



PREPARED FOR
**K. Thompson — X
Company**

REF. NO.
SR-2026-014

DATE
03 Jul 2026

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§ The short version

IN ONE PARAGRAPH

X Company loses an estimated \$4,700 per month to slow referral response and hand-retyped intake paperwork. Two systems, built on your current phone number and inbox, would recover most of it. Expected payback is around four weeks, and your team's day-to-day does not change.

AT A GLANCE

Estimated leak	\$4,700 / mo
Systems proposed	2
One-time build	\$2,600
Expected payback	~4 weeks

A What we found

Referral calls go to voicemail while the team is on visits, and after-hours referrals wait until morning. Intake and referral forms arrive by fax and email, then get retyped by hand into AxisCare — and visit confirmations are still sent manually every evening.

FINDING	ESTIMATED LEAK	CONFIDENCE
Referral calls hit voicemail during visits and after hours	1–2 referrals / mo lost ≈ \$3,600 / mo	High
Referral & intake forms retyped by hand into AxisCare	6–8 hrs / wk ≈ \$700 / mo	Medium
Visit confirmations and reminders sent manually	~2 hrs / wk ≈ \$400 / mo	High
Estimated combined leak	\$4,700 per month	

Basis: figures provided by the client on 01 Jul 2026, cross-checked against typical values for home care. Adjust after the first month of real numbers.

B What we'd build

● A TYPICAL NIGHT, ONCE THE SYSTEMS ARE LIVE

UNIT SR-2026-014 · RUNS 24/7 · WATCHED DAILY

23:05 Referral inquiry via website form — answered in 8s
00:12 Referral fax received — 14 fields extracted into AxisCare, 0 retyped
02:47 After-hours referral call missed — text-back sent, details captured
07:58 Morning digest to K. Thompson — 3 referrals waiting · 0 lost overnight

FIG. 1 — PROPOSED OPERATION FOR X COMPANY

EXISTING TOOLS ONLY: YOUR NUMBER · YOUR INBOX · AXISCARE

SYSTEM	NAME	WHAT IT DOES IN YOUR OPERATION	PRIORITY
SW-01	Instant referral response	Every referral call, form, and email gets an answer in seconds — day, night, weekend — before the case manager tries the next agency on the list.	BUILD FIRST
SW-07	Referral & intake extraction	Key details are pulled from referral faxes and intake forms and logged as clean rows in AxisCare — never retyped, and never stored outside your own tools.	PHASE 2

C The numbers

ONE-TIME BUILD \$2,600 Both systems, built on your existing tools. You own them outright.	MONTHLY WATCH \$180 Daily monitoring plus a monthly numbers report. Cancel anytime. Automation platform runs in your name (≈\$25 / mo, billed to you) — if you ever cancel, the systems keep running and stay yours.	EXPECTED RETURN \$3,100 / mo Basis: ≈1 recovered referral / mo × avg. monthly billing \$2,400, plus ≈\$700 / mo of admin hours returned.	PAYBACK ~4 weeks If it would not pay for itself, this report would say so instead.
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Figures are estimates based on the numbers you provided. The monthly report replaces these estimates with your real numbers from month one.

D What's in, what's not

INCLUDED IN THIS BUILD	NOT INCLUDED · READ THIS FIRST
✓ Design, build, and testing of SW-01 and SW-07 on your tools	× No new software for your team to learn. Your day-to-day tools stay exactly as they are.
✓ Message templates written in your voice, approved by you	× No lock-in. Everything delivered is documented and owned by you.
✓ Daily monitoring by the person who built it	× New website pages, ad campaigns, or CRM migration — quoted separately if wanted
✓ Monthly report: what ran, what it caught, what it earned	× No charge for this survey, whatever you decide.
✓ Fixes at no charge if anything we built misbehaves	

E How it goes live

STAGE	WHEN	WHAT HAPPENS	WHAT WE NEED FROM YOU
E.1 Build	Week 1	Systems built and connected to your number, inbox, and AxisCare.	30 min: access + approve message templates
E.2 Shadow	Week 2	Systems run silently alongside your normal day. We compare their output against reality and tune.	Nothing. Work as usual.
E.3 Live	Week 3	Systems go live. The daily watch begins, and your first monthly report follows.	15 min: go-live check together

F Next step

Reply to this chat with "go". That is the whole process.

We send a one-page scope confirmation, then start the build within 5 business days. Questions first? Send them over on WhatsApp, or book 15 minutes, whichever suits you. This estimate is valid for 30 days from the date above.



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PREPARED BY
Damida — Sparehand

CONTACT
WA +62 878-3540-5688

CHECKED
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CLIENT APPROVAL +
DATE