FREE WRITTEN PROPOSAL

Readiness Proposal

Where AI could help, what we recommend, and what it would cost.

Prepared for

James Hartley

Meridian Property Management
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CLIENT CONFIDENTIALITY & ANONYMISATION

This sample document is based on a real client engagement. The organisation and individual names have been changed to protect client confidentiality. The document is published with the client's permission for illustrative purposes.

Intelligent Choice treats client confidentiality and the responsible handling of business information as fundamental to our work.

SECTION 01

What We Heard

Meridian manages a rental portfolio with a small office team. In our 15-minute chat you described three pressures on the business.

- **Maintenance coordination.** Requests arrive by phone, email and text. Someone then chases quotes, owner approvals and tradie bookings, often after hours.
- **Inbox load.** Tenant and owner emails fill the day, and many are repeat questions.
- **Owner reporting.** Month-end owner updates are assembled by hand from several systems.

You want to know where AI could genuinely help, what it would cost, and whether it is worth doing at your size. This proposal answers those three questions.

SECTION 02

What Looks Possible

Our first view, ranked by likely value and by how realistic each opportunity is. This is a starting view, not a verdict: the Discover step tests it against how your business really runs.

Opportunity	Why it matters	First view
Maintenance request triage and trade coordination	Most of the after-hours chasing and the longest delays sit here.	Strong candidate
First drafts of routine tenant and owner replies	Saves time every day, with a person still approving each reply.	Realistic, smaller win
Owner report preparation	Reduces month-end effort, but depends on how tidy the source data is.	Needs a closer look

> **HONEST ADVICE**
> We will also tell you where AI is not the answer. Sometimes a process fix, or a setting in a system you already pay for, does the job.

SECTION 03

What We Recommend

Start with **Step 1, Discover**. We talk with you and your team, look at how requests flow today, and rank the opportunities by value and realism. You receive a **Readiness Summary** and a ranked shortlist in plain English.

You can stop there, or take the plan to any provider you like. We build nothing and sell nothing, so the advice is yours alone.

SECTION 04

Investment

Step 1 is a fixed fee, agreed before we start. The later steps (Blueprint, Prove and Procure) are scoped and priced only when you reach them, and you can stop after any step.

NEXT STEP	
Phase 1 · Discover Readiness Summary	
FIXED PHASE FEE	**$5,000 + GST**

All fees exclude GST. 50% on signing the Phase Schedule, the balance on delivery of the final Deliverables. Invoices are payable within 14 days. Fees shown are the standard indicative fees; the fee that applies to you is the one set out in your signed Phase Schedule. Names and figures in this sample are illustrative.

SECTION 05

Your Decision

- **Take your time.** Share this proposal with your team. There is no pressure either way.
- **If you want to go ahead,** we send the Phase Schedule and our Standard Terms of Trade for e-signature, and book the first working session.
- **If not,** keep this proposal. It is yours, and it is free.



Travis Shaw
Founder, Intelligent Choice
travis@intelligentchoice.digital
intelligentchoice.digital