

• INITIAL PILOT SCOPE

Client Agent for Innov8tion R&D

A low-risk 3-month pilot that answers every inbound enquiry and turns it into a qualified lead, built on everything Innov8tion R&D offers.

Delivered by Express Agent.

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• WHAT YOUR CLIENT SEES

Your next client just asks

No contact form, no phone tag. They ask in plain language, and the Client Agent answers from everything Innov8tion R&D offers, qualifies the enquiry, and captures it for your team.

 **Innov8tion R&D**
● Online

EXAMPLE

We spent about \$300k this year developing a new mining sensor system. Would that qualify for the R&D Tax Incentive?

Eligibility needs a professional assessment, so I won't call it either way, but I can explain what the program looks for. Is the development work done in Australia?

Yes, all here in Perth. Roughly what would we get back?

The benefit depends on turnover and profit position, so I can't put a number on it. I'll capture your details so the team can book your eligibility assessment:

 **Professional Eligibility Assessment**
Captured qualified for the team to book

Example

Ask me anything... 



Knows every service you offer

Trained on the full catalogue, not a script for the top ten questions.



Answers like your best person

Plain language, specific to what they asked.



Qualifies and captures the lead

Sector, activity type, spend band and timing arrive quote-ready.



Hands off at the right moment

A person the instant the enquiry needs one.

Where your next client already is

Most enquiries start on your website, and most are lost to a slow reply. The Client Agent answers them the moment they arrive, and follows the client onto the documents you already send.



On your website

PRIMARY

Every visitor with a question gets an answer on the spot, across everything you offer, and every enquiry is captured with the detail your team needs to quote.

- ✓ Answers across the full service catalogue
- ✓ Qualifies the enquiry before it reaches your team
- ✓ Captures the lead even at 9pm on a Sunday



On quotes, reports and documents

The same agent by QR or link on the paperwork you already send, so a question about one service becomes an enquiry about the next.

Real questions, real answers

A few more conversations, across the enquiries that win or lose work. The client asks in plain language; the agent answers, qualifies, and captures.

Is what we're doing actually eligible R&D?

- ✓ Explains the program's broad criteria in general terms, never a yes or no
- ✓ Asks about sector, the activity in broad terms and timing
- ✓ Books the professional eligibility assessment with the team

How much could we get back on our development spend?

- ✓ Explains the benefit depends on turnover, profit position and offset rate
- ✓ Points to Innov8tion's own benefit estimation tool for a rough scenario
- ✓ Captures spend band and timing for the team, never a dollar figure

We already have an accountant. How do you work with them?

- ✓ Answers from Innov8tion's own process: lodgement is facilitated with the client's registered tax agent
- ✓ Explains the existing accountant stays involved throughout
- ✓ Captures the enquiry with the company's details for the team

We're an accounting firm with R&D clients. Can you train our team or run the claims?

- ✓ Recognises a practice enquiry, not an end-client lead
- ✓ Explains the advisory, training and operational support offer
- ✓ Routes it to Martin directly as a practice-partnership lead

Why Innov8tion R&D, and why now

Every new client starts as an enquiry, and enquiries go to whoever answers first. That is exactly where a Client Agent earns its keep.



The site's own promise is a reply within 24 hours, with no phone number published – the agent answers the moment the enquiry arrives.



Directors research the R&D Tax Incentive at night and on weekends; today those enquiries sit in an inbox until the next business day.



Four service lines, a 9-step claim process and 25 industries – the agent answers across the whole book and qualifies as it goes.



A small senior team answers every enquiry; the agent lets a niche practice respond like a large one.



Two audiences share one contact form – companies with eligible R&D, and other practices buying training – and the agent routes each correctly.



R&D tax is regulated territory: the agent explains and qualifies, and leaves eligibility and advice to the professionals.

A staged, low-risk 3-month pilot



MONTH 1

Live on your website

The Client Agent goes live on your site, trained on your core services, answering and capturing real enquiries against a baseline agreed up front.

 Baseline agreed



MONTH 2

Every service, every enquiry

Coverage extends across the full service catalogue and every enquiry type, with client feedback reviewed at the mid-pilot checkpoint.

 Client feedback

 Mid-pilot review



MONTH 3

Gated expansion

Extend to further channels and existing-client uses only if month 1/2 targets are met, UAT is signed off and data readiness is confirmed.

 Conditional expansion

CONTROLLED ROLLOUT



Limited start

Core services first, not the whole catalogue.



UAT before release

You sign off before each go-live.



Reviewed monthly

Performance checked every month.



Criteria-gated

Expansion only when targets are met.

What the pilot is designed to prove

The pilot proves the Client Agent can capture and convert inbound enquiries across your full service range, measured against an agreed baseline. Everything else it does is upside.



More leads captured

Every enquiry answered and captured, none lost to a slow reply.



Answers across everything you offer

The full service catalogue, including the services clients never think to ask you about.



Better qualified leads

Quote-ready detail arrives with the enquiry, not three phone calls later.



After-hours capture

Enquiries answered at 9pm, not returned at 9am.



And the rest is upside

Less routine load on your team, consistent answers everywhere, and evidence you can point to at review time.

Measured, real outcomes

The same agent platform is already live with real customers, and the standout lesson is that it makes the biggest difference where customers have questions to answer before they commit. Those are exactly the conversations this pilot targets.

MORE SPENT PER
TRANSACTION (+\$38)

+42%

ENGAGED CUSTOMERS WHO
PURCHASED

58%

AVERAGE RESPONSE TIME

8 sec



Double the big baskets

12% of agent-assisted transactions exceeded \$200, double the store average.



Any customer, any language

27 languages on day one: the agent answers in the customer's own language.



No new hardware

Activated by a QR code, with no new hardware and no POS integration.



Staff made it theirs

Frontline teams adopted the agent as their own on-demand expert.

Benchmark results from a previous live retail deployment of the same agent platform. They are the benchmark, not this pilot's baseline: Innov8tion R&D's own baseline is measured in month 1, and this pilot's measures are agreed at kick-off.

Why this works, and why us

Has this been done before, will it work here, and why are we confident. Five reasons.



It is already live

PROVEN

The Client Agent is a working product in production today, not a prototype.

- ✓ A live agent you can try right now
- ✓ Conversational answers over real operational data
- ✓ The same platform and approach proposed for this pilot



Proof before approval

Before approval, Innov8tion R&D sees a live demo and anonymised deployment snapshot covering usage, feedback and handoff behaviour.



Enterprise-grade delivery

Built and run by AI Consulting Group, a Sydney data and AI consultancy delivering for BHP, Downer, Fremantle Ports, NRL and government, partnered with AWS, Databricks, Microsoft and Snowflake.



Built on your data

It answers from everything Innov8tion R&D offers: the full service catalogue, coverage and standards, with minimal integration alongside the systems you already run.



Guardrails built in

R&D tax is regulated territory: the agent never assesses eligibility and never gives tax advice. It explains the service, qualifies the enquiry and hands it to Martin's team for the professional assessment.

The approval pack includes a live demo plus current deployment results and customer feedback before the kick-off is booked.

What it costs

Priced to be an easy yes: \$15,000 all-in to prove and deploy. That buys a white-gloved pilot with us in charge of making it successful – and if it does not earn its place, it ends there.

TO PROVE AND DEPLOY:
\$5,000 A MONTH FOR 3
MONTHS

\$15,000 all-in

ONGOING, SCALED TO USAGE

**\$100-\$400 /
month**

SETUP AND PLATFORM FEES

\$0

The 3-month pilot

Everything it takes to succeed: build, training on your full service catalogue, structured testing and UAT, go-live and hands-on tuning. \$15,000 all-in.

\$5,000 / month

Ongoing, after the pilot

A subscription that scales with usage. Continuing is a decision you make on the results, not a default.

\$100-\$400 / month

Setup and platform fees

No setup fee, no platform fee, no usage charges during the pilot.

\$0

\$15,000 all-in to prove it. From \$100 a month to keep it.

WHAT THE \$5,000 A MONTH BUYS



Tested before it's live

Structured testing and UAT with your team. Nothing customer-facing until you sign it off.



White-gloved throughout

We build it, run it and tune it hands-on through the pilot, with a review every month.



We own the outcome

Making the pilot successful is our job, not yours. Your team's only asks are data and sign-offs.



Go/no-go at three months

The pilot ends unless the evidence earns what comes next, with the ongoing price confirmed before you continue.

How we start

A defined, low-risk start. Four steps from go-ahead to a live agent on your website.



01 Kick-off meeting

Lock scope, success targets and timing.



02 Data request

Core inputs from Innov8tion R&D.

- ✓ The full service catalogue and what each service covers
- ✓ Coverage areas and where each service is offered
- ✓ The qualifying questions your team asks before quoting
- ✓ Where captured leads should land, even a shared inbox
- ✓ Accreditations, standards and compliance constraints



03 UAT

You sign off before anything goes live.



04 Go live

The Client Agent goes live on innov8tion.com.au.

THE ASK

Approve the pilot, share the data, and book the kick-off. We handle the rest, and you see a working agent live within weeks.