



# The Lawnsmith × Vambrace AI

## Project Kickoff

January 20, 2026

**Project Goal:** Modernize The Lawnsmith's digital presence with instant estimates, automated payments, and AI-powered business tools

# Agenda

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1. Our philosophy & approach
2. Project goals & success metrics
3. Current situation & challenges
4. Scope overview & phases
5. Workstreams deep dive (6 areas)
6. Plan & timeline
7. Roles & ways of working
8. Decisions & next steps

# Working Together: Our Philosophy

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**We're your partner, not just a vendor.** We focus on practical implementations of AI that drive real business value.

## Our Approach

- Start small, deliver fast, iterate based on feedback
- Focus on outcomes, not technology for its own sake
- Transparent communication and collaborative decision-making
- Build solutions that work for your team and your customers

## What You Can Expect

- Regular check-ins and progress updates
- Clear documentation and knowledge transfer
- Honest feedback about what's working and what's not
- Solutions designed for long-term sustainability

# Project Goals & Success

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**Primary Goal:** Transform The Lawnsmith's operations with modern digital tools—instant estimates that convert, automated payments that eliminate collections headaches, and AI-powered insights that drive growth.

## How We'll Measure Success

### Customer Experience

- Instant estimates delivered in seconds
- Property images shown before pricing
- Easy online ordering & account management

### Revenue & Collections

- Card-on-file for all customers
- Automated payment collection
- Stripe ↔ QuickBooks sync

### Marketing & Growth

- Re-engage inactive customers
- Weather-triggered campaigns
- Modern SEO & AI visibility

### Operations & Insights

- AI Command Center for business questions
- Daily executive summaries
- Improved crew app workflows

# Current Situation

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## Business Context

The Lawnsmith is an established lawn care provider serving the Minneapolis area, with a strong customer base and solid operational foundation.

## Key Challenges to Address

- **Estimate process:** Manual, time-consuming, customers wait for responses
- **Payment collection:** Invoice-based, collections headaches, cash flow delays
- **Website & marketing:** Needs modernization, better SEO, email automation
- **Field operations:** Crew acknowledgment workflows, customer issue submission
- **Business insights:** No centralized dashboard for real-time business questions

# Scope Overview

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## PHASE 1 Foundation & Launch

Jan 20 – Mar 1

- Instant Estimate System
- Marketing Automation & Communications
- Stripe Payment Integration
- Website & Customer Portal

## PHASE 2 AI & Advanced Features

Mar 1 – Apr 20

- AI Command Center
- Advanced Marketing Intelligence
- Operations & Field Tools
- AI Customer Service (as determined)

**Engagement:** January 20 – April 20, 2026 (3 months) • **Fee:** \$12,000 (\$4,000/month)

# Scope — Open Discussion

Let's confirm priorities and ensure we're aligned on what success looks like for each  
workstream.

# Workstream 1: Instant Estimate System

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**Objective:** Customers receive immediate, accurate estimates based on property data—no waiting, higher conversion.

## Key Capabilities

- Property images shown to customers before estimates
- Automated pricing from satellite measurements
- Historical data integration for accuracy
- Percentage-of-property input option

## Success Measures

- Estimate delivered in < 30 seconds
- Quote-to-customer conversion ↑
- Manual estimate requests ↓ 80%

## Accuracy Controls

- Management approval queue for edge cases
- Confidence thresholds for auto-approval
- Easy override for manual adjustments

## Decisions Today

- Approval threshold (\$X or %) for auto-approve
- Property data source access
- Pricing rules and edge cases



# Workstream 2: Marketing Automation & Communications

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**Objective:** Re-engage inactive customers, automate outreach, and drive growth through intelligent, targeted communications.

## Email Marketing Automation

- Re-engaging inactive customers
- Weather-triggered campaigns
- Psychographic clustering for targeting
- AI-powered audience selection

## Success Measures

- Inactive customer reactivation rate ↑
- Email open rates  $\geq 25\%$
- Campaign-driven revenue tracked

## Automated Customer Comms

- Estimate follow-up sequences
- Service reminders & confirmations
- Seasonal service promotions
- Personalized outreach based on history

## Decisions Today

- Definition of "inactive" customer
- Weather triggers (rain, drought, etc.)
- Key customer segments to prioritize

# Workstream 3: Billings, Payments & Accounting

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**Objective:** Automated payment collection with card-on-file—eliminate collections headaches, improve cash flow.

## Stripe Integration

- Payment links for phone/email orders
- Card-on-file capability
- Automatic billing upon service completion
- Future card expiry reminders

## Success Measures

- Days Sales Outstanding (DSO) ↓
- Collections calls eliminated
- Payment success rate  $\geq 95\%$

## QuickBooks Sync

- Stripe ↔ QuickBooks automatic sync
- Desktop vs Online evaluation
- Invoice reconciliation

## Decisions Today

- QuickBooks Desktop vs Online
- Payment terms / auto-charge timing
- Failed payment handling workflow

# Workstream 4: Website & Customer Portal

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**Objective:** Modern, high-converting website with self-service customer portal.

## Website Redesign

- Modern, mobile-friendly design
- Clear calls-to-action
- Improved SEO for local search
- AI visibility optimization

## Success Measures

- Website conversion rate ↑
- Portal adoption rate
- Phone call volume ↓

## Customer Portal

- Issue/photo submission capability
- Service history and scheduling
- Account management & payments
- Potential AI assistant for questions

## Decisions Today

- Brand assets and style preferences
- Portal feature priorities
- Reference sites you like

# Workstream 5: Operations & Field Tools

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**Objective:** Improve crew workflows with mandatory acknowledgments and better field documentation.

## Crew App Improvements

- Mandatory note acknowledgment (e.g., "close gate")
- Cannot continue to next property without confirming
- Photo documentation workflow
- Service completion verification

## Success Measures

- Note acknowledgment compliance = 100%
- Customer complaints from missed notes ↓
- Photo documentation coverage ↑

## Future Enhancements

- Route optimization
- Real-time crew tracking
- Predictive scheduling

## Decisions Today

- Current crew app platform
- Most common notes requiring acknowledgment
- Photo requirements by service type

# Workstream 6: AI Command Center

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**Objective:** AI-powered dashboard for real-time business insights and intelligent decision support.

## Phase 2 Core Features

- Real-time Q&A about your business data
- Daily executive summary (automated)
- Advanced marketing intelligence
- Campaign performance analytics

## Success Measures

- Questions answered accurately  $\geq 90\%$
- Time saved on reporting
- Data-driven decisions  $\uparrow$

## Longer-Term Possibilities

- AI customer service automation
- Phone bot for common inquiries
- Predictive business forecasting

## Inputs Needed

- Access to historical data
- Common business questions you ask
- KPIs you track today

# Plan & Timeline

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## **PHASE 1** Foundation & Launch (Jan 20 – Mar 1)

### **Weeks 1-4 (Jan 20 – Feb 16)**

Kickoff • Data migration • Instant estimates • Marketing automation setup • Customer communications

### **Weeks 5-6 (Feb 17 – Mar 1)**

Stripe payments • Website & portal • Email campaigns live • Testing • March 1 launch

## **PHASE 2** AI & Advanced Features (Mar 1 – Apr 20)

### **Weeks 7-9 (Mar 1 – Mar 23)**

AI Command Center • Advanced marketing intelligence • Operations & crew app improvements

### **Weeks 10-12 (Mar 24 – Apr 20)**

Refinement • Additional features as determined • Documentation & handoff

## What We Need from The Lawnsmith

Legacy data access, inactive customer lists, brand assets, pricing rules, QuickBooks access, weather trigger preferences

# Roles & Communication

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## Team Structure

### The Lawnsmith

**Dan Beutz** – Owner, Primary Contact & Decision Maker

### Vambrace AI

**Luke Deasy** – Founder & Project Lead

## Communication Cadence

- **Weekly check-ins:** Progress review and planning calls (time TBD)
- **Ad-hoc calls:** As needed for quick decisions or demos
- **Email:** Formal documentation and milestone approvals
- **Shared workspace:** For real-time collaboration and feedback

# Decisions for Today

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What must be confirmed now to move forward effectively:

## Marketing & Communications

- Definition of "inactive" customer
- Weather triggers (rain delay, drought, etc.)
- Key customer segments to target first
- Email platform preference

## Technical & Access

- Legacy data access (from current provider)
- QuickBooks Desktop vs Online
- Estimate approval threshold
- Brand assets delivery timeline

**Goal:** Ensure we're aligned on marketing automation priorities and have customer data access to start immediately



# Risks & Constraints

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## Known Constraints

### Data Migration

Dependent on access to legacy provider data—critical path item for Week 1

### Integration Complexity

Stripe ↔ QuickBooks sync depends on Desktop vs Online decision

## Risk Mitigation Strategy

- **Early data access:** Prioritize legacy data extraction in Week 1
- **Phased rollout:** Launch core features first, add advanced features iteratively
- **Regular check-ins:** Early detection of blockers or misalignment
- **Clear documentation:** Ensure sustainability and knowledge transfer

# Next Steps

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## 1. Gather Required Assets & Access

**Owner:** Dan Beutz • **Due:** January 24, 2026

Legacy data access, brand assets (logo, colors), pricing rules, QuickBooks credentials

## 2. Schedule Weekly Check-ins

**Owner:** Luke Deasy • **Due:** January 21, 2026

Confirm recurring meeting times for progress reviews

## 3. Begin Data Migration & Design

**Owner:** Luke Deasy • **Due:** January 27, 2026

Initial data extraction, homepage mockups, estimate system architecture

**Next Meeting:** Week 1 Check-in (Date TBD) — Review initial progress and confirm direction



# Let's Build Something Great Together

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