



taffy  
tree



data management | dynamic documents  
proposals | contracts | reporting  
eSignature | billing | project history  
contacts | custom themes | file filters  
built-in text editor | scope creep alerts



01

**Taffy  
Tree**





**Brad Jones**



**Scott Blevins**

When two friends—Brad Jones and Scott Blevins—came together to co-found their agency Carefully Crafted, they needed a robust project manager system that could handle their large volume of clients and projects. With their combined experience in the agency world, they knew the software they previously worked with wouldn't be fully up to the task at hand. So why not build one? With Carefully Crafted's focus on AI integration, Taffy Tree was born - with the primary goal of outsourcing tedious business tasks to AI, freeing up team bandwidth.

## **Taffy Tree**

Nothing is more valuable than your time—that's why Taffy Tree offers a unique AI-enhanced platform for task management that simplifies your business operations. **Let Taffy Tree cut through team overload**, streamlining tasks to significantly enhance efficiency.

By integrating seamless AI, Taffy Tree can take on tasks such as proposal generation, project management tracking, CRM integration, and more. Think of us as **the ultimate task manager hub with a jetpack**, boosting you with integrated AI features for your agency that you never knew you needed.

Welcome to your re-imagined project manager hub. **Let's get started!**

# Q2

**The Place  
of AI in the  
Modern Agency**



## What is AI?

Artificial Intelligence (AI) is the field of computer science focused on creating systems capable of performing tasks that typically require human intelligence. These tasks include learning, reasoning, problem-solving, understanding language, and perception. AI systems are designed to mimic human cognitive functions and improve their performance over time through experience and data. Businesses use AI to automate tasks traditionally done by people, as AI can perform some tasks more accurately and efficiently.

AI is central to some of today's most successful companies, including Apple, Microsoft, Meta, and Uber. With a growing emphasis on integrating AI into business operations, agencies are now being called upon to adapt or risk falling behind—and many are choosing to leverage AI to empower their employees and unlock a new world of timesaving possibilities.







## Why AI is Critical for Modern Agencies

As Forbes profiled, the use of Artificial Intelligence within the agency world holds tremendous potential and is already transforming the industry. Advertising's business models are being reinvented, as AI can augment our abilities, expand our creative horizons, and significantly refine operational processes.<sup>1</sup>

With humans always at the helm, adding AI integration to your business can significantly increase efficiency. Taffy Tree harnesses AI potential by creating a master hub of enhanced project management tools built specifically for agency needs, a first of its kind in platform management.

"Our agency is using machine learning algorithms to automate repetitive tasks, analyze large data sets for insights and optimize marketing campaigns, saving tons of manual hours. This improves efficiency, accuracy and speed, freeing up time for our team to focus on more creative and strategic initiatives."

## THE FACTS

According to a report from WPP's GroupM, **AI-enabled marketing accounts for nearly half (45%)** of all advertising globally, around \$370 billion.

By 2032, **AI could influence 90% of all ad revenue** - which is more than \$1.3 trillion.



## **Efficiency Improvement**

From task management to time tracking, make the leap to stress-free productivity for your agency. Ready for a transformation? Let Taffy Tree guide you from overwhelming to overachieving.



## **Cost Savings**

Tired of paying for multiple project manager systems just to get all of the features you need? Or working with your existing system and wanting for more? Reduce annual licensing fees with a program that does everything you're looking for, all in one place.



## **Client Relationship Management**

Imagine seamlessly managing your contacts with personal touches that win clients over. With Taffy Tree, that daydream is a reality.



## **Staying Competitive**

Adapting to AI can reap countless benefits for your company, as it's currently doing with many top companies and agencies. The ever-shifting landscape requires constant upgrades - be on the forefront of the AI evolution with a project manager system that can go the distance.

# OB

**Identifying  
Areas for AI  
Integration**







# Proposal Creation

Do you ever find yourself staring at the blank page of a proposal, unsure of where to start? Let Taffy Tree streamline the process with AI-powered proposal tools at your fingertips. Imagine creating proposals that highlight your professionalism and unique brand voice while saving hours of work. With Taffy Tree, that's your new reality.

Illuminate your proposals with insights and ideas that captivate. From dynamic templates that unleash creativity while maintaining consistency to an array of customization options, turn pitches into partnerships with proposals that stand out from the crowd.



# Client Relationship Management

Ever dream of a reality where every client feels like your only client? With Taffy Tree's Contact Management, that world is here. It's your boosted digital Rolodex, never missing a beat, ensuring every interaction counts towards building lasting bonds. Taffy Tree makes memorable interactions simple, embedding the essence of your brand into every communication.







# Task Management

Let's be real: managing tasks can sometimes feel like herding cats. Chaotic, unpredictable cats. Enter Taffy Tree's Task Management. Like having an incredibly organized personal assistant, there's no more sticky note mayhem; it's all about efficiency and clarity, helping you stay on top of your game without breaking a sweat.

Our Task Management includes several features, such as Status & Focus, Automatic Tasks, and Contracted Tasks. These tasks help prevent mistakes and ensure you're doing exactly what you discussed with your client and nothing more. Contracted Tasks can be modified through revisions to the original contract, which brings scope creep front and center. Now you have time to act before a project goes off track.

# 04

## **Starting the AI Integration Journey**



## Assessing Current Processes

It's likely you've identified several bottlenecks and inefficiencies that slow down your projects and cause unnecessary headaches—you've probably even accepted them as part of the process. Let Taffy Tree step in, streamlining and eliminating those frustrating bottlenecks for maximum project flow. With CRM, Document Handling, Proposal Creation, and Task Management, as well as an array of other tools, you'll wonder how you ever managed without it. Don't just take our word for it, experience the magic yourself. Dive into Taffy Tree's world—and watch your agency flourish.





## Choosing the Right Tools

Selecting the right tools for your business is crucial to driving efficiency and growth. With a variety of options available, it's important to choose solutions that align with your goals and needs. Whether you're focused on automating tasks, managing documents, or enhancing customer communication, these tools are designed to streamline your operations and boost productivity.



**Proposal generation**



**AI-Powered proposal tools**



**Project management tracking**



**Task management automation**



**Document handling**



**CRM Integration automation**



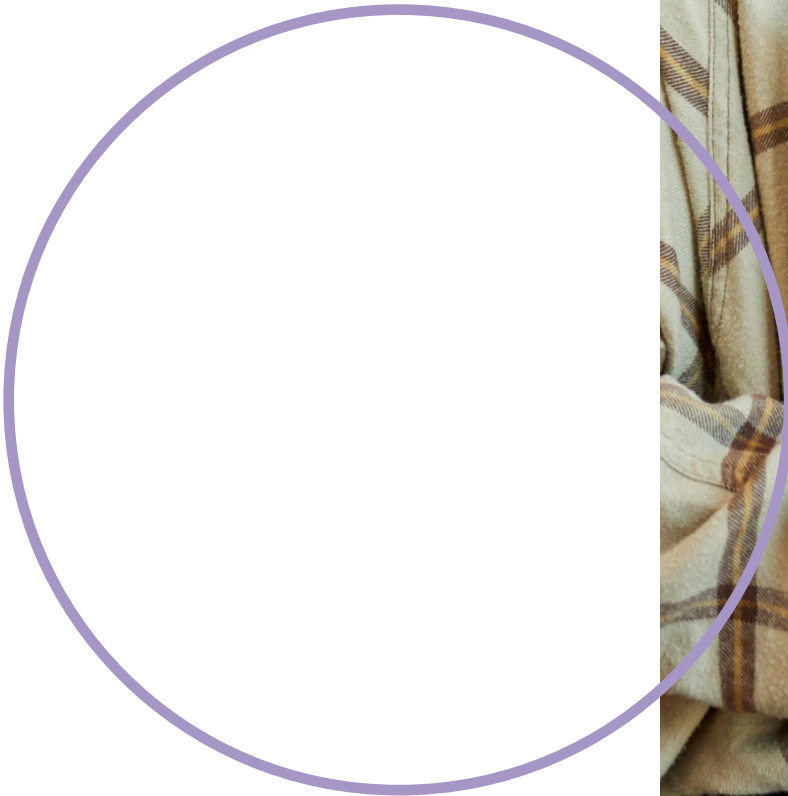
**Persona hub**



**Personalized communication through AI**

## Training and Onboarding

Prepare your team for AI adaptation with an assigned specialist and our one-on-one Taffy Tree training. We'll teach you how to work with AI integration to get the most out of your project management hub, unlocking features, generating proposals, and setting tasks to automate like a pro in no time.



# 05

**The Benefits of  
Embracing AI  
Now**



## **Immediate Efficiency Gains**

AI can automate repetitive and time-consuming tasks, allowing employees to focus on higher-value work. This can streamline operations and boost overall productivity.

## **Cost Effectiveness**

By automating processes and improving operational efficiency, AI can reduce costs associated with manual labor, errors, and inefficiencies.



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6

**Overcoming  
Common  
Challenges**





## Addressing Skepticism and Fear of Change

AI can be incredibly powerful, but it also requires careful implementation and oversight. Some companies make the mistake of thinking AI will replace employees, yet this is a neither/nor proposition. There's no denying that AI can do some things faster and better than humans. At the same time, humans excel at things that AI doesn't. Agencies—and all companies—should strive to utilize both AI and employee strengths to drive the best outcomes for clients. By empowering employees to work with AI to automate or enhance certain tasks or projects, companies can free up valuable time for their employees to focus on other important work, giving them better control over their time. Schedule a free demo today and explore how Taffy Tree can work for your business.



## OUR MISSION

To simplify business processes and power up project management through AI integration.

We're here to help you enhance productivity by outsourcing tedious tasks to AI, leaving your team free for the larger tasks at hand. Take back your time with Taffy Tree.



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