INGENUITY SYSTEMS

AUTOMATION & INTELLIGENCE SERVICES CATALOG

Modular AI Agents, Systems Architecture, and Scalable Automation Infrastructure

Executive Philosophy

Ingenuity Systems designs, deploys, and operates automation systems that integrate directly into real businesses. We do not sell generic software subscriptions or disconnected AI features. We build modular, scalable automation infrastructure composed of autonomous agents, supported by enterprise-grade services and governed through a centralized platform.

> **Core Principle**
>
> *"Agents do the work. Services design the system."*

OUR APPROACH TO VALUE

Our approach enables clients to engage with Ingenuity Systems as a long-term systems partner. Every component in this catalog is designed to drive one of two outcomes: **Revenue Increase** (by capturing more leads or increasing LTV) or **Efficiency Gains** (by reducing labor hours or operational drag).

THE AUTOMATION STACK LAYERS

- **1. Business Operations:** The reality of your day-to-day client operations.
- **2. Services Layer:** The digital foundation (Web, Data, Architecture).
- **3. Base Agents (Foundation):** Standardized automation for repeatable tasks.
- **4. Premier Agents (Authority):** Advanced intelligence for optimization.
- **5. Enterprise Intelligence:** Governance, scale, and platform control.

Table of Contents

Table of Contents (Cont.)

Strategic Web Development   FOUNDATION

VALUE PROPOSITION & UTILITY

A conversion-first, system-aware website designed to support automation, agents, SEO, and long-term growth — not just "look good." Every site is built to convert traffic into action, support future automation, and integrate cleanly with agents and dashboards.

Foundation Website

Best for early-stage businesses establishing credibility. Includes single-page or light multipage structure, conversion-oriented layout, mobile optimization, and contact + CTA architecture.

Pricing: Setup $1,500 – $2,500

Growth Website

Best for scaling businesses needing clarity, SEO structure, and stronger funnels. Includes multi-page architecture, service-specific sections, stronger copy structure, and SEO-ready foundation.

Pricing: Setup $3,500 – $6,000

Authority Website

Best for high-ticket, professional, or enterprise-facing businesses. Includes advanced layout components, conversion psychology integration, trust & authority positioning, and deeper funnel architecture.

Pricing: Setup $7,500 – $15,000

SEO & Visibility

DISCOVERY

VALUE PROPOSITION & UTILITY

Professional setup and optimization of local discovery channels and search engine visibility. We ensure your business is found by the right customers at the right time.

Local Search Presence Setup

Optimization of local discovery channels including Google Business Profile optimization, category & service alignment, and discovery readiness checklist.

Pricing: One-Time $750 – $1,500

SEO Foundation

Baseline visibility and index readiness. Includes structure cleanup, metadata alignment, and technical hygiene.

Pricing: $1,500 – $3,000

SEO Growth

Competitive visibility and expansion. Includes content expansion, targeting refinement, and deeper technical optimization.

Pricing: $4,000 – $8,000

Brand Identity & Visual Foundation   TRUST

VALUE PROPOSITION & UTILITY

A professional identity system used across website, platforms, and automation touchpoints. Ensures consistency, trust, and authority in every interaction.

Brand Identity Package

Includes logo refinement or creation, brand direction, core usage guidelines, typography selection, and color palette definition.

Pricing: $2,000 – $5,000

Visual Consistency

Ensures your automated emails, invoices, and portals match your public-facing brand, increasing customer confidence.

Authority Positioning

Design elements that communicate scale, reliability, and professionalism to high-ticket clients.

Platform Architecture & Systems Design

INFRASTRUCTURE

VALUE PROPOSITION & UTILITY

A deep-dive systems design engagement that defines how agents, data, and humans interact. We map every data flow, decision point, and failure mode to create a blueprint for your future state.

Business Automation Architecture Design

Comprehensive mapping of your entire business ecosystem. We identify where data lives, how it moves, and where the bottlenecks are. Includes workflow mapping, system diagrams, agent deployment strategy, and failure-mode analysis.

Pricing: $5,000 – $15,000

Workflow Mapping

Visual diagrams of every process to document the "as-is" and design the "to-be" state.

Deployment Strategy

A phased roadmap for rolling out agents, prioritizing high-impact areas first.

Systems Integration & Tool Bridging

<div style="text-align: right;">CONNECTIVITY</div>

VALUE PROPOSITION & UTILITY

We eliminate data silos by connecting your disparate software tools. This ensures that information flows freely across your organization without manual re-entry.

API Integration & Data Sync

Connecting tools via REST/GraphQL APIs for real-time data transfer.

Custom Webhook Bridges

Event-driven connections that trigger actions instantly.

Legacy System Support

Modernizing data access for older, on-premise software.

White-Label & Platform Enablement

SCALE

VALUE PROPOSITION & UTILITY

For agencies and franchises, we provide the infrastructure to resell our automation under your own brand. This allows you to offer high-value tech services without the development overhead.

White-Label Platform Setup

Rebranding our agent interface with your logo and domain.

Franchise Deployment

Standardizing agent stacks across multiple locations.

Managed Operations

We handle the backend while you manage the client relationship.

Optimization, Governance & Support

<div style="text-align: right">

RELIABILITY

</div>

VALUE PROPOSITION & UTILITY

Automation is not "set and forget." We provide ongoing monitoring and tuning to ensure your agents perform optimally as your business evolves.

Monthly Optimization Program

Regular reviews to refine logic and improve efficiency.

Reliability Monitoring

24/7 uptime checks and error handling.

Performance Tuning

Adjusting thresholds and prompts for better results.

1. Lead Intake & Qualification Agent

BASE

Domain: Revenue / Growth | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

This agent acts as your 24/7 digital front desk. It instantly captures leads from any source—web forms, emails, or messages—and uses intelligent logic to filter and qualify them. This ensures your sales team only spends time on high-quality opportunities, while the agent handles the initial vetting automatically.

Efficiency Value & ROI

Capacity Lift: Functions as a digital force multiplier for your Sales team, equivalent to adding a $45k/yr Junior SDR role capacity lift.

This agent acts as a force multiplier for your sales team, handling the initial 10-15 minutes of vetting for every single lead. It ensures your high-value sales staff only speak to qualified prospects, increasing their closing efficiency by ~30%.

Inputs

- Web Forms
- Inbound Email
- SMS / Twilio
- Google Chat

Outputs

- Structured Lead Record
- Qualification Score
- Priority Notification
- CRM Sync

When You Need This

- Leads are slipping through cracks or sitting in inboxes.
- Response times are slow or inconsistent.
- Sales team is wasting time on unqualified prospects.

Plays Well With (Connections)

Feeds: Scheduling & Booking Agent (3)
Triggers: Lead Follow-Up Agent (2)

Upgrade Pathway

Next Level: Executive Command Agent (Premier)

Commercial Model

One-Time Setup: $750 – $1,500   **Monthly Retainer:** $150 – $300

2. Lead Follow-Up & Nurture Agent   `BASE`

Domain: Revenue / Sales | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

This agent automates the persistence required to close deals. It executes a multi-channel cadence (Email, SMS) to nudge prospects who have gone silent. It is context-aware: if a prospect replies, the agent stops immediately and alerts a human. This ensures no lead is ever lost due to lack of follow-up.

Efficiency Value & ROI

Capacity Lift: Enhances Sales Admin capacity equivalent to a $40k/yr role.

Recovers 10-15% of "lost" leads by simply persisting longer than a human typically would. Frees your sales team from the drudgery of manual "checking in" emails.

Inputs

- CRM Lead Status
- Time Delays
- Inbound Replies

Outputs

- Personalized Emails
- Engagement Alerts
- Reactivation Logs

When You Need This

- You have a list of "dead" leads that haven't been touched.
- Sales reps forget to follow up after 1-2 attempts.
- You want to automate the "just checking in" process.

Plays Well With (Connections)

Triggered by: Lead Intake Agent (1)
Triggers: Scheduling & Booking Agent (3), CRM Sync Agent

Upgrade Pathway

Next Level: Executive Command Agent (Premier)

Commercial Model

One-Time Setup: $750 – $2,000   **Monthly Retainer:** $200 – $400

3. Scheduling & Booking Agent   `BASE`

Domain: Operations / Admin | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Scheduling & Booking Agent removes friction between interest and action. It allows prospects and customers to book appointments instantly, reschedule without staff involvement, and receive confirmations and reminders. This agent eliminates manual scheduling back-and-forth and prevents calendar chaos.

Efficiency Value & ROI

Capacity Lift: Provides the utility of a Scheduling Coordinator ($38k/yr).

Reduces administrative overhead by ~80% for appointment-based businesses. Drastically lowers no-show rates through automated reminders and easy rescheduling options.

Inputs

- Staff Calendars
- Booking Requests
- Business Rules

Outputs

- Confirmed Events
- ICS Invites
- Reminders

When You Need This

- Missed booking opportunities due to email tag.
- Manual scheduling errors or double-bookings.
- Staff time wasted coordinating calendars.

Plays Well With (Connections)

Integrates with: Lead Intake Agent (1), Follow-Up Agent (2), Dispatch Agent (4)

Upgrade Pathway

Next Level: AI Receptionist (Voice) Agent (Premier)

Commercial Model

One-Time Setup: $1,000 – $3,000   **Monthly Retainer:** $300 – $600

4. Dispatch & Assignment Agent

Domain: Field Ops / Logistics | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Dispatch & Job Assignment Agent ensures that every scheduled job is assigned to the right person at the right time, without manual coordination. It automatically routes work based on availability, role or skill, location or service area, and priority/urgency.

Efficiency Value & ROI

Capacity Lift: Augments Dispatcher capabilities ($50k/yr value).

Optimizes route efficiency by ~15%, reducing fuel costs and travel time. Increases billable hours per technician by minimizing administrative downtime between jobs.

Inputs

- Job Requirements
- Staff Skills
- Real-time GPS

Outputs

- Assignment Alerts
- Route Optimization
- Schedule Updates

When You Need This

- Dispatching is a manual bottleneck every morning.
- Technicians are driving inefficient routes.
- Confusion over job ownership or missed assignments.

Plays Well With (Connections)

Integrates with: Scheduling Agent (3), Capacity Monitoring Agent (11), Support Agent (8)

Upgrade Pathway

Next Level: Operational Efficiency Agent (Premier)

Commercial Model

One-Time Setup: $1,500 – $3,500   **Monthly Retainer:** $300 – $700

5. Job Status Tracking Agent

<div style="float:right">`BASE`</div>

Domain: Field Ops / Transparency | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Job Status Tracking & Completion Agent ensures that every job moves cleanly from "assigned" to "completed" with full visibility. It tracks progress in real time, captures completion details, and prevents jobs from silently stalling or being marked "done" without proof.

Efficiency Value & ROI

Capacity Lift: Automates Field Auditing ($15k/yr value).

Eliminates revenue loss from unbilled hours or disputed work. Provides "Uber-style" transparency to clients, increasing trust and reducing "Where is the tech?" phone calls.

Inputs

- Mobile Field Inputs
- GPS Geofences
- Timestamps

Outputs

- Verified Logs
- Customer Updates
- Completion Photos

When You Need This

- Jobs stuck in limbo or inconsistent status updates.
- No proof of work completion leading to billing disputes.
- Poor handoff between field and office.

Plays Well With (Connections)

Feeds: Billing Agent (6), Review Agent (9)
Triggered by: Dispatch Agent (4)

Upgrade Pathway

Next Level: Operational Efficiency Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,200   **Monthly Retainer:** $200 – $450

6. Billing & Invoice Prep Agent

`BASE`

Domain: Finance / AR | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Billing & Invoice Preparation Agent ensures that completed work turns into billable revenue automatically and accurately. It prepares invoices the moment a job is verified as complete, gathers required billing details, and prevents revenue leakage caused by missing, delayed, or incorrect invoicing.

Efficiency Value & ROI

Capacity Lift: Functions as an automated Bookkeeper ($45k/yr value).

Reduces billing latency from days to seconds. Improves cash flow velocity by ~30%. Eliminates mathematical errors that lead to under-billing and revenue leakage.

Inputs
- Job Completion Data
- Rate Cards
- Material Logs

Outputs
- Draft Invoices (QBO)
- PDF Generation
- Approval Requests

When You Need This
- Invoices go out days or weeks after work is done.
- Manual data entry errors are causing billing disputes.
- You want to improve cash flow velocity.

Plays Well With (Connections)
Triggered by: Job Status Agent (5)
Feeds: Payment Collection Agent (7), Accounting Integration

Upgrade Pathway
Next Level: Revenue Optimization Agent (Premier)

Commercial Model
One-Time Setup: $1,500 – $4,000   **Monthly Retainer:** $300 – $700

7. Payment Collection Agent   `BASE`

Domain: Finance / AR | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

Handles the "last mile" of revenue collection. Monitors unpaid invoices and sends polite, persistent reminders (SMS/Email) as due dates approach and pass. Facilitates payment via secure links and handles reconciliation.

Efficiency Value & ROI

Capacity Lift: Augments AR Clerk duties ($48k/yr value).

Reduces overdue invoices by ~40% through consistent, automated follow-up. Removes social friction from collections, preserving client relationships while ensuring payment.

Inputs

- Invoice Registry
- Due Dates
- Payment Gateways

Outputs

- Dunning Messages
- Payment Receipts
- Reconciled Ledger

When You Need This

- High volume of overdue invoices.
- Staff uncomfortable with collections calls.
- Need to automate dunning process.

Plays Well With (Connections)

Integrates with: Billing Agent (6), Customer Lifecycle Agent (23), Revenue Forecast Agent (24)

Upgrade Pathway

Next Level: Revenue Optimization Agent (Premier)

Commercial Model

One-Time Setup: $1,500 – $4,000   **Monthly Retainer:** $300 – $800

8. Support & Ticket Triage Agent

Domain: Customer Service | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Customer Support & Ticket Triage Agent ensures that every customer issue is received, categorized, and routed correctly, without relying on inboxes or manual sorting. It acts as the front door for support, preventing issues from being missed, delayed, or sent to the wrong person.

Efficiency Value & ROI

Capacity Lift: Equivalent to a Support Coordinator ($42k/yr).

Reduces First Response Time (FRT) by ~90%. Ensures high-priority VIP issues are never missed. Deflects ~30% of simple tickets via auto-answers, freeing up staff.

Inputs

- Emails / Chats
- Keyword Analysis
- Customer Tier Data

Outputs

- Categorized Tickets
- Priority Flags
- Routing Actions

When You Need This

- Support requests lost in email inboxes.
- Slow or inconsistent response times.
- Urgent issues getting lost in the noise.

Plays Well With (Connections)

Integrates with: Knowledge Base Agent (10), Follow-Up Agent (2)

Upgrade Pathway

Next Level: Customer Growth (LTV) Agent (Premier)

Commercial Model

One-Time Setup: $1,500 – $4,000   **Monthly Retainer:** $300 – $800

9. Review & Reputation Agent

`BASE`

Domain: Brand / Marketing | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Review & Reputation Management Agent ensures that customer feedback is captured, encouraged, monitored, and responded to consistently across public platforms. It helps businesses build trust at scale by increasing positive reviews, identifying issues early, and preventing reputational damage caused by silence or delayed responses.

Efficiency Value & ROI

Capacity Lift: Provides the function of Reputation Management Services ($500/mo).

Increases positive review volume by ~3x. Protects brand equity by catching negative sentiment early. Directly impacts SEO ranking and local search visibility.

Inputs

- Job Completion Event
- Client Info
- Review Feeds

Outputs

- Review Requests
- Internal Alerts
- Response Prompts

When You Need This

- Inconsistent or missing review requests.
- Negative reviews going unanswered.
- No visibility into sentiment trends.

Plays Well With (Connections)

Triggered by: Job Status Agent (5)
Integrates with: Customer Support Agent (8), Brand Signal Agent (44)

Upgrade Pathway

Next Level: Brand Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $1,000 – $2,500   **Monthly Retainer:** $200 – $500

10. Knowledge Base Agent

`BASE`

Domain: Internal Ops / Training | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Knowledge Base & FAQ Agent creates and maintains a single source of truth for answers about your business. It ensures customers, prospects, and internal staff get accurate, consistent answers without repeating work or relying on tribal knowledge.

Efficiency Value & ROI

Capacity Lift: Recovers ~200 hours/yr of Manager Interruption Time.

Reduces onboarding ramp time for new hires by ~40%. Saves senior staff hours per week answering repetitive questions. Ensures process consistency across the org.

Inputs

- SOP Docs / PDFs
- Slack History
- Historical Tickets

Outputs

- Instant Answers
- Source Citations
- Gap Analysis

When You Need This

- New hires ask the same questions repeatedly.
- Information is scattered across Google Docs and emails.
- Customers get inconsistent answers from support.

Plays Well With (Connections)

Integrates with: Customer Support Agent (8), Lead Intake Agent (1)

Upgrade Pathway

Next Level: Workforce Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $600 – $2,000   **Monthly Retainer:** $150 – $350

11. Capacity Monitoring Agent   `BASE`

Domain: Ops / HR | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Capacity & Workload Monitoring Agent gives businesses real-time visibility into how stretched their team and systems are. It continuously tracks workload, utilization, and bottlenecks so leaders can act before service quality drops.

Efficiency Value & ROI

Capacity Lift: Provides the insights of an Operations Analyst ($65k/yr).

Prevents costly employee burnout and turnover. Identifies under-utilized staff to maximize billable hours. Provides data-driven justification for hiring decisions.

Inputs

- Task Lists
- Calendar Availability
- Effort Estimates

Outputs

- Utilization Heatmaps
- Overload Alerts
- Hiring Triggers

When You Need This

- Teams operating at unknown or unsafe capacity.
- Sudden overloads causing missed deadlines.
- Poor forecasting of staffing needs.

Plays Well With (Connections)

Integrates with: Dispatch Agent (4), Scheduling Agent (3), Hiring Pipeline Agent (26)

Upgrade Pathway

Next Level: Operational Efficiency Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,200   **Monthly Retainer:** $200 – $450

12. SLA Monitoring Agent

BASE

Domain: Service Quality | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The SLA & Response Time Monitoring Agent ensures your business meets its promised response times—internally and externally. It continuously tracks how quickly inquiries, tickets, jobs, and requests are handled, alerting leadership before service level agreements are violated.

Efficiency Value & ROI

Capacity Lift: Automates Quality Assurance oversight ($70k/yr value).

Prevents contract penalties and client churn due to missed deadlines. Enforces a high standard of reliability across the organization automatically.

Inputs

- Job Creation Time
- Contract Terms
- Resolution Stamps

Outputs

- Countdown Timers
- Jeopardy Alerts
- Breach Reports

When You Need This

- You have contracts with response time guarantees.
- You are losing customers due to slowness.
- You need to measure team responsiveness objectively.

Plays Well With (Connections)

Integrates with: Customer Support Agent (8), Dispatch Agent (4), Capacity Monitoring Agent (11)

Upgrade Pathway

Next Level: Risk & Governance Agent (Premier)

Commercial Model

One-Time Setup: $600 – $2,000

Monthly Retainer: $180 – $400

13. Compliance Enforcement Agent   `BASE`

Domain: Governance / Risk | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Compliance & Policy Enforcement Agent ensures that your business actually follows its own rules — consistently, automatically, and audit-ready. It monitors actions, data changes, workflows, and communications to ensure they comply with internal policies.

Efficiency Value & ROI

Capacity Lift: Functions as an always-on Compliance Auditor ($80k/yr).

Prevents revenue leakage from unauthorized discounts (avg 5-10% savings). Reduces liability risk by ensuring safety/legal steps are never skipped.

Inputs

- Transaction Streams
- Policy Rules
- User Permissions

Outputs

- Blocking Actions
- Approval Workflows
- Violation Logs

When You Need This

- Policies written but not enforced.
- Human error causing compliance violations.
- Inconsistent rule application across teams.

Plays Well With (Connections)

Integrates with: Internal Approval Agent (29), Billing Agent (6), Security Access Agent (36)

Upgrade Pathway

Next Level: Regulatory Director Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,000

Monthly Retainer: $250 – $600

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14. Data Integrity Guard Agent

`BASE`

Domain: Data Quality | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Data Integrity & Error Detection Agent acts as a guardian for your operational data. It continuously monitors spreadsheets, databases, and automation outputs to detect inconsistencies, missing or malformed data, and logical contradictions.

Efficiency Value & ROI

Capacity Lift: Automates data cleaning tasks equivalent to a $35k/yr Clerk.

Prevents marketing waste from sending to bad emails. Ensures accurate reporting by cleaning data at the source. Saves hours of manual database cleanup.

Inputs

- Database Records
- Validation Schemas
- Input Streams

Outputs

- Cleaned Records
- Error Reports
- Merge Suggestions

When You Need This

- Your CRM is full of duplicate contacts.
- Email campaigns bounce frequently.
- Reports are untrustworthy due to bad data.

Plays Well With (Connections)

Integrates with: Compliance Agent (13), Billing Agent (6), Analytics Agent (15)

Upgrade Pathway

Next Level: Data Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,500

Monthly Retainer: $200 – $500

15. Analytics & Reporting Agent

<div style="float:right">`BASE`</div>

Domain: Business Intelligence | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Reporting & Performance Analytics Agent turns raw operational data into clear, decision-ready insights. Instead of manually building reports, this agent continuously aggregates metrics across systems and presents performance in a way leadership can immediately understand.

Efficiency Value & ROI

Capacity Lift: Provides the output of a BI Analyst ($75k/yr).

Saves executives ~5-10 hours per week on manual data gathering. Provides real-time visibility to make faster, data-backed decisions.

Inputs

- Raw Data APIs
- KPI Definitions
- Target Baselines

Outputs

- Live Dashboards
- PDF Reports
- Trend Alerts

When You Need This

- Data scattered across tools.
- Delayed insight into performance.
- Manual report creation consuming time.

Plays Well With (Connections)

Integrates with: Revenue Forecast Agent (24), Marketing ROI Agent (25), Executive Oversight Agent (48)

Upgrade Pathway

Next Level: Executive Command Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,000   **Monthly Retainer:** $250 – $600

16. Alerting & Escalation Agent   BASE

Domain: Incident Response | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Alerting & Escalation Orchestration Agent ensures that important issues reach the right person at the right time. It centralizes alerts across systems, applies intelligent severity rules, and escalates issues progressively until they are acknowledged or resolved.

Efficiency Value & ROI

Capacity Lift: Provides 24/7 Monitoring capability ($1k/mo).

Drastically reduces downtime costs by ensuring rapid response. Prevents minor issues from becoming major client-facing disasters.

Inputs

- Error Logs
- Trigger Events
- On-Call Schedules

Outputs

- Routed Alerts
- Escalations
- Incident Timelines

When You Need This

- Critical alerts buried in inboxes.
- Slow response times to outages.
- Need for an on-call rotation without hiring more staff.

Plays Well With (Connections)

Integrates with: SLA Monitoring Agent (12), Capacity Monitoring Agent (11), Compliance Agent (13)

Upgrade Pathway

Next Level: Auto. Orchestration Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,500   **Monthly Retainer:** $200 – $500

17. Change Management Agent

`BASE`

Domain: IT / Governance | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Change Management & Version Control Agent ensures that changes to your systems, data, and workflows are intentional, traceable, and reversible. It prevents "mystery breakages" by tracking what changed, when, why, and by whom.

Efficiency Value & ROI

Capacity Lift: Automates IT Audit processes ($10k/yr value).

Reduces troubleshooting time by ~80% by pinpointing the exact cause of "sudden" breakages. Increases system stability and uptime.

Inputs

- Config Files
- Activity Logs
- Deployments

Outputs

- Change Logs
- Rollback Points
- Risk Alerts

When You Need This

- Changes made without documentation.
- Broken workflows after "small edits".
- No rollback capability when things go wrong.

Plays Well With (Connections)

Integrates with: Release Control Agent (41), Security Access Agent (36), Compliance Agent (13)

Upgrade Pathway

Next Level: Systems Architecture Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,200   **Monthly Retainer:** $250 – $600

18. Workflow Optimization Agent   `BASE`

Domain: Process Improvement | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Workflow Optimization & Bottleneck Detection Agent continuously analyzes how work actually moves through your business—and identifies where it slows down, stalls, or breaks. Instead of relying on intuition, this agent provides ongoing, data-driven visibility into inefficiencies.

Efficiency Value & ROI

Capacity Lift: Provides the insights of an Ops Consultant ($150/hr).

Identifies hidden constraints that limit revenue throughput. Can improve overall process velocity by 20-30% by targeting the right bottlenecks.

Inputs

- Process Timestamps
- State Transitions
- Volume Metrics

Outputs

- Bottleneck Reports
- Cycle Time Analysis
- Optimization Suggestions

When You Need This

- Processes feel slow but you don't know why.
- Work piles up at specific stages.
- You want to identify the best places to automate.

Plays Well With (Connections)

Integrates with: Capacity Monitoring Agent (11), SLA Monitoring Agent (12), Dispatch Agent (4)

Upgrade Pathway

Next Level: Operational Efficiency Agent (Premier)

Commercial Model

One-Time Setup: $800 – $2,800

Monthly Retainer: $250 – $550

19. Vendor Coordination Agent

Domain: Partner Ops | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Vendor & External Partner Coordination Agent manages how your business works with outside parties—vendors, subcontractors, suppliers, agencies—so deadlines, deliverables, and communications don't fall through the cracks.

Efficiency Value & ROI

Capacity Lift: Automates Project Management tasks ($60k/yr value).

Eliminates delays caused by "forgotten" vendor deliverables. Saves hours of email back-and-forth per week managing external partners.

Inputs

- Vendor Contracts
- Deliverable Dates
- Tracking APIs

Outputs

- Vendor Scorecards
- Reminder Emails
- Delay Alerts

When You Need This

- Missed vendor deadlines.
- No visibility into external dependencies.
- Manual follow-ups consuming staff time.

Plays Well With (Connections)

Integrates with: Project Timeline Agent (22), Vendor Cost Control Agent (35), Contract Lifecycle Agent (20)

Upgrade Pathway

Next Level: Operational Efficiency Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,500

Monthly Retainer: $200 – $500

20. Contract Lifecycle Agent

Domain: Legal / Admin | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Contract Lifecycle & Renewal Monitoring Agent ensures that no contract, agreement, or renewal date is ever missed. It tracks contracts from creation through expiration, flags upcoming renewals, and alerts stakeholders well in advance.

Efficiency Value & ROI

Capacity Lift: Functions as a Legal Admin Assistant ($50k/yr value).

Protects revenue by ensuring 100% of renewals are pursued. Saves costs by preventing auto-renewal of unused vendor tools.

Inputs

- Contract Metadata
- Key Dates
- Notice Periods

Outputs

- Renewal Alerts
- Expiration Dashboards
- Cancellation Workflows

When You Need This

- Missed contract renewal deadlines.
- Contracts scattered across email/drive.
- Paying for unused software due to auto-renewal.

Plays Well With (Connections)

Integrates with: Billing Agent (6), Vendor Coordination Agent (19), Compliance Agent (13)

Upgrade Pathway

Next Level: Regulatory Director Agent (Premier)

Commercial Model

One-Time Setup: $600 – $2,200

Monthly Retainer: $180 – $450

21. Inventory Tracking Agent

<div style="border:1px solid;display:inline-block;padding:2px">**BASE**</div>

Domain: Asset Management | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Inventory & Asset Tracking Agent gives businesses real-time visibility into what they own, where it is, and how it's being used. It tracks inventory levels, tools, equipment, and other assets to prevent shortages, losses, and operational downtime.

Efficiency Value & ROI

Capacity Lift: Provides the utility of an Inventory Manager ($55k/yr).

Reduces holding costs by ~20%. Prevents lost revenue from stockouts. Automates purchase orders to save admin time.

Inputs

- Sales Data
- Usage Logs
- Reorder Thresholds

Outputs

- Stock Level Dashboard
- Low Stock Alerts
- PO Drafts

When You Need This

- Running out of critical inventory unexpectedly.
- Lost or untracked equipment.
- Overstock tying up cash.

Plays Well With (Connections)

Integrates with: Vendor Coordination Agent (19), Workflow Optimization Agent (18), Billing Agent (6)

Upgrade Pathway

Next Level: Operational Efficiency Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,600   **Monthly Retainer:** $200 – $500

22. Project Timeline Agent   `BASE`

Domain: PMO / Delivery | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Project Timeline & Milestone Tracking Agent ensures that projects move forward on schedule and that leadership always knows what's on track, what's late, and what's at risk. It replaces guesswork with continuous, automated visibility.

Efficiency Value & ROI

Capacity Lift: Augments your Project Manager ($50k/yr value).

Increases on-time delivery rates. Reduces client friction by providing realistic, data-backed timelines. Identifies resource crunches early.

Inputs

- Task Completion
- Dependency Maps
- Baseline Schedules

Outputs

- Real-Time Gantt
- Slippage Alerts
- Risk Flags

When You Need This

- Projects consistently run late.
- Clients ask "what's the status?" frequently.
- Dependencies are missed, causing delays.

Plays Well With (Connections)

Integrates with: Workflow Optimization Agent (18), Alerting & Escalation Agent (16), Capacity Monitoring Agent (11)

Upgrade Pathway

Next Level: Auto. Orchestration Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,800   **Monthly Retainer:** $220 – $550

23. Customer Lifecycle Agent   `BASE`

Domain: Customer Success | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Customer Lifecycle & Retention Monitoring Agent gives you continuous visibility into where every customer is in their journey—from first engagement to renewal or churn risk. It surfaces early warning signals and highlights opportunities.

Efficiency Value & ROI

Capacity Lift: Equivalent to a CS Analyst ($60k/yr).

Reduces churn by identifying at-risk clients 30-60 days before they cancel. Increases expansion revenue by flagging healthy clients ready for upsell.

Inputs

- Usage Metrics
- Support History
- Payment Behavior

Outputs

- Health Scores (0-100)
- Churn Risk Alerts
- Retention Tasks

When You Need This

- Customers silently disengaging.
- No visibility into churn risk.
- Missed renewal or upsell opportunities.

Plays Well With (Connections)

Integrates with: Client Comms Agent (31), Support Agent (8), Review Agent (9)

Upgrade Pathway

Next Level: Customer Growth (LTV) Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,000   **Monthly Retainer:** $250 – $600

24. Revenue Forecast Agent

`BASE`

Domain: Finance / Strategy | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Revenue Forecasting & Pipeline Health Agent gives leadership clear, forward-looking visibility into expected revenue. It continuously evaluates deal pipelines, customer activity, and historical performance to forecast revenue and flag risk.

Efficiency Value & ROI

Capacity Lift: Provides the insights of a Financial Analyst ($80k/yr).

Prevents cash crunches by forecasting deficits weeks in advance. Enables confident investment in growth by visualizing future liquidity.

Inputs

- Pipeline Probability
- Invoiced Receivables
- Fixed Costs

Outputs

- Cashflow Forecasts
- Variance Analysis
- Risk Scenarios

When You Need This

- Inaccurate revenue projections.
- Leaders surprised by missed targets.
- No insight into pipeline quality.

Plays Well With (Connections)

Integrates with: Lead Intake Agent (1), Customer Lifecycle Agent (23), Billing Agent (6)

Upgrade Pathway

Next Level: Financial Strategy Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,500

Monthly Retainer: $300 – $650

25. Marketing ROI Agent   BASE

Domain: Marketing Analytics | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Marketing Campaign Performance & Attribution Agent shows you what marketing is actually working. It tracks campaigns across channels, ties activity to outcomes, and provides attribution clarity so marketing spend can be optimized.

Efficiency Value & ROI

Capacity Lift: Automates Marketing Analytics ($70k/yr value).

Typically saves 20-30% of ad budget by identifying non-performing channels. Increases overall ROAS by reallocating budget to high-yield campaigns.

Inputs

- Ad Platform Data
- CRM Revenue Data
- Attribution Tags

Outputs

- ROI Dashboards
- CAC Analysis
- Channel Performance

When You Need This

- Marketing spend with unclear ROI.
- Attribution disputes between teams.
- Campaigns optimized on clicks instead of revenue.

Plays Well With (Connections)

Integrates with: Marketing Attribution Agent (45), Lead Intake Agent (1), Revenue Forecast Agent (24)

Upgrade Pathway

Next Level: Market Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,000

Monthly Retainer: $250 – $600

26. Hiring Pipeline Agent   `BASE`

Domain: Talent Acquisition | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Hiring Pipeline & Talent Funnel Agent gives businesses clear visibility into every stage of hiring—from applicant intake to offer acceptance. It ensures candidates don't fall through the cracks and hiring timelines stay on track.

Efficiency Value & ROI

Capacity Lift: Equivalent to a Recruiting Coordinator ($50k/yr).

Reduces time-to-hire by ~30%. Saves HR managers 10+ hours per week on resume screening and scheduling logistics.

Inputs

- Resumes / Applications
- Job Criteria
- Interviewer Calendars

Outputs

- Ranked Candidates
- Scheduled Interviews
- Rejection Emails

When You Need This

- Hiring for multiple roles simultaneously.
- Candidates dropping out due to slow responses.
- Scheduling interviews is a logistical nightmare.

Plays Well With (Connections)

Integrates with: Scheduling Agent (3), Capacity Monitoring Agent (11), Compliance Agent (13)

Upgrade Pathway

Next Level: Workforce Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,800

Monthly Retainer: $220 – $550

27. Employee Performance Agent   `BASE`

Domain: People Ops | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Employee Performance & Engagement Monitoring Agent provides objective, ongoing insight into how employees are performing and engaging with their work—without invasive surveillance. It tracks signals like workload completion, responsiveness, and consistency.

Efficiency Value & ROI

Capacity Lift: Automates Performance Data Collection.

Increases team productivity by ~15% through transparency. Reduces turnover of high-performers by recognizing them early. Identifies training needs objectively.

Inputs

- Task Logs
- Sales Data
- Activity Metrics

Outputs

- Performance Scorecards
- Trend Analysis
- Coaching Flags

When You Need This

- No visibility into employee performance trends.
- Burnout going unnoticed.
- Performance reviews based on anecdote.

Plays Well With (Connections)

Integrates with: Training & Onboarding Agent (28), Capacity Monitoring Agent (11), SLA Monitoring Agent (12)

Upgrade Pathway

Next Level: Workforce Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,200   **Monthly Retainer:** $250 – $600

28. Training & Onboarding Agent   `BASE`

Domain: People Ops / Enablement | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Training, Onboarding & Skill Progression Agent ensures that new hires ramp faster, existing employees upskill continuously, and institutional knowledge compounds over time. It creates a structured, trackable learning journey aligned with real work outcomes.

Efficiency Value & ROI

Capacity Lift: Augments HR Onboarding Staff ($55k/yr value).

Reduces new hire ramp time by ~25%. Saves IT and HR 5-10 hours per new hire in setup time. Ensures 100% compliance with training requirements.

Inputs

- New Hire Data
- LMS Content
- Role Requirements

Outputs

- Provisioned Accounts
- Training Assignments
- Progress Reports

When You Need This

- Slow or inconsistent onboarding.
- Knowledge gaps hurting performance.
- Training content not tied to outcomes.

Plays Well With (Connections)

Integrates with: Knowledge Base Agent (10), Employee Performance Agent (27), Hiring Pipeline Agent (26)

Upgrade Pathway

Next Level: Workforce Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,200   **Monthly Retainer:** $220 – $550

29. Internal Approval Agent   `BASE`

Domain: Governance / Ops | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Internal Request & Approval Workflow Agent creates a clear, auditable path for internal decisions—purchases, time off, policy exceptions, access requests, discounts, and more. It replaces informal chats and email threads with structured workflows.

Efficiency Value & ROI

Capacity Lift: Functions as an Executive Assistant ($60k/yr value).

Reduces approval cycle time by ~50%. Eliminates bottlenecks that slow down operations. Creates an audit trail for compliance.

Inputs

- Request Forms
- Org Chart
- Policy Rules

Outputs

- Approval Notifications
- Status Updates
- Audit Logs

When You Need This

- Approval requests lost in email or chat.
- Delays due to missing information.
- Lack of audit trail for decisions.

Plays Well With (Connections)

Integrates with: Compliance Agent (13), Vendor Cost Control Agent (35), Alerting Agent (16)

Upgrade Pathway

Next Level: Decision Support Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,800   **Monthly Retainer:** $200 – $500

30. Document Management Agent   `BASE`

Domain: Information Mgmt | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Document Management & Lifecycle Agent ensures that every important document is organized, accessible, versioned, and governed from creation to archival. It eliminates document sprawl by enforcing structure, ownership, and retention rules.

Efficiency Value & ROI

Capacity Lift: Automates Office Admin Filing ($40k/yr value).

Saves hours per week spent searching for files. Reduces legal risk by enforcing retention policies automatically.

Inputs

- File Metadata
- Naming Conventions
- Retention Policies

Outputs

- Organized Folders
- Archived Files
- Search Index

When You Need This

- Documents scattered across folders and tools.
- Outdated documents still in use.
- Manual filing and cleanup.

Plays Well With (Connections)

Integrates with: Compliance Agent (13), Knowledge Base Agent (10), Change Management Agent (17)

Upgrade Pathway

Next Level: Regulatory Director Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,000   **Monthly Retainer:** $220 – $550

31. Client Communications Agent

Domain: CX / Communications | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Client Communication & Messaging Coordination Agent ensures that clients receive the right message, at the right time, through the right channel—without chaos or inconsistency. It centralizes outbound and inbound communications so messaging is coordinated, consistent, and traceable.

Efficiency Value & ROI

Capacity Lift: Augments Account Coordinators ($45k/yr value).

Eliminates context-switching and searching for client history. Improves client satisfaction by ensuring every team member knows the full story.

Inputs

- Communication Channels
- CRM Records
- Trigger Events

Outputs

- Unified Logs
- Synced History
- Gap Alerts

When You Need This

- Clients receiving conflicting messages.
- Important communications missed or duplicated.
- Manual follow-ups forgotten.

Plays Well With (Connections)

Integrates with: Customer Lifecycle Agent (23), Support Agent (8), Review Agent (9)

Upgrade Pathway

Next Level: AI Receptionist (Voice) Agent (Premier)

Commercial Model

One-Time Setup: $700 – $2,800   **Monthly Retainer:** $220 – $550

32. Pricing Governance Agent

Domain: Revenue Ops | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Pricing Rules & Discount Governance Agent ensures that pricing decisions follow your business rules—every time. It prevents margin erosion by enforcing approved pricing, monitoring discounts, and requiring proper authorization when exceptions occur.

Efficiency Value & ROI

Capacity Lift: Automates Sales Manager Approvals ($30k/yr value).

Stops margin leakage instantly. Typical ROI is immediate by preventing unauthorized discounts that erode profit.

Inputs

- Draft Quotes
- Rate Cards
- Authority Rules

Outputs

- Validated Quotes
- Blocking Alerts
- Approval Requests

When You Need This

- Unauthorized or inconsistent discounts.
- Margin leakage over time.
- Sales teams improvising prices.

Plays Well With (Connections)

Integrates with: Revenue Forecasting Agent (24), Billing Agent (6), Approval Workflow Agent (29)

Upgrade Pathway

Next Level: Revenue Optimization Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,200   **Monthly Retainer:** $250 – $600

33. Feedback Analysis Agent

Domain: CX Intelligence | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Customer Feedback & Sentiment Analysis Agent continuously captures and interprets how customers actually feel —not just what they explicitly say. It aggregates feedback across channels and applies sentiment analysis to surface satisfaction trends and early dissatisfaction signals.

Efficiency Value & ROI

Capacity Lift: Replaces Manual Survey Reading.

Identifies churn drivers months before they show up in revenue data. Guides product/service improvements with hard data.

Inputs

- Survey Text
- Support Tickets
- Reviews

Outputs

- Sentiment Scores
- Theme Clouds
- Alerts

When You Need This

- Feedback scattered across channels.
- Only hearing from unhappy customers.
- Leadership blind to emotional signals.

Plays Well With (Connections)

Integrates with: Review & Reputation Agent (9), Support Agent (8), Customer Lifecycle Agent (23)

Upgrade Pathway

Next Level: Customer Growth (LTV) Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,000   **Monthly Retainer:** $250 – $600

34. Risk Warning Agent

`BASE`

Domain: Ops / Risk | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Risk Monitoring & Early Warning Agent acts as your organizational radar system. It continuously scans operational, financial, customer, and people signals to detect early indicators of risk—before those risks turn into outages, churn, compliance issues, or revenue loss.

Efficiency Value & ROI

Capacity Lift: Automates Operational Monitoring.

Prevents revenue loss from silent system failures (e.g., checkout broken). Reduces downtime by alerting instantly on anomalies.

Inputs
- System Logs
- Transaction Volume
- Error Rates

Outputs
- Anomaly Alerts
- Trend Warnings
- Status Dashboards

When You Need This
- Risks identified too late.
- No centralized risk visibility.
- Expensive firefighting instead of prevention.

Plays Well With (Connections)
Integrates with: SLA Monitoring Agent (12), Capacity Monitoring Agent (11), Revenue Forecasting Agent (24)

Upgrade Pathway
Next Level: Risk & Governance Agent (Premier)

Commercial Model
One-Time Setup: $1,000 − $3,800

Monthly Retainer: $300 − $750

35. Vendor Cost Control Agent

Domain: Finance / Procurement | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Vendor Cost Optimization & Spend Control Agent ensures that money leaving the business is intentional, justified, and optimized. It continuously monitors vendor spend, detects anomalies, highlights cost creep, and surfaces renegotiation opportunities.

Efficiency Value & ROI

Capacity Lift: Augments AP Clerk Auditing ($45k/yr value).

Often saves 5-10% of total vendor spend by catching errors and price creep. Pays for itself by identifying a single overcharge.

Inputs

- Invoices
- Contracts
- Historical Spend

Outputs

- Variance Reports
- Overcharge Alerts
- Spend Analysis

When You Need This

- Vendor costs slowly increasing unnoticed.
- Duplicate or unnecessary services.
- Manual invoice review consuming time.

Plays Well With (Connections)

Integrates with: Contract Lifecycle Agent (20), Vendor Coordination Agent (19), Billing Agent (6)

Upgrade Pathway

Next Level: Financial Strategy Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,200

Monthly Retainer: $250 – $600

36. Security Access Agent   `BASE`

Domain: IT Security | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Security Access & Permission Governance Agent ensures that the right people have the right access—no more, no less—at all times. It continuously monitors user access across systems, detects permission drift, and enforces least-privilege rules.

Efficiency Value & ROI

Capacity Lift: Automates IT Security Audits ($60k/yr value).

Reduces license costs by removing dormant users. Mitigates massive financial risk from data breaches caused by unauthorized access.

Inputs
- User Directory
- Login Logs
- HR Status

Outputs
- Access Revocation
- Security Alerts
- Audit Logs

When You Need This
- Former employees still have access to systems.
- Over-permissioned users.
- No audit trail of permission changes.

Plays Well With (Connections)
Integrates with: Change Management Agent (17), Compliance Agent (13), Alerting & Escalation Agent (16)

Upgrade Pathway
Next Level: Risk & Governance Agent (Premier)

Commercial Model
One-Time Setup: $900 – $3,500   **Monthly Retainer:** $300 – $700

37. Data Privacy (GDPR) Agent

Domain: Compliance | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Data Privacy & Retention Compliance Agent ensures your business stores data responsibly, deletes it on time, and can prove compliance when asked. It enforces data retention rules, flags privacy risks, and maintains an audit trail.

Efficiency Value & ROI

Capacity Lift: Automates Compliance Tasks (Legal Fees Savings).

Avoids massive regulatory fines. Reduces storage costs by purging old data. Automates tedious legal request fulfillment.

Inputs

- Data Stores
- Retention Rules
- Deletion Requests

Outputs

- Purged Records
- Compliance Logs
- Certificates

When You Need This

- No clear data retention policies.
- Over-retaining sensitive customer data.
- Manual compliance audits.

Plays Well With (Connections)

Integrates with: Compliance Agent (13), Document Management Agent (30), Security Access Agent (36)

Upgrade Pathway

Next Level: Regulatory Director Agent (Premier)

Commercial Model

One-Time Setup: $1,000 – $4,000

Monthly Retainer: $350 – $800

38. Disaster Recovery Agent   BASE

Domain: Resilience | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Disaster Recovery & Business Continuity Agent ensures your business can withstand disruptions, recover quickly, and continue operating when systems, people, or processes fail. It monitors readiness, validates recovery paths, and ensures that there's a plan.

Efficiency Value & ROI

Capacity Lift: Automates Sysadmin Integrity Checks.

The ROI is existential: it prevents business-ending data loss. Reduces downtime during outages by ensuring recovery paths are tested.

Inputs

- Backup Logs
- Test Environment
- Integrity Checks

Outputs

- Validation Reports
- Failure Alerts
- Restoration Proof

When You Need This

- Backups exist but aren't tested.
- No documented recovery plans.
- High downtime costs.

Plays Well With (Connections)

Integrates with: Risk Monitoring Agent (34), Security Access Agent (36), Alerting Agent (16)

Upgrade Pathway

Next Level: Auto. Orchestration Agent (Premier)

Commercial Model

One-Time Setup: $1,200 – $4,500

Monthly Retainer: $400 – $900

39. Knowledge Management Agent

Domain: Internal Intelligence | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Knowledge Management & Internal Intelligence Agent turns tribal knowledge into a living, searchable, and operational asset. It captures internal documents, SOPs, FAQs, and institutional memory so teams can find answers instantly.

Efficiency Value & ROI

Capacity Lift: Provides the utility of a Knowledge Manager ($70k/yr).

Reduces time employees spend searching for information by ~30%. Ensures staff are using current, accurate information, reducing errors.

Inputs

- Doc Repositories
- Usage Logs
- Freshness Rules

Outputs

- Search Index
- Stale Content Alerts
- Tagging Structure

When You Need This

- Knowledge locked in people's heads.
- Repeated questions slowing teams down.
- Inconsistent processes.

Plays Well With (Connections)

Integrates with: Knowledge Base Agent (10), Training & Onboarding Agent (28), Support Agent (8)

Upgrade Pathway

Next Level: Workforce Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $900 − $3,600

Monthly Retainer: $300 − $700

40. Workflow Orchestration Agent

<div style="float:right;">`BASE`</div>

Domain: Process Automation | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Internal Workflow Orchestration Agent ensures that work moves smoothly across teams without bottlenecks, handoff confusion, or manual chasing. It coordinates internal tasks, approvals, and status transitions so operations run like a system.

Efficiency Value & ROI

Capacity Lift: Automates Manual Data Entry across systems.

Saves hundreds of hours of copy-pasting. Increases data speed and accuracy across the organization. Enables tools to work as a unified system.

Inputs

- Webhooks
- API Events
- Data Objects

Outputs

- Triggered Actions
- Data Payloads
- Success Logs

When You Need This

- Work getting "stuck" between teams.
- Manual follow-ups and reminders.
- Operational drag as teams scale.

Plays Well With (Connections)

Integrates with: Knowledge Management Agent (39), Change Management Agent (17), Notification Agent

Upgrade Pathway

Next Level: Auto. Orchestration Agent (Premier)

Commercial Model

One-Time Setup: $1,000 – $3,800   **Monthly Retainer:** $350 – $800

41. Release Control Agent

`BASE`

Domain: IT Stability | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Change Management & Release Control Agent ensures that changes to systems, processes, and operations happen intentionally—not accidentally. It tracks changes, enforces approvals, prevents unreviewed releases, and creates a clear audit trail.

Efficiency Value & ROI

Capacity Lift: Automates Configuration Monitoring.

Prevents costly downtime caused by configuration errors. Reduces security surface area by detecting unauthorized changes immediately.

Inputs

- Config Files
- Admin Logs
- Baselines

Outputs

- Change Alerts
- Reversion Actions
- Incident Logs

When You Need This

- Uncontrolled changes causing outages.
- No visibility into who changed what.
- Leadership unaware of risk exposure.

Plays Well With (Connections)

Integrates with: Change Management Agent (17), Internal Approval Agent (29), Security Access Agent (36)

Upgrade Pathway

Next Level: Systems Architecture Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,400

Monthly Retainer: $300 – $700

42. SLA Assurance Agent   `BASE`

Domain: Service Quality | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The SLA Monitoring & Performance Assurance Agent guarantees that promises made to customers are promises kept. It continuously tracks service-level commitments, detects breaches early, and alerts teams before customers feel the impact.

Efficiency Value & ROI

Capacity Lift: Augments Service Manager Oversight ($85k/yr value).

Eliminates SLA penalties. Protects brand reputation by ensuring promises are kept. Allows managers to intervene only when necessary.

Inputs
- Queue Volume
- Velocity Metrics
- Deadlines

Outputs
- Risk Probability
- Resourcing Alerts
- Forecasts

When You Need This
- SLA breaches discovered too late.
- No real-time visibility into service performance.
- Lost trust due to missed commitments.

Plays Well With (Connections)

Integrates with: Support Agent (8), Internal Workflow Agent (40), Risk Monitoring Agent (34)

Upgrade Pathway

Next Level: Risk & Governance Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,600

Monthly Retainer: $300 – $750

43. Customer Experience Map Agent

`BASE`

Domain: UX / CX | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Customer Sentiment & Experience Intelligence Agent continuously listens to how customers actually feel—not just what they say directly. It aggregates sentiment signals across touchpoints, detects shifts in customer experience early, and gives leadership a clear pulse.

Efficiency Value & ROI

Capacity Lift: Provides UX Research Insights ($90k/yr value).

Increases conversion rates by identifying and fixing funnel leaks. Reduces support volume by solving upstream UX issues.

Inputs

- Web Analytics
- Session Logs
- Support Tickets

Outputs

- Friction Maps
- Drop-off Alerts
- Journey Logs

When You Need This

- Customer dissatisfaction discovered too late.
- Leadership relying on anecdotes.
- Declining loyalty without clear cause.

Plays Well With (Connections)

Integrates with: Feedback Analysis Agent (33), Review & Reputation Agent (9), Customer Lifecycle Agent (23)

Upgrade Pathway

Next Level: Customer Growth (LTV) Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,500

Monthly Retainer: $300 – $700

44. Brand Signal Agent   `BASE`

Domain: Reputation | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Reviews, Reputation & Brand Signal Agent actively protects and strengthens your public image. It monitors reviews, ratings, and brand mentions across platforms, detects reputation risk early, and ensures leadership always knows how the market perceives the business.

Efficiency Value & ROI

Capacity Lift: Replaces PR Monitoring Agency ($2k/mo).

Prevents PR crises by detecting negative spikes early. Identifies brand advocates for amplification, driving organic growth.

Inputs

- Social Feeds
- News Alerts
- Keywords

Outputs

- Sentiment Alerts
- Volume Spikes
- Mention Logs

When You Need This

- Negative reviews going unnoticed.
- No centralized reputation visibility.
- Missed opportunities to amplify positives.

Plays Well With (Connections)

Integrates with: Customer Sentiment Agent (43), Marketing Performance Agent (45), Notification Agent

Upgrade Pathway

Next Level: Brand Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $800 – $3,200   **Monthly Retainer:** $250 – $650

45. Marketing Attribution Agent   `BASE`

Domain: Analytics | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Marketing Campaign Performance & Attribution Agent shows you what marketing is actually working. It tracks campaigns across channels, ties activity to outcomes, and provides attribution clarity so marketing spend can be optimized.

Efficiency Value & ROI

Capacity Lift: Automates Marketing Data Science tasks.

Optimizes ad spend by revealing the true source of revenue. Prevents cutting campaigns that actually drive sales (even if they don't get the 'last click').

Inputs
- UTM Parameters
- CRM Deals
- Ad Spend Data

Outputs
- Attribution Models
- ROAS Reports
- Channel Efficacy

When You Need This
- Marketing spend with unclear ROI.
- Channels blamed or praised inaccurately.
- Gut-driven budget decisions.

Plays Well With (Connections)
Integrates with: Marketing ROI Agent (25), Revenue Forecast Agent (24), Lead Intake Agent (1)

Upgrade Pathway
Next Level: Market Intelligence Agent (Premier)

Commercial Model
One-Time Setup: $1,000 – $4,000   **Monthly Retainer:** $350 – $800

46. Content Operations Agent   `BASE`

Domain: Content Marketing | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Content Operations & Publishing Intelligence Agent ensures that content is planned, produced, published, and measured like an operational system. It brings structure to content workflows, enforces publishing cadence, and provides visibility into performance.

Efficiency Value & ROI

Capacity Lift: Augments Content Management ($60k/yr value).

Increases content output by ~30% by streamlining the workflow. Ensures consistent brand presence without manual posting labor.

Inputs

- Content Calendar
- Draft Status
- Channel APIs

Outputs

- Published Posts
- Deadline Reminders
- Performance Metrics

When You Need This

- Inconsistent content publishing.
- Content ideas lost or duplicated.
- No visibility into content ROI.

Plays Well With (Connections)

Integrates with: Marketing Performance Agent (45), Knowledge Management Agent (39), Social Distribution Agent

Upgrade Pathway

Next Level: Brand Intelligence Agent (Premier)

Commercial Model

One-Time Setup: $900 – $3,600

Monthly Retainer: $300 – $700

47. Legal Intake Agent   `BASE`

Domain: Legal Ops | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Legal Intake & Contract Lifecycle Agent brings structure, visibility, and control to legal requests and contracts. It tracks legal intake, manages contracts from request through execution and renewal, and ensures leadership always knows what's signed and what's expiring.

Efficiency Value & ROI

Capacity Lift: Augments Legal Admin / Paralegal roles.

Speeds up deal closure by ~20% by organizing legal requests. Reduces legal costs by ensuring lawyers only review complete, prepared requests.

Inputs

- Request Forms
- Document Attachments
- Priority Flags

Outputs

- Queued Tasks
- Status Updates
- SLA Tracking

When You Need This

- Contracts scattered across inboxes.
- Legal requests handled ad hoc.
- Unclear legal exposure.

Plays Well With (Connections)

Integrates with: Contract Lifecycle Agent (20), Vendor Cost Control Agent (35), Compliance Agent (13)

Upgrade Pathway

Next Level: Regulatory Director Agent (Premier)

Commercial Model

One-Time Setup: $1,200 – $4,500

Monthly Retainer: $400 – $900

48. Executive Oversight Agent   `BASE`

Domain: BI / Strategy | **Standalone:** Yes

VALUE PROPOSITION & UTILITY

The Executive Intelligence & Strategic Oversight Agent gives leadership a single, coherent view of the business. Instead of dashboards scattered across departments, this agent synthesizes operational, financial, people, customer, and risk signals into executive-level insight.

Efficiency Value & ROI

Capacity Lift: Automates Executive Assistant Reporting ($60k/yr value).

Saves executives ~5 hours/week of data gathering. Ensures leadership is always aligned on the most critical daily metrics and risks.

Inputs

- Agent Alerts
- KPI Summaries
- Financial Totals

Outputs

- Daily Briefing Email
- Trend Summaries
- Strategic Alerts

When You Need This

- Leadership drowning in disconnected metrics.
- Decisions made reactively.
- Executive intuition unsupported by data.

Plays Well With (Connections)

Integrates with: Risk Monitoring Agent (34), Revenue Forecasting Agent (24), Workforce Intelligence Agent

Upgrade Pathway

Next Level: Executive Command Agent (Premier)

Commercial Model

One-Time Setup: $1,500 – $6,000   **Monthly Retainer:** $500 – $1,200

Premier Agents

The Authority Layer

Advanced intelligence, probabilistic decision making, and executive support. These agents do not just execute; they think, predict, and optimize.

1. Executive Command Agent

STRATEGIC ROLE & UTILITY

Functions as a digital Chief of Staff. Synthesizes signals across Ops, Finance, and Sales to answer: "What should leadership focus on this week?" Identifies strategic anomalies and frames tradeoffs for decision-making. This agent thinks in priorities, not metrics.

> **Efficiency Value & ROI**
>
> **Capacity Lift:** Augments the Chief of Staff function ($150k+/yr value).
>
> Provides real-time strategic synthesis that a human CoS would take days to compile. Prevents strategic drift and aligns executive focus on high-impact issues.

ENTERPRISE CAPABILITIES

- Priority Synthesis
- Anomaly Detection
- Tradeoff Analysis
- Decision Briefing Generation

> **System Influence (Connections)**
>
> **Amplifies:** All Base Agents (optional, not required)
> **Synthesizes:** Operations, Finance, Sales, Risk signals

> **Commercial Model**
>
> **One-Time Setup:** $8,000 – $25,000   **Monthly Retainer:** $1,500 – $4,000

2. Revenue Optimization Agent   **PREMIER**

STRATEGIC ROLE & UTILITY

Acts as a relentless Chief Revenue Officer. Analyzes transaction history to find leakage, underpricing, and upsell opportunities. Models price elasticity to maximize margin without sacrificing volume. It identifies where money is left on the table.

Efficiency Value & ROI

Capacity Lift: Enhances Revenue Operations ($140k/yr value).

Typically identifies 5-15% in recoverable revenue leakage within the first 90 days. Optimizes pricing to increase margins without churn.

ENTERPRISE CAPABILITIES

- Leakage Detection
- Upsell Modeling
- Margin Analysis
- Lifetime Value Optimization

System Influence (Connections)

Amplifies: Sales, Marketing, Pricing, Customer, Finance agents
Diagnoses: Monetization inefficiencies

Commercial Model

One-Time Setup: $7,500 – $22,000   **Monthly Retainer:** $1,500 – $4,000

3. Operational Efficiency Agent   PREMIER

STRATEGIC ROLE & UTILITY

Hybrid COO/CFO. Obsessed with friction. Correlates time, cost, and throughput to identify waste. Ranks optimization opportunities by ROI. It connects operational friction directly to margin erosion and identifies high-leverage efficiency gains.

Efficiency Value & ROI

Capacity Lift: Provides continuous Operational Consulting ($200/hr value).

Continually reduces operational drag, often lowering cost-to-serve by 10-20%. Identifies process bottlenecks that human managers miss.

ENTERPRISE CAPABILITIES

- Cost-to-Serve Modeling
- Drag Detection
- ROI Ranking
- Margin Erosion Diagnostics

System Influence (Connections)

Amplifies: Workflow, Vendor, Finance, Capacity, Risk agents
Optimizes: Throughput and cost structures

Commercial Model
One-Time Setup: $8,000 – $24,000   **Monthly Retainer:** $1,500 – $4,500

4. Workforce Intelligence Agent   PREMIER

STRATEGIC ROLE & UTILITY

Strategic Talent Planner. Models workforce capacity, burnout risk, and succession gaps. Answers "When do we need to hire?" based on data. It aligns headcount strategy with growth and margin goals.

> **Efficiency Value & ROI**
>
> **Capacity Lift:** Enhances Workforce Planning capabilities ($120k/yr value).
>
> Prevents costly over-hiring by accurately forecasting capacity. Reduces turnover costs (avg $30k per replacement) by detecting burnout early.

ENTERPRISE CAPABILITIES

- Capacity Modeling
- Burnout Prediction
- Succession Mapping
- Talent Utilization Intelligence

> **System Influence (Connections)**
>
> **Amplifies:** Hiring, Performance, Training, Capacity, Risk agents
> **Forecasts:** Capacity shortfalls and talent risk

> **Commercial Model**
> **One-Time Setup:** $7,500 – $22,000   **Monthly Retainer:** $1,500 – $4,000

5. Risk & Governance Agent

STRATEGIC ROLE & UTILITY

Enterprise Risk Officer. Synthesizes risk across legal, finance, and ops into a unified heatmap. Predicts exposure from regulation or process failure. It models organizational risk holistically across operations, data, people, and vendors.

Efficiency Value & ROI

Capacity Lift: Augments the Chief Risk Officer role ($180k/yr value).

Mitigates existential risks (lawsuits, regulatory fines, reputation collapse). Provides board-level assurance of compliance and stability.

ENTERPRISE CAPABILITIES

- Cross-Domain Synthesis
- Compliance Modeling
- Exposure Forecasting
- Mitigation Prioritization

System Influence (Connections)

Amplifies: Risk Monitoring, Security, Privacy, Legal, Change agents
Models: Cascading failure scenarios

Commercial Model

One-Time Setup: $9,000 – $28,000   **Monthly Retainer:** $2,000 – $5,000

6. Customer Growth (LTV) Agent

PREMIER

STRATEGIC ROLE & UTILITY

Retention Strategist. Focuses on LTV. Predicts churn and identifies expansion opportunities. Guides account teams on who to call and what to sell. It treats customers as long-term assets, not transactions.

> **Efficiency Value & ROI**
>
> **Capacity Lift:** Augments Customer Success Leadership ($160k/yr value).
>
> Increases Lifetime Value (LTV) by 20-30%. Reduces churn by proactively identifying at-risk accounts. Turns support centers into profit centers via upsells.

ENTERPRISE CAPABILITIES

- Cohort Modeling
- Churn Prediction
- Expansion Intel
- Lifetime Value Analysis

> **System Influence (Connections)**
>
> **Amplifies:** Sentiment, Reviews, Marketing, Revenue, Support agents
> **Predicts:** Retention risk and upsell windows

> **Commercial Model**
>
> **One-Time Setup:** $7,500 – $23,000   **Monthly Retainer:** $1,500 – $4,000

7. Market Intelligence Agent

STRATEGIC ROLE & UTILITY

Competitive Analyst. Scans external environment for competitor moves, pricing shifts, and trends. Identifies white space and threats. It translates intelligence into actionable positioning decisions.

Efficiency Value & ROI

Capacity Lift: Replaces Market Research Firms ($10k/mo value).

Prevents market share loss by alerting on competitor moves. Identifies pricing opportunities to increase margins based on market data.

ENTERPRISE CAPABILITIES

- Competitor Detection
- Trend Analysis
- White Space Finding
- Strategic Positioning

System Influence (Connections)

Amplifies: Marketing, Revenue, Pricing, Executive agents
Detects: Competitor movement and market shifts

Commercial Model

One-Time Setup: $8,000 – $26,000   **Monthly Retainer:** $1,500 – $4,500

8. Systems Architecture Agent

STRATEGIC ROLE & UTILITY

Virtual Enterprise Architect. Maps dependencies, detects fragile integrations, and enforces data standards. Prevents technical debt from killing scale. It designs, governs, and continuously optimizes how tools integrate.

Efficiency Value & ROI

Capacity Lift: Augments Enterprise Architecture roles ($170k/yr value).

Prevents catastrophic system failures as you scale. Reduces technical debt, saving huge refactoring costs down the line.

ENTERPRISE CAPABILITIES

- Dependency Mapping
- Failure Analysis
- Debt Detection
- Integration Health Monitoring

System Influence (Connections)

Amplifies: All Base Agents + Premier Agents
Governs: System-wide integration topology

Commercial Model

One-Time Setup: $9,000 – $30,000   **Monthly Retainer:** $2,000 – $5,000

9. Financial Strategy Agent

STRATEGIC ROLE & UTILITY

Strategic CFO. Evaluates capital allocation, ROI, and opportunity cost. Models cash flow resilience. Guides investment decisions with data. It goes far beyond bookkeeping or forecasting—evaluating ROI and risk tradeoffs.

Efficiency Value & ROI

Capacity Lift: Augments CFO / Financial Advisor roles ($200k/yr value).

Optimizes capital allocation to maximize ROI. Prevents bad investments by modeling risk and opportunity cost.

ENTERPRISE CAPABILITIES

- Allocation Modeling
- ROI Analysis
- Resilience Forecasting
- Investment Prioritization

System Influence (Connections)

Amplifies: Revenue, Cost, Risk, Workforce, Executive agents
Simulates: Capital allocation scenarios

Commercial Model

One-Time Setup: $10,000 – $32,000   **Monthly Retainer:** $2,000 – $5,500

10. Auto. Orchestration Agent   PREMIER

STRATEGIC ROLE & UTILITY

Automation Conductor. Governs execution priority and dependencies across the entire agent fleet. Prevents collisions and ensures smooth operation at scale. It governs priority, sequencing, dependencies, and failure handling.

Efficiency Value & ROI

Capacity Lift: Functions as a Lead Automation Engineer ($130k/yr value).

Ensures 99.9% uptime for complex automation stacks. Prevents system crashes caused by conflicting automations.

ENTERPRISE CAPABILITIES

- Dependency Mapping
- Priority Throttling
- Conflict Detection
- Failure Isolation

System Influence (Connections)

Amplifies: All Base Agents + Other Premier Agents
Orchestrates: System-wide automation flow

Commercial Model

One-Time Setup: $10,000 – $35,000   **Monthly Retainer:** $2,500 – $6,000

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11. Data Intelligence Agent

STRATEGIC ROLE & UTILITY

Predictive Forecaster. Transforms history into foresight. Models trends in sales, churn, and load. Provides probabilistic forecasts, not just charts. It builds predictive models, scenario simulations, and probabilistic forecasts.

Efficiency Value & ROI

Capacity Lift: Provides Data Science Team capabilities ($200k+/yr value).

Allows businesses to anticipate market shifts rather than reacting. Optimizes inventory and staffing based on accurate predictions.

ENTERPRISE CAPABILITIES

- Predictive Modeling
- Probabilistic Forecasts
- Confidence Intervals
- Scenario Simulations

System Influence (Connections)

Amplifies: Executive, Revenue, Operations, Risk, Market agents
Predicts: Future trends and outcomes

Commercial Model

One-Time Setup: $10,000 – $35,000

Monthly Retainer: $2,500 – $6,500

12. Scenario Planning Agent

STRATEGIC ROLE & UTILITY

Strategic Simulator. Runs "What If" scenarios to test decisions before committing resources. Models second-order effects of major changes. It allows leadership to test decisions before committing to them.

Efficiency Value & ROI

Capacity Lift: Replaces Strategy Consultancy Projects ($50k+ per engagement).

De-risks major decisions (M&A, new product launch) by simulating outcomes. Prevents costly strategic blunders.

ENTERPRISE CAPABILITIES

- Multi-Path Simulation
- Constraint Modeling
- Decision Rehearsal
- Risk-Adjusted Outcomes

System Influence (Connections)

Amplifies: Executive Command, Financial Strategy, Market Intelligence, Risk agents
Simulates: Strategic choices and consequences

Commercial Model
One-Time Setup: $12,000 – $40,000   **Monthly Retainer:** $2,500 – $7,000

13. Regulatory Director Agent

PREMIER

STRATEGIC ROLE & UTILITY

Compliance Foresight. Monitors external legislative landscape for changes impacting the business. Interprets policy and forecasts operational impact. It continuously monitors, interprets, and forecasts regulatory changes.

Efficiency Value & ROI

Capacity Lift: Augments General Counsel ($200k+/yr value).

Avoids massive fines and business shutdowns. Proactively adapts operations to new laws before enforcement begins.

ENTERPRISE CAPABILITIES

- Regulatory Monitoring
- Shock Modeling
- Risk Quantification
- Policy Interpretation

System Influence (Connections)

Amplifies: Risk, Legal, Finance, Strategy, Executive agents
Forecasts: Regulatory directionality and impact

Commercial Model

One-Time Setup: $8,000 – $30,000   **Monthly Retainer:** $2,000 – $6,000

14. Decision Support Agent

STRATEGIC ROLE & UTILITY

Command & Control. Aggregates all intel to present clear, prioritized options during crises or complex situations. Filters noise to enable rapid executive action. It synthesizes signals into clear, prioritized, decision-ready recommendations.

Efficiency Value & ROI

Capacity Lift: Functions as a Strategic Advisor ($5k/day value).

Increases executive decision velocity. Reduces decision fatigue and cognitive load. Ensures leadership focus is always on the highest-impact issue.

ENTERPRISE CAPABILITIES

- Intel Synthesis
- Prioritization
- Command Distribution
- Strategic Recommendations

System Influence (Connections)

Amplifies: All agents (acts as synthesis/command layer)
Translates: Signals into leadership action

Commercial Model

One-Time Setup: $15,000 – $50,000   **Monthly Retainer:** $4,000 – $10,000

15. Brand Intelligence Agent   PREMIER

STRATEGIC ROLE & UTILITY

Perception Analyst. Maps brand sentiment and competitive positioning in real-time. Identifies trust erosion and white space opportunities. It continuously analyzes market sentiment, pricing signals, and brand perception.

Efficiency Value & ROI

Capacity Lift: Augments CMO / Brand Agency functions ($15k/mo value).

Detects brand risks early to prevent PR disasters. Identifies positioning opportunities to capture market share from competitors.

ENTERPRISE CAPABILITIES

- Landscape Mapping
- Perception Analysis
- White Space Detection
- Strategic Differentiation

System Influence (Connections)

Amplifies: Sales, Marketing, Executive, Pricing, Product agents
Detects: Positioning shifts and threats

Commercial Model

One-Time Setup: $9,000 – $30,000   **Monthly Retainer:** $2,500 – $6,500

16. AI Receptionist (Voice) Agent　　　　PREMIER

STRATEGIC ROLE & UTILITY

Voice-Native Employee. Answers calls 24/7 with natural speech. Handles FAQs, qualifies leads, and books appointments live. Ensures zero missed revenue from unanswered phones. It behaves like a 24/7 senior receptionist.

Efficiency Value & ROI

Capacity Lift: Provides coverage equivalent to 3 Full-Time Receptionists ($120k/yr value).

Captures 100% of inbound leads, day or night. Never calls in sick. Scales infinitely during call spikes without wait times.

ENTERPRISE CAPABILITIES

- Natural Speech
- Calendar Write
- Escalation
- Intent Detection

System Influence (Connections)

Directly Feeds: Scheduling Agent (3), Lead Intake Agent (1), CRM
Parallel To: All ops agents

Commercial Model

One-Time Setup: $6,000 – $15,000　　　　**Monthly Retainer:** $1,500 – $4,000

Engagement Bundles (Overview)

Our engagement models are designed to scale with business maturity. Bundles are outcome-based, not agent-based. We deploy the right mix of agents to solve the specific problems of your stage.

Tier	Setup	Monthly	Ideal For
Foundation	$3,500 – $6,000	$750 – $1,500	**Small / Early Stage:** Needs credibility, lead capture, and operational relief. Focus is on survival and basic hygiene.
Growth	$10,000 – $20,000	$2,000 – $4,000	**Scaling Business:** Needs revenue acceleration, reduced admin overhead, and visibility. Focus is on buying back time for the owner.
Authority	$25,000 – $50,000	$5,000 – $10,000	**High-Ticket / Professional:** Needs operational dominance and systemized excellence. Focus is on margin expansion.
Enterprise	$50,000 – $250k+	$10,000 – $30k+	**Platform / Franchise:** Needs proprietary automation infrastructure and centralized control. Focus is on governance and scale.

Engagement Bundles (Detail)

A deeper look at the structure of our engagement tiers and how they evolve with your business needs.

Foundation Tier Includes:

- Strategic Website (Foundation)
- Lead Intake Agent
- Review & Reputation Agent
- Basic Monthly Reporting

Growth Tier Includes:

- Strategic Website (Growth)
- Scheduling Agent
- Follow-Up & Nurture Agent
- Full SEO Package
- Weekly Optimization

Add-On Structure

Additional Base Agent: Setup $1,000–$2,500 | Mo $300–$750

Additional Premier Agent: Setup $5,000–$15,000 | Mo $1,000–$3,000

Custom Project: $5,000 – $25,000+ (Scoped by Engineering Team)

Engagement Lifecycle & Next Steps (Phases 1-2)

We do not sell automation as a commodity; we design systems that scale. Our engagement process is designed to be consultative, roadmap-driven, and risk-mitigated.

1. Discovery & Audit

We begin with a 360-degree audit of your current operations. We identify bottlenecks, map data flows, and determine your business stage (Operator, Growth, Authority, Enterprise) to recommend the correct agent mix.

- Tech Stack Review
- Process Mining
- Financial Baseline Analysis

2. Strategic Roadmap

You receive your Complimentary Automation Roadmap. This includes a visual architecture diagram of your future state, a phased deployment schedule, and projected ROI models based on your transaction volume.

- Architecture Diagrams
- Phased Rollout Plan
- ROI Projections

Engagement Lifecycle (Phases 3-4)

3. Activation & Kickoff

Upon approval, we move to the Activation phase. This includes a formal Kickoff Workshop, setting up Slack/Teams integration channels, and beginning the "Shadow Mode" calibration of your initial agent deployment.

- Calibration Period (2-4 Weeks)
- Slack/Teams Integration
- User Training

4. Expansion & Optimization

Scale non-disruptively. We conduct Quarterly Systems Reviews (QSRs) to analyze performance data and recommend new agents or logic adjustments to further capture efficiency gains.

- Quarterly Business Reviews
- Logic Refinement
- New Agent Deployment

White-Label & Licensing (Overview)

For agencies, franchises, and enterprise divisions, Ingenuity Systems can be deployed as the underlying operating system. This model allows partners to leverage our agent infrastructure under their own brand, creating a seamless experience for their downstream clients.

Agency Resale

Bundle our agents into your service retainers. Mark up the cost or use automation as a value-add retention tool. Create a sticky, tech-enabled service offering.

Franchise Enablement

Standardize operations across locations. Mandate "Lead Intake" or "Reputation" agents to ensure brand consistency and operational excellence across the entire franchise network.

White-Label & Licensing (Commercials)

API-First Integration

Our platform is designed with an API-first approach, allowing deep integration into existing proprietary dashboards or client portals. You maintain the user experience; we provide the intelligence engine.

Licensing Model

Platform Setup: $50,000 – $250,000+

Includes custom domain setup, branding, and API integration architecture.

Monthly License: $10,000 – $30,000

Includes infrastructure maintenance, security updates, and priority support.

Platform & Client Governance (Client View)

The Platform answers one core client question: "Is this system working — and what should we do next?" This is not just a dashboard; it is a client-facing operating system that provides real-time visibility, proof of value, and strategic direction.

Executive Snapshot (Landing Page)

Replaces weekly check-in calls with undeniable data.

- **Automation Impact:** Real-time counter of tasks automated this month.
- **Hours Saved:** Calculated metric showing human-equivalent time returned.
- **Revenue Influenced:** Estimated dollar value of leads captured or retained.

Agent Registry & Visibility

Transparency into the "black box" of automation.

- **Active Agents:** List of all running agents with status (Healthy / Warning).
- **Volume Handled:** Throughput metrics per agent.
- **Detail Pages:** Drill-down views showing specific actions taken.

Expansion Surface ("Recommended Next Moves")

The platform proactively suggests next steps based on system data, not sales pressure.

- *"Hiring volume increasing → Staffing Intelligence Agent recommended."*
- *"Exceeding manual review thresholds → Analytics Agent recommended."*

Platform & Client Governance (Internal Ops)

How Ingenuity Systems operates internally to ensure reliability, security, and scale. This layer protects your business from the chaos of unmanaged automation and provides the governance required for enterprise adoption.

Governance & Trust

Enterprise-grade accountability for every action.

- **Audit Logs:** Immutable records of every agent decision.
- **Uptime & Health:** 99.9% uptime SLAs with transparent status.
- **Error Resolution:** Clear timelines for incident response.

Three-Tier Support Model

Structured support to ensure stability.

- **Tier 1 (Automated):** Monitoring, health checks, and self-healing.
- **Tier 2 (Corrective):** Human intervention for logic drift or API changes.
- **Tier 3 (Strategic):** Quarterly reviews for optimization and growth.

White-Label & Multi-Tenancy

Built for agencies and enterprises managing multiple brands.

- **Tenant Isolation:** Strict data separation between business units.
- **Role-Based Access:** Granular permissions for admins, managers, and viewers.
- **Custom Branding:** Your logo, your domain, your platform.

Roadmap 1: Foundation (0-3 Months)

STRATEGIC FOCUS: STABILIZATION & CAPTURE

The goal of the Foundation phase is to "stop the bleeding." We focus on implementing systems that capture every lead, build trust automatically, and establish the digital infrastructure required for future scale. This is about hygiene and reliability.

> **Outcome Objectives**
>
> - **100% Lead Capture:** No inbound opportunity is lost to a full voicemail or unmonitored inbox.
> - **Automated Trust:** Every completed job generates a review request.
> - **Cash Flow Velocity:** Invoices are generated instantly upon work completion.

Timeline	Focus Area	Key Activations & Milestones
Month 1	Strategy & Infrastructure	• **Audit:** Systems & Process Review • **Web:** Foundation Website Deployment • **SEO:** Local Search Setup
Month 2	Capture & Brand	• **Agent 1:** Lead Intake & Qualification Agent • **Agent 9:** Review & Reputation Agent • **Milestone:** First "Zero-Touch" Lead Capture
Month 3	Revenue & Support	• **Agent 6:** Billing & Invoice Prep Agent • **Agent 8:** Support & Ticket Triage Agent • **Milestone:** First Automated Invoice Paid

> **Transition Criteria**
>
> Ready for Growth Phase when: Lead capture is >95%, Google Reviews are consistent, and invoicing is automated.

Roadmap 2: Growth (3-6 Months)

STRATEGIC FOCUS: EFFICIENCY & SCALE

Once the foundation is stable, we move to "removing friction." This phase automates the logistics of service delivery—scheduling, dispatching, and communication—freeing up your team to handle more volume without adding headcount.

Outcome Objectives

- **Reduced Admin Time:** Elimination of scheduling tag and dispatch confusion.
- **Optimized Utilization:** Better routes and fuller schedules.
- **Clear Attribution:** Knowing exactly which marketing dollars are working.

Timeline	Focus Area	Key Activations & Milestones
Month 4	Calendar & Nurture	• **Agent 3:** Scheduling & Booking Agent • **Agent 2:** Lead Follow-Up & Nurture Agent • **Milestone:** First Automated Re-booking
Month 5	Field Operations	• **Agent 4:** Dispatch & Assignment Agent • **Agent 5:** Job Status Tracking Agent • **Milestone:** Real-time Ops Visibility
Month 6	Intelligence & Comms	• **Agent 25:** Marketing ROI Agent • **Agent 31:** Client Communications Agent • **Milestone:** Quarterly Business Review (QBR)

Transition Criteria

Ready for Authority Phase when: Operations are smooth, calendars are full, and you have clear data on what drives revenue.

Roadmap 3: Authority (6-12 Months)

STRATEGIC FOCUS: OPTIMIZATION & INTELLIGENCE

With operations humming, we pivot to "maximizing the margin." We deploy Premier Agents to optimize pricing, forecast revenue, and handle high-value interactions autonomously. This is where the system begins to think for you.

Outcome Objectives

- **Higher LTV:** Proactive retention and upsell identification.
- **Lower Cost-to-Serve:** Advanced workflow optimization.
- **Predictive Insight:** Forecasting revenue and risks before they happen.

Timeline	Focus Area	Key Activations & Milestones
Q3 (M6-9)	Premier Upgrades	• **Premier 16:** AI Receptionist (Voice) Agent • **Premier 2:** Revenue Optimization Agent • **Milestone:** 24/7 Voice Coverage Active
Q4 (M9-12)	Advanced Ops	• **Agent 18:** Workflow Optimization Agent • **Agent 21:** Inventory Tracking Agent • **Milestone:** Margin Expansion Analysis
Ongoing	Executive Intel	• **Agent 15:** Analytics & Reporting Agent • **Agent 48:** Executive Oversight Agent • **Milestone:** Automated Board/Owner Reports

Roadmap 4: Enterprise (12-18 Months)

STRATEGIC FOCUS: GOVERNANCE & EXPANSION

For organizations managing multiple locations, franchises, or complex regulatory environments. The focus shifts to "control at scale"—ensuring compliance, security, and unified orchestration across the entire network.

> **Outcome Objectives**
> - **Audit Readiness:** Automated compliance and security logging.
> - **Resilient Infrastructure:** Disaster recovery and automated orchestration.
> - **Strategic Agility:** Scenario planning for market shifts.

Phase	Focus Area	Key Activations & Milestones
Phase 1	Governance & Risk	• **Agent 13:** Compliance Enforcement Agent • **Agent 36:** Security Access Agent • **Milestone:** Security Audit Clearance
Phase 2	Scale & Orchestration	• **Premier 4:** Workforce Intelligence Agent (Multi-Loc) • **Premier 10:** Auto. Orchestration Agent • **Milestone:** Cross-Location Unification
Phase 3	Strategy & Resilience	• **Premier 12:** Scenario Planning Agent • **Premier 13:** Regulatory Director Agent • **Milestone:** Enterprise Risk Dashboard

Roadmap 5: Field Service Sprint (6-Month Custom)

VERTICAL SPECIFIC: HIGH-VOLUME SERVICE BUSINESS

A tailored, aggressive implementation track designed for a Field Service business needing to modernize operations rapidly. This approach runs parallel tracks for Sales, Operations, and Administration.

Track	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Sales	Web Fnd.	Ag 1 Intake	Ag 2 Nurture	Ag 3 Booking	Ag 25 ROI	Premier 2
Ops			Ag 4 Dispatch	Ag 5 Status	Ag 11 Capacity	Ag 18 Flow
Admin		Ag 9 Review	Ag 6 Billing	Ag 7 Paymt	Ag 8 Support	Ag 48 Exec

Parallel Execution Strategy

By decoupling Sales, Ops, and Admin tracks, we avoid bottlenecks. Sales automation funds the Ops improvements, while Admin automation cleans up the back-office mess created by increased volume.

Sprint Goal

To achieve a fully "self-driving" core loop (Lead -> Book -> Service -> Bill -> Review) within 180 days.

INGENUITY SYSTEMS

Agents • Systems • Platforms