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Experience Intelligence



PRODUCTION PILOT PROPOSAL

Prepared for Pieter

29 SEPTEMBER 2026

PRE-DISCOVERY REVIEW EDITION

The proposal

THREE COMPLETE PILOT CHOICES

Each choice is a complete production pilot. B builds on A; C builds on A and B. The prices are alternatives, not amounts to add together.

A

Information Foundation

R95 000

A branded knowledge workspace, linked client and supplier records, source-aware catalogue and staff search.

B

Core Proposal Operations

R125 000

Everything in A, then enquiry capture, linked briefs, human proposal preparation, review, approval and CRM tracking.

C

Signature Experience

R150 000

Everything in A and B, then permission-aware semantic retrieval, grounded AI draft and a responsive client proposal under human approval.

PG-1 Discovery at R15 000 is already included in every projected total. Selecting A ends before B and C work; selecting B ends before C work. Later scope is decided at Discovery.

Reading guide

This proposal first defines the product each choice delivers, then the implementation and commercial controls. The three choices are alternative total prices, and higher choices include lower capabilities in order.

Option A — the actual workspace

Information Foundation | R95 000. DMC staff sign in to a branded internal workspace with role-based access. A client profile links representatives, approved preferences and historical references to a HubSpot ID or agreed CRM reference. A supplier and destination catalogue shows services, location, capacity, rate evidence and expiry, available travel details and permitted media. The source library supports keyword search, filters and links to approved original documents. An administrator imports a bounded corpus, resolves duplicates, corrects metadata and marks stale rates. DMC receives a production tenant, operating notes, training and UAT.

Example: a consultant opens a client, finds preferences, filters Western Cape suppliers for a group, checks rate validity and opens the source. An expired price is flagged for verification. Acceptance checks search on agreed real records, correction and denied access for an unauthorised role. A stops before enquiry routing, proposal workbench, semantic/RAG search and AI output.

Option B — the human proposal operation

Core Proposal Operations | R125 000. A is implemented first. An approved email/CRM intake path or agreed manual fallback creates a request linked to the correct client and representative, with duplicate checks and human triage. An employee confirms the editable brief: event, dates, group, budget, preferences, journey, accommodation and missing facts. The proposal workbench uses A's sources to shortlist suppliers and compile a human-authored proposal. Status and version controls move the exact draft through review, changes and named approval. Staff use the agreed DMC send channel and record the outcome and known reason against the client/CRM.

Example: for a four-day group enquiry, staff confirm the client, correct dates and budget, select verifiable options, seek a fresh quote when needed, secure approval and record the response. Acceptance covers duplicate or wrong-client cases, status and version history, unauthorised release and CRM linkage. B stops before semantic retrieval, AI recommendations and drafting, and the Signature client proposal site.

Option C — the AI-assisted Signature experience

AI Native Signature Experience | R150 000. A and B are delivered in order. Approved DMC excerpts gain a permission-aware semantic index and source-visible RAG, while structured filters check rates, capacities and dates. The intake assistant classifies proposal enquiries and extracts suggested fields with provenance and uncertainty; staff confirm the brief. Retrieval combines client context, suppliers, travel, media and previous proposal outcomes. An assistant offers an editable, grounded shortlist and draft. A validator checks agreed budget, dates, capacity, travel assumptions, rate validity, rights and missing facts; unverified claims remain marked for staff review.

A controlled renderer assembles a responsive DMC-branded private proposal from approved structured content and media. Staff preview and edit, then a named approver approves the exact version before the agreed private publication

path. Recorded outcomes and source corrections improve rules, prompts and indexing through measured evaluation. UAT covers relevance, unsupported claims, permissions, failure cases and appearance.

C includes a bounded premium proposal experience. Free-form code generation of arbitrary cinematic websites, automatic dispatch, client acceptance portal, booking Kanban, autonomous model training and fine-tuning are separate Scope Lock candidates with explicit effort and acceptance; otherwise they enter a later change request.

Executive decision

The immediate commitment is PG-1 Discovery at R15 000, included in each proposed total. Option C at R150 000 is our recommended working hypothesis. All options deliver a bounded production system used by DMC during the pilot. The final implementation scope and phase amounts follow Discovery, and DMC can stop after PG-1.

What the system can organise

The selected, approved corpus may include client preferences, contacts and representatives; supplier services, pricing validity and locations; travel options; media assets; previous proposals and recorded outcomes. HubSpot remains the agreed record system where technically possible. The DMC-branded workspace gives staff a usable route to this information. The exact source set, volume, permissions and integration method are confirmed in Discovery.

Three production pilot options

Choice	Projected total	Production pilot outcome
A · Information Foundation	R95 000	DMC knowledge, CRM relationships, source-aware catalogue and branded internal search workspace.
B · Core Proposal Operations	R125 000	Everything in A, then human-led enquiry capture, linked brief, shortlist, review, approval and CRM tracking.
C · Signature Experience	R150 000	Everything in A and B, then AI interpretation, approved-source semantic retrieval, verified draft and branded responsive client proposal under human approval.

Each amount is one alternative projected total for a complete production pilot. The R15 000 Discovery fee is already included, not added. B includes A; C includes A and B, with C only R25 000 above B today. If A is chosen, B/C work stops; if B, C work stops. Later upgrades need fresh scoping and pricing.

Indicative delivery phases

Phase / time estimate	A → B → C deliverables in implementation order	C planning fee
PG-1 · Discovery · 5–8 workdays	Current process and data map, requirements, feasibility, AI enablement opportunities, success tests, Scope Lock and go/revise/stop decision. All options.	R15 000 fixed
PG-2 · Foundation · 8–12 workdays	A: CRM/data model, approved corpus, access and branded knowledge workspace. B: request and client linkage. C: consented semantic index and evaluation corpus.	R32 000
PG-3 · Build · 15–22 workdays	A: working catalogue. B: enquiry triage, request workspace, human proposal controls and CRM logging. C: grounded retrieval/recommendation, validation and bounded responsive client proposal.	R55 000
PG-4 · Live pilot · 10–15 workdays	A: real source use. B: real human-led enquiry cases. C: AI relevance, budget/date/privacy checks, human edits and proposal experience refinement.	R32 000
PG-5 · UAT · 5–8 workdays	A: data/admin training. B: process/approval training. C: AI verification and safe publishing. All: UAT, handover, stabilisation and formal acceptance.	R16 000

Time estimates are workdays after each phase is authorised, dependent on DMC access, decisions and source quality. Overlap and calendar dates are confirmed after Discovery. PG-1 is fixed at R15 000; C implementation-phase amounts above are pre-Discovery estimates. A and B implementation-phase amounts are allocated after Discovery, without inventing a generic waterfall.

Phase decisions and evidence

Before Discovery (G0): agree the protected Discovery documents and obtain the correctly issued R15 000 fee at least two business days before the substantive workshop. DMC supplies the sponsor, sample workflow and approved source access. The Discovery output is a written proceed / revise / narrow / restructure / stop decision; if DMC stops, implementation does not begin.

PG-1 exit: DMC reviews the current-state map, source and CRM inventory, feasibility and cost findings, option recommendation, acceptance examples, final phase allocations and the selected-option Scope Lock. The next phase begins against the agreed written scope and phase funding.

PG-2 exit: agreed real client and supplier records, rates, permissions and source links can be found safely. B/C also has a linked request schema; C additionally proves authorised results from its approved-source index. The phase is reviewed and the following phase is funded before proceeding.

PG-3 exit: show a realistic end-to-end scenario at the selected option level. For B and C that includes a human review/approval state; C additionally shows source traceability, explicit uncertainty and a private branded proposal preview. The next build and pilot tranche follows a written gate review.

PG-4 exit: record bounded production use and test results. Resolve severe defects or document a precise agreed remedy. For C, specifically test unsupported claims, expired prices, dates, budget,

source permissions, prompt injection and visual quality before handover.

PG-5 exit: deliver role-based training, operating notes, UAT evidence, any agreed punch list and formal acceptance. The terms and costs for continued licence, hosting, model/API usage and support are proposed separately; there is no automatic post-pilot renewal.

Time is expressed as indicative workdays per phase, not fixed calendar dates. The phase ranges are PG-1 5–8, PG-2 8–12, PG-3 15–22, PG-4 10–15 and PG-5 5–8; they depend on source readiness, access and timely DMC decisions. The C planning amounts are R15 000 / R32 000 / R55 000 / R32 000 / R16 000. A and B retain the same fixed PG-1; their remaining phase allocation follows Discovery.

Additional workflow ideas for Discovery

Automatic client dispatch after approval, client self-service acceptance/decline capture, post-acceptance booking tasks and Kanban, outcome feedback, personalised video and arbitrary AI-generated cinematic sites are candidates to evaluate. They become committed pilot deliverables only when DMC approves their precise bounds, integrations, cost, timeline and tests at Scope Lock. Otherwise they remain a priced change request or later roadmap. C already includes bounded AI enquiry classification with human confirmation, source-grounded drafting and a responsive branded proposal. An unrestricted coding agent is a separate feasibility and pricing candidate.

Commercial and legal boundaries

PG-1 is a fixed R15 000 fee for the stated Discovery work. A R95 000, B R125 000 and C R150 000 are pre-Discovery projected complete pilot totals. PG-2–PG-5 C amounts are planning estimates, not independent fixed contracts. After Discovery DMC receives the final selected-option phase breakdown, requirements, exclusions, calendar plan, acceptance criteria and third-party cost schedule. Material changes require DMC's written approval before work. Phase funding and written exit gates govern implementation. Tax and invoicing follow the final agreements and confirmed lawful treatment.

Future operating licence

The system runs in production during the pilot. If DMC wishes to continue afterward, SASWEAR (Pty) Ltd t/a UpliftAI will separately propose the licence, hosting, storage, model/API usage limits, monitoring, maintenance, support and applicable third-party charges. No recurring fee or continued-use obligation is fixed in this proposal.

Responsibilities

DMC supplies the sponsor, champion, appropriate staff time, approved sources and review decisions. Waldo leads architecture, implementation, security and technical delivery. Sven contributes business discovery, stakeholder insight and adoption support; we agree each later phase's specific contribution together in its schedule. DMC information stays tenant-specific; the reusable platform/IP remains UpliftAI technology. This proposal is subject to the applicable signed client documents.