PRO-AI-AGENT

TO GROW YOUR BUSINESS WITH INTELLIGENT SOLUTIONS | IT & AI SERVICES

AI agent deployment action plan

Freelancers & Independent Professionals

When you work alone, admin eats into billable time. The AI agent becomes your personal assistant: prospecting, quotes, invoices, calendar and follow-ups.

The challenges we address

- Admin work eating into billable time
- Irregular prospecting and uneven income
- Unpaid invoices and forgotten follow-ups

Overview

1	**Days 1-30**	**Foundations & quick wins**	5 to 8 hours of admin recovered per week
2	**Days 31-60**	**Core business automations**	Average payment time cut in half
3	**Days 61-90**	**Integrations & optimization**	Lead pipeline fed every week
4	**Months 4-6**	**Scale & intelligence**	Higher effective hourly rate
5	**Months 7-12**	**Autonomy & growth**	A one-person business that runs even while you're on vacation

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DAYS 1-30

Foundations & quick wins

Goal : Set up a secure infrastructure, connect the agent to your messaging tools, train your team and deliver the first high-impact automations.

⚙ Common foundation

- **Kick-off workshop & process audit** — Mapping of your repetitive tasks, identification of quick wins and prioritization with your PRO-AI-AGENT project manager.
- **Dedicated VPS creation, deployment & configuration** — Private server sizing, hosting region selection, domain name, automatic backups and monitoring. Your data stays yours.
- **Ubuntu system security hardening** — Non-root user, key-only SSH access, firewall, brute-force attack protection, automatic security updates and log monitoring.
- **AI agent harness installation & configuration** — Setup of the agent's runtime environment, skills, permissions and action logging.
- **Connection to the LLM of your choice** — OpenAI, Anthropic, Google Gemini, Alibaba (Qwen) or lower-cost Chinese LLMs: secured API keys, spending caps and a fallback model.
- **Agent connection to your messaging apps** — Telegram, WhatsApp, Signal, email or others: you talk to your agent like a colleague, right from your phone.
- **Agent memory setup** — Specialized or open-source tools depending on your budget and the project manager's recommendations: long-term memory, company knowledge base, documents and procedures.
- **Team training** — Getting started with the tools, how to phrase a request, delegate a task, approve an action, plus security best practices to start automating daily work.

💻 Industry automations

- **Personal assistant on Telegram or WhatsApp** — Email triage, reminders, notes and voice-dictated to-do lists.
- **Calendar & appointment management** — Client bookings and automatic reminders.
- **Quotes and invoices in one sentence** — "Draft a 3-day quote for Client X": document ready to send.

🎯 **Target outcome :** 5 to 8 hours of admin recovered per week

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DAYS 31-60

Core business automations

Goal : Automate the most time-consuming daily processes of your business and anchor new habits within the team.

⚙ Common foundation

- **Bi-weekly performance review** — Conversation analysis, instruction tuning and enrichment of the agent's memory.
- **Advanced training** — The team learns to create routines and scheduled tasks on its own, no technical skills needed.
- **LLM cost tracking** — Usage report and budget alerts to keep spending under control.

💻 Industry automations

- **Automatic payment reminders** — Polite, escalating reminders until paid.
- **Assisted prospecting** — Lead research, personalized messages and response tracking.
- **Project & deliverable tracking** — Deadlines, status and progress updates sent to clients.

🎯 **Target outcome :** Average payment time cut in half

3

DAYS 61-90

Integrations & optimization

Goal : Connect the agent to your business software, make end-to-end workflows reliable and measure the first return on investment.

⚙ Common foundation

- **Quarterly security audit** — System patches, API key rotation, backup restore test.
- **Model selection optimization** — Smart routing between premium and low-cost models depending on each task's complexity.
- **90-day ROI review** — Hours saved, revenue generated and priorities for the next semester.

💻 Industry automations

- **Bookkeeping & tax prep** — Expense and receipt filing, sales tax return preparation.
- **Content creation & personal branding** — Regular LinkedIn posts and portfolio updates.
- **Custom proposals** — Responses to RFPs and proposals built from your templates.

🎯 **Target outcome :** Lead pipeline fed every week

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MONTHS 4-6

Scale & intelligence

Goal : Move from task automation to intelligent management: specialized agents, forecasting, dashboards and compliance.

⚙ Common foundation

- **Multi-agent architecture** — Specialized agents (sales, operations, admin) coordinated by a main agent.
- **Compliance & data protection** — Data policy review (Quebec Law 25, PIPEDA, GDPR depending on your market), access logs and consents.
- **Power-user training** — Your internal champions become autonomous in evolving the automations.

💻 Industry automations

- **Productizing your services** — Packaged offers and sales pages.
- **Automated client onboarding** — Contract, questionnaire and kick-off sent automatically.
- **Revenue & profitability dashboard** — Revenue per client, real hourly rate and forecasts.

🎯 **Target outcome :** Higher effective hourly rate

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MONTHS 7-12

Autonomy & growth

Goal : Turn AI into a lasting growth lever: new revenue streams, replicating the model and a year-2 roadmap.

⚙ Common foundation

- **Annual ROI & KPI review** — Full measurement of time savings, revenue and service quality over 12 months.
- **Full security audit & upgrade** — Infrastructure review, server and model upgrades to the latest generations.
- **Year-2 roadmap** — New automations, new channels and growth targets defined with your project manager.

💻 Industry automations

- **Recurring revenue** — Subscriptions, retainers and digital products managed by the agent.
- **Collaborating with other freelancers** — Delegating to and coordinating subcontractors.
- **Year-2 roadmap** — Positioning, pricing and new markets.

🎯 **Target outcome :** A one-person business that runs even while you're on vacation

Ready to launch your action plan?

Get a personalized plan and a free quote within 24 hours.

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Target outcomes are indicative goals; they are adjusted during the initial audit according to your situation. The plan is customized by your PRO-AI-AGENT project manager.