

NYC PR Firm - AI Implementation Proposal

Executive summary

The engagement will determine which solutions an NYC PR Firm should adopt, what to build vs. buy, how systems should connect, and what implementation will require, including costs, owners, and timelines.

Over **eight weeks**, we will assess six defined use cases, document their current and target workflows, evaluate solution options, and produce a costed implementation roadmap.

The proposed consulting budget is **200 hours at \$300 per hour, totaling \$60,000**.

The engagement will cover use-cases within each of six opportunity areas:

- Case studies and pitch decks.
- Reporting and media intelligence.
- Creator intelligence and operations.
- Financial operations.
- Agency operations.
- Cultural intelligence and GEO.

Guiding principles

- **Understand** the process, decisions, and bottlenecks before selecting technology.
- **Use AI where interpretation is needed.** Use established rules for calculations, transaction checks, and routine system updates.
- **Keep accountability with the PR Firm.** Preserve human approval, confidentiality, disclosure, and brand-safety standards.
- **Prove value before expanding.** Test representative cases and measure results, including correction effort and ongoing costs.
- **Buy proven capabilities, integrate existing systems, and build selectively.** Custom development must address a demonstrated gap or create value from firm's proprietary knowledge.

Approach

1. **Map the Current State Process and Technology:** Identify systems, owners, handoffs, exceptions, and baseline performance for each use case.
2. **Design the Target Workflow:** Define each step's inputs, outputs, automation, human decisions, and interface.
3. **Evaluate AI Models for Each Use Case:** Determine where AI adds value and assess suitable models against task workflow requirements.
4. **Compare Vendors and Test Solutions:** Compare candidate solutions across the six use cases and conduct hands-on testing for the priority use case.
5. **Recommend and Cost the Solution:** Recommend what to buy, integrate, or build, how systems should connect, and the expected costs.
6. **Develop the Implementation Plan:** Establish phases, timelines, owners, dependencies, acceptance criteria, and training requirements.

Success Metrics

- **Efficiency:** Reduce staff time required to complete the work, including review and corrections.
- **Quality:** Increase the percentage of outputs that meet agreed business requirements without correction.
- **Technical reliability:** Increase the percentage of workflow runs completed without system failures, missing updates, or duplicate records.
- **Adoption:** Increase the proportion of eligible work completed through the approved workflow.
- **Financial return:** Demonstrate that measurable financial benefits justify implementation and ongoing costs. Report released staff capacity separately from cash savings.

Deliverables

- **Current and target workflows** for every use case, including systems, inputs, outputs, owners, automation, and human decisions.
- **AI model assessments and vendor comparisons** for each use case, with hands-on evaluation results for the priority use case.
- **Recommended solutions for each use case**, including build-versus-buy rationale, proposed system architecture, and cost estimates.
- **Consolidated implementation roadmap** with sequencing, owners, dependencies, timelines, and acceptance criteria.

Approach Details

1. Map the Current Process and Technology

For each use case, we will work with the process owner and representative users to trace the work from its initial trigger to completion. We will review actual examples and document systems, source records, manual tasks, decisions, approvals, and handoffs.

The assessment will distinguish routine work from exceptions and identify where delays, duplication, missing information, or rework occur. We will establish baseline volumes, handling time, turnaround, and quality where records permit. Where reliable measurements are unavailable, we will identify the gap and propose a measurement method.

Output: Six current-process maps, supporting system inventories, baseline measures, and documented pain points.

2. Design the Target Workflow

Each current-process map will be translated into a proposed target workflow. For every step, we will define required inputs, expected outputs, ownership, supporting technology, and the decision or action being performed.

The design will show what can be automated, where AI interpretation may help, and what remains subject to human review. It will address exception handling, missing information, approvals, and how unresolved issues reach an accountable owner.

We will recommend the interface that best fits the work: an existing application, review queue, search experience, chat, or background process. Microsoft Copilot and agents will be assessed where relevant.

Output: Six target workflows showing automation opportunities, AI tasks, human responsibilities, interfaces, and required information flows.

3. Evaluate AI Models for Each Use Case

We will identify the tasks within each use case that require AI and establish task-specific evaluation criteria. Retrieving relevant case studies, drafting pitch content, summarizing media coverage, and interpreting invoice exceptions will require different measures of quality.

Native platform capabilities will be assessed first. Where external models are appropriate and model choice is available, we will compare candidates on accuracy, source support, response time, data handling, review effort, and cost.

For the priority use case, candidates will be tested against consistent inputs and expected outcomes. For the remaining use cases, recommendations will identify the model capabilities needed and the testing required before implementation.

Output: AI task assessments and model recommendations for all six use cases.

4. Compare Vendors and Test Solutions

We will develop a shortlist for each use case based on workflow requirements, the firm's existing technology, integration needs, and budget considerations.

Vendor discussions will address functionality, licensing, access requirements, implementation effort, and support. Where possible, demonstrations will use representative firm scenarios rather than generic product walkthroughs.

For the priority use case, we will coordinate trial access and apply agreed cases and scoring. Findings will distinguish capabilities demonstrated in testing, capabilities shown in demonstrations, vendor claims, and unresolved requirements. Proposed custom components will be assessed against the gaps they would address.

Output: Vendor comparisons for each use case, priority use case test findings, and documented gaps and dependencies.

5. Recommend and Cost the Solution

For every use case, we will recommend which capabilities the firm should buy through existing or alternative products and which, if any, justify custom development.

The recommendation will explain what each product provides, where it falls short, and whether configuration or integration can close the gap. A custom build will be considered where it addresses an unmet requirement or creates value from the firm's proprietary knowledge.

The proposed architecture will identify each system's role, authoritative information sources, required connections, and user interfaces. Shared capabilities across use cases will be identified to avoid unnecessary duplication.

The business case will include professional services, implementation, licensing, usage, and ongoing support. Benefits will distinguish released staff capacity, avoidable expenses, and potential revenue or margin effects. Confirmed quotes and partner estimates will be separated from planning assumptions.

Output: Six solution recommendations with build-versus-buy rationale, proposed architecture, costs, expected benefits, and outstanding decisions.

6. Develop the Implementation Plan

We will consolidate the recommendations into a sequenced roadmap. Priorities will reflect expected value, readiness, dependencies, implementation effort, and the firm's capacity to absorb change.

Each use case will have proposed delivery phases, owners, timing, budget, and acceptance criteria. The plan will identify prerequisites such as data cleanup, licensing, technical resources, or revised approval processes.

We will define pilot measures, business testing, training, support ownership, and requirements for broader rollout. Where requested, we will also scope Evan's continued role leading delivery for the firm and coordinating the technical team.

Output: A consolidated implementation roadmap with use-case-level plans, shared dependencies, delivery responsibilities, and investment decisions.

Worked example: Invoice Processing

This example is purely illustrative.

The workflow, systems, records, invoice volumes, approval rules, vendor capabilities, costs, and potential savings all require confirmation with the firm.

The example follows one vendor invoice from receipt through payment and reconciliation. It assumes the firm uses BILL for invoice processing and QuickBooks Online for accounting. Client rebilling is outside this example.

1. Map the Current Process and Technology

We would begin by following actual invoices with Finance to understand:

- How invoices arrive and enter BILL.
- Where purchase orders, contracts, and delivery confirmations are stored.
- Who checks charges, confirms delivery, and approves payment.
- How bills and payments reach QuickBooks Online.
- Where manual work, delays, and corrections occur.

The key question is whether Finance can reliably connect what the firm authorized, what the vendor delivered, and what the vendor invoiced.

For example, if a purchase order exists but nobody records delivery acceptance, software cannot complete a reliable three-way match. That process gap would need to be addressed.

2. Design the Target Workflow

Assume the following:

- The firm issues a **\$10,000 purchase order** for event products.
- The vendor delivers the first **\$4,000** of products.
- A business owner confirms that this delivery was received and accepted.
- No previous invoice has been submitted for that delivery.

Now compare two possible invoices:

Step	Invoice A: \$4,000	Invoice B: \$4,500
Read the invoice	Capture vendor, invoice number, PO reference, amount, and currency.	Capture the same information.
Check supporting records	Find the \$10,000 PO and confirmation of the \$4,000 delivery. Check for duplicates and earlier invoices.	Perform the same checks. An email also mentions a \$500 rush fee.
Compare the charge	The invoice matches the accepted delivery. It can proceed to approval.	The invoice exceeds the accepted delivery value by \$500. Hold it for review.
Resolve and approve	An authorized person reviews and approves payment.	Finance determines whether the rush fee was authorized. The vendor either corrects the invoice or the firm records the required approval and supporting change before payment approval.

Pay and reconcile	Follow the authorized payment process and confirm that bill and payment records agree between systems.	Follow the same process once the discrepancy is resolved and the invoice approved.
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The \$10,000 PO does not automatically justify the \$4,500 invoice. Finance must confirm that the specific charges are supported by accepted delivery or another documented authorization.

Invoices without a PO would follow a separate approval process agreed with Finance.

3. Evaluate AI Models for Each Use Case

For this workflow, AI could help with two tasks:

Task	What AI would do	How it would be evaluated
Read invoices	Extract fields from invoice documents.	Correct vendor, invoice number, PO reference, amount, and currency; human corrections required.
Explain unclear charges	Find relevant passages in supporting documents and explain why a charge needs review.	Correct evidence, accurate explanation, and clear identification of unresolved questions.

For Invoice B, AI could surface the email mentioning the rush fee and explain that it does not establish clear approval. Finance would decide whether the fee is valid.

Calculations, duplicate checks, and approval routing would use application rules. Native product capabilities would be tested first; external models would be considered where they improve results and the platform supports them.

4. Compare Vendors and Test Solutions

We would first assess whether BILL can support the proposed workflow through its available features and configuration. We would compare one or two alternatives where material requirements remain unmet.

If finance is selected for hands-on evaluation, a proposed test set could include **30 historical invoices**, with Finance defining the correct outcome for each. Cases would cover routine invoices, disputed charges, duplicates, partial deliveries, missing records, and non-PO invoices.

Each candidate would be assessed against the same questions:

- Does it capture the invoice correctly?
- Can Finance access the supporting records?
- Does it flag discrepancies and avoid incorrectly blocking valid invoices?
- Can reviewers understand and resolve the issue?
- How much handling and correction time does it require?

Vendor access would be important for demonstrations, trial environments, licensing questions, and integration confirmation. Accounting synchronization and duplicate prevention would require supported technical tests. Payment testing would use a sandbox or simulation.

Findings would distinguish what was tested, what the vendor demonstrated, and what still needs confirmation.

5. Recommend and Cost the Solution

The results would support a build-versus-buy decision:

Decision	What it would mean
Buy: configure existing software or select an alternative	Use purchased software for invoice capture, matching, approvals, and accounting connections wherever it meets the requirements. Retain BILL if it performs adequately; consider an alternative if it does not.
Build: add functionality for a specific gap	Develop a limited component only where necessary—for example, collecting approval evidence from emails and contracts and making it available during invoice review.

The recommendation could combine both. For example, BILL could remain the invoice and approval system while a custom component helps Finance find supporting evidence.

The recommendation would identify the products to retain or purchase, any functionality to build, the required system connections, and total setup and ongoing costs. A vendor or technical implementation partner would confirm feasibility and delivery estimates.

To illustrate the potential benefit:

Illustrative measure	Current process	Target process
Monthly invoices	200	200
Average active handling time per invoice	20 minutes	8 minutes
Monthly staff time	66.7 hours	26.7 hours

That would release 40 staff hours per month. The baseline and target would need validation, including review and corrections. Released time becomes cash savings only if the firm reduces an actual expense.

6. Develop the Implementation Plan

The final output would be a plan to implement the selected solution:

1. Confirm required licenses, records, approval rules, and delivery responsibilities.
2. Configure the workflow and establish the necessary connections.
3. Test routine invoices, exceptions, accounting updates, and failure handling.
4. Run a controlled live pilot with Finance.
5. Measure results, resolve issues, train users, and decide whether to expand.

Finance would own approval policy and acceptance. The technical team or implementation partner would own configuration, integrations, and technical validation.

Evan could lead delivery on the firm's behalf by managing requirements, coordinating the teams, organizing business testing, and guiding adoption. Implementation timing and costs would be established after solution selection; production implementation would follow the initial assessment engagement.

Timeline and costs

The proposed engagement is **eight weeks and approximately 200 consulting hours**. It includes detailed workflow assessment and design for six defined use cases, solution comparisons for each, and hands-on testing for one priority use case.

Timing	Activities and outputs	Hours	Fee
Weeks 1–2	Confirm six use cases; interview stakeholders; review systems and sample records; begin current-process mapping; initiate vendor introductions and access requests.	50	\$15,000
Weeks 3–4	Complete current-process maps and baselines; design target workflows for all six use cases; define model and vendor requirements; select the priority use case for testing.	60	\$18,000
Weeks 5–6	Compare vendors and model options; conduct demonstrations and priority-use-case testing; refine workflows; obtain licensing and implementation input.	55	\$16,500
Weeks 7–8	Finalize recommendations and cost estimates for each use case; identify shared dependencies; complete the implementation roadmap and review deliverables with the firm.	35	\$10,500
Total	Six use-case assessments and workflow designs, solution recommendations, and implementation planning	200	\$60,000

Professional fees will be billed for actual time at \$300 per hour, against the proposed 200-hour budget. Additional hours or scope changes will require the firm's approval.

Additional costs and subsequent delivery

Cost category	Treatment
Vendor trials, paid evaluations, and model usage	Confirmed and approved before spending; billed separately where applicable.
Software subscriptions and licensing upgrades	Identified during evaluation and included in the business case.
Technical implementation	Quoted separately by the selected vendor or implementation partner, or estimated by the firm's technical team.
Evan's implementation and delivery leadership	Scoped separately at \$300 per hour once requirements, responsibilities, and timing are established.
Ongoing hosting, maintenance, and support	Estimated for the selected solution and assigned to a named owner.

Risks, dependencies, and assumptions

Risks and dependencies

Risk or dependency	Potential effect	Planned response
Vendor access and responsiveness	Delayed trials, demonstrations, pricing, or technical answers may limit evaluation or extend the schedule.	Request introductions in week one and begin scheduling access immediately. Document unavailable evidence and agree whether to extend testing or make a conditional recommendation.
Access to the firm's records and staff	Incomplete documents or limited stakeholder availability may weaken workflow maps, baselines, and test coverage.	Agree required records, process owners, and interview schedules at kickoff.
Data quality and confidentiality	Inconsistent records or restrictions on sharing client information may constrain evaluation.	Review sample quality early and use approved, redacted, or synthetic data where necessary, identifying resulting limitations.
Product and integration limitations	Required features may depend on licensing, APIs, configuration, or custom development.	Seek vendor confirmation and implementation-partner input; distinguish demonstrated functionality from assumptions.
Technical delivery capacity	Implementation may be delayed if no technical owner or partner is available.	Identify delivery responsibilities and reflect availability in the roadmap.

Assumptions

- The engagement covers **six defined use cases**, initially assumed to be one per opportunity area.
- Every use case receives detailed current and target workflows, a solution assessment, and an implementation recommendation.
- The firm will provide a sponsor, relevant process owners, approved sample records, and timely feedback.
- The firm will support vendor introductions and authorize requests for demonstrations, trials, pricing, and technical information.
- Public information and sales presentations alone may be insufficient to validate critical requirements.
- Recommendations describe architecture at the system and workflow level. Detailed technical design and implementation require a technical team or implementation partner.
- Eight weeks assumes timely access and decisions. Material delays or additional workflows may require revised timing or scope.
- Implementation costs and expected benefits remain estimates until supported by quotations, testing, or live operating data.

Appendix

Considerations

- **Evan is not a software engineer.** He will lead business and product delivery, while the technical team owns engineering design, development, integrations, deployment, and technical validation.
- He can also **lead delivery on the firm's behalf in future follow-up projects**, working directly with technical implementation teams to clarify requirements, manage priorities and dependencies, coordinate testing, and guide rollout and adoption.