

Your AI plan, *built around your business.*

I don't sell packages off a shelf. Every engagement starts with research into how your business runs. Then you get a plan written for you: what to change first, which tools to use, what gets built and by whom, what your team will learn and what comes after.

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SAMPLE PLANS

[Architecture and engineering](#) [Law](#) [Accounting and bookkeeping](#) [Real estate](#) [Trades and home services](#)
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HOW IT WORKS

Research first. *Then a plan made for you.*

I learn your business from the experts already in it and build around what they know. Two plans rarely look alike, even for firms in the same field.

1 Research

Research comes with every engagement. I meet the people who do the work, review what you produce and the software you use, then follow real jobs end to end.

2 Your plan

You receive a written plan: what I found, what to change first, which tools to use, what gets built and by whom, what your team learns and the scope with its price.

3 Fit it to your budget

You decide what stays in. Remove parts to fit your budget, or add them now or later. Nothing gets built until you approve the final scope.

4 Build and teach

Each part is shaped around your documents and tools and built by me, your team or both of us. Your team learns to run it all and, if you want, to build new pieces.

5 Choose what comes next

Once it all works in daily use, you choose what follows: a long-term plan, a short-term plan, a continued partnership or a mix, with a hiring plan if needed.

What I'll ask from you

- ◆ Time with you and your team
- ◆ Examples of your best documents, so everything matches your standard
- ◆ Access to your software where it's needed
- ◆ One person to lead it after hand-off

Who does what

- ◆ I research, plan, build and teach.
- ◆ **You** decide what goes in and approve it.
- ◆ **Your team** runs it, adjusts it and builds on it, with my support if you want it.

I work out of Tulsa, Oklahoma. Sessions happen at your office anywhere in the US, remotely or both.

YOUR PLAN

What's inside your plan

The plan is a working document written for your business alone. It's specific enough to act on and clear enough to share with partners or managers before you decide.

Recommended plan

PREPARED FOR YOUR BUSINESS

- 01 Findings**
Where the hours go, which tasks repeat and where delays and mistakes tend to start.
- 02 Priorities**
The workflows to change first, ranked by time saved and how easily they'd take hold.
- 03 Tools**
Each tool I recommend and what it's for, plus which of your current tools should stay.
- 04 Build list**
Every template, set of AI instructions, connection and custom build, listed one by one with who builds it: me, your team or the two of us together.
- 05 Training**
Who learns which tools, who learns to build on them and how the training is delivered.
- 06 Safeguards**
What stays with your people, how client information is handled and where each AI draft gets checked.
- 07 Measures**
Where each workflow stands today and how we'll both know the change is working.
- 08 After the build**
What I recommend once it's built: a long-term or short-term plan, a continued partnership or a mix, plus a hiring plan if needed.
- 09 Scope and price**
The recommended scope with its price, the parts you can remove or add and any software subscriptions it needs.

Nothing in the plan is boilerplate. If a section doesn't apply to your business, it isn't there.

BUILDING BLOCKS

The parts of a plan

Plans are built from parts like these, chosen and shaped by the research into your business. They're the most common ones, not the full list. Most can be added or removed to fit your budget and your timing.

WORKFLOWS AND DOCUMENTS

Workflow rebuild

One job your team repeats, rebuilt from the first request to delivery, with AI where it helps and a person at every decision point.

YOU RECEIVE

The new workflow, written out for your team.

Document templates

Templates for the documents you produce most, built from your own best examples.

YOU RECEIVE

A template set for proposals, reports, letters, checklists or client updates.

AI instructions

Custom instructions set up inside your AI tools, so drafts come out in your format, your terminology and your voice.

YOU RECEIVE

Instructions for each document type, installed and tested.

Reference library

Your approved language, past work and standard answers organized so AI drafts can draw on them.

YOU RECEIVE

A library your tools and your team can search.

Procedure guides

How your business does things, written down in plain steps so the know-how doesn't depend on anyone's memory.

YOU RECEIVE

A guide for each procedure your team repeats.

Meeting notes and follow-ups

With everyone's consent, meetings become organized notes, assigned action items and drafted follow-up emails.

YOU RECEIVE

A meeting-notes setup your team runs on its own.

TOOLS AND CONNECTIONS

Tool setup

Business accounts, shared workspaces, permissions and privacy settings configured correctly from the start.

YOU RECEIVE

Tools ready for client work, with data settings documented.

Automations

Information that moves between your tools without retyping: a form fills a tracker, a signed document updates a record, a finished job starts an invoice.

YOU RECEIVE

Automations built, tested and explained.

Custom connectors

When your software won't connect to the rest on its own, I build what joins them, where the software allows it.

YOU RECEIVE

A connector built for your systems.

Trackers and dashboards

One view of what's in progress, what's waiting on whom and what's overdue.

YOU RECEIVE

A tracker or dashboard built on your live work.

RULES AND SAFEGUARDS

Team AI guidelines

Written rules for your team on approved tools, client information and review.

YOU RECEIVE

Guidelines ready to adopt and share.

Review checklists

Checklists for whoever signs off, so every AI draft is checked against the same standard before it goes out.

YOU RECEIVE

A checklist for each document that needs sign-off.

Some parts depend on others. What can connect also depends on the software you use. The research into your business sorts out both before your scope is set.

LARGER BUILDS

I can build any of these for you, build them side by side with your team or, where it fits, teach your people to make them.

Website

A new or rebuilt website for your business, with forms that send inquiries straight into your systems.

YOU RECEIVE

A finished site, handed over with full access.

Client portal

A place where clients upload files, sign documents and check where their work stands.

YOU RECEIVE

A portal set up for your clients, with your team trained on it.

Custom apps and tools

Software made for a job your business does its own way, like an estimating calculator, a scheduling board or an intake screen.

YOU RECEIVE

A working app, documented and handed over.

Assistants built on your work

AI assistants set up on your past work, procedures and standards, so answers and drafts start from how your business already does things.

YOU RECEIVE

An assistant for each team or role, tested on real work.

Specialist software add-ons

Plugins and add-ons that bring AI inside the programs your field depends on, or carry work from one program to the next.

YOU RECEIVE

Add-ons built, tested and installed in your software.

AI agents for multi-step work

Agents that carry a job through several stages: gathering what it needs, drafting, checking against your requirements and routing it to a person for approval.

YOU RECEIVE

A working agent with every approval point marked.

Larger builds aren't limited to this list. If something is worth building for your business, whether the research turns it up or you bring it to me, it can go into your plan.

TRAINING AND TEACHING

Training on one tool

Depth on the single tool your team will use most, taught on your own documents.

YOU RECEIVE

Sessions plus a reference guide for that tool.

Training across tools

How several tools work together inside your workflows, from first draft to finished file.

YOU RECEIVE

Sessions plus a guide to which tool handles each step.

One-on-one coaching

Individual time for owners, leads or anyone who needs more of it.

YOU RECEIVE

Coaching sessions on that person's actual work.

Team sessions

Group training at your office or remote, using your own jobs as the material.

YOU RECEIVE

Sessions for each team or department.

Role guides

Short reference guides for each role: which tool to use, when to use it and what to check.

YOU RECEIVE

One guide per role named in the plan.

Builder training

For the people who'll own your systems: how to adjust them, fix what breaks when a tool changes and build the next workflow on their own.

YOU RECEIVE

Hands-on sessions building real pieces of your systems.

Your plan recommends the parts that matter most for your business. The rest stay available whenever you want them.

AFTER THE BUILD

I don't just build it. *I teach your people how.*

Training goes past using the tools. The people who'll own your systems can learn to adjust them, fix them when something changes and build what comes next.

01

I build it

The first pieces, built around your documents with your team weighing in.

02

We build together

Your people take the lead on the next pieces while I work beside them.

03

Your team builds

They adjust, fix and extend the systems on their own.

How far your team goes is your call. Some clients want everything built for them. Others want their own people taking the lead as early as possible.

WHAT COMES AFTER THE BUILD

Like the rest of your plan, this part is chosen to fit your business. Pick one, combine them or change course later.

TO RUN IT ON YOUR OWN

A long-term plan

Who owns each system, what gets checked and updated, what to do when a tool changes, how new hires learn it and what to build next.

FOR THE NEAR TERM

A short-term plan

Only the next steps after hand-off, if you'd rather settle in before planning further ahead.

TO KEEP ME ON

A continued partnership

I stay on for tune-ups when tools change, training for new hires and the next build when you're ready. How involved I stay is up to you.

WHEN THE WORK CALLS FOR IT

A hiring plan

Which roles to add or reshape, the skills to look for and how a new hire gets up to speed, with draft job descriptions and interview questions.

Hiring decisions, pay and job postings stay with you. Drafts go to your HR adviser or lawyer for approval.

What I build for you is yours to use and change. Your agreement spells out who owns what, including the outside tools it runs on.

CUSTOMIZATION

Same building blocks. *Different plans.*

No two plans come out alike, even in the same field. These shape yours.

Industry

The documents you produce, the rules you work under and the software your field runs on.

Team size

A solo owner's plan leans on setup and one-on-one coaching. A larger team's adds role guides, shared templates and training by department.

Tools you already have

Plans start from what you already pay for. Microsoft 365 and Google Workspace business plans include some AI, and that's often the first stop. Microsoft 365 Copilot, which works across your own files, is a separate license.

Training

One tool learned thoroughly or several learned together, at your office, remotely or both.

How much your team takes on

I build it all for you, build it with your people beside me or teach them to build their own.

After the build

A long-term plan, a short-term plan, a continued partnership with me or a mix.

Budget

Start with the parts that matter most and add the rest when you're ready.

ONE NEED, THREE PLANS

"Writing proposals and estimates takes far too long."

Engineering firm

A proposal library drawn from past projects, scope language for each project type and a review checklist for the engineer who signs.

Home-service contractor

Estimates built from job-site photos and voice notes, priced from your own price list and approved by the owner before they go out.

Marketing agency

A proposal and statement-of-work template for each service, with relevant past work pulled in for the account lead to choose from.

The sample plans that follow cover six fields. They're examples, not limits. If yours isn't among them, see [page 22](#).

SAMPLE PLAN • 01 OF 06

Architecture and engineering firms

A large share of a design firm's hours goes into the documents around the design: proposals, meeting notes, markups, responses and reports. That paperwork is where I aim the plan. The architect or engineer of record stays in charge of the work and seals what needs sealing.

A TYPICAL RECOMMENDED PLAN

Proposals and scopes

A proposal library drawn from past projects, templates for each project type and instructions that draft scope and fee narratives in your firm's terms.

CHECKED BY

The principal who signs the proposal

Meetings and site visits

Meetings and walkthroughs recorded with everyone's agreement, then turned into organized notes, action items and follow-up emails.

CHECKED BY

The project lead

Markups, RFIs and submittals

One tracker for every comment, response and open item across consultants, contractors and plan reviewers.

CHECKED BY

The project manager

Reports and code information

Report templates, plus code references gathered with their sources for the professional to verify.

CHECKED BY

The architect or engineer of record

TRAINING

Principals learn to direct and check AI drafts, usually one-on-one. Project staff learn the templates and the tracker in team sessions at the office. Your office lead learns to update the templates and build new ones.

WHAT WE MEASURE

Drafting hours per proposal and report, open items on the tracker and corrections that come back from plan reviewers.

A sample, not a template: your own plan comes from research into your business. Continued on the next page.

ARCHITECTURE AND ENGINEERING FIRMS

What shapes this plan

The research looks closely at these, and the answers change what goes into your plan.

- ◆ Your discipline: architecture, structural, civil or MEP
- ◆ Whether your contractors run projects in Procore or another system
- ◆ How many people touch a project between proposal and close-out
- ◆ The project types you pursue and how proposals get written today
- ◆ The design programs your team models and drafts in

EXAMPLE TOOLS

ChatGPT Business, Claude Team or Microsoft 365 Copilot

Drafting proposals, reports and letters from your templates and past projects

Bluebeam

Markups and drawing comparisons that feed the tracker

Revit, AutoCAD or SketchUp

Your design programs, kept as they are, with connectors where files don't move cleanly

Procore

Submittals and RFIs, when the contractor runs the project there

Otter, Fireflies or Zoom AI Companion

Notes and action items from meetings and walkthroughs

Power Automate or Zapier

Moving items between email, the tracker and project folders

Stays with your people

- ◆ Design decisions and code interpretations
- ◆ Anything stamped or sealed and the responsible charge behind it
- ◆ Consent before any meeting or site visit is recorded

OFTEN ADDED

- ◆ Connectors between your design programs
- ◆ A client portal for drawing sets and approvals
- ◆ Close-out packages assembled from project records

OFTEN TRIMMED

- ◆ Recording site visits, starting with office meetings
- ◆ Dashboards, until the tracker is in daily use

These tools are examples, not a full list. They were current in October 2026. Your plan picks the ones that suit your business, including software you already have.

SAMPLE PLAN • 02 OF 06

Law firms

Attorney hours tend to leak into intake, routine letters, document summaries and billing descriptions. I build the plan around those tasks. Advice, research and anything filed with a court stay with the attorneys.

A TYPICAL RECOMMENDED PLAN

Client intake

Intake forms that become a clean summary for the attorney, with the details a conflict check needs pulled out. Any intake assistant says it's automated and not a lawyer, only collects information and uses wording the firm approves.

CHECKED BY

The intake attorney or paralegal

Engagement letters and routine correspondence

Templates for engagement letters, status updates and document requests, drafted from the matter file.

CHECKED BY

The responsible attorney

Document and transcript summaries

Summaries and timelines from large document sets and transcripts, with each point tied to its page.

CHECKED BY

The attorney on the matter

Billing descriptions

Rough time notes turned into clear, consistent descriptions before bills go out.

CHECKED BY

The attorney who did the work

TRAINING

Attorneys learn to direct and verify drafts. Staff learn intake, templates and summaries, while one paralegal keeps the templates current. Confidentiality settings come first in every session.

WHAT WE MEASURE

Time from first contact to signed engagement letter, hours spent on summaries and how many billing descriptions need rework.

A sample, not a template: your own plan comes from research into your business. Continued on the next page.

LAW FIRMS

What shapes this plan

The research looks closely at these, and the answers change what goes into your plan.

- ◆ Your practice areas and how matters usually come in
- ◆ Who handles intake today and how conflicts get checked
- ◆ Firm size, from a solo practice to several offices
- ◆ Your practice management and document systems
- ◆ How the firm bills: hourly, flat fee or a mix

EXAMPLE TOOLS

Clio, 8am MyCase or Smokeball

Matters, calendars and client communication, using their built-in AI where it fits

Lawmatics

Intake forms, follow-up and new-client tracking

NetDocuments or iManage

Keeping drafts and summaries inside your document system

ChatGPT Business, Claude Team or Microsoft 365 Copilot

Drafting and summarizing on business plans that keep client data out of model training by default

Docusign

Engagement letters and signatures

Stays with your people

- ◆ Legal advice, strategy, research and every citation
- ◆ Filings, signatures and anything sent to a client
- ◆ Client consent and decisions about confidential material

OFTEN ADDED

- ◆ A reference library of approved language
- ◆ A client portal for documents and status
- ◆ Intake for a second practice area

OFTEN TRIMMED

- ◆ Billing descriptions
- ◆ Transcript summaries, if your matters rarely have them

These tools are examples, not a full list. They were current in October 2026. Your plan picks the ones that suit your business, including software you already have.

SAMPLE PLAN • 03 OF 06

Accounting and bookkeeping firms

Deadline seasons fill up with chasing documents, re-explaining reports and checklists nobody but one person knows. I target that work first. Judgment calls stay with the CPA, enrolled agent or lead bookkeeper responsible for each client.

A TYPICAL RECOMMENDED PLAN

Document collection

Request lists by client type, reminders that go out on their own and uploads renamed and filed the same way every time.

CHECKED BY

The staff accountant

Close and reconciliation prep

A close checklist for each client, with unusual transactions flagged for a person to review.

CHECKED BY

The accountant on the client

Client explanations

Templates that explain reports, deadlines and requests in terms clients can follow.

CHECKED BY

The CPA or EA on the client

Procedure guides

Your procedures written into guides staff can follow, so knowledge doesn't leave with one person.

CHECKED BY

A partner or owner

TRAINING

Staff learn the request system and close checklists. Reviewers learn to check AI-prepared work. A senior staff member learns to update checklists and requests as services change. Sessions are scheduled around your deadline calendar.

WHAT WE MEASURE

Time to collect a client's documents, rework found at review and how often staff need to ask how something is done.

A sample, not a template: your own plan comes from research into your business. Continued on the next page.

ACCOUNTING AND BOOKKEEPING FIRMS

What shapes this plan

The research looks closely at these, and the answers change what goes into your plan.

- ◆ Your service mix: tax, bookkeeping, payroll or advisory
- ◆ Your ledger, portal and practice management software
- ◆ The kinds of clients you serve and how they send documents
- ◆ When your deadline seasons fall and who carries them

EXAMPLE TOOLS

QuickBooks Online or Xero

The books, with their built-in AI for categorizing and flagging

Dext or Hubdoc

Receipts and bills captured and matched

Karbon, Canopy, TaxDome or Financial Cents

Workflow, client requests and the client portal

Microsoft 365 Copilot, ChatGPT Business or Claude Team

Reconciliation notes, summaries and client emails

Docusign or your portal's e-signature

Engagement letters and authorizations signed online

Stays with your people

- ◆ Tax positions, advice and anything signed or filed
- ◆ Opinions, attest work and reports for investors or markets
- ◆ Whether client tax information can go into an AI tool, including any consent IRC 7216 requires

OFTEN ADDED

- ◆ A new-client onboarding packet
- ◆ Engagement letter templates for each service
- ◆ A deadline-season status board

OFTEN TRIMMED

- ◆ Procedure guides, saved for after deadline season
- ◆ Client explanation templates

These tools are examples, not a full list. They were current in October 2026. Your plan picks the ones that suit your business, including software you already have.

SAMPLE PLAN • 04 OF 06

Real estate teams

I aim the plan at follow-up, listing marketing and the deadlines spread across inboxes. Contracts, pricing and fair housing review stay with licensed people.

A TYPICAL RECOMMENDED PLAN

Lead follow-up

Follow-up sequences for each lead source and stage, drafted in your voice and sent from your CRM once an agent approves them.

CHECKED BY

The agent

Listing marketing

Listing descriptions, social posts and announcements drafted from agent notes and photos.

CHECKED BY

The listing agent, with a fair housing check

Contract to close

A tracker for every date, document and party in a transaction, with reminders before anything is due.

CHECKED BY

The transaction coordinator

Client updates

Regular updates for buyers and sellers, plus local news and events for your newsletter.

CHECKED BY

The agent

TRAINING

Agents learn drafting and follow-up on their phones. Coordinators learn the tracker. Team leads learn the review checks. An operations lead learns to adjust sequences and build new ones.

WHAT WE MEASURE

Response time to new leads, deadlines that slip and hours spent on listing marketing.

A sample, not a template: your own plan comes from research into your business. Continued on the next page.

REAL ESTATE TEAMS

What shapes this plan

The research looks closely at these, and the answers change what goes into your plan.

- ◆ Whether you're a solo agent, a team or a brokerage
- ◆ Your CRM and transaction management system
- ◆ Where your leads come from and how fast they expect an answer
- ◆ Your listing mix and how much marketing each listing gets

EXAMPLE TOOLS

Follow Up Boss, BoldTrail or Lofty

Leads, follow-up sequences and client history

Canva

Listing graphics and social posts from your brand templates

Zapier

New leads routed to the right agent and the tracker

Dotloop or SkySlope

Transaction files, signatures and compliance review

ChatGPT Business, Claude Team or Gemini in Google Workspace

Drafting descriptions, emails and updates, including from a phone

Stays with your people

- ◆ Contract terms and anything that reads as legal advice
- ◆ Pricing recommendations
- ◆ Fair housing review of every ad and disclosure of virtually staged or digitally altered photos
- ◆ Consent for automated texts and recorded calls

OFTEN ADDED

- ◆ A listing presentation template
- ◆ A new-agent onboarding guide
- ◆ Open-house follow-up sequences

OFTEN TRIMMED

- ◆ Local news for the newsletter
- ◆ Social post drafting

These tools are examples, not a full list. They were current in October 2026. Your plan picks the ones that suit your business, including software you already have.

SAMPLE PLAN • 05 OF 06

Trades and home-service contractors

Estimates get written at night, job details live in someone's phone and customers call to ask where things stand. I start with the tools your techs already carry, so the plan fits how field work really runs.

A TYPICAL RECOMMENDED PLAN

Estimates

Estimate templates filled from job-site photos and voice notes and priced from your own price list.

CHECKED BY

The owner, before anything is sent

Job documentation

Photos and voice notes turned into daily logs, change-order records and completion reports.

CHECKED BY

The lead on the job

Customer messages

Confirmations, on-the-way texts and follow-ups drafted and scheduled. Review requests go to every customer, not only the happy ones.

CHECKED BY

The office manager

Permit paperwork

Permit and inspection paperwork prepared from the job details.

CHECKED BY

The licensed contractor

TRAINING

Owners and office managers learn estimating and the office setup. Field techs learn photo and voice documentation on their phones. The office manager learns to update templates and messages as the business changes.

WHAT WE MEASURE

Time from site visit to estimate sent, calls asking for job status and jobs missing documentation.

A sample, not a template: your own plan comes from research into your business. Continued on the next page.

TRADES AND HOME-SERVICE CONTRACTORS

What shapes this plan

The research looks closely at these, and the answers change what goes into your plan.

- ◆ Your trade and whether the work is residential or commercial
- ◆ Your field service app and how the office dispatches
- ◆ How much of it is service calls versus installs or projects
- ◆ How many techs are in the field and how they report back

EXAMPLE TOOLS

Jobber, Housecall Pro or ServiceTitan

Scheduling, dispatch, invoices and customer messages, including AI call answering where it fits

CompanyCam

Job photos by project, with AI walkthrough reports and voice checklists

QuickBooks

Invoices and job costing

ChatGPT Business, Claude Team or Gemini in Google Workspace

Estimates, notes and messages by voice from a phone

Google Business Profile

Your business details and reviews, with review replies drafted for the owner to approve

Stays with your people

- ◆ Pricing, warranties and contract terms
- ◆ Code, safety and structural calls
- ◆ Permit signatures and license details on every ad
- ◆ Consent for automated texts and recorded calls

OFTEN ADDED

- ◆ Online booking on your website
- ◆ Maintenance-plan reminders, sent with customer consent
- ◆ A hiring plan and onboarding guide for new techs

OFTEN TRIMMED

- ◆ Permit paperwork
- ◆ Dashboards

These tools are examples, not a full list. They were current in October 2026. Your plan picks the ones that suit your business, including software you already have.

SAMPLE PLAN • 06 OF 06

Agencies and creative studios

Briefs get rewritten, reports get reformatted and feedback gets chased across email threads. My plan takes on that production work. Creative judgment, client approval and rights stay with your team.

A TYPICAL RECOMMENDED PLAN

Briefs

A brief form clients complete that becomes a structured project brief and task list.

CHECKED BY

The account lead

Each client's voice

A voice guide and a separate AI project for every client, so drafts sound like that client. Memory and access settings keep each client's files apart.

CHECKED BY

The account lead, then the client

Feedback and approvals

One tracker for every round of feedback, what changed and what's approved.

CHECKED BY

The project manager

Client reporting

Reports drafted from your analytics, with a short summary of the results and what drove them.

CHECKED BY

The account lead

TRAINING

Account leads learn client projects and voice guides. Creatives learn drafting and image tools. Project managers learn the tracker. An operations lead learns to set up each new client's project and voice guide without me.

WHAT WE MEASURE

Rounds of revision, hours spent on reporting and time from brief to first draft.

A sample, not a template: your own plan comes from research into your business. Continued on the next page.

AGENCIES AND CREATIVE STUDIOS

What shapes this plan

The research looks closely at these, and the answers change what goes into your plan.

- ◆ The services you sell, on retainer, by project or both
- ◆ Your project management tool and how approvals happen today
- ◆ How many clients each account lead carries
- ◆ Which work is written, designed, filmed or recorded

EXAMPLE TOOLS

Asana, monday.com or ClickUp

Projects, tasks and approvals

ChatGPT Business, Claude Team or Gemini in Google Workspace

A separate project for each client's drafting and research, set so projects don't share memory

Adobe Firefly or Canva

Image work, with commercial-use terms checked for each project

Figma

Design and prototyping

Descript

Editing video and audio from the transcript

Data Studio (formerly Looker Studio)

Report data and dashboards

Stays with your people

- ◆ Final creative and client approval before anything is published
- ◆ Claims, reviews, endorsements and disclosures in ads
- ◆ Rights to images, music, voices and likenesses
- ◆ What AI-made work a client can own

OFTEN ADDED

- ◆ Proposal and statement-of-work templates by service
- ◆ A client portal for approvals
- ◆ Onboarding for new creatives

OFTEN TRIMMED

- ◆ Video editing tools
- ◆ Client reporting, kept manual at first

These tools are examples, not a full list. They were current in October 2026. Your plan picks the ones that suit your business, including software you already have.

BEYOND THE SAMPLES

Don't see your fit? *Reach out anyway.*

The sample plans show how a plan changes from field to field, not where my work ends. The parts in this guide are the common ones, not everything I build or teach. Every plan starts with research into your business, so your field doesn't need to be in this guide.

SEND A NOTE IF

- ◆ Your team rewrites the same kinds of documents again and again
- ◆ Customers ask for updates someone has to write by hand
- ◆ Good work gets turned away for lack of hours
- ◆ Answers sit with a few people while everyone else waits
- ◆ You pay for tools your team never fully took up
- ◆ You need something this guide doesn't mention

I read every note myself. If I can help, I'll tell you where I'd start. If I can't, I'll say so.

GETTING STARTED

Three steps to your plan

1

Send a short note

Write to me through the form on landondickey.com. A few sentences on what your business does and what's eating your team's hours is plenty.

2

We talk it through

If I can help, we set a time to talk about your business.

3

Research begins

Once we agree to work together, I get to know your business. Research is always part of the work, and your plan comes out of it.