AN AI AGENT TEAM FOR EACH AREA

# Choose the area. Delegate the next step.

Marketing, Sales, People and Executive assistance. Agents prepared with your business context, connected to your tools and producing work you can review.

01 Areas

02 Deliverables

03 Content

04 Investment

## Marketing

**Content ready for the next step.**

Editorial calendars, posts, carousels, videos, clips, captions and ad variations.

## Sales

**A next step for every conversation.**

Prospect research, CRM organization, meeting briefs, proposals and follow-ups for approval.

## People

**Context for people joining and growing.**

Onboarding guides, a knowledge base, training materials and documents for the team.

## Executive assistance

**Your day organized around decisions.**

Daily briefs, calendars, inboxes, meeting notes, priorities and commitment follow-up.

The proposal defines agents, deliverables, volume, tools and approval points. We begin with the process that most needs to improve.

WHAT WE CAN BUILD

# One workflow. Many useful next steps.

Concrete examples from the catalog. Your proposal selects the set that makes sense for your operation.

01

### Executive and administrative assistant

A daily summary with suggested priorities, meetings, open items and decisions awaiting you.

02

### Inbox, calendar and meetings

A suggested reply queue, conversation summaries and relevant attachment pointers.

03

### Knowledge, memory and methods

A navigable index with summaries, categories, sources and materials that still need review.

04

### Sales, CRM and follow-up

A reviewable list with evidence, fit rationale, gaps and possible duplicates.

05

### Marketing, content and ads

A calendar with each piece's topic, objective, format, source, owner and next step.

06

### Video and audio creation and editing

A script, visual sequence, list of missing footage and first cut in the agreed format.

07

### Documents, PDFs, presentations and spreadsheets

A Google Docs or DOCX document, as scoped, with content gaps flagged.

08

### Operations, projects and reporting

A plan with stages, proposed owners, completion criteria and decision points.

09

### People, teams and development

An onboarding plan with a proposed schedule, reading materials, owners and a follow-up checklist.

10

### Customer service and customer experience

An FAQ collection with sources, versions and guidance on when to route a question to the team.

11

### Connected apps and workflows

A map of proposed connections, required permissions, limits and an activation checklist.

YOUR NEXT STEP

## Choose the first process.

See implementation and ongoing work on page 4.

FROM BRIEF TO DELIVERABLE

# Content with a clear destination.

| | |
|---|---|
| **Editing lessons, interviews and long videos** | An edited cut for review, with chapters or titles when included in scope. |
| **Clips for Reels, Shorts and social media** | A selection of moments, clip files and suggested titles and post captions. |
| **Captions, transcripts and language versions** | A reviewed transcript, an SRT or VTT file and a captioned video when requested. |
| **Voice cleanup and audio editing** | Cleaned audio for review and a distribution version in the agreed format. |

Ads: a brief, messaging, creative variations and campaign preparation. Launching ads and media spend require agreed scope and approval.

THE SAME APPROACH, IN YOUR CONTEXT

### Founders and lean teams

Calendar and open work → daily brief → priorities reviewed by you.

### Experts, consultants and coaches

An interview about your method → playbook → guidance material.

### Agencies and marketing teams

Brand brief → editorial calendar → scripts and assets for approval.

### Educators and training businesses

Learning objective → learning path → lesson script and presentation.

### Real estate teams and property operations

Authorized property information → organized listing sheet → sales material for review.

### Appointment-based service businesses

Service question → policy-based reply → team routing when needed.

Format, duration, languages, revision rounds and usage rights are agreed before production.

IMPLEMENT. USE. IMPROVE.

# A defined starting point. An operation that improves.

IMPLEMENTATION

**US$ 5,000**

One-time setup

ONGOING OPERATION

**By proposal**

Monthly terms agreed in your proposal

## 01 During implementation

Process mapping, initial knowledge, AI identity, agreed access and the first configured and tested workflows. Your team participates in validation.

## 02 During ongoing operation

Operation and improvement of the contracted workflows, context updates, follow-up and prioritized adjustments. Capacity, support and revisions are set out in your proposal.

## 03 Clear costs and boundaries

Paid media, licenses, model usage, storage and external services are not assumed to be included. Each cost and owner is defined. New projects require additional scope.

## Which process should we simplify first?

Bring a real example from your week.

Book a conversation

calendly.com/juancarlo8800/call-estrategica