# A managed communication service

Approved emails and short videos, scheduled follow-up, staff routing and reports for employees and existing customers.

## An illustrative starting scope

One workflow for up to 100 existing customers or 25 employees. Includes three approved email templates, two captioned short videos totaling one finished minute, one branded information page, one response form, staff routing and handover. The first 30 live days include weekly reports and a final pilot review.

| Proposed base example | Service fee | What the amount covers |
|---|---|---|
| Implementation | $2,300 once | Design, build, testing and accepted handover |
| Management retainer | $575 per 30 days | Scheduled operation, monitoring, reports and agreed maintenance |
| Client-direct software budget | $50 per month | Editable allowance for providers, paid separately by the client |

**Initial budget: $2,925** for setup plus the first 30 live days and the illustrative software allowance. Ongoing estimated budget: $625 per 30 days including that allowance. Taxes, additional scope and provider overages are separate. These are proposed cost-based figures, not market-validated rates or a client-specific quote.

## Required setup payments

| Completion milestone | Share of setup | Base payment |
|---|---|---|
| Signed scope, readiness and reserved kickoff | 50% | $1,150 |
| Documented staging acceptance | 30% | $690 |
| Production acceptance and operator handover | 20% | $460 |

All three payments credit toward the single $2,300 setup fee. At accepted production handover, the final $460 and the first $575 management retainer are due. The retainer funds the next 30 live days. There is no additional pilot operations fee.

# Deployment timing and milestones

The delivery clock begins after the signed scope, startup payment, approved assets and working access are ready.

| Client example | Deployment estimate | Planning basis |
|---|---|---|
| Ready, one-workflow pilot | 9-11 business days; target 10 | 100 contacts, clean data, existing approved sender, one page and one form |
| Expanded connected deployment | 21-28 business days; target 24 | 3 workflows, 500 contacts, 8 emails, 4 videos totaling 3 minutes, 2 extra integrations and mixed data |
| New private portal or sensitive information | Discovery and manual quote | Access, security and required approvals must be scoped first |

## Variables that change the estimate

The calculator adjusts the work for contact volume and cleanup, workflow count, email templates, video count and length, pages, forms, additional integrations, existing access controls and review rounds. It also includes approver turnaround, external lead time and our allocated production hours per business day.

The base estimate assumes four production hours per business day, two approval cycles of one business day each, one external dependency day and a 20% setup reserve. Business days exclude weekends and the holidays entered for the project. A new or unapproved sending account needs its own readiness lead time before a delivery date can be committed.

| Milestone | Evidence required before moving forward |
|---|---|
| Readiness / kickoff | Scope, authorized contact source, content assets, sender access, named approver, response owner and startup payment |
| Staging acceptance | Approved content and links, captions, routing and controlled test results; client records acceptance |
| Production acceptance | Required acceptance tests pass in the production configuration; operator completes handover |
| First 30 live days | Weekly activity and exception reports; final review after 30 days from accepted handover |

Client approval delays, missing access, scope changes and provider holds receive a documented reason and revised date. Payments follow completion evidence, not the passage of time. Silence does not constitute acceptance. The dated client proposal sets the delivery commitment; these ranges are estimates.

# Acceptance and operator usability

Every required test must pass before the final 20% setup payment becomes due.

| Required test | Acceptance evidence |
|---|---|
| 1. Correct audience | The selected contacts reconcile to the client-approved list and exclusions. Required fields and exceptions remain visible. |
| 2. Approved content | Each included email, video, page and form matches its approved version. Required links work and captions play in sync. |
| 3. Scheduled execution | Two controlled internal test cycles follow the sequence and produce provider-accepted dispatches to approved healthy test addresses. Injected failures produce explicit exceptions. |
| 4. Duplicate prevention | Repeating an identical test input produces one intended dispatch, with duplicate handling recorded. |
| 5. Stop rules | Opt-out, completion and other agreed stop events prevent the next applicable follow-up in the test. |
| 6. Response routing | Normal form and reply tests reach the named employee. An injected routing failure appears in the visible exception queue. |
| 7. Reconciliation | Every test event has a recorded outcome. Uncertain outcomes remain visible for review. |
| 8. Operator usability | The designated operator can pause the workflow, review an exception and export the report using the handover guide. |

## The acceptance record

For each test, record its owner, date, expected result, observed result, evidence reference and client acceptance. Use internal test addresses before release to the approved audience. Record the desktop and mobile browser versions included in the signed scope.

A failed essential test blocks acceptance of the affected workflow. Provider acceptance confirms the dispatch outcome; it does not establish inbox placement, readership or a customer response. Employee acknowledgement records a response, not understanding or training certification.

# Deployment acceptance guarantee

Proposed commitments with an observable definition of success and a stated remedy.

## Before production acceptance

We deliver the workflows in the signed scope and demonstrate that they pass every required acceptance test. If an essential test fails because of our work, we correct it at no additional labor charge within **10 business days** of documented notice. If it still fails, the client may reject the affected workflow. We refund its allocated paid setup fees within **15 calendar days** and waive its unpaid setup balance.

The signed quote allocates setup fees among workflows. The default allocation is equal: total setup fee divided by workflow count. A rejected one-workflow base deployment therefore receives its paid setup fees back and owes no remaining setup balance. Accepted workflows remain billable. Only preapproved, nonrefundable third-party charges are excluded from this refund.

## Thirty-day workmanship correction

For 30 calendar days after accepted handover, we correct defects in the agreed configuration at no additional labor charge. New content, additional workflows and requested scope changes require a separate quote. A defect reported during that 30-day window remains eligible for the stated cure process.

If a material covered defect remains unresolved after 10 business days, the client may cancel the affected ongoing service and receive its unearned prepaid management balance. Refund = affected retainer x unused days / days in the prepaid period. The quote states the affected service share. Accepted implementation work remains billable under this post-launch remedy.

## Conditions and client control

The client supplies accurate approved information, authorized contacts, required access and timely decisions. Any cure delay caused by a specific missing client dependency is documented with a revised deadline. Client accounts and records remain under client control. Handover includes the agreed report export and operating guide.

Support hours and escalation contacts are stated in the signed scope. No guarantee covers leads, sales, financial savings, recipient actions, inbox placement or third-party uptime. These are proposed service terms, not a measured historical service-level record. They take effect only through a signed client scope.

**Source basis for clear guarantee claims:** FTC, Advertising FAQs for Small Business (guarantees and substantiation): ftc.gov/business-guidance/resources/advertising-faqs-guide-small-business. Texas Business & Commerce Code 17.46: tcss.legis.texas.gov/resources/BC/pdf/BC.17.pdf. The prices, timings and remedies above are proposed business terms, not legal requirements drawn from those sources.