



FUTURE MOTOR LEASE

AI Response System Proposal

A controlled 60-second speed-to-lead pilot, with a clear path to voice and historical reactivation

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RECOMMENDED START

Option 1 — 60-Second Response Pilot

1. Executive recommendation

Here is what we recommend: launch a bounded 60-second response pilot for new enquiries first. Prove that Future Motor Lease can respond, qualify, route and recover missed calls reliably before adding full voice volume, historical reactivation or a complete CRM migration.

THE COMMERCIAL LOGIC Future Motor Lease does not need “another bot”. It needs a measurable response system that protects lead value outside office hours and gives the team clean context for the next action.

What the pilot will change

- Every supported new enquiry receives an acknowledgement and first qualifying step within a target of 60 seconds.
- WhatsApp and website conversations capture intent, public starting criteria, vehicle interest and preferred next step.
- Missed calls trigger a compliant WhatsApp recovery path and a callback task.
- Human advisors retain control of approval, final pricing, vehicle availability, contracts and sensitive issues.
- A GHL-based workspace records conversations, stages, owners, tasks and pilot reporting while HubSpot remains in place initially.

Why not launch everything on day one

Voice AI can add meaningful coverage, but it also introduces higher usage costs, telephony dependencies, recording/disclosure decisions and more failure modes. The pilot should earn the right to expand.

Decision	Recommendation	Reason
Initial purchase	Option 1: 60-Second Response Pilot	Fastest route to measurable value with bounded risk.
CRM posture	Parallel pilot; no immediate full migration	Protects continuity and avoids making legacy migration a launch dependency.
Voice	Price now; activate after pilot proof	Prevents paying for scale before qualification and handoff logic is stable.
Historical leads	Small consent-cleared segment first	Protects POPIA, sender reputation and operational capacity.

2. What we heard and what must improve

This proposal responds directly to the 16 July 2026 discovery call and the operating context shared by Future Motor Lease.

Current signal	Commercial implication
20–40 weekday leads and approximately 100 over a weekend	After-hours and weekend response cannot depend only on human availability.
Target: contact every new enquiry within 60 seconds	Response time must be designed and reported as an operational SLA.
Reported fleet of 300+ vehicles	Vehicle answers require a canonical inventory and pricing source before automation can promise specifics.
HubSpot plus spreadsheets	New-lead orchestration can be proved in parallel before any migration decision.
Historic leads from roughly one to three years	Reactivation could create revenue and insight, but only after consent and suppression checks.
Reported scaling of approximately 45%	The system must improve follow-up capacity without adding equivalent administrative load.

The first bottleneck

WHAT BREAKS FIRST If more lead volume enters the same slow or inconsistent response process, growth creates a larger follow-up backlog—not a stronger sales engine. Speed-to-lead and ownership discipline come before deeper automation.

Pilot success scorecard

- Median automated first response within 60 seconds for all connected, supported lead sources.
- Clear capture of intent, qualifying context, vehicle interest and preferred next action.
- Successful assignment or human handoff with a concise conversation summary.
- Missed-call recovery workflow tested and operating within approved hours and consent rules.
- No AI approval, decline, guaranteed inventory or unapproved final-price statements in QA and monitored live conversations.
- Weekly visibility into lead volume, engagement, qualification completion, handoff, application starts, opt-outs and exceptions.

Final numeric conversion targets will be agreed after Future Motor Lease supplies baseline lead, contact, application and delivery data. This proposal does not claim a finance-ready ROI before those inputs exist.

3. Proposed solution: the 60-second response engine

The pilot combines CRM structure, Conversation AI, channel automation and human handoff into one operating workflow. The technology is not the product; the product is a reliable response and progression system.

Customer journey

1. A lead arrives from an approved website, WhatsApp, call or connected source.
2. The system creates or updates the contact, records the source and starts the response timer.
3. The digital assistant acknowledges the enquiry, identifies intent and asks one useful question at a time.
4. For rent-to-buy interest, the assistant captures the three published starting criteria without making an approval decision.
5. Vehicle interest, monthly comfort range and contact preference are saved.
6. The system routes the lead to an advisor, offers an application or callback, and sends a concise internal summary.
7. If a call is missed or the person does not complete the journey, approved recovery rules trigger and stop appropriately on reply or opt-out.

Phase 1 deliverables

Workstream	Included output
GHL workspace foundation	Account configuration, users/queues, core sales pipeline, fields, tags, permissions and pilot dashboard.
Lead capture	Connection of agreed pilot sources, contact matching, source attribution and response-timer logic.
WhatsApp Conversation AI	Approved persona, public FAQ, starting-criteria flow, vehicle-interest capture, application/callback next steps and opt-out behaviour.
Website chat	Equivalent approved first-response experience for the agreed website surface.
Missed-call recovery	Approved WhatsApp response, callback task, urgency routing and stop conditions.
Human handoff	Assignment rules, internal summaries, alerts, AI pause conditions and advisor takeover.
QA and optimisation	Test suite, controlled launch, weekly review and four weeks of initial prompt/workflow tuning.
Reporting	Lead volume, response time, engagement, qualification, handoff, application starts, opt-outs and exceptions.

4. Operating boundaries and future expansion

What the assistant may do

- Answer approved public questions about rent-to-buy, long-term hire, the application journey and the referral programme.
- Collect only the minimum non-sensitive context required for routing and progression.
- Use published starting criteria as a screening conversation, with a clear human-review disclaimer.
- Share approved public vehicle examples only with availability and price-confirmation caveats.
- Create opportunities, tasks, summaries, callbacks and human handoffs.

What remains human-only

- Applicant approval, decline, affordability, risk exceptions and legal or contractual decisions.
- Final vehicle availability, reservation, rental amount, activation fee, deposit and delivery promise.
- Sensitive document handling, payment details, complaints, legal threats, accidents, theft and liability decisions.
- Approval of outbound historical-lead segments and expansion beyond pilot limits.

Expansion roadmap

Phase	Scope	Expansion gate
0. Workflow and data contract	Sources, owners, consent, inventory truth, pricing rules, handoffs and scorecard.	Required before build.
1. Response pilot	GHL, WhatsApp, website chat, missed-call recovery, routing and reporting.	Recommended first purchase.
2. Inbound voice	After-hours/overflow answering, qualification, transfer, summaries and fallback.	Phase 1 QA and telephony proof.
3. Historical reactivation	Consent-cleared 300–500 record pilot by WhatsApp and/or voice.	Legal/data QA and suppression rules.
4. Application and inventory orchestration	Canonical stock, document/status handoffs, signing and end-to-end dashboards.	Separate discovery and integration scope.

5. Itemised investment

RECOMMENDED Approve the WhatsApp and CRM foundation now. Keep inbound voice and outbound reactivation commercially visible, but activate them only after the first response workflow passes QA and produces a stable baseline.

Channel modules

Module	Once-off setup	Monthly management	Estimated third-party usage
A. CRM foundation + WhatsApp and website response	R9,800	R3,450	R2,700–R4,800/month at the working full-volume scenario
B. Inbound Voice AI add-on	R6,500	+R1,250	R1,100–R1,600/month at approximately 500 connected minutes
C. Outbound voice reactivation add-on	R8,600	+R2,200	R2,900–R3,800/month at approximately 1,000 connected minutes

Modules B and C depend on Module A. Usage estimates are planning ranges, not fixed quotes. Prices exclude VAT, if applicable.

Two purchase options

Option	Setup	Monthly management	What is included
Option 1 — 60-Second Response Pilot	R9,800	R3,450	Module A: CRM foundation, WhatsApp AI, website chat, missed-call recovery, handoff, reporting and optimisation.
Option 2 — Integrated AI Response Engine	R24,900	R6,900	Modules A, B and C: Option 1 plus inbound voice and a controlled outbound reactivation pilot.

What the management fee covers

- Platform administration and managed GHIL workspace access for the approved scope.
- Workflow monitoring, Conversation AI prompt/knowledge maintenance and issue triage.
- Weekly optimisation during the initial launch month and agreed monthly reporting thereafter.
- Reasonable configuration improvements within the agreed scope; new channels, integrations or major workflow changes are separately scoped.

BUDGET VIEW Option 1 is the right first commitment. Option 2 should be treated as a priced expansion path, not an instruction to switch on all voice traffic immediately.

6. Third-party usage estimate and cost controls

Third-party usage is billed separately because it changes with response rates, call duration, message volume, template classification, provider billing and the USD/ZAR exchange rate. The figures below are intended for responsible budgeting, not as a guaranteed invoice amount.

Working planning scenario

Channel	Working assumption	Planning range
WhatsApp Conversation AI	Approximately 1,300 initial messages, 715 active conversations and about 9,620 total inbound/outbound messages.	R2,700–R4,800/month
Inbound Voice AI	Approximately 500 connected minutes, including AI processing, SA inbound telephony, number and basic recording allowance.	R1,100–R1,600/month
Outbound Voice AI	Approximately 1,000 connected minutes, mostly mobile destinations, with basic detection/recording allowance.	R2,900–R3,800/month
Combined full-channel budget	All three working scenarios active.	Provision R7,000–R10,000/month

Cost controls built into the design

- Use WhatsApp qualification first for opted-in new leads; call people who request a call, reply positively, meet approved starting criteria or show strong vehicle intent.
- Use outbound voice selectively for incomplete high-intent journeys and approved reactivation segments —not as an indiscriminate database blast.
- Set wallet/budget alerts, monitor connected minutes and message volumes, and reconcile actual usage monthly.
- Start historical reactivation with 300–500 consent-cleared records and expand only after reviewing response, opt-out, complaint and conversion signals.
- Recalibrate the usage budget after the first 30 days of real traffic.

The working estimate includes AI processing, South African telephony, WhatsApp transport and likely template/Conversation AI charges. It excludes extraordinary reactivation volume, extra numbers, premium voices, SMS fallback, bespoke verification services, taxes and unapproved integrations.

7. Implementation plan and acceptance gates

The controlled launch is planned for approximately three weeks after kickoff, subject to access, approvals and source readiness. The initial engagement runs for a minimum of three months from controlled go-live so the system can be measured and improved rather than abandoned after setup.

Timing	Work	Decision/output
Week 0	Commercial approval, deposit, owner nomination and kickoff scheduling.	Kickoff confirmed.
Week 1	Workflow mapping, source inventory, consent and handoff rules, knowledge review and success targets.	Approved solution map and data contract.
Week 2	GHL configuration, pipeline/fields, channel connections, agent build and internal routing.	Build ready for QA.
Week 3	Test contacts, happy paths, exceptions, opt-out, handoff, reporting and safety tests.	Controlled go-live approval.
Weeks 4-7	Monitored traffic, weekly review, prompt/workflow tuning and issue correction.	Stable pilot baseline.
Months 2-3	Performance review and expansion decision for inbound voice, reactivation or deeper orchestration.	Go / revise / stop decision.

Launch acceptance gates

- Future Motor Lease approves the knowledge, starting criteria, disclaimers and escalation owners.
- Test leads complete the correct qualification, routing and advisor handoff paths.
- The assistant does not approve, decline, guarantee availability or quote unapproved final amounts.
- Opt-out, suppression and AI-pause behaviour is verified.
- Missed-call recovery and human takeover work during the agreed service windows.
- Pilot reporting and the response-timer measurement are visible and agreed.
- An authorised Future Motor Lease owner signs off before higher traffic or outbound expansion.

8. Governance, privacy and operational safeguards

Future Motor Lease deals with financial, employment, identity and application information. The system will use a least-data approach and keep material decisions behind approved human gates.

Control area	Pilot rule
Personal information	Collect only the minimum context required for qualification and routing; direct sensitive documents to an approved secure process.
Automated decisions	No final approval, decline, affordability, pricing exception, contract or liability decision by AI.
Historic outreach	No reactivation until consent/lawful-contact basis, suppression lists, sender identity and opt-out behaviour are approved.
Call recording and AI disclosure	Wording and policy must be approved before voice launch.
Vehicle and pricing data	Use a canonical owner-approved source with timestamps; otherwise give only clearly qualified public examples.
Human escalation	Pause automation on request, uncertainty, complaints, negative sentiment, sensitive topics or repeated misunderstanding.
Change control	Record material changes to prompts, knowledge, workflows, fees, inventory connections and decision rules.
Access	Named users, least-privilege permissions and owner-approved channel credentials.

IMPORTANT This proposal provides operational safeguards, not legal advice. Future Motor Lease remains responsible for approving its POPIA, direct-marketing, recording, consent, retention and customer-contract requirements.

Data and platform posture

- Run the pilot alongside HubSpot first; do not make a full CRM migration a condition for launch.
- Do not port or replace production numbers during demo/QA without a separate approved cutover plan.
- Do not activate bulk outbound workflows, payments or production webhooks before written sign-off.
- Use fictional tagged contacts for QA and controlled internal demonstrations.

9. Client inputs, exclusions and change control

Future Motor Lease will provide

- A commercial owner, operational owner and named advisors/queues for handoff.
- Access or approved connection support for website forms, lead sources, WhatsApp/Meta assets, telephony and relevant CRM records.
- Approved qualification, pricing, inventory, application, office-hours and escalation rules.
- Baseline metrics where available: monthly leads by source, response time, contact/application/delivery conversion, missed calls and current costs.
- Consent, privacy, opt-out, recording and data-retention decisions.
- Timely review and sign-off during workflow, knowledge and QA gates.

Not included in the current pilot price

- Full HubSpot migration, historic activity reconstruction or large-scale data cleansing.
- Custom inventory, finance, document-signing, payment or underwriting integrations beyond standard connection methods.
- A new website, advertising management, landing-page programme or lead-generation media spend.
- Legal advice, formal POPIA audit, contract drafting or regulator submissions.
- Bulk historical outreach beyond an approved pilot segment.
- Third-party usage, number, verification, premium voice, template, email/SMS or taxes unless expressly bundled in writing.

Change control

A request is treated as a change when it adds a channel, materially changes a decision rule, introduces a custom integration, expands data volume, changes the approved user journey or requires work outside the stated deliverables. ORBITxi will describe the impact on fee, timeline, risk and acceptance before work proceeds.

SCOPE PROTECTION The R4,000 basic-agent estimate mentioned during discovery does not cover this multi-channel production response system. The proposal prices the CRM structure, workflows, handoff, QA, governance and ongoing optimisation required to make the agent operationally useful.

10. Commercial terms

Term	Proposal position
Validity	Valid until 30 July 2026.
Initial option	Future Motor Lease selects Option 1 or Option 2 in the acceptance section.
Setup payment	50% on acceptance and 50% when the approved pilot is ready for controlled go-live.
Management term	Minimum three months from controlled go-live; thereafter month-to-month unless superseded by a signed agreement.
Usage	Third-party usage funded separately, monitored transparently and reconciled against actual provider charges.
VAT	Prices exclude VAT, if applicable.
Timeline	Approximately three weeks to controlled launch after kickoff, subject to access, approvals and dependency readiness.
Ownership	Future Motor Lease retains its business data and approved source content. Third-party platform rights remain subject to provider terms.
Confidentiality and data processing	Appropriate confidentiality and operator/data-processing terms must be agreed before production personal data is processed.
Termination and transition	Any offboarding, data export, number transfer or platform transition will follow the signed service agreement and provider constraints.

Assumptions requiring confirmation at kickoff

- The email, WhatsApp, domain, telephony and Meta assets required for the pilot are controlled by or can be authorised by Future Motor Lease.
- The reported lead volumes are directionally accurate but will be validated by source.
- The public three-question criteria are only a starting screen; a human retains final application authority.
- The 300+ reported fleet has an internal source that can later be assessed for inventory integration.
- HubSpot remains available during the parallel pilot unless a separately approved change is agreed.

11. Approval and next step

Approval authorises ORBITxi to schedule kickoff and begin Phase 0 workflow/data confirmation for the selected option. It does not authorise bulk outreach, a production CRM cutover, number porting, migration of the historic database or activation of unapproved AI/voice workflows.

RECOMMENDED DECISION Select Option 1, nominate the workflow owners and schedule the 60–90 minute mapping session. Use the first 30 days of pilot evidence to decide whether inbound voice and historical reactivation should be activated.

Select an option

Select	Option	Commercial commitment
☐	Option 1 — 60-Second Response Pilot	R9,800 setup + R3,450/month management + third-party usage
☐	Option 2 — Integrated AI Response Engine	R24,900 setup + R6,900/month management + third-party usage

Acceptance

 Authorised Future Motor Lease representative — name and signature

 Title / role

 Date

The next three actions

1. Confirm Option 1 or Option 2 and the commercial owner.
2. Schedule a 60–90 minute workflow, data and access mapping session.
3. Provide the agreed source/access checklist so the solution map and final launch plan can be signed off.

Prepared by ORBITxi

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