dual path, where implementation starts from top-down and bottom-up at the same time, executing parallel processes.

## 1. Top-down execution

- Migrate workstreams to AI-Powered Systems
- Build Vector DB for Knowledge DB
- Use pre-trained existing LLMs
- Deploy Single Agents

## 2. Bottom-up execution

- Automate workstream AI-Powered Systems, UI/UX flows, and include IPA/RPA
- Build Datalake, Datawarehouse, and Semantic Layer
- Build custom ML Models, LLMs, and GPTs
- Deploy Multi-Agents

# AI DEVELOPMENT LIFECYCLE

**Model  
Evaluation &  
Monitoring**

**Model  
Deployment**

**Iteration &  
Tuning**

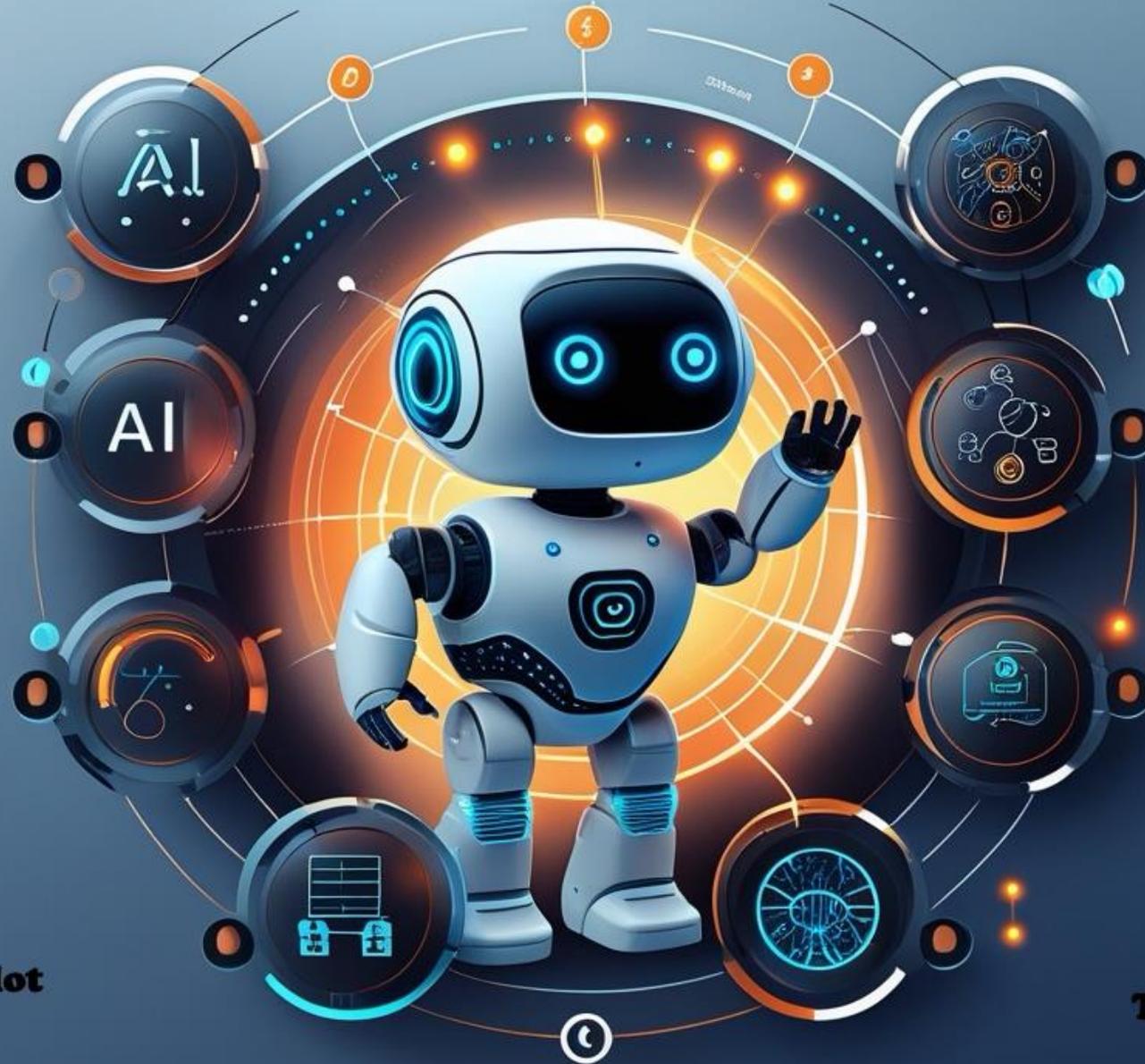
**Pilot**

**Problem  
Identification**

**Data  
Collection**

**Model  
Selection**

**Model  
Training**



# Execution Plan AI Lifecycle Phase

AI LIFECYCLE PHASE	MVP	FULL SCALE
<b>Problem Identification</b>	Lack of efficiency in customer outreach and lead qualification = low conversion rates.	Lack of data insights for predictive and prescriptive analysis.
<b>Data Collection</b>	Collect data from CRM systems, surveys/complaints feedback, documents and artifacts from workstreams (Sales and Marketing).	Expand data collection to include customer tickets, social media interactions, web analytics, documents and artifacts from other workstreams.
<b>Model Selection</b>	Choose pre-trained language models (i.e., GPT, BERT).	Deploy custom LLMs and multi-modals models.
<b>Model Training</b>	Train models on historical and current sales and marketing data, company data, and customer data.	Fine-tune models using almost real-time data from Datalake, Datawarehouse.
<b>Pilot</b>	Deploy AiSDR Sales Agent and LangChain Marketing Single Agent	Scale Marketing Agent into CrewAI and add a new CrewAI SDR Agent
<b>Iteration &amp; Tuning</b>	Train and Tune CrewAI SDR Agent on existing AiSDR Agent. Tune existing CrewAI Marketing Agent.	Build additional CrewAI Agents specialized for each workstream.
<b>Model Deployment</b>	Deploy new CrewAI SDR Agent; integrate with CRM systems, sunset AiSDR Agent.	Deploy additional CrewAI Agents. Integrate all AI agents with custom RAG-based LLMs, Datalake, and Datawarehouse.
<b>Model Evaluation &amp; Monitoring</b>	Monitor lead engagement and marketing reach. Measure responses.	Continuously track KPIs per workstream.
<b>Data &amp; System Integration</b>	Integrate workstream systems, CRM, and databases to AI systems.	Full Datalake/Datawarehouse integration with all systems for real-time insights and automation.



Build vs. Buy vs. Outsource

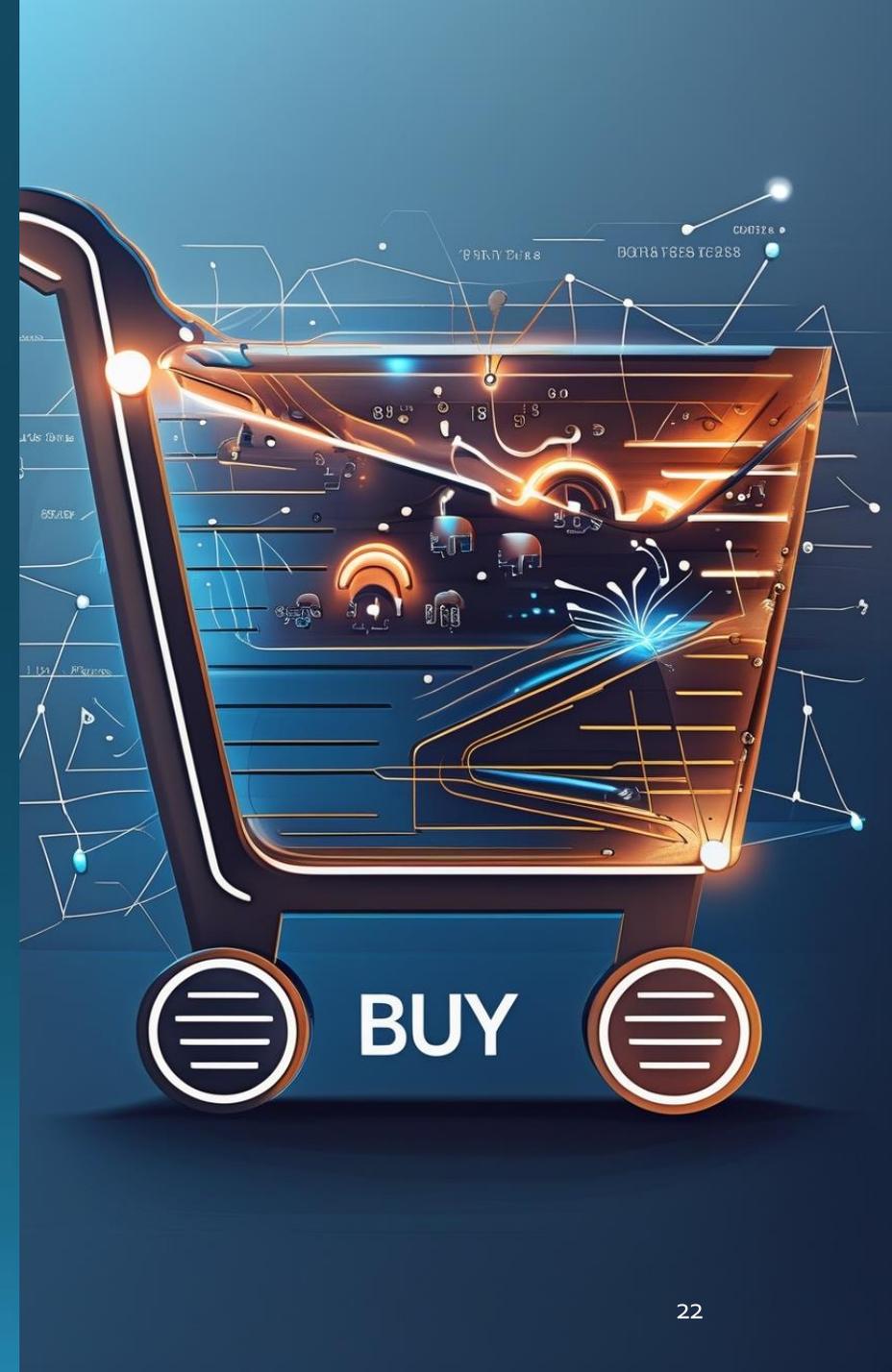
# AI Agents Comparison

# Buy

**AiSDR** is a **SaaS** solution, so the primary tasks involve **integration** and **configuration** rather than development from scratch.

- **Duration:** 1-4 Weeks
- **Cost:** Subscription Model, varies by usage and features.
  - \$900-\$4.5K/mo month-to-month.
  - \$750-\$4K/mo yearly contract.
- **Resources:** 1-2 internal team members for integration and monitoring.
- **Complexity:** Low to Moderate. Pre-built SaaS with basic customization.
- **Customization:** Limited based on SaaS features and integrations.

See [Monday.com AI Agents Implementation BRD](#) for detailed breakdown



# Build Single Agent

Building a custom AI SDR single agent using **LangChain, Pinecone and WatsonX Orchestrate** involves **development work** but gives full control over solution **customization and scalability**.

- **Duration:** 1-2 months
- **Cost:**
  - Development \$11-\$18K or 400-800 hours
  - Operational Cost \$500-\$2K/mo + maintenance
- **Resources:** 2-3 engineers (1 backend, 1 ML/AI, 1 DevOps engineer) + 1 PM
- **Complexity:** Moderate
- **Customization:** Highly customizable

See [Monday.com AI Agents Implementation BRD](#) for detailed breakdown



**BUILD**

# Build Multi-Agent

Building custom AI Multi-Agents using **Crew.AI, LangChain, Pinecone and WatsonX Orchestrate** involves **complex development work** but gives full control in creating autonomous AI teams with specialized roles.

- **Duration:** 2-3 months
- **Cost:**
  - Development \$30-\$43.5K or 800-1,200 hours
  - Operational Cost \$500-\$8K/mo + maintenance
- **Resources:** 3-4 engineers (1 backend, 1 ML/AI, 1 DevOps, 1 Prompt or Data Engineer) + 1 PM
- **Complexity:** Moderate to High
- **Customization:** Highly customizable

See [Monday.com AI Agents Implementation BRD](#) for detailed breakdown



**BUILD**

# Outsource

**Outsourcing** provides external contractors or agencies that handle the **design** and **development** solutions. It combines both buy and build, but with 3<sup>rd</sup> party expertise.

- **Duration:** 2-6 months
- **Cost:**
  - \$100-\$250/hr per developer and per AI specialist.
  - Full project cost can range from \$50K - \$150K depending on scope.
- **Resources:** Depending on scope of the project, at least 2 developers, 1 AI specialist, 1 Designer, 1 PM.
- **Complexity:** Moderate to High.
- **Customization:** Highly customizable.

*See Monday.com [AI Agents Implementation BRD](#) for detailed breakdown*



## OUTSOURCE



## Recommendation

**Phase 1:** Deploy **AiSDR SaaS** for a **quick win** in the **short term**. This option requires **low effort**, involves **similar monthly costs**, and offers **high ROI potential**.

**Phase 2:** Build a **single marketing agent** using **LangChain, Pinecone, and WatsonX Orchestrate**. This phase involves **low to medium effort** for a customizable, scalable marketing solution.

**Phase 3:** Develop an **SDR agent** using **Crew.AI, LangChain, Pinecone, and WatsonX Orchestrate**. This will add a second agent, alongside the marketing agent, creating the **first multi-agent system** for enhanced automation and orchestration, while **sunsetting AiSDR**.

Phase	Implementation Time Est.	Development Cost	Ops Cost Monthly
Phase 1: AiSDR (Sales)	1-2 weeks	\$900-\$4,500/mo \$750-\$4K/mo yearly (subscription)	\$900-\$4,500/mo \$750-\$4K/mo yearly (subscription)
Phase 2: Single Agent (LangChain + Pinecone + WatsonX Orchestrate)	4-8 weeks	\$11K-\$18K or 400-800 hours	\$500-\$2K/mo + maintenance
Phase 3: Multi-Agent (Crew.AI + LangChain + Pinecone + WatsonX Orchestrate)	8-12 weeks	\$30K - \$43.5K or 800-1,200 hours	\$4,500-\$8K/mo + maintenance

See [Monday.com AI Agents Implementation BRD](#) for detailed breakdown

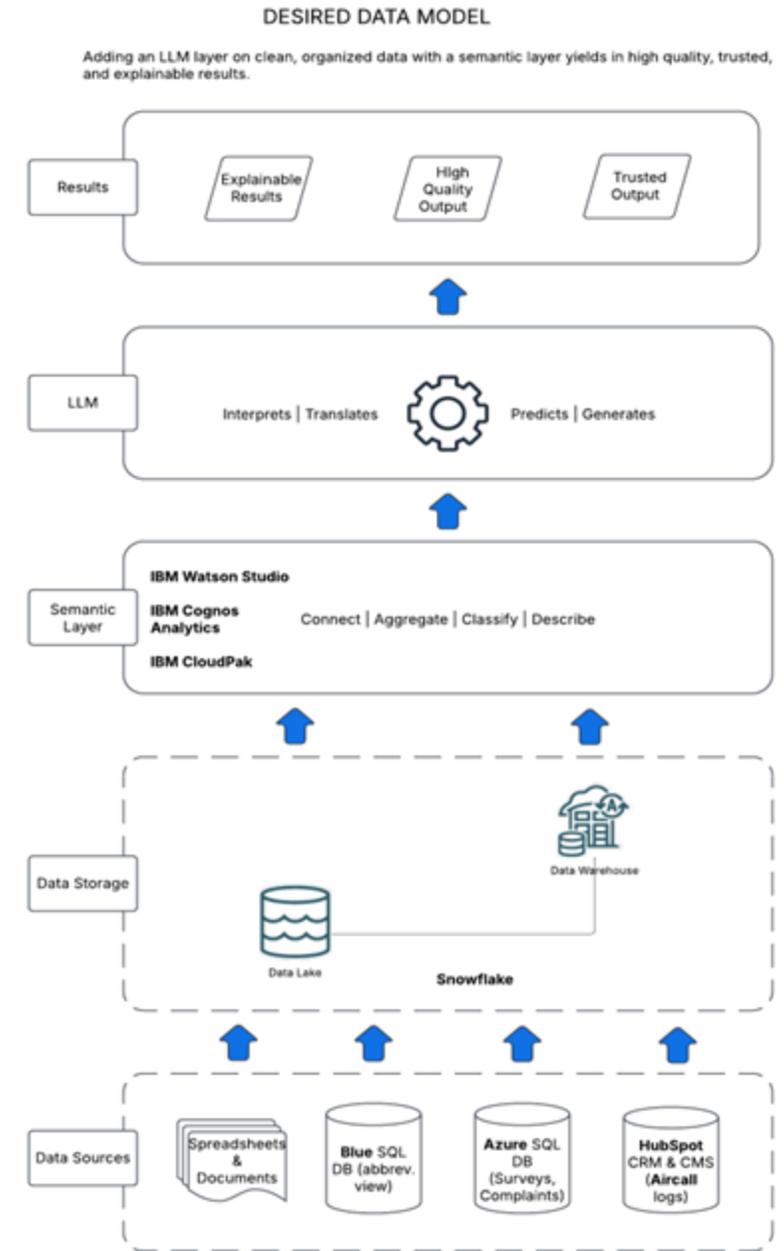
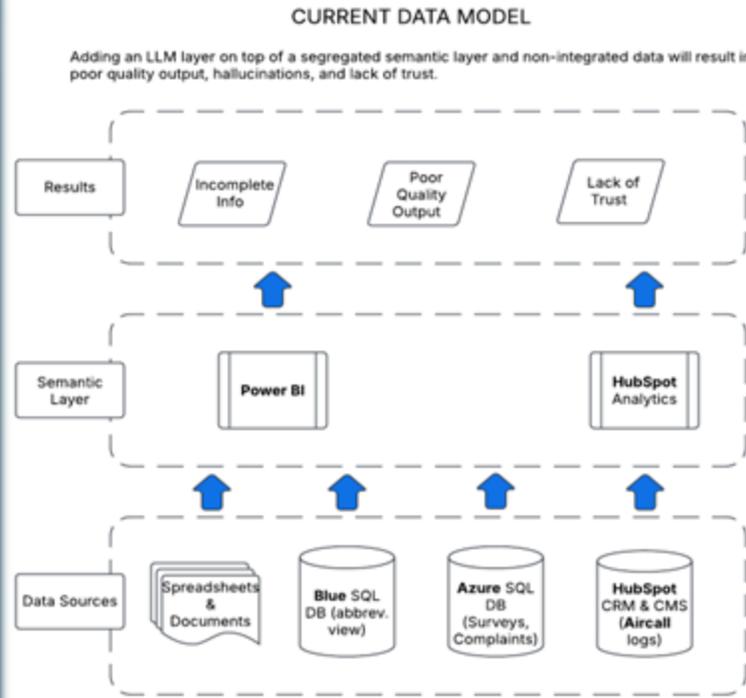


Current and Future

# Systems & Models

# Data Model Concept for AI

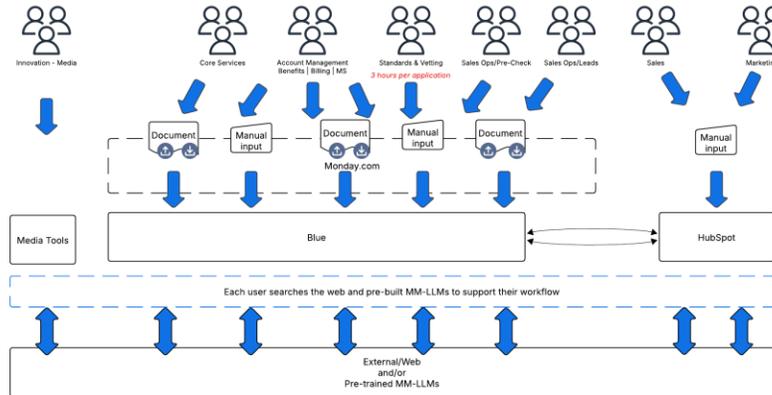
- Left Diagram: Adding an LLM layer on top of a segregated semantic layer and non-integrated data will result in poor quality output, hallucinations, and lack of trust.
- Right Diagram: Adding an LLM layer on clean, organized data with a semantic layer yields in high quality, trusted, and explainable results.



# System Workflow Concept using AI Agents

## HIGH LEVEL INTERNAL WORKFLOW

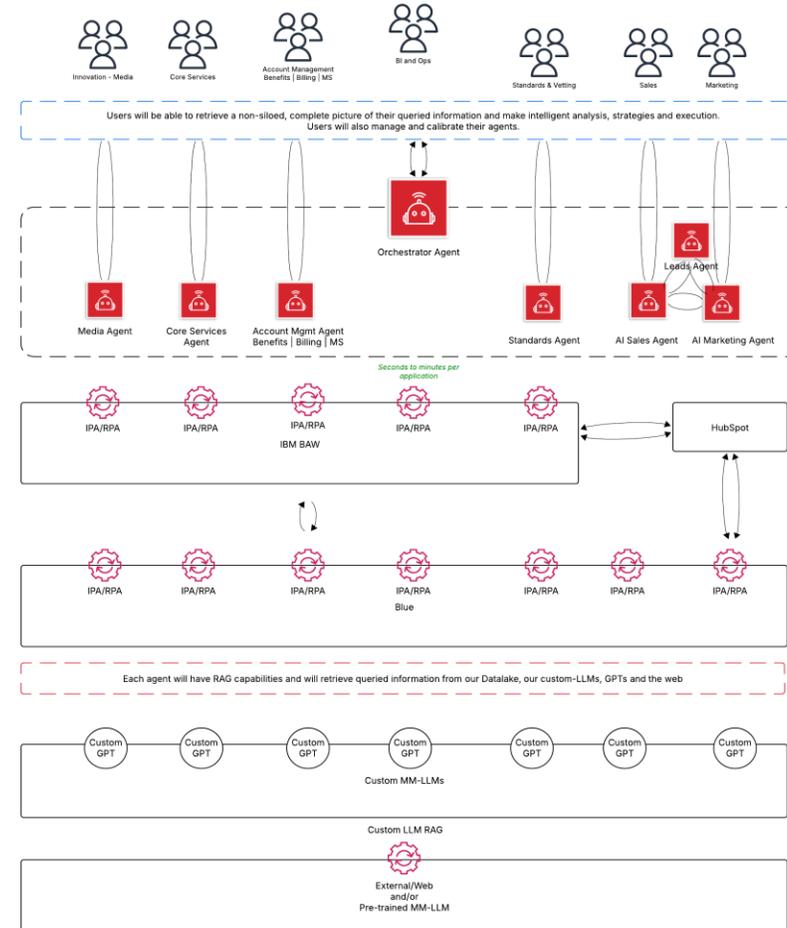
Current workflows are heavily manual and extremely siloed.



- Left Diagram: Company operations are heavily manual, and data is heavily siloed.
- Right Diagram: AI Agents along with RPA/automation exponentially reduces manual work. Information is also retrieved, analyzed and aggregated to provide a complete picture to users/employees. Employees will be trained to manage the AI, including smart querying. AI agents will all be RAG and continue to retrieve up-to-date information inside and outside of the company knowledge base.

## DESIRED SYSTEM WORKFLOW

AI agents along with RPA/automation will reduce the heavy manual workflows. AI Agents retrieve, analyze and provide well-researched information to their human counterparts.



# Custom AI Agents & Custom MM-LLMs Concept

## Agentic RAG:

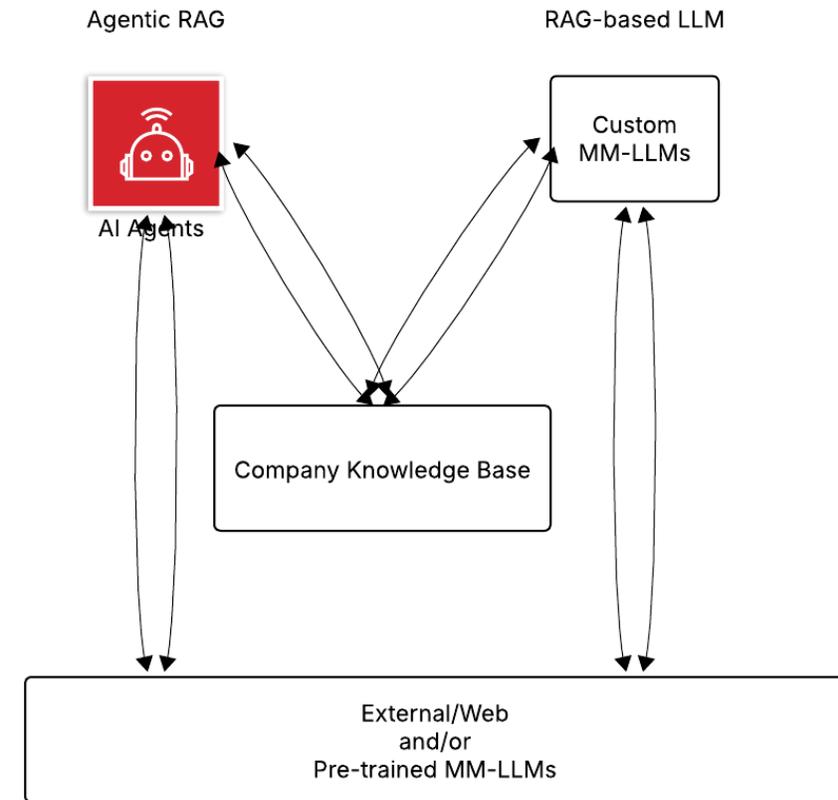
- The AI Agents are involved in task execution and can interact with both the Company Knowledge Base and external sources (like the web or pre-trained MM-LLMs).
- The key here is that the Agentic RAG has autonomous capabilities that go beyond simple information retrieval. It can perform actions and drive workflows, not just generate content.

## RAG-based LLM:

- The Custom MM-LLMs (Multi-Modal Large Language Models) are linked to the Company Knowledge Base and external sources. These models retrieve relevant data to augment the generative capabilities of the LLM.
- This component is primarily focused on text generation, ensuring the generated output is grounded in real-time data or pre-existing knowledge.

## CUSTOM AI AGENTS & CUSTOM MM-LLMs

Both custom AI Agents and MM-LLMs will be RAG based. This allows for information to be up-to-date and prevents stale data.





# The Future of BBB Is AI-Powered

*BBB has always been about trust. AI lets us scale that trust into new revenue streams and better solutions.*

# THANK YOU

For questions or comments on this presentation, please contact Eunice Quezon [eunice.quezon@thebbb.org](mailto:eunice.quezon@thebbb.org)

# Appendix:

- [AI Agents Implementation BRD](#)
- [AI & Automation for Sales & Strategy: Unique Ideas & Revenue Growth for BBB](#)
- [BBB Subscription Model Framework](#)
- [AI-Driven Subscription Models for BBB](#)