

## BrightWave Analytics — AI Cost Optimization Opportunity

 Prepared for **Sample Report**

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Sample Report, based on BrightWave Analytics's recent SaaS spend, BrightWave Analytics can realistically replace 7 high-cost SaaS tools with AI agents and save \$15,444 every month — that's \$147,589 in the first year alone after setup costs. With an average payback period of 3 months from contract signing — including each scenario's implementation window — the return arrives quickly. The biggest wins come from AI CRM & Sales Agent (\$5,118/mo) and AI Communication Hub (\$2,587/mo).

Current Monthly Cost

**\$20,310**

With AI Replacements

**\$4,866**

Net Monthly Savings

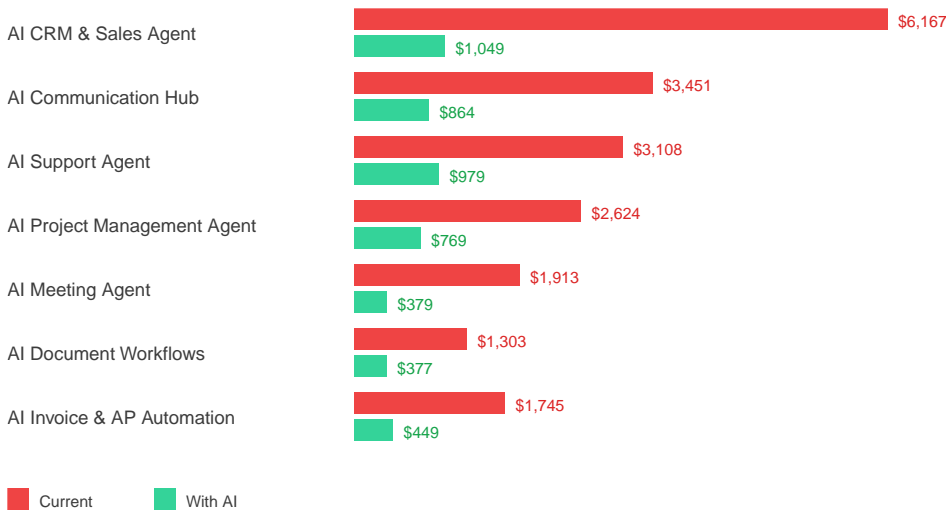
**\$15,444**

3-Year Net Savings

**\$518,255**

### Monthly Cost: Current vs. AI

Includes SaaS fees, labor hours, and proportional error costs



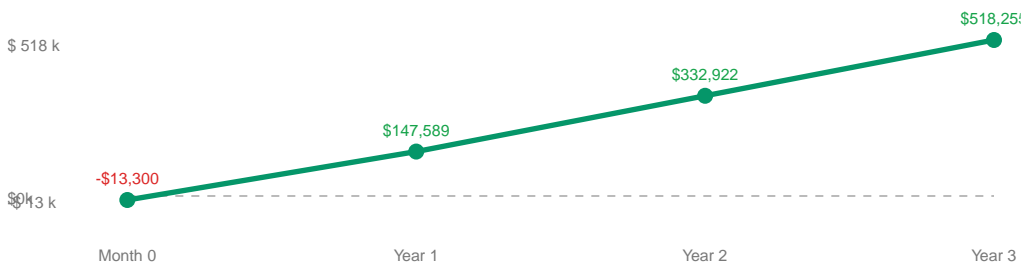
### Scenario Breakdown

Scenario	Current/mo	With AI/mo	Savings/mo	Payback	3yr Net
AI CRM & Sales Agent	\$6,167	\$1,049	<b>\$5,118</b>	3 mo	<b>\$171,004</b>
AI Communication Hub	\$3,451	\$864	<b>\$2,587</b>	3 mo	<b>\$86,442</b>
AI Support Agent	\$3,108	\$979	<b>\$2,129</b>	3 mo	<b>\$71,998</b>
AI Project Management Agent	\$2,624	\$769	<b>\$1,855</b>	2 mo	<b>\$63,437</b>

AI Meeting Agent	\$1,913	\$379	\$1,534	2 mo	\$53,091
AI Document Workflows	\$1,303	\$377	\$926	3 mo	\$31,221
AI Invoice & AP Automation	\$1,745	\$449	\$1,296	5 mo	\$41,064
<b>Total</b>	<b>\$20,310</b>	<b>\$4,866</b>	<b>\$15,444</b>	<b>3 mo avg</b>	<b>\$518,255</b>

## Projected Net Savings Over Time

Setup costs are front-loaded in Year 1



## Multi-Year Savings Projection

	Year 1	Year 2	Year 3
Setup Investment	-\$13,300	\$0	\$0
Net Cumulative Savings	\$147,589	\$332,922	\$518,255

## Scenario Details

### AI CRM & Sales Agent

**\$5,118/mo**

Replaces: Salesforce, HubSpot

Payback: 3 months from signing

Time to go live: 2 months

Sales reps spend only 30% of time selling (Salesforce State of Sales 2024, 5,500 reps surveyed). 64% of reps save 1-5 hrs/week with AI tools (HubSpot 2025).

AI-powered CRM returns \$5.60 per \$1 spent (WifiTalents 2024). Forrester TEI: 125-468% ROI for Copilot for Sales.

Setup cost median anchored at HubSpot's published onboarding fees: \$1,500 Sales Hub Professional, \$3,000

Marketing Hub Professional (RevPartners 2026, [blog.revpartners.io/en/revops-articles/hubspot-onboarding-pricing](https://blog.revpartners.io/en/revops-articles/hubspot-onboarding-pricing)). Pipedrive partner pricing

\$2,750–\$4,825 for basic SMB (ITQlick pricing, [itqlick.com/pipedrive/pricing](https://itqlick.com/pipedrive/pricing)). Salesforce Sales Cloud SMB floor is \$15,000

with full deployments reaching \$50,000 (RTDynamic 2026, [rtdynamic.com/blog/salesforce-implementation-cost-2026](https://rtdynamic.com/blog/salesforce-implementation-cost-2026); AnavClouds,

[anavcloudsoftwares.com/blog/salesforce-implementation-cost-for-smb](https://anavcloudsoftwares.com/blog/salesforce-implementation-cost-for-smb)) — bump setupCost slider for Salesforce-class migrations. Time-to-go-live: HubSpot 2–8

weeks (InvolveDigital, [involvedigital.com/insights/hubspot-salesforce-pipedrive-crm-comparison](https://involvedigital.com/insights/hubspot-salesforce-pipedrive-crm-comparison)); Salesforce 4–12 weeks for QuickStart, 3–6 months for mid-market.

Avidly's '500-hr DIY' figure ([avidlyagency.com/blog/crm-implementation-costs-what-youll-really-pay-beyond-the-license](https://avidlyagency.com/blog/crm-implementation-costs-what-youll-really-pay-beyond-the-license)) implies ~12 weeks at 40 hrs/week.

## AI Communication Hub

\$2,587/mo

Replaces: Slack, Zoom

Payback: 3 months from signing

Time to go live: 2 months

Workers spend 28% of their workweek managing email and 20% searching for information or tracking down colleagues (McKinsey 2024). Slack AI summarizes channels and threads, saving an estimated 97 minutes per user per week (Slack Workforce Index 2024). Microsoft Copilot for Teams users are 4x faster at catching up on missed meetings (Microsoft Work Trend Index 2024). Average enterprise spends \$17.50/user/mo on Slack Pro; as of January 2026, Slack AI features are included at no extra cost on Business+ and Enterprise+ plans.

Setup cost and time-to-live anchored at Forrester TEI Microsoft 365 Copilot for SMB Oct 2024 —

200-employee composite measured 180 hrs total initial implementation effort across 3 personnel at \$65/hr loaded

= ~\$3,900 first-year impl portion, \$130,425 risk-adjusted PV over 3 years (tei.forrester.com/go/microsoft/SMB365Copilot;

microsoft.com/en-us/microsoft-365/blog/2024/10/17/microsoft-365-copilot-drove-up-to-353-roi-for-small-and-medium-businesses-new-study). Slack AI admin guide prescribes 1–2 week pre-launch communication + 1–2 month post-launch weekly cadence (slack.com/resources/slack-for-admins/slack-ai-admin-adoption-guide); also flags governance prerequisites (default-public channels, retention policies). Glean is enterprise-only — 100-seat minimum, 90–120 day procurement (Vendr, vendr.com/marketplace/glean) — not applicable to SMB. Setup cost median \$1,500 covers Slack AI on existing Business+ workspace + governance review; bump for full Copilot/Glean.

## AI Support Agent

\$2,129/mo

Replaces: Zendesk, Intercom

Payback: 3 months from signing

Time to go live: 1 month

Intercom Fin averages 66% resolution rate across all customers (Intercom 2025 Year in Review). Vendors claim 60-83% (Ada, Zendesk, Freshworks). Cost per AI interaction: \$0.50-\$2.00 vs \$6-\$15 for human agents (LiveChat AI 2025). Gartner predicts 80% autonomous resolution by 2029.

Setup cost reflects 20–40 hrs internal labor for KB import + custom integrations at \$65–\$75/hr loaded (\$1,500–\$3,000), plus parallel-run overlap. Hiver 2026 SMB help desk migration guide cites \$2,500–\$12,000 for 10–50 agent teams (hiverhq.com/blog/help-desk-migration). Time-to-go-live reflects 4–6 weeks of KB content work for AI agent training (Intercom Fin documentation; eesel AI 2025 Intercom Fin roadmap, eesel.ai/blog/intercom-fin-features-and-roadmap-updates-2025) plus 30–60 day parallel run before legacy cutover. Vendor self-serve claims ('Klariqo 3 minutes', 'Intercom Fin no setup fee') describe account access, not operational go-live.

## AI Project Management Agent

\$1,855/mo

Replaces: Asana

Payback: 2 months from signing

Time to go live: 1 month

Project managers spend 54% of their time on administrative work rather than strategic planning (PMI Pulse of the Profession 2024). AI task generation from meeting transcripts reduces status-update labor by 40-60% (Reclaim.ai 2024). Asana AI Studio credits cost \$150/mo for 100K credits; users report consuming 200K/person/month, making AI add-ons a hidden cost multiplier. Linear cut Enterprise pricing 45% in Feb 2026, signaling race-to-bottom pricing in AI-native PM tools.

Setup cost median biased toward self-serve+ tier; consultant-assisted Asana Monday migration for a 30-person team with 50+ boards runs \$5,000–\$15,000 (Relokia migration service, project-management.relokia.com/asana-to-monday-migration; single-sourced — bump slider for consultant scenarios). Linear self-serve onboarding with native import tools for Jira/Asana/GitHub Issues; Vendr lists median Linear contract at ~\$12K/yr seat licensing, no setup fees published (vendr.com/marketplace/linear). Notion AI: 60–90 day departmental adoption ramp (notion.com/releases/2026-01-20). Asana AI Studio credits cost \$150/mo for 100K credits; users report 200K/person/month consumption — hidden cost multiplier. Linear cut Enterprise pricing 45% in Feb 2026. Height.app sunset October 2025 (skywork.ai/skypage/en/Height-App-The-Rise-and-Sunset-of-an-AI-Project-Management-Pioneer/1975012339164966912). Time-to-go-live: 1–3 days data import, 2–4 weeks workflow recreation, 4–8 weeks team adoption.

## AI Meeting Agent

\$1,534/mo

Replaces: Zoom

Payback: 2 months from signing

Time to go live: 1 month

Professionals spend 31 hours per month in unproductive meetings (Atlassian 2024). Otter.ai and Fireflies.ai reduce meeting follow-up time by 50-75% via auto-generated summaries and action items (Otter.ai case studies 2024). Zoom AI Companion is included free on paid plans but requires \$13.33/user/mo Workplace plan minimum. Meeting transcription tools like tl;dv offer free recording with AI summaries, undercutting Zoom's native pricing.

Setup cost median reflects 4–10 hrs admin time at \$65–\$75/hr (\$260–\$750) for org-wide Microsoft Entra/Google Workspace calendar consent (Otter Entra admin consent guide, help.otter.ai/hc/en-us/articles/26338981397783-Granting-admin-consent-to-Otter-in-Entra), Fireflies recording-consent compliance configuration (guide.fireflies.ai/articles/7003995379), and CRM integration. Time-to-go-live includes adoption/trust period: 84% of users change speech behavior when AI notetaker present (Fellow.ai 2025, fellow.ai/blog/ai-notetaker-statistics) and ~2 weeks of summaries are noisy while the model calibrates to speakers/vocab. BIPA legal exposure (Otter active lawsuit, Fireflies hit Dec 2025 in Illinois, uctoday.com/?p=572660) creates a policy review step at risk-aware SMBs. Athenic 2025 500-meeting empirical study (getathenic.com/blog/ai-meeting-assistants-comparison-roi) cites 4.2 hrs/week saved per user.

## AI Invoice & AP Automation

**\$1,296/mo**

Replaces: Bill.com

Payback: 5 months from signing

Time to go live: 2 months

AI reduces cost per invoice from \$12.88-\$19.83 to \$2.36-\$2.78 — an 80%+ reduction (Ardent Partners 2025). AI+ML achieves ~99% accuracy vs 85-95% for OCR-only (Parseur 2025). Best-in-class teams achieve 60-80% touchless processing. SMB payback: 6-9 months.

Setup cost median reflects ERP integration labor + approval workflow design + 30-60 day parallel testing. Quadient 2025 cites \$2,000-\$10,000

annual subscription tier with implementation 'scoped based on needs' (quadient.com/en/blog/how-much-does-accounts-payable-ap-automation-cost). NetSuite 2026 AP automation guide breaks full deployment into Planning (2-4 wk) + Config (3-6 wk) + Testing (2-4 wk) + Pilot (2-4 wk) = 9-18 weeks

(netsuite.com/portal/resource/articles/accounting/ap-automation-business-case.shtml). Ramp QuickBooks integration is a self-serve outlier at 12.6-minute setup (ramp.com/integrations/quickbooks); set monthsToLive=0 if QBO-only. Parseur 2025 SMB AP payback: 6-9 months.

## AI Document Workflows

**\$926/mo**

Replaces: DocuSign

Payback: 3 months from signing

Time to go live: 1 month

AI reduces document creation time by 40-70% (PandaDoc 2024). AI-powered financial document automation reduces human error rates by up to 98% and saves finance teams 25%+ of their time (PandaDoc 2024).

Setup cost median reflects template rebuild labor (10-15 hrs for ~20 templates at \$65/hr = \$650-\$975 per CostBench

costbench.com/software/contract-management/pandadoc) plus minor consultant/integration touchpoints. PandaDoc Business plan (\$49/user/mo) is self-service onboarding with no implementation fee on standard tier (eSignGlobal 2025, esignglobal.com/blog/pandadoc-pricing-per-user; ITQlick, itqlick.com/pandadoc/pricing).

PandaDoc API integration alone ~3 hrs (pandadoc.com/api/docuSign-api-vs-pandadoc-api). Time-to-go-live: 1-4 weeks technical, with PandaDoc partner

PureProposals citing 60-day guided rollout for full adoption.

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## Key Assumptions

- Cost per hour of manual work: \$50/hr (salary + benefits + overhead)
- Projection period: 3 years
- Implementation timing: Cumulative savings begin after each scenario's go-live window. AI subscription fees accrue from contract signing.
- AI resolution rates: Intercom 2024 Year in Review, Ada, Zendesk, Freshworks benchmarks
- Cost per invoice: Ardent Partners 2025 AP Automation Report
- Sales rep time allocation: Salesforce State of Sales 2024 (5,500 reps surveyed)
- Email automation ROI: Wix/Adobe personalization studies, Campaign Refinery 2024

Disclaimer: These estimates are based on industry benchmarks and your reported SaaS spend. Actual savings may vary based on your specific use case, team size, and implementation complexity. This report is for informational purposes only and does not constitute financial advice.