



NDA Autopilot

Workflow Automation Proposal

Designed & Implemented by Magic Unicorn (Aaron Stransky)

The Problem: The Manual Grind

Every signed NDA currently triggers a chain of manual tasks: downloading files, renaming documents, checking duplicates, copying data into Salesforce, organizing Drive folders, and following up manually. This creates friction, errors, and time loss that directly impacts deal velocity and operational focus.

As Tom put it: *"We want a \$100/hour assistant."* NDA Autopilot is exactly that — infrastructure that eliminates administrative work so your team can focus on revenue-driving activity.

Value Positioning

NDA Autopilot is not just "automation." It is operational infrastructure designed to deliver:

- **Operational time recovery**
- **Error elimination**
- **Scalability** as deal volume grows

Implementation Phases

Phase	Scope	Timeline	Investment
Phase 1	DocuSign → Google Drive Automation	2–4 weeks	\$6,000
Phase 2	Salesforce Sync & Data Validation	Additional 3–5 weeks	\$5,000
Phase 3	Crexi → DocuSign Integration	3–5 weeks	\$4,000
Total	Complete NDA Pipeline	8–12 weeks	\$15,000

Friends & Family Consideration

This engagement reflects a **~35% Friends & Family discount** from standard pricing of approximately **\$23,000**. The goal is to deliver enterprise-grade infrastructure while honoring the existing relationship.

Phase 3 Integration Note

Phase 3 is a best-effort integration. Crexi's API is currently in beta. This phase includes fallback strategies if direct API access is limited, ensuring functional continuity even if full automation is not possible at this time.

Payment Terms

- 50% due at project start per phase
- 50% due upon completion per phase

Example – Phase 1: \$3,000 to start, \$3,000 at go-live

Return on Investment

Estimated savings of **15–25 minutes per NDA** multiplied by monthly volume results in significant hours recovered each month, eliminating manual data entry, reducing error risk, and accelerating deal progression.

Next Steps

1. Approve Phase 1 to initiate project kickoff
2. Provide required system access (DocuSign, Google Drive, Salesforce as applicable)
3. Confirm timeline and start date