

# GOLDRICH CAPITAL

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## AI Infrastructure & Automation Services

*Comprehensive Service Proposal & Playbook*

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April 2026 | Confidential

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# 01 — EXECUTIVE SUMMARY

In today's competitive landscape, businesses that fail to integrate intelligent automation into their operations are leaving revenue, efficiency, and customer satisfaction on the table. Goldrich Capital provides end-to-end AI infrastructure services — from foundational domain and workspace setup to custom-built autonomous agents, real-time KPI dashboards, and fully automated sales funnels.

This proposal outlines a comprehensive, phased approach to transforming your business operations through technology. Every service described here has been battle-tested across real client deployments, refined through hands-on implementation, and designed to scale with your growth.

*"We don't just set up tools — we build the intelligent infrastructure that lets your business operate at a fundamentally different level."*

## What You Get

- Complete digital foundation — domains, email, workspace, and identity
- AI-powered communication systems with full regulatory compliance
- Custom autonomous agents tailored to your specific business processes
- Real-time KPI dashboards with proprietary metrics per business segment
- Automated sales funnels and campaign infrastructure
- Ongoing optimization and support

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## 02 — THE GOLDRICH CAPITAL ADVANTAGE

Goldrich Capital isn't a traditional consulting firm or a dev shop that hands you a deliverable and disappears. We operate as an embedded technology partner, building infrastructure that is owned by you, operated for you, and designed to compound in value over time.

### Our Core Differentiators

#### Full-Stack Ownership

You own every domain, account, dashboard, and agent we build. No vendor lock-in, no hostage pricing.

#### Battle-Tested Playbooks

Every system we deploy has been refined through real-world implementation — not theoretical frameworks pulled from a textbook.

#### AI-Native Thinking

We don't bolt AI onto existing processes. We redesign workflows around what's now possible with intelligent automation.

#### Compliance-First

From AI disclosure requirements to TCPA-compliant texting campaigns, every system we build meets current regulatory standards.

#### Scalable Architecture

Whether you're a 5-person startup or a 500-person enterprise, our infrastructure scales without rearchitecting.

### Who This Is For

Our services are designed for businesses that are ready to professionalize their digital operations — companies that have outgrown duct-taped systems, that need real infrastructure but don't have the internal team to build it, or that want to leverage AI before their competitors do.

- Small to mid-size businesses scaling past founder-led operations
- Companies in regulated industries needing compliant AI integration
- Sales-driven organizations looking to automate top-of-funnel
- Established businesses modernizing legacy tech stacks

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## 03 — PHASE 1: DIGITAL FOUNDATION

### Domain & Workspace Setup

Every serious business needs a professional digital foundation. This phase establishes the core identity and communication infrastructure that everything else builds on top of. We handle the full lifecycle — from domain acquisition through workspace configuration and team onboarding.

#### Domain Acquisition & Management

- Domain registration and DNS configuration via GoDaddy or preferred registrar
- Primary domain + strategic secondary/defensive domain registrations
- SSL certificate provisioning and auto-renewal setup
- DNS record configuration (MX, SPF, DKIM, DMARC) for email deliverability
- Domain forwarding and subdomain architecture planning

#### Google Workspace Deployment

- Google Workspace Business setup linked to your custom domain
- Professional email addresses (team@yourdomain.com)
- Shared Drive architecture — organized by department/function
- Google Calendar, Meet, and Chat configuration for team collaboration
- Admin console security policies (2FA enforcement, device management)
- User provisioning and role-based access controls

#### Identity & Brand Consistency

- Email signature templates with consistent branding across all users
- Google Sites internal wiki or client-facing landing page
- Document templates (letterhead, proposals, invoices) in Google Docs
- Brand asset library in Shared Drive

Deliverable	Description	Timeline
Domain Portfolio	Primary + defensive domains registered and configured	Week 1

Google Workspace	Full workspace with email, drives, and admin policies	Week 1-2
DNS & Security	SPF, DKIM, DMARC, SSL — production-grade email security	Week 1
Team Onboarding	User accounts, permissions, and training documentation	Week 2

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# 04 — PHASE 2: AI COMMUNICATION & COMPLIANCE

## Texting, AI Disclosure & Compliant Automation

As AI-powered communication becomes standard, regulatory requirements are tightening. We build your outbound communication infrastructure with compliance baked in from day one — not bolted on as an afterthought. This includes SMS/MMS campaigns, AI chatbot deployment, and the disclosure frameworks required by FTC guidelines and emerging state-level AI transparency laws.

### Compliant Texting Infrastructure

- Business texting platform setup (Twilio, OpenPhone, or equivalent)
- 10DLC registration and A2P campaign verification
- TCPA-compliant opt-in/opt-out workflows
- Automated drip sequences with intelligent scheduling
- Two-way conversational SMS with AI-powered response handling
- Campaign analytics dashboard with delivery rates, response rates, and ROI tracking

### AI Disclosure & Transparency Frameworks

With the FTC and multiple states now requiring businesses to disclose when customers are interacting with AI, we implement disclosure frameworks that protect your business while maintaining user experience.

- Automated AI disclosure messaging at point of bot interaction
- Disclosure language reviewed for current FTC, CCPA, and state-level requirements
- Opt-out pathways for customers who prefer human interaction
- Audit trail and logging for all AI-to-customer interactions
- Quarterly compliance review and disclosure language updates

### Chatbot & Virtual Assistant Deployment

- Website chatbot trained on your business knowledge base
- Lead qualification and appointment booking automation
- After-hours intelligent response handling
- Escalation workflows — AI to human handoff with full context transfer
- Multi-channel deployment (website, SMS, social DMs)

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# 05 — PHASE 3: INTELLIGENT AGENT DEPLOYMENT

## Custom Autonomous Agents

Beyond chatbots, we build individualized AI agents that operate as autonomous digital team members. These agents are purpose-built for specific business functions — from content generation to data analysis to customer lifecycle management. Each agent is designed around your proprietary processes, trained on your data, and monitored for performance.

### What Makes Our Agents Different

- **Purpose-built** — Each agent is designed for a specific function, not a generic chatbot trying to do everything
- **Knowledge-grounded** — Agents operate on your proprietary data, SOPs, and business rules
- **Autonomous** — Set schedules, triggers, and workflows. Agents operate without babysitting
- **Observable** — Full audit logs, performance dashboards, and alerting when agents need attention
- **Evolving** — Agents improve over time through feedback loops and prompt refinement

### Example Agent Deployments

#### Content Engine Agent

Automatically generates blog posts, social media content, newsletter drafts, and marketing copy based on your brand voice and content calendar.

#### Lead Qualification Agent

Scores inbound leads based on your ICP criteria, enriches contact data, and routes qualified leads to the appropriate sales rep with context.

#### Customer Success Agent

Monitors customer health signals, triggers proactive outreach sequences, and surfaces at-risk accounts before they churn.

#### Research & Intelligence Agent

Scans industry sources, competitor activity, and market data to deliver daily/weekly intelligence briefings to your leadership team.

#### Operations Agent

Automates recurring operational tasks — report generation, data reconciliation, scheduling, inventory alerts, and workflow orchestration.

*Every client receives at least one custom agent as part of their base package. Additional agents are scoped and priced based on complexity.*

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# 06 — PHASE 4: KPI DASHBOARDS & BUSINESS INTELLIGENCE

## Individualized Metric Dashboards

Generic analytics tools show you data. Our KPI dashboards show you what matters. We build individualized dashboards for each critical segment of your business — each with proprietary metrics, real-time data feeds, and actionable insights specific to that function.

### Dashboard Architecture

Every client receives one to two segment-specific dashboards as part of their core package. Additional dashboards are available as add-ons, priced based on data complexity and integration requirements.

#### Sales Performance Dashboard

- Pipeline velocity and conversion rates by stage
- Revenue forecasting with AI-powered trend analysis
- Rep-level activity metrics and leaderboards
- Deal health scoring and at-risk deal alerts
- Campaign attribution and source-of-truth tracking

#### Marketing Analytics Dashboard

- Campaign ROI across all channels (paid, organic, email, SMS)
- Funnel analytics — traffic to lead to customer conversion
- Content performance scoring and engagement trends
- Audience segmentation insights and behavioral cohorts
- Budget allocation optimizer with spend-to-outcome modeling

#### Operations Dashboard

- Process cycle time and throughput metrics
- Resource utilization and capacity planning
- Quality metrics and error rate tracking
- Vendor/partner performance scorecards
- Automated alerting on KPI threshold breaches

#### Customer Success Dashboard

- NPS/CSAT trending with drill-down by segment

- Churn prediction scoring with risk factors
- Expansion revenue tracking and upsell pipeline
- Support ticket analytics and resolution metrics
- Customer health composite scoring

## **Technology Stack**

- Data integration via API connectors, webhooks, and ETL pipelines
- Visualization layer built on Looker Studio, Retool, or custom React dashboards
- Real-time data refresh (15-minute to real-time depending on source)
- Role-based access — executives see strategy, managers see operations, reps see their numbers
- Mobile-responsive design for on-the-go access

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# 07 — PHASE 5: SALES FUNNELS & CAMPAIGN AUTOMATION

## Revenue-Generating Infrastructure

Traffic means nothing without conversion infrastructure. We build complete sales funnels — from first touch to closed deal — with intelligent automation at every step. Whether you're running paid ads, organic content, or outbound campaigns, the funnel captures, nurtures, and converts.

### Funnel Architecture

- **Top of Funnel:** Landing pages, lead magnets, ad campaign integration, SEO content
- **Middle of Funnel:** Email nurture sequences, retargeting, webinar funnels, case study delivery
- **Bottom of Funnel:** Proposal automation, meeting scheduling, trial/demo workflows, contract generation
- **Post-Sale:** Onboarding sequences, upsell triggers, referral campaigns, review solicitation

### Campaign Types We Build

#### Outbound Sales Campaigns

Multi-channel outreach sequences (email + SMS + social) with AI-personalized messaging, A/B testing, and automated follow-up cadences.

#### Paid Acquisition Funnels

Landing page design, ad creative, audience targeting, conversion tracking, and automated lead routing from Google Ads, Meta, and LinkedIn.

#### Email Marketing Automation

Welcome sequences, cart abandonment, re-engagement campaigns, newsletter infrastructure, and deliverability optimization.

#### Referral & Loyalty Programs

Automated referral tracking, reward distribution, loyalty tier management, and program performance analytics.

#### Event & Webinar Funnels

Registration pages, reminder sequences, live event tech setup, post-event follow-up automation, and attendee scoring.



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# 08 — PHASE 6: END-TO-END TECHNOLOGY STACK

## Complete Technical Infrastructure

For clients who want the whole picture, we architect and deploy a complete technology stack — every tool, integration, and automation layer working together as a single system. This is the full transformation: from disconnected tools and manual processes to an integrated, intelligent operation.

### Infrastructure Layer

Domain, DNS, hosting, SSL, CDN, cloud storage, and backup systems

### Communication Layer

Email (Google Workspace), texting (Twilio), chat (Slack/Teams), video (Meet/Zoom)

### CRM & Data Layer

CRM setup and customization, contact management, pipeline automation, data hygiene

### AI & Automation Layer

Custom agents, chatbots, workflow automation, intelligent routing

### Analytics Layer

KPI dashboards, reporting infrastructure, data warehousing, BI tools

### Marketing & Sales Layer

Funnels, campaigns, ad management, content pipeline, social scheduling

### Security & Compliance Layer

Access controls, AI disclosure, data privacy, audit logging, backup/recovery

*The end-to-end stack is our most comprehensive offering. It is typically deployed over 8-12 weeks and includes dedicated support throughout.*

## 09 — SERVICE PACKAGES & PRICING

We offer three core packages designed to meet businesses at different stages of their technology journey. All packages include ownership of everything we build — you're never locked into our platform.

<p style="text-align: center;"><b>FOUNDATION</b></p> <p style="text-align: center;"><b>\$2,500</b></p> <p style="text-align: center;">per month</p> <ul style="list-style-type: none"> <li>✓ Google Workspace setup</li> <li>✓ Domain acquisition (1 domain)</li> <li>✓ DNS &amp; email security config</li> <li>✓ 1 KPI dashboard</li> <li>✓ Basic chatbot deployment</li> <li>✓ AI disclosure framework</li> <li>✓ 30 days post-launch support</li> </ul>	<p style="text-align: center;"><b>GROWTH</b></p> <p style="text-align: center;"><b>\$5,000</b></p> <p style="text-align: center;">per month</p> <ul style="list-style-type: none"> <li>✓ Everything in Foundation</li> <li>✓ Compliant SMS infrastructure</li> <li>✓ 2 custom AI agents</li> <li>✓ 2 KPI dashboards</li> <li>✓ 1 sales funnel build</li> <li>✓ Email automation setup</li> <li>✓ Campaign analytics</li> <li>✓ 60 days post-launch support</li> </ul>	<p style="text-align: center;"><b>ENTERPRISE</b></p> <p style="text-align: center;"><b>\$10,000+</b></p> <p style="text-align: center;">per month</p> <ul style="list-style-type: none"> <li>✓ Everything in Growth</li> <li>✓ Full end-to-end tech stack</li> <li>✓ Unlimited custom agents</li> <li>✓ 4+ KPI dashboards</li> <li>✓ Multi-funnel architecture</li> <li>✓ Dedicated account manager</li> <li>✓ Quarterly strategy reviews</li> <li>✓ Ongoing optimization retainer</li> </ul>
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### Add-On Services

Add-On	Description	Starting At
Additional KPI Dashboard	Custom dashboard for an additional business segment	\$750/mo
Additional AI Agent	Purpose-built agent for a specific business function	\$1,000/mo
Additional Sales Funnel	Complete funnel build with landing pages and automation	\$1,500

SMS Campaign Management	Ongoing campaign management, A/B testing, and optimization	<b>\$500/mo</b>
Compliance Audit	Quarterly review of AI disclosure and communication compliance	<b>\$500/quarter</b>
Training & Onboarding	Team training sessions on all deployed systems	<b>\$250/session</b>

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## 10 — IMPLEMENTATION TIMELINE

Our phased implementation approach ensures each layer of infrastructure is properly built, tested, and validated before moving to the next. Timelines are based on the Growth package; Foundation is faster and Enterprise may extend depending on scope.

Week	Phase	Key Deliverables
1	Discovery & Planning	Business audit, requirements gathering, architecture planning
2	Digital Foundation	Domains, Google Workspace, DNS, email security, team onboarding
3-4	Communication & Compliance	SMS infrastructure, chatbot, AI disclosure framework, compliance audit
5-6	Agent Deployment	Custom AI agents built, trained, tested, and deployed
7-8	Dashboards & Analytics	KPI dashboards live with real-time data, team training
9-10	Funnels & Campaigns	Sales funnels built, campaigns configured, A/B testing initiated
11-12	Optimization & Handoff	Performance review, optimization pass, documentation, support transition

*Note: Timelines are estimates based on typical engagement scope. Actual timelines are confirmed during the discovery phase and may vary based on client-specific requirements, data availability, and integration complexity.*

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# 11 — CASE STUDY: FULL-STACK DEPLOYMENT

The following case study demonstrates the breadth and impact of a full Goldrich Capital engagement. While client details have been generalized for confidentiality, the scope, approach, and outcomes are representative of our standard deployment methodology.

## The Challenge

A growing service-based business was operating on a patchwork of disconnected tools — personal Gmail accounts for business email, no CRM, manual lead tracking in spreadsheets, and zero automation. Their team was spending 30+ hours per week on tasks that should have been automated. They had no online presence beyond a basic website and were losing leads due to slow response times and inconsistent follow-up.

## What We Built

- Registered and configured their primary business domain plus two defensive domains
- Deployed Google Workspace with 12 user accounts, shared drives, and security policies
- Set up compliant SMS infrastructure with automated lead follow-up sequences
- Built a website chatbot handling 60% of inbound inquiries without human intervention
- Deployed three custom AI agents: content engine, lead qualifier, and operations assistant
- Created two real-time KPI dashboards: sales performance and marketing analytics
- Built a complete inbound sales funnel with landing pages, nurture sequences, and booking automation
- Implemented AI disclosure framework compliant with FTC guidelines

## Results

Metric	Before	After	Impact
Lead Response Time	4-6 hours	Under 2 minutes	97% faster
Weekly Manual Hours	30+ hours	8 hours	73% reduction
Lead-to-Close Rate	8%	19%	2.4x improvement

Inbound Inquiries Handled by AI	0%	<b>60%</b>	<b>Freed human team</b>
Monthly Revenue Impact	Baseline	<b>+38%</b>	<b>Within 90 days</b>

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# 12 — TERMS & NEXT STEPS

## Engagement Terms

- **Ownership:** All domains, accounts, dashboards, agents, and infrastructure are owned by the client. Goldrich Capital retains no proprietary access after engagement ends.
- **Payment:** Monthly packages billed on the 1st of each month. Setup fees (if applicable) are billed at project kickoff. Add-ons are billed monthly or per-instance as noted.
- **Term:** Foundation and Growth packages have a 3-month minimum engagement. Enterprise packages have a 6-month minimum. Month-to-month available after the initial term.
- **Confidentiality:** All client data, business processes, and proprietary information are treated as strictly confidential. NDA available upon request.
- **Support:** All packages include email and chat support during business hours. Enterprise includes a dedicated Slack channel and priority response SLA.

## Getting Started

Ready to build your AI infrastructure? Here's how we begin:

### Step 1: Discovery Call

30-minute call to understand your business, current tech stack, and goals. We'll identify the right package and any custom requirements.

### Step 2: Proposal & SOW

Within 48 hours of our call, you'll receive a customized Statement of Work with exact scope, timeline, and pricing.

### Step 3: Kickoff

Upon approval, we schedule a kickoff meeting and begin the discovery phase. You'll have a dedicated project lead from day one.

### Step 4: Build & Deploy

We build in phases with weekly check-ins. Each phase has clear deliverables and sign-off before we move to the next.

### Step 5: Optimize & Support

After launch, we monitor, optimize, and provide ongoing support to ensure everything performs at the highest level.

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# LET'S BUILD

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