CLIENT GUIDE

Workflow pilot

Test one recurring workflow before a larger build.

USD 1,500

Fixed pilot fee · One workflow · One review and revision round

For home service businesses with a repeatable bottleneck. Prism builds a testable prototype using approved sample jobs so you can review how the workflow could work in practice.

What you receive

- A focused workflow outline with clear inputs, outputs and success checks.
- A prototype and walkthrough using approved samples, with human review built in.
- One consolidated review round with in-scope revisions, plus brief handoff notes.

The pilot is a controlled test, not a production-ready system. Live deployment, integrations and ongoing support are quoted separately.

Apply the pilot fee to the same workflow

The paid $1,500 pilot fee is credited once toward either build route below for the same workflow. A larger build is optional and scoped separately.

Build route	Build fee	Pilot credit	Remaining fee
Workflow Sprint	$7,500	$1,500	$6,000
Core System Build	$15,000	$1,500	$13,500

What we need to start

A named process owner, a few approved sample jobs, the current tool names and a clear test result to aim for. We confirm the schedule after the scope and usable inputs are ready.

Possible starting points

HVAC: technician findings and owner-approved pricing into a reviewed proposal. Roofing: job handoff. Plumbing: estimate queue. Pest control: service recap. Remodeling: scope summary. Home inspection: findings summary.

These are illustrative workflows, not customer results.

All prices are USD. Third-party tools and applicable tax are separate. This brief does not authorize a software purchase or subscription.

Planning guide only, not a contract. A separate proposal and agreement set scope, payment and terms. This kit does not replace an existing agreement.

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Pilot intake

Use short answers to identify one workflow. Complete this page or use the questions as a conversation guide. Share only business context at this stage.

Business and process owner Company, owner name and role, business email

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1 **Which workflow should we test?** What starts it, and what finished result is needed?

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2 **Where does it get stuck?** Name the handoff, repeated step or common correction.

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3 **Which tools are involved?** Tool names and manual steps only; no login details.

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4 **How often does it happen?** Approximate volume and current handling time, including review.

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5 **What would a useful test show?** Expected output, quality checks and what a person must approve.

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6 **Who will review it?** Name the reviewer, their availability and any timing constraints.

Prepare the sample jobs

[ ] Choose a few representative examples: a typical job, a common exception and an incomplete input.

[ ] Include the expected result or explain what a good result would look like.

[ ] Confirm you have permission to use and share each example for this pilot.

Keep the data small and safe

Use synthetic or redacted examples first. Remove customer names, contact details, addresses and sensitive records unless their use is separately agreed as necessary and authorized. Do not send passwords, API keys, tokens, payment details, health records or information about children.

Wait for Prism to confirm a suitable sharing route before sending files. No production access is needed to complete this intake.

Next step: **review fit**, **agree the workflow and success checks**, **then confirm scope and scheduling separately**.

Questions: info@consultwithprism.com