
Client A - Sales AI Assistant - Proposal

A Custom Software Solution by Riseup Asia LLC

Submitted to: Client A (Brand A + Brand B lighting group)

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1. Introduction

Client A operates two lighting brands under one team: **Brand A** serves the high-end designer and architectural market (B2B and project work); **Brand B** serves the mid-market e-commerce segment (B2C, transactional). Between them, roughly **1,000 active customer contacts** live across personal phones, WhatsApp chats and informal notes with no central system of record.

This proposal responds to the brief received on 30 June 2026 from Jane Chew (10xAI Business Consulting). Where the brief is clear, we confirm delivery. Where a single line implies a larger build (full contact migration, complete SEO/AEO overhaul, paid CRM platform), we scope it as a future phase so Phase 1 ships a working, governed foundation rather than a half-built one.

2. Project Objectives

| # | Objective | Our Approach |
|---|---|---|
| 1 | End dependence on individual staff judgment across the pipeline | Sales AI Assistant with codified qualification logic - see Section 3.2, 3.3 |
| 2 | Create a single source of truth for all ~1,000 contacts | Lightweight CRM segmented by brand and customer type - see Section 3.1 |
| 3 | Make enquiries trackable from first touch to close | WhatsApp Business as the primary trackable channel - see Section 3.1 |
| 4 | Enforce a follow-up cadence that survives staff turnover | Guided cadences with reminders and templates - see Section 3.2, 3.3 |
| 5 | Give management pipeline visibility without chasing | Shared dashboard across both brands - see Section 3.4 |
| 6 | Reflect the two different sales cycles in one system | Separate scoring and cadence per brand, one database - see Section 3.5 |

3. Scope of Work

Each subsection mirrors a stream of the engagement. Tables hold the mechanical checklist. Load-bearing decisions (contact migration, SEO/AEO, paid CRM upgrade) are pulled into short prose paragraphs labelled **Scope boundary** so they are not buried inside a checklist row.

3.1 Shared Foundation - WhatsApp Business + Central CRM (Stream 1)

> **Section 3.1 (1):** "WhatsApp Business is not yet in place and is the starting point... All enquiries route into one lightweight CRM that becomes the single home for all ~1,000 contacts."

1. Set up **WhatsApp Business** for both brands with catalogue and quick-reply basics; retire personal WhatsApp numbers as enquiry channels.
2. Configure one **lightweight CRM** as the single home for all contacts, auto-tagged at entry by brand (Brand A / Brand B) and type (B2B project / B2C retail).
3. Wire enquiry sources (WhatsApp Business, web forms, walk-in notes) into the CRM so no enquiry starts life outside the system.

| # | Item | Delivery |
|---|--------------------------------------|--|
| 1 | WhatsApp Business setup, both brands | Catalogue, quick replies, greeting/away messages, business profile |
| 2 | CRM instance (lean tier) | One workspace, segmented pipelines for Brand A (B2B) and Brand B (B2C) |
| 3 | Contact schema | Fields for brand, type, source, stage, last-touch, next-action |
| 4 | Enquiry intake wiring | WhatsApp Business API webhook + web form intake + walk-in quick-add |
| 5 | Auto-tagging rules | Rules assign brand + type at intake based on source and keywords |

Scope boundary - existing contact migration. Cleaning and importing all ~1,000 scattered contacts (deduping across personal phones, WhatsApp chats and informal records) is a separate data engagement priced in the rate-card. Phase 1 ships the empty schema and imports contacts as they touch the system organically; a bulk historical import is quoted after the sources are audited.

3.2 Priority 1 - Sales AI Assistant for B2B / Brand A (Stream 2)

> **Section 3.2 (1):** "Higher deal value, longer sales cycle, and more complex enquiries make this the track with the highest return on a Sales AI Assistant. Built first."

1. Encode the qualification signals your most experienced staff already use intuitively (project size, budget language, urgency, decision-maker signals) into an **AI enquiry scoring** model that returns **Hot / Warm / Cold** with a one-line reason.

2. Ship a **guided follow-up cadence** for project-style sales: quote sent to Day 3 check-in to Day 7 final follow-up, with reminders and ready-to-send message templates.
3. Give management **pipeline visibility** so stuck deals surface without staff being chased for status.

| # | Item | Delivery |
|---|------------------------------|--|
| 1 | B2B enquiry scoring | Hot/Warm/Cold + one-line reason, tuned for project-style sales |
| 2 | Follow-up cadence templates | Quote to Day 3 to Day 7 with editable message templates |
| 3 | Reminder engine | Reminders assigned to owner with SLA on next-action |
| 4 | Staff walkthrough (B2B team) | One working session, recorded for future hires |

Scope boundary - scoring model source of truth. The scoring rules are derived from one kickoff session with your most experienced staff member. Iteration is expected: the model is reviewed after 30 days of live data and re-tuned. Deep ML-based scoring (learning from historical closed-won/lost data) is a future phase.

3.3 Priority 2 - Sales AI Assistant for B2C / Brand B (Stream 3)

> **Section 3.3 (1):** "Faster-moving, higher-volume, transactional enquiries. Same assistant logic, lighter-touch cadence - extended once Priority 1 is live and proven."

1. Ship a **lighter scoring model** tuned for retail signals (in-stock interest, price sensitivity, repeat-customer flags), not project qualification.
2. Ship a **faster follow-up cadence** suited to impulse and short-cycle retail buying behaviour.
3. Route B2C enquiries into the same dashboard as B2B so management sees both brands in one place.

| # | Item | Delivery |
|---|-------------------------------|--|
| 1 | B2C enquiry scoring | Retail-tuned rules; lighter than B2B |
| 2 | Short-cycle cadence templates | Same-day and next-day reminders with retail-tone templates |
| 3 | Staff walkthrough (B2C team) | One working session, recorded |

Scope boundary - sequencing. Priority 2 goes live after Priority 1 (B2B) is running and the scoring rules have survived first contact with real enquiries - see Section 5 for the per-tier month schedule. Both tracks run on the same database and dashboard from Section 3.1.

3.4 Pipeline Visibility & Reporting (Stream 4)

| # | Item | Delivery |
|---|----------------------------|---|
| 1 | Unified pipeline dashboard | One view; filter by brand, stage, score, owner |
| 2 | Stuck-deal alerts | Deals with no activity beyond SLA surface automatically |
| 3 | Weekly digest | Auto-emailed Monday summary of new / stuck / won / lost |

3.5 One System, Two Segments (Design Principle)

Both tracks run through the **same database** and the **same Sales AI Assistant**, but Brand A (B2B/project) and Brand B (B2C/retail) are scored and followed up using **separate logic appropriate to their sales cycle**. The system reflects how the business actually sells, not a one-size-fits-all template. This is enforced by the segmentation in Section 3.1 (auto-tagging at intake) and the two scoring models in Sections 3.2 and 3.3.

3.6 Website, SEO & AEO - Future Phase (Stream 5)

> **Section 3.6 (1):** "A preliminary review of both websites - useful context alongside the CRM/AI system, since enquiry quality starts with what shows up in search and AI answer engines before a contact ever reaches the database."

Preliminary review of both sites is included in Phase 1 as a written note. The build-out below is **scoped as a future phase** and is not in the committed Phase 1 budget:

1. **Brand A (brand-a-website.com):** structure the 1,100+ product catalogue for SEO, add project/B2B landing pages targeting searches like "commercial lighting design Kuala Lumpur", add guide content that AI answer engines will cite.
2. **Brand B (brand-b-website.com):** add FAQ and "how to choose" content per category (the format AEO favours most), differentiate metadata and headline positioning from Brand A.
3. **Both:** align on-page metadata so Brand A signals "design-led, project-capable" and Brand B signals "affordable, fast, reliable".

Scope boundary - Phase 2. SEO/AEO content build-out for either site is a dedicated content engineering engagement and is quoted separately once Phase 1 CRM is live and generating real enquiry data (which becomes the source material for the FAQ content).

3.7 Support, Warranty & Handover (Stream 6)

| # | Item | Delivery |
|---|-----------------------|---|
| 1 | 30-day stabilisation | Free; defects fixed immediately post go-live |
| 2 | 90-day warranty | Free; covers scoring rule bugs, cadence engine, dashboard defects |
| 3 | Post-warranty support | Rate-card in Section 6 |

4. Deliverables

| # | Deliverable | Handed over |
|---|--|---|
| 1 | WhatsApp Business (both brands) | Live, catalogue configured, quick replies ready |
| 2 | Central CRM workspace | Segmented pipelines, contact schema, auto-tagging rules live |
| 3 | Sales AI Assistant - B2B scoring + cadence | Live for Brand A, tuned to project sales |
| 4 | Sales AI Assistant - B2C scoring + cadence | Live for Brand B, tuned to retail sales |
| 5 | Pipeline dashboard | Unified view, stuck-deal alerts, weekly digest |
| 6 | Preliminary website / SEO / AEO note | Written review of both sites, priorities for Phase 2 |
| 7 | Staff training | Two working sessions (one B2B, one B2C), recorded for future hires |
| 8 | Operations manual | PDF: how to add contacts, read scores, run cadences, read the dashboard |

Stack. Lean CRM tier + WhatsApp Business API + a scoring engine we own and can tune. We deliberately avoid HubSpot/Zoho paid tiers in Phase 1 (see Section 3.6 boundary and the "not included" list) until the workflow is proven.

5. Delivery Timeline

Two delivery windows map to the two commercial tiers in Section 6.1. Phase order is identical; only the calendar changes. Months are measured from signed SOW and paid deposit.

Table 1 - Fast Track (3 - 5 months, matches Section 6.1 Fast Track tier)

| Phase | Month | Outcome |
|--|-------------|--|
| Discovery + qualification workshop with senior staff | Month 1 | Scoring rules captured, cadence agreed, sources mapped |
| Shared Foundation + Priority 1 (B2B) build | Month 1 - 2 | WhatsApp Business live, CRM live, B2B assistant live, B2B team trained |
| Priority 2 (B2C) build | Month 3 | B2C assistant live, B2C team trained, dashboard unified |
| Stabilisation + on-site / local AI support handover | Month 4 - 5 | Live monitoring, first cadence data reviewed, tuning, local support runbook signed off |

Table 2 - Standard (6 - 7 months, matches Section 6.1 Standard tier)

| Phase | Month | Outcome |
|--|-------------|--|
| Discovery + qualification workshop with senior staff | Month 1 | Scoring rules captured, cadence agreed, sources mapped |
| Shared Foundation + Priority 1 (B2B) build | Month 2 - 3 | WhatsApp Business live, CRM live, B2B assistant live, B2B team trained |
| Priority 2 (B2C) build | Month 4 - 5 | B2C assistant live, B2C team trained, dashboard unified |
| Stabilisation (remote) | Month 6 - 7 | Live monitoring, first cadence data reviewed, tuning, remote handover |

Scope boundary - timeline vs tier. Fast Track compresses the same scope into 3 - 5 months by running Shared Foundation and Priority 1 in parallel and by including on-site / local AI support during stabilisation. Standard sequences the phases and

delivers remote-only. Neither tier drops scope - the deliverables in Section 4 are identical.

6. Commercials

6.1 Delivery Tiers & Pricing

Pricing is presented in Malaysian Ringgit (MYR) and structured as two delivery tiers. Both tiers deliver the same Section 4 scope; only the calendar, staffing model, and support format differ. Third-party costs (WhatsApp Business API messaging, CRM subscription, SMS/email quota, any paid CRM upgrade licences) are pass-through at cost, paid directly by the Client to each provider, and are excluded from the tier price.

Table 1 - Tier comparison at a glance (MYR)

| Line | Fast Track | Standard |
|----------------------------|---|---|
| Delivery window | 3 - 5 months | 6 - 7 months |
| List price | RM 22,000 | RM 16,000 |
| After discount | RM 16,000 | RM 10,000 - 14,000 |
| Client saving vs list | RM 6,000 (~27%) | RM 2,000 - 6,000 (~13 - 37%) |
| Team allocation | Dedicated squad, parallel workstreams | Lean squad, sequenced workstreams |
| On-site / local AI support | Included during stabilisation | Not available |
| Delivery mode | Hybrid (on-site + remote) | Remote-only |
| Post-delivery maintenance | RM 80/hour | RM 100/hour |
| Payment schedule | 50% signature / 50% at Priority 2 go-live | 50% signature / 50% at Priority 2 go-live |

Table 2 - Fast Track (3 - 5 months) - detailed breakdown

| Item | Detail | Value (MYR) |
|---|---|-------------|
| Discovery + qualification workshop (Month 1) | On-site, senior staff interview, scoring rules captured | included |
| Shared Foundation build (WhatsApp Business + CRM) | Run in parallel with Priority 1 | included |

| Item | Detail | Value (MYR) |
|--|--|-------------------|
| Priority 1 - B2B / Brand A assistant | Scoring, cadence, reminders, B2B team training | included |
| Priority 2 - B2C / Brand B assistant | Scoring, cadence, B2C team training, unified dashboard | included |
| Stabilisation with on-site / local AI support | Month 4 - 5, on-the-ground tuning + runbook handover | included |
| 30-day post-launch defect fixes + 90-day warranty | Section 3.7 | included |
| List price | Before discount | RM 22,000 |
| Fast Track discount | Applied on signature within validity | - RM 6,000 |
| Committed price | Fixed at kickoff | RM 16,000 |
| Post-delivery maintenance | Ad-hoc, monthly timesheet, no minimum | RM 80/hour |

Table 3 - Standard (6 - 7 months) - detailed breakdown

| Item | Detail | Value (MYR) |
|---|--|-------------|
| Discovery + qualification workshop (Month 1) | Remote, senior staff interview, scoring rules captured | included |
| Shared Foundation build (WhatsApp Business + CRM) | Sequenced, Month 2 - 3 | included |
| Priority 1 - B2B / Brand A assistant | Scoring, cadence, reminders, B2B team training | included |
| Priority 2 - B2C / Brand B assistant | Month 4 - 5, unified dashboard | included |
| Stabilisation - remote only | Month 6 - 7, remote monitoring + handover | included |
| 30-day post-launch defect fixes + 90-day warranty | Section 3.7 | included |

| Item | Detail | Value (MYR) |
|---------------------------|---|---------------------------|
| List price | Before discount | RM 16,000 |
| Standard discount band | Set at kickoff by manpower + go-live date | - RM 2,000 to - RM 6,000 |
| Committed price | Fixed at kickoff within band | RM 10,000 - 14,000 |
| Post-delivery maintenance | Ad-hoc, monthly timesheet, no minimum | RM 100/hour |

Scope boundary - local AI support. On-site / local AI support is available **exclusively under the Fast Track tier**. Standard tier engagements are delivered remotely; local support cannot be added later without upgrading the engagement to Fast Track.

Scope boundary - Standard tier range. The RM 10,000 - 14,000 band on Standard reflects manpower allocation and target go-live date. The exact figure is fixed at kickoff and written into the SOW: a larger team and faster go-live push the number toward RM 14,000; a lean team with a relaxed timeline lands near RM 10,000. The band does not float after kickoff.

Scope boundary - what the discount reflects. The Fast Track discount (RM 6,000 off list) reflects the operational efficiency of a dedicated parallel-track squad. The Standard discount band reflects the flexibility Client A retains on staffing and cadence. Neither discount reduces the Section 4 deliverables.

Scope boundary - maintenance. Post-delivery maintenance is billed hourly outside the fixed tier price - **RM 80/hour** for Fast Track engagements, **RM 100/hour** for Standard. Covers ad-hoc changes, model tuning, monitoring assistance, and any support work outside the original delivery scope. Billed monthly against a signed timesheet; no monthly minimum.

6.2 What Is Explicitly NOT In The Tier Price

Bulk migration of the ~1,000 existing scattered contacts (Section 3.1 boundary), the **full SEO/AEO content build-out** (Section 3.6), a **paid CRM platform upgrade** (Section 7, item 3), and a **deep ML scoring model** (Section 7, item 4). Each is quoted separately on the rate-card below. Third-party subscriptions and messaging fees are also outside the tier price - paid directly by the Client to each provider with no markup from Riseup Asia.

6.3 Optional Extended Track & Rate-Card

| Item | Cost |
|---|---|
| Bulk migration of ~1,000 existing contacts (dedupe, clean, import) | MYR 2,500 fixed, quoted firm after source audit |
| Full SEO/AEO content build-out - Brand A (project/B2B landing pages + guides) | Scoped and quoted after Phase 1 launch (typical range MYR 8,000 - 15,000) |
| Full SEO/AEO content build-out - | Scoped and quoted after Phase 1 |

| Item | Cost |
|--|--|
| Brand B (FAQ + "how to choose" per category) | launch (typical range MYR 6,000 - 12,000) |
| Paid CRM platform upgrade (HubSpot / Zoho / equivalent) | Licence at vendor rate + MYR 3,000 migration and reconfiguration |
| Deep ML scoring model (trained on closed-won/lost history) | Scoped after 6+ months of clean pipeline data; MYR 6,000+ typical |
| Additional training sessions beyond those included in the tier | MYR 250/hour |

Third-party costs (WhatsApp Business API messaging, CRM subscription, SMS/email quota, any paid CRM upgrade licences) are paid directly by the Client to those providers; we do not mark them up. We supply a one-page itemised purchase list at kickoff so the Client can buy them in one go.

6.4 Payment Terms

| Term | Detail |
|----------------|---|
| Payment method | Wise or local Malaysian bank transfer (MYR) |
| Schedule | 50% upfront on signature, 50% within 7 days of Priority 2 (B2C) go-live |
| Currency | Committed price in MYR; USD equivalent available on request at the prevailing bank rate |
| SST | Not applied by default (see Section 6.1). If required, added as a separate line at 8%. |
| Invoice format | One invoice per milestone, itemised by tier deliverables |
| Validity | This proposal is valid for 60 days from the submission date above |

7. Not Included in Phase 1 (Flagged for Later)

Each item below is deliberately scoped out of the committed Phase 1 budget and quoted separately on the rate-card in Section 6.3:

- Migration of all ~1,000 existing scattered contacts** - requires a separate data clean-up effort once sources are confirmed.
- Full SEO/AEO content build-out for both websites** - see Section 3.6.
- Paid CRM platform upgrade (HubSpot / Zoho / equivalent)** - recommended only once the lean version proves the workflow.

4. **Deep ML scoring model** - trained on historical closed-won/lost data; needs 6+ months of clean pipeline data first.

8. Next Steps

1. Confirm scope and budget in Section 6.
2. Share current enquiry sources (WhatsApp numbers, web forms, walk-in notes) so the CRM structure matches reality.
3. Schedule the Month 1 kickoff session to map current qualification criteria with your most experienced staff member.

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