WhereAI Implementation Brief

Prepared for Northstar Services · 2026-09-09 · Prepared from your WhereAI assessment

Start with recurring reports

Recommended move: Automate | Mechanism: AI-assisted workflow | Payback 2.7–5.8 months from project start

HOURS TODAY **624 hrs/yr**	ADDRESSABLE CAPACITY **424–549 hrs/yr** 78% of this workflow
ANNUAL CAPACITY VALUE **$31,087–$40,251**	IMPLEMENTATION RANGE **$3,500–$7,500** Planning range, not a quote

WHY THIS RANKS FIRST

It is the largest block of addressable time you reported: 624 hours a year. The assessment models approximately 78% of it as potentially addressable — a planning estimate to validate during discovery, not a measured automation result. The systems most likely needed are present, suggesting relatively strong readiness. Access, data quality and feasibility still need confirming. Build effort is low, which keeps the first result close enough to hold attention.

READ THIS BEFORE ACTING ON THE NUMBERS

Capacity value is the cost of the time returned, not automatic cash savings. It becomes money only if the hours are redeployed to revenue work or headcount plans change.

IN THIS BRIEF

01 Opportunity portfolio

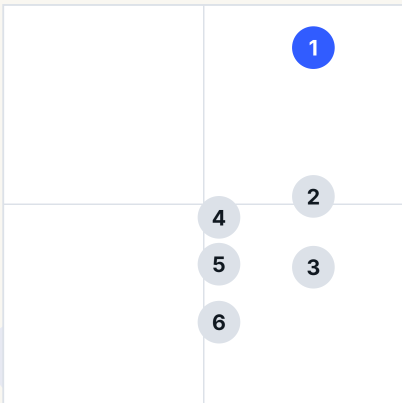
The workflows you mapped, ranked on capacity value, readiness and build effort.

#	WORKFLOW	HOURS/YR	ADDRESSABLE	CAPACITY VALUE	READY	EFFORT	MOVE	SEQUENCE
01	**Recurring reports**	**624**	**424–549**	**$31,087–$40,251**	**High**	**Low**	**Automate**	**Start now**
02	Lead follow-up	572	292–406	$15,267–$21,227	High	Low	Automate	Next
03	Meeting notes and follow-up	260	114–166	$8,358–$12,171	High	Low	Automate	Next
04	Proposal or quote preparation	468	159–253	$11,657–$18,549	High	Moderate	Automate	Next
05	Invoice processing	416	233–337	$8,681–$12,556	High	Moderate	Automate	Next
06	Customer inquiries	364	66–138	$2,459–$5,142	Moderate	Moderate	Not worth it	Later / conditional

Start now is the single build to fund. Next is scoped only after the first is measured. Later / conditional means the sequence depends on process or access work, not on value.

VALUE AGAINST EASE OF IMPLEMENTATION

Higher value



Harder — Easier to implement →

1. Recurring reports
2. Lead follow-up
3. Meeting notes and follow-up
4. Proposal or quote preparation
5. Invoice processing
6. Customer inquiries

SEQUENCING LOGIC

01 Recurring reports
First because it combines the strongest capacity value with high implementation readiness and low build effort.

02 Lead follow-up
Sequenced after recurring reports because its capacity value is smaller and the build effort is low.

03 Meeting notes and follow-up
Sequenced after recurring reports because its capacity value is smaller and the build effort is low.

02 Blueprint — Recurring reports

Proposed roles for systems you reported: QuickBooks, Monday. Access unconfirmed.

78% system | 22% person

Planning allocation: approximately 78% system-assisted, 22% human-led — modeled from your assessment, not a validated result. Validate during discovery.

FUTURE-STATE FLOW

Trigger — SYSTEM
Scheduled run, plus a manual run on request.

Inputs — proposed, validate — SYSTEM
Confirmed from the assessment as tools you use: QuickBooks, Monday. Their role in this workflow is proposed — validate access and data before build.

Automated preparation 1 — SYSTEM
Assemble each weekly pack automatically from Monday hours, QuickBooks invoiced value and HubSpot pipeline, in one agreed layout.

Automated preparation 2 — SYSTEM
Draft the commentary from the actual variances — over/under hours, slipped milestones, unbilled work — for the delivery lead to edit.

Automated preparation 3 — SYSTEM
Hold every pack for the delivery lead's approval before it reaches the client, and flag any client whose data is incomplete instead of publishing a gap.

Human review where required — PERSON
The workflow owner approves the first runs before anything is sent, posted or written back, then reviews a sample and all flagged items.

Output — SYSTEM
The finished report or answer, with the figures and their source shown.

Destination — proposed, validate — SYSTEM
Proposed write-back to QuickBooks, referenced against Monday once approved. Selecting a tool does not make it the system of record — confirm during discovery.

Exception path — PERSON
Anything the rules cannot resolve is queued with the reason attached, assigned to a person, and the rule updated.

Measurement — SYSTEM
Every run logs volume, handling time, exception reason and review time for the monthly review.

Human control: nothing is sent, posted or written back until the workflow owner approves it — sign-off moves to sampling only once error rates are measured. Anything the rules cannot resolve is queued with its reason, assigned, and handled within the agreed service level.

03 Economics and decision scenarios

Three internally coherent cases — conservative, planning and favorable — each computed from the inputs shown in the basis column.

LINE	CONSERVATIVE	PLANNING	FAVORABLE	BASIS
One-time implementation	$7,500	$5,500	$3,500	Build effort low, adjusted for high readiness.
Annual running cost	$1,900	$1,200	$500	Maintenance, model and monitoring load: 15–25% of build cost a year.
Addressable capacity value	$31,087	$35,669	$40,251	Approximately 78% of 624 hours modeled as addressable, at the cost you entered.
Realized value, year one	$17,098	$19,618	$22,138	60% realization after a 1-month ramp.
Payback (months from project start)	5.8	4.3	2.7	Includes the 1-month ramp. Capacity-equivalent, not cash recovered.

Payback is stated in months from project start and includes the ramp period before value begins.

REVENUE SCENARIO — KEPT SEPARATE FROM CAPACITY VALUE, NEVER ADDED TO IT

MODELED ADDITIONAL REVENUE

$100,800/yr

From a 0.5pt conversion improvement on the lead volume and deal value you entered.

ADDITIONAL CUSTOMERS

4/yr

Against 86 won today at your stated conversion rate.

HOW TO READ THESE FIGURES

Capacity returned
Hours no longer spent, valued at the cost you entered. Real, but not cash by itself.

Cash savings
Only occurs if spend or headcount plans actually change. This brief does not assume they do.

Revenue growth
Modeled solely from your own lead volume, conversion rate and deal value. Kept separate and never added to capacity value.

WHAT MOVES THESE NUMBERS

Toward the favorable case
Access turns out to be available, one output format is accepted, and the exception rules stay simple.

Toward the conservative case
Data needs cleaning first, several output variants are required, or approval sits with more than one person.

What is not included
Internal time, licence fees for systems you do not yet own, and any process redesign decided during the build.

04 Implementation plan

Three stages, each with a decision gate before the next.

FIRST 30 DAYS

Baseline recurring reports and build the narrowest useful version.

KEY ACTIONS
— Instrument Recurring reports: capture volume, handling time and exception rate for two weeks.
— Confirm access and data ownership across HubSpot, Google Workspace, QuickBooks.
— Agree the definition of done and the human approval point with the workflow owner.
— Build the narrowest useful version — one trigger, one output.

OWNER
Workflow owner, with the build partner

DELIVERABLE
Measured baseline, agreed definition of done, one working trigger-to-output path.

MEASUREMENT
Volume, handling time and exception rate over two weeks.

DECISION GATE
Proceed only if the baseline is measured and system access is confirmed.

DAYS 31–60

Run in parallel, prove output quality, then cut over.

KEY ACTIONS
— Run Recurring reports in parallel with the manual process and compare outputs.
— Tighten rules against the exceptions found, then remove the parallel run.
— Publish the measured hours returned against the baseline.
— Scope Lead follow-up using the same instrumentation.

OWNER
Workflow owner

DELIVERABLE
Parallel-run comparison, tightened rules, published hours returned.

MEASUREMENT
Output agreement with the manual process, exception rate, review time per item.

DECISION GATE
Cut over only when output quality holds and the exception rate is understood.

DAYS 61–90

Review measured results from the first workflow and decide whether to scope, defer or reject lead follow-up.

KEY ACTIONS
— Review measured results from the first workflow and decide whether to scope, defer or reject lead follow-up.
— Decide explicitly where the recovered capacity is redeployed.
— Set a monthly review of volume, exceptions and value realized.
— Re-run the opportunity map with real measured numbers.

OWNER
Sponsor and workflow owner

DELIVERABLE
Redeployment decision, monthly review cadence, and a written scope/defer/reject decision.

MEASUREMENT
Hours actually returned against baseline, adoption, capacity redeployed.

DECISION GATE
Another build starts only once output quality meets the agreed threshold, adoption is demonstrated, exception rates are understood, capacity returned is measured, technical access is validated, and a new scope and budget are approved.

DEFINITION OF DONE — FIRST WORKFLOW

— An agreed portion of eligible work follows the new path, measured against the baseline after the pilot, with the scope and success threshold agreed after baseline measurement and technical validation.

— Exceptions are logged, assigned and handled within the service level agreed with the workflow owner.

— Outputs match the manual process on a two-week parallel run.

— Hours returned are measured against the baseline, not estimated.

— One named owner, and a written destination for the capacity freed.

05 Requirements, measurement and risk

What has to be true for the first build to work.

SYSTEMS AND ACCESS

SYSTEM	WHY IT IS NEEDED	REQUIRED ACCESS	OPEN QUESTION
QuickBooks	Proposed source of the records this workflow reads — validate.	Read-only to start. Any write is a separate decision, scoped per action.	Who owns the account, is API access available, and is the data complete?
Monday	Possible source or destination — validate.	Read-only access to the records this workflow needs.	Who owns the account, is API access available, and is the data complete?
Logging destination	Holds run history so value can be measured rather than claimed.	Write access to a table, sheet or log store.	Where should run history live?

MEASUREMENT PLAN

METRIC	HOW IT IS CAPTURED
Volume	Items entering the workflow per week, logged automatically per run.
Handling time	Minutes per item, sampled manually at baseline and monthly after.
Exception rate	Share of runs a person had to resolve, with the reason recorded.
Human review time	Minutes spent approving or correcting output per week.
Adoption	Share of eligible items going through the new path rather than around it.
Capacity redeployment	Where the freed hours went, named by the owner each month.

RISKS AND CONTROLS

RISK	WHY IT MATTERS	MITIGATION	OWNER
Capacity leaks away	Freed hours refill with low-value work and the value never shows.	Name the destination for the hours before go-live and review it monthly.	Sponsor
Adoption, not technology	People route around a workflow they did not help design.	One owner, involved from day one; publish the measured result internally.	Sponsor

APPENDIX — METHOD AND ASSUMPTIONS

— Fully loaded cost multiplier: 1.25× base compensation.
— Working year: 2,080 hours.
— Realization: 60% of addressable capacity, not 100%.
— Ramp before value starts: 1 month (low complexity), 3 months (moderate), 5 months (high).
— Illustrative implementation ranges are derived from complexity and readiness. They are planning ranges, not quotes.
— Method: your inputs (hours, people, cost, repetition, judgment, systems) drive every figure arithmetically. No benchmarks, no industry averages, no AI-generated numbers.
— Payback is capacity-equivalent: it measures the value of time returned, not cash recovered.
— Capacity value is the value of time returned. It is not cash saved unless headcount or contractor spend changes.
— Revenue scenarios are illustrative and kept separate from capacity value.

06 From brief to implementation

What this document is, what is still unproven, and how a responsible next step works.

THE PATH FROM HERE

Your WhereAI brief	Validate assumptions	Define the smallest useful pilot	Confirm scope and pricing	Separate written agreement before implementation

WHAT YOUR $49 COVERED

A planning recommendation based on your assessment · A proposed future-state workflow · Transparent capacity and revenue scenarios · Directional implementation and running-cost ranges · Systems, data, measurement and risk considerations · A staged validation and implementation roadmap

WHAT IT DID NOT INCLUDE

Technical discovery · Access to or inspection of your systems · A final architecture · Vendor or API confirmation · Security or compliance review · Configuration, development or implementation · An NAC proposal or statement of work · Guaranteed savings, revenue, timeline or feasibility

STILL TO BE VALIDATED BEFORE ANY BUILD

The exact current workflow, step by step · Source and destination systems · API and access availability · Data quality and ownership · Human approval points · Exception handling · Security and compliance requirements · Baseline measurements · Adoption and workflow ownership · Final implementation and operating cost

CHOOSE YOUR NEXT STEP

Use the brief internally
Take the recommendation, sequence and economics to your own team.

Validate with your team
Test the assumptions, access and baseline before spending anything.

Request an optional NAC review
Ask New Age Consulting AI to assess fit and the most responsible next step.

Want help taking the next step?

Requesting a review does not commit you or NAC to an engagement. NAC will first assess fit, feasibility and the most responsible next step.

The $49 purchase covers this brief only. NAC implementation is a separate, optional engagement. Any work would require a fit review, confirmed scope, separate pricing, and a written agreement. The implementation ranges in this brief are planning estimates — not an NAC quote.

Submitting the form sends your assessment inputs and contact details to New Age Consulting AI LLC so it can review the brief with you.

WhereAI is a planning product from New Age Consulting AI LLC. Card statements appear as NEW AGE CONSULTING.
whereai.app/privacy · whereai.app/terms

support@whereai.app

nacstrategy.com

Planning ranges, not quotes. Produced deterministically from your inputs.