

BORRON STRATEGIC INTELLIGENCE

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All engagements are treated with strict confidentiality

LANDSCAPING OPERATIONS

AI Workflow Package for Small Business Trades

PREPARED FOR

Client / Business Name: *[Client Business Name]*

Contact Name: *[Contact First & Last Name]*

Business Address: *[Street Address, City, State, ZIP]*

Phone: *[Client Phone Number]*

Email: *[Client Email Address]*

Date of Offer: *[Date]*

Offer Reference: *[BSI-OFFER-XXXX]*

OUR PROMISE TO YOUR BUSINESS

"We help small business trades book more jobs and spend less time on callbacks, estimates, and admin — with AI workflows that capture leads faster, qualify requests automatically, and follow up with clients so you never have to chase."

THE CHALLENGE WE ARE SOLVING

A landscaping crew on a job site cannot always answer the phone. By the time a call is returned that afternoon, the homeowner has already booked someone else. The same pattern plays out with estimates that take too long, recurring maintenance reminders that never go out, and reviews that do not get requested because the day is already full before the job wraps up.

The strongest return on investment in landscaping operations almost always comes from two places: fewer missed leads and less time spent on quoting and scheduling. That is exactly what this package addresses.

WHERE AI WORKS IN YOUR LANDSCAPING BUSINESS

- **AI Receptionist for Calls & Web Leads:** Answers calls and web leads instantly — captures job details, service area, and scope while your crew is in the field.
- **Estimate Request Intake & Job Qualification:** Qualifies incoming requests before they reach you — filtering by service area, job type, and budget range to reduce wasted quote time.
- **Calendar Booking & Dispatch Handoff:** Customers book their own consultation or service slot — the system confirms, reminds, and hands off to your dispatch process automatically.
- **Post-Job Review & Referral Sequence:** After job completion, an automatic sequence requests a review and gently prompts satisfied customers to refer a neighbour or friend.
- **Recurring Maintenance Follow-Up:** Seasonal reminders go out automatically to past clients — spring cleanups, irrigation checks, fall prep — without anyone remembering to send them.
- **Quote & Proposal Drafting Templates:** AI-assisted proposal drafting that produces professional, consistent quotes faster — more estimates out the door in less time.

HOW WE WORK TOGETHER

Three clear steps. Built around your schedule.

STEP 01 · AUDIT · One-time fixed fee

- Map your current lead-to-job workflow from first call to invoice
- Identify where leads are dropping off or slowing down
- Pinpoint the 3 to 5 automations with the clearest return on investment
- Written findings delivered within 5 business days

STEP 02 · BUILD · Per workflow — modular

- Configure AI receptionist for calls and web leads
- Set up estimate intake qualification workflow
- Activate calendar booking and dispatch handoff process
- Build post-job review, referral, and maintenance reminder sequences

STEP 03 · SUPPORT · Monthly subscription

- Monthly review of lead capture and booking metrics
- Seasonal workflow adjustments — spring, summer, and fall cycles
- Add recurring maintenance sequences and referral campaigns as needed
- Ongoing proposal template refinement based on what is winning jobs

COMPLETE PACKAGE DELIVERABLES

- 1. AI Receptionist for Calls & Web Leads:** Captures inquiries instantly when your crew is on site — service area, job type, contact details — and routes qualified leads directly to you.
- 2. Estimate Request Intake & Job Qualification:** Filters incoming requests so you are spending quote time on jobs worth quoting, not driving across the county for a job outside your service area or budget range.
- 3. Calendar Booking & Dispatch Handoff:** Clients book themselves into available slots — confirmations, reminders, and job details flow automatically to your dispatch process without manual coordination.
- 4. Post-Job Review Request & Referral Sequence:** Automatic SMS and email after job completion — happy customers go to Google and Yelp, unhappy ones come back to you privately, satisfied clients get a referral prompt.
- 5. Recurring Maintenance Reminder Campaigns:** Seasonal outreach to your existing client list — spring, summer, and fall — runs automatically without anyone on your team remembering to send it.
- 6. Quote & Proposal Drafting Templates:** AI-assisted templates that produce professional, consistent proposals faster — helping you get more estimates out the door without more hours in the office.

INVESTMENT

Audit: **[\$ Insert Fee]** — One-time, fixed. Payable prior to commencement.

Build: **[\$ Insert Fee / workflow]** — Per workflow, modular. Invoice issued per phase.

Support: **[\$ Insert Fee / month]** — Monthly subscription. Cancel with 30 days notice.

TERMS & CONDITIONS

- This offer is valid for 30 days from the date shown above.
- All work and communications are treated with strict confidentiality.
- Work commences upon receipt of signed agreement and agreed deposit.
- Scope changes beyond this offer will be quoted separately in writing.
- Either party may terminate the Support phase with 30 days written notice.
- Borrón Strategic Intelligence retains the right to reference the engagement type (not client name) for portfolio purposes unless confidentiality is requested.

AGREEMENT & AUTHORISATION

By signing below, both parties agree to the scope, deliverables, and terms described in this offer document. Work will commence upon receipt of the signed agreement and any applicable deposit as agreed.

Client Signature: *[Signature]*

Date: *[Date]*

Printed Name: *[Printed Name]*

Title: *[Title / Role]*

BSI Authorised: *[Borrón Strategic]*

Date: *[Date]*