



WHITE RABBIT ADVISORY GROUP

Why do business with **White Rabbit**

We help our clients build systems and processes that let them leapfrog their competition. We build the thing, we stand behind it, and you own it.

Chuck Poole, Principal Consultant

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An engineer who builds, not a consultant who talks

Plenty of people will tell you what AI could do for your business. Very few will sit inside your business, build it, and make sure it keeps working.

01

We build the thing

White Rabbit is run by someone who owned and operated a software development company and has written more than 400 applications, not by a slide deck. The deliverable is working software and automations inside your business, not a strategy document you have to go find someone else to implement.

03

Security is the starting point

Chuck holds the CISSP certification and co-authored the cybersecurity book *Under Attack*. Access, data handling and vendor accounts are set up the right way from day one, in your name, under your control.

05

You own what we build

Once you are paid in full, the deliverables are yours. If the engagement ends, your automations keep running. We do not hold your business hostage to a subscription.

02

30 years in the chair: CIO, CEO and CSO

Chuck Poole has spent 30 years in IT and cybersecurity leadership as a CIO, CEO and CSO, including owning and operating an IT managed services firm until its sale in 2024. He has sat where you sit, and he has seen what happens when technology is bolted on carelessly.

04

White-glove, and automated where it should be

You get a direct line to the person doing the work. At the same time, we automate our own delivery wherever it makes sense, and you see it. An AI consultant who does everything by hand would not be worth hiring.

06

We put our fee on the line

Every engagement carries a money-back guarantee. If the work does not do what we agreed and we cannot fix it, you get that month's fee back. Details on page 6.



A proven process, simple terms

Every client follows the same four steps and signs the same terms, from the first conversation to the day you decide you are done.

1

A conversation first

Every engagement starts with a phone call or a note through the website. We do not take every client. If we are not the right fit for what you need, we will tell you and point you somewhere useful. No charge.

2

The AI Opportunity Assessment

If it is a fit, you sign a short plain-language agreement. All of our work is sold in blocks: a block is 10 hours of hands-on work for \$3,500, paid up front, and the assessment is your first one. Over about two weeks we talk with you and the people who actually do the work, look inside your real systems, and deliver a written plan that ranks your three to five best opportunities by payback and names what to build first. Unlike a traditional audit, ours ends with the first automation already under way, not a report you then have to pay someone to act on.

3

We build with you, not for you

After the assessment, each block buys the next 10 hours of building. We work closely with your team, show you working results early, and iterate. Most clients run one block a month; if you want a bigger project done faster, buy two or three blocks that month and we move at that pace.

4

Stay as long as it pays off

Engagements run a three-month minimum, long enough to finish the assessment and get your first automations into production. After that, month to month, stop any time. When you are done, your automations keep running and we hand everything over in working order with the documentation to run it.

"Within weeks the whole team was using it and inventing new uses on their own."

Pinnacle Cleaning, a 15-person commercial cleaning company, after White Rabbit put an AI teammate on the chat app their crews already used. Their sales rep dictates visit notes from her phone and they land in the CRM as clean records, and she can have a proposal generated while still standing in front of the prospect. On the operations side, every client complaint is automatically logged and escalated, so problems get resolved faster.



Every engagement needs an AI Champion

One requirement we hold every client to: name one person on your team to be your AI Champion. Not a technician, just someone with a real appetite to learn AI and the backing of leadership.

WHAT THEY DO

Own the keys

The Champion holds your company-owned accounts (your AI subscriptions, GitHub, and the intellectual property we build), including who has access and removing it when staff leave. It all stays in your name.

WHAT THEY GET

Trained alongside us

The Champion learns as we build. By the end you are not just holding automations, you have a person on staff who understands them and can run them.

WHAT IT TAKES

A few hours a week and a mandate

Enough time to stay involved, and the authority to make day-to-day decisions without convening a meeting, or the work stalls waiting on approvals.

AFTER WE ARE DONE

The handoff point

When the engagement ends, support hands off to your Champion with full documentation. If they ever leave, you name a replacement; nothing walks out the door with a person. A maintenance retainer is available if you would rather keep us on call.

"Chuck mentored Sophak as we built, and today Sophak stands up his own AI agents from a template he created."

Jim Cross, Co-CEO of Blue Sky Capital Strategies. White Rabbit took the spreadsheets his team had been living in and built a funding source intelligence platform: searchable, multi-user, contacts kept current automatically, with a bid workflow on top. Jim calls it a strategically critical asset. Along the way his technical lead became the company's AI Champion.



Don't take our word for it. Our clients say it best.

Every client has offered to take a call from a prospective one. Here is what we did for each of them; ask them how it went.

COMMERCIAL REAL ESTATE

Cindy Sutherland, CFO, Asset Specialists

A Palm Beach Gardens property management and brokerage firm, established 1989, with terabytes of lease data. A lease insurance compliance tool grew into ASI Suite: tenant and vendor compliance chased automatically on the firm's letterhead, responses read in from a mailbox and routed to the right person, and the reports her team built by hand generated from the data. White Rabbit is also the firm's virtual CIO.

EQUIPMENT FINANCE

Jim Cross, Co-CEO, Blue Sky Capital Strategies

A leasing advisory firm matching clients to more than 500 funders, previously by spreadsheet. White Rabbit built a funding source intelligence platform: searchable, multi-user, contacts kept current automatically, with a bid workflow that packages a deal, sends it to the right funders, grades the bids and sends the award documents. Jim calls it a strategically critical asset. His technical lead now builds his own AI agents.

COMMERCIAL CLEANING

Dan Whitaker, Owner, Pinnacle Cleaning

A 15-person company cleaning upscale restaurants, run on WhatsApp and 1099 crews. White Rabbit modeled an AI teammate on months of their real WhatsApp traffic and put it in the middle of operations: complaints logged and escalated, crews covered when someone calls in sick, supplies reordered, visit notes dictated from the field into the CRM, proposals generated in front of the prospect. Dan's team now invents new uses on its own.

HOSPITALITY

Richard Cullifer, Owner, Dive Bar Restaurant

A high-volume Jupiter restaurant whose point of sale and a 20-year-old accounting package did not talk to each other, so daily figures were rekeyed by hand. White Rabbit built an automation that pulls sales, tenders and time cards from the POS nightly, posts the sales journal, payables and payroll into the legacy accounting system through its own screens, and routes a summary to the controller for approval before anything is entered. Ownership receives a nightly sales report and a weekly insights report, and an in-house technical lead is being trained to maintain the system.



What you pay, what you own, and our promise

These are the same terms written into every White Rabbit agreement, so what you read here is what you sign.

AI Consulting	\$3,500 per 10-hour block of hands-on work. Most clients run one block a month; if you want a bigger project done faster, buy as many blocks in a month as it needs. Three-month minimum, then month to month and you can stop at any time. Invoices are due on receipt, paid by ACH or wire.
Third-party costs	Any outside services, such as your Claude subscription, are opened in your name, billed to you, and sized to the work you ask for. They grow only as the project grows. You own the accounts; we never ask for your passwords.
Travel	Travel outside Palm Beach County is billed at cost (airfare, lodging, ground transport) with no markup, approved by you in advance. Travel time counts toward the block.
Ownership	Once all fees are paid, you own the deliverables and automations. We do not stop or disable anything when an engagement ends.
Ongoing support	Your AI Champion is the first line of support after the engagement. An optional maintenance retainer keeps White Rabbit on call for updates, fixes and new requests.

The money-back guarantee

If the work does not do what we agreed, here is what happens:

1. You send us written notice (email is fine) describing the problem.
2. We acknowledge it and have 30 days to put it right.
3. If it is not fixed in 30 days, you may request a refund of the fee for the month the notice was given, and we pay it within 15 days.

If you take the refund, the deliverables and automations become White Rabbit's property and may be removed from your systems. The guarantee does not cover problems caused by outside vendor changes, outages, or your own systems.



Where to start

Most clients come to us one of two ways: they know they need AI but not where, or they have a specific process they are sick of doing by hand. Either one is a good first call.

AI CONSULTING

Hands-on automation for your business

Custom automations and AI tools built inside the systems you already use. \$3,500 per 10-hour block, as many blocks a month as your project needs. Three-month minimum, then month to month.

BOS

White Rabbit Business Operating System

A managed AI teammate for your whole company, living in the chat tool your staff already uses (Teams, WhatsApp and others). Annual agreement, priced by employee count, starting at \$995 for up to 10 employees.

WEB

Managed Web Design

A fully managed website: build, hosting, and ongoing search and AI-search optimization so you keep showing up where your customers are looking.

MARKETING

Managed Marketing

Managed social media from \$499 per month, automated email campaigns from \$599 per month, and list enrichment at \$300 per 1,000 contacts.

Ready to leapfrog your competition? **Let's talk.**

One conversation is all it takes to find out whether we are the right fit. No pitch deck, no pressure.

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