Pareve • BUSINESS SYSTEMS & AI SOLUTIONS

Business Systems & AI Discovery

Our discovery process is built to understand how your business runs today, evaluate the systems you rely on, and identify where technology, automation, and AI can save time and reduce cost. You walk away with a clear, practical plan for what to implement and in what order.

WHAT WE DO

Discovery Sessions

Two working sessions, in person or over Zoom, with owners, management, and key team members. We sit down with the people doing the work to understand your goals, where things slow down or break, what your team spends too much time on, and how you want the business to run.

Process Mapping

We document how work actually moves through your business today, from first contact through delivery and billing, and pinpoint the handoffs, manual steps, and bottlenecks that cost you time.

Systems & Integration Audit

We review your key business systems and platforms and evaluate:

- Which systems can connect to each other, including available APIs and native integrations
- Where data is entered more than once or moved between systems by hand
- Which tasks can be automated, and which are good fits for AI
- Whether each tool should be kept, connected, upgraded, or replaced
- The most cost-effective way to get there, using what you already pay for wherever possible

WHAT YOU RECEIVE

A Business Systems & AI Discovery Report, including:

Current-State Process Maps	Visual documentation of key workflows, showing how work moves between people, departments, and systems.
Opportunity Report	The inefficiencies we found and identified opportunities for process improvement, automation, and AI.
Proposed Solutions	Specific integrations, automations, and AI capabilities for each opportunity.
Implementation Roadmap	A prioritized, phased plan for next steps.
Implementation Pricing	Pricing for each recommended solution or phase, so you know exactly what it costs to move forward.

TIMELINE

1 Discovery Sessions

Scheduled as soon as possible after approval, based on mutual availability. Typically completed within about a week, depending on how many team members are involved.

2 Report Delivery

Within 7 days of the final session and receipt of any requested information.

3 Review Meeting

We walk through the report together, answer questions, and map out next steps.

INVESTMENT

$2,500
Fixed discovery fee

Implementation Credit: 100% of the discovery fee ($2,500) is credited toward an implementation agreement of $10,000 or more, if signed within 30 days of receiving the discovery report.

Payment Terms: Due in full upon engagement approval. Discovery sessions are scheduled once payment is received.

What the Fee Covers: Both discovery sessions, all assessments and analysis, the discovery report, and the review meeting.

Additional Costs: In-person sessions outside the New York Tri-State area include travel costs. Additional sessions, locations, or significantly expanded scope may require additional fees. Any additional costs are agreed upon in advance.