



1parkplace, Inc.

GetGeoSocial.com GHL **INTEGRATION PROJECT** Scope of Work

Prepared by: **Steve Hundley** V1.2 updated 6/27/24

Introduction:

Slice, style and INTEGRATE a new custom landing page in GoHighLevel and configure automation 3rd party application integration and workflows for our GHL Snapshot ready to launch the www.GetGeoSocial.com campaign. Integration scope includes GHL dashboard updates to display and report on desired KPI's

Integration Deliverables:

1. Slice and style to pixel perfect match to design a landing page and INTEGRATE into GHL.
2. The page has a **Mobile Version** and a **Desktop Version** - both need to be pixel perfect.
3. Zip code inventory lookup to check if Zip is in stock – if yes continue to zoom if no, thank you page
4. Program a multi step form, after Zip lookup, grab contact info, then company info
5. Produce 9 detailed flowcharts for each workflow showing triggers, channels and paths.
6. Document workflow automation rules for selling, onboarding, scheduling, and nurturing workflows.
7. Configure affiliate solution to track influencer orders to get them paid.
8. A finished site that can book appointments, track onboarding, and deliver an excellent customer journey

Context:

This project involves configuring GoHighLevel to support a new landing page funnel for www.GetGeoSocial.com, with the goal of converting visitors to leads, prompting them to schedule a Zoom meeting, and managing subsequent communication via the series of the 9 included Workflows presented in the next section.

GetGeoSocial.com – 9 GoHighLevel Workflows in PROJECT SCOPE:

1. CHECK ZIP INVENTORY Workflow | Runs process to lookup zip from inventory

Explanation: The funnel will provide information and present an offer to secure an exclusive Zip Code for a breakthrough service that helps REALTORS get more listings. The intent of the page is to prequalify the visitors by having them enter a desired Zip Code. Upon submit, the system will need to validate the zip code availability against an inventory list somewhere and determine if the zip is available. Continue on Multi page contact form.

2. NO ZIP Workflow | Display Contact confirmation

Explanation: In this case the system did not immediately find a match so we do not want to present the Zoom scheduler, instead a page that captures their contact information and puts them on a list and launches a different workflow. Contacts in this path will show in a PENDING status in GHL and will have a KPI on the dashboard for a manual check, perhaps there is a zip they want on 48 hr lock and it they could be the back up, or they are in an area we need to secure data for. In each case, workflow is an off line assessment and status update to customer.

3. HOLD ZIP Workflow | Prompt to Schedule Zoom Meeting

Explanation: After entering contact information, leads are prompted to schedule a Zoom meeting. Suggested Message: "Great! Now let's schedule a Zoom meeting to discuss how GeoSocial marketing can benefit your business. Please select a convenient time." Purpose: Move leads to the next step by scheduling a Zoom meeting.

4. GOT ZOOM Workflow | Zoom is scheduled & Zip(s) hidden from Inventory

Explanation: Upon completing a Zoom booking show a confirmation screen showing the meeting details and contact details to confirm accuracy. Upon submit of confirmation, trigger Meeting Confirmation Workflow – where emails and text messages congratulate prospect of the win, butter them up and keep em motivated to attend the Zoom. Messages that inspire and education on GeoSocial opportunities. And reminders of the meeting up to 15 minutes before the meeting - 2 texts the same day if meeting is after 10:00 AM.

5. DOESN'T GET IT Workflow | Entered lead data but did not schedule Zoom

Explanation: If a lead does not schedule a meeting, send follow-up messages. Suggested Message: "We noticed you haven't scheduled a Zoom meeting yet. Would you like assistance or have any questions?" **Purpose:** Encourage unscheduled leads to take the next step.

6. STOOD ME UP Workflow | Scheduled Meeting and was NO SHOW

Explanation: If a lead does not SHOW for a scheduled a meeting, send follow-up messages. Suggested Message: "Thanks for wasting our time. . . . – 1. Chance to redeem or Zips go back into inventory

7. GOT AWAY Workflow | Met on Zoom but didn't buy

Explanation: After the meeting, send a thank-you message and let's stay in touch. if they purchase. Suggested Message: "Thank you for your time today! Here are the next steps to get started with GeoSocial marketing."

Purpose: Smooth transition from prospect to customer.

8. I'M A GENIOUS Workflow | Post sale Onboarding Workflow

Explanation: They bought a zip and their onboarding journey begins. . Suggested Message: "You are the amongst the smartest people in real estate and we're to get rolling!" Onboarding campaign integrated with task manager.

NOTE: Explore GHL task manager for feasibility before embarking into Zapping Asana.

Purpose: Ensure structured and efficient onboarding.

9. Remarketing Workflow | Auto launch Social and Google ads to leads that have not bought

Explanation: Deploy Google, YouTube, and Facebook Remarketing ads to all who visited funnel until sold.

NEEDS: Expert Google and Meta Ad specialist who is experienced in REMARKETING solutions

NOTE: BELOW AER FUTURE WORKFLOWS FOR PHASE II: (NOT INCLUDED IN THIS RFP)

10. KEEP YOU POSTED Workflow | Long term drip to leads that did not buy (NOT IN SCOPE)

Explanation: Long term drip to visitor who entered contact info and did not schedule a zoom

Purpose: Maintain engagement and provide additional information.

11. GetGeoSocial Workflow (NOT IN SCOPE)

Explanation: Start an email campaign to educate leads about GeoSocial marketing benefits. Suggested Message: "Discover how GeoSocial marketing enhances your business. Here are some benefits you might be interested in..."

Purpose: Keep leads engaged and informed.

12. PATIENCE Workflow (NOT IN SCOPE)

Explanation: For leads in areas we do not currently provide GeoSocial service

Purpose: Keep em in the game until we have their area covered



GetGeoSocial.com GHL **INTEGRATION PROJECT** – Request for Proposal

Prepared by: **Steve Hundley** - v1.1 updated 6/27/24

Project Goal

- Integrate and configure a new sales funnel under www.GetGeoSocial.com in GHL.

Success Means:

- Landing Page visitors are motivated to claim a Zip and book a Zoom.
- Accountability at every interaction with the customer can be measured
- Workflows and triggers keeping customers and staff free of process breakdowns
- Onboarding steps are transparent and customers are very satisfied
- Post Sales/Onboarding receiving EXCELLENT REVIEWS from customers

List of Deliverables:

- Slice, Style and Integrate new Landing Page design into GHL
- Ensure pixel perfect MOBILE and DESKTOP versions
- Build Multi Step, capturing and storing data at each step in case they bounce
- Integrate seamless and pixel perfect scheduling app
- Integrate 2 confirmation pages - 1 for a Zoom and lead combo and one for lead only
- Setup 9 separate trigger based workflows
- Integrate "I'M A GENIOUS" Onboarding Workflow with task manager (GHL or Asana)

Landing Page Flow - Customer Journey Expectations

1 Build Multi Step Lead Capture Form:

- Create Multi Step Form: Form captures and stores data entered at each "submit"
- fields: Step 1 Zip Code (provision for up to 3 unique zip codes)
- Email + Name, Phone Number, Company + Address, ST, Zip code
 - **NOTE:** Write function to check Zip inventory. If yes, lock it for 72 hours and proceed to Zoom scheduler, if NO, then proceed to Thank you page. Do LOOKUP IN BACKGROUND, do not want to reveal to customer.

2 IF YES TO ZIP(s) Proceed to Integrated Zoom Scheduler:

- Calendar widget integration
- Confirmation and reminder texts
- Invitation to join Facebook group

IF NO to ZIP – insert all Zip and Contact info– Tag of NOZIP and show thank you page

3 Create Follow up Workflows:

- Text messages: Initial follow-up, confirmation, reminders, rescheduling options
- Drip email campaign: Educational content about GeoSocial marketing
- Retargeting launched per prospect until they purchase

4 Integrate Customer Onboarding Tasks:

- Welcome Workflow launched – includes messages and task monitoring alerts
- Discovery: Decide if GHL or Asana for ONBOARDING Task Management
- Checklist of 5 steps with automatic triggers for congrats and next step emails)

5 Measure Customer Journey: (via GHL Dashboard)

- Monitor Sales pipelines and results
- Monitor Onboarding Tasks
- Monitor customer satisfaction
- Report generator for accountability management

PROJECT NOTES:

- Landing Page creative is being designed by 3rd party designer
- This project includes the slicing, styling and integrating the new Landing Page
- Contractor will provide 1parkplace list of content needs by Workflow and stage to compose
- Genie integration requires collaboration with Genie tech team
- Advise on any alternative approaches, overlap of efforts or possible options for betterment

Outstanding Discovery Needs :

- TheGenie.ai data feeds to monitor List Miner Orders, areas optimized and service request notes
- Solution for receiving feedback, monitoring client satisfaction and generate positive reviews
- TheGenie: For 2-way communication via API or Zapier – contact mapping, orders & service

Project Leader: Steve Hundley Text: 619.507.4404 e: steve@hundley.com

NEXT Phase II: Post Deployment desired skills and experience

Seeking resources who are experienced with managing Sales Funnel projects.
Please advise if you or your team possess the list of skills and needs below.

Digital Marketing Experience :

- Google, YouTube, Facebook (META): For Ad placement and retargeting campaigns
- Meta Messenger for monitoring messaging channels re Campaign
- Asana: For task management during onboarding (TBD)
- Implement GHL Facebook Conversion API:
- Implement GHL Add to Google AdWords function
- Implement Add to Google Analytics function

GHL Desired KPIs (wish list – determine feasibility)

- Funnel Bounce Rate
- Conversion rate of visitors to leads
- Rate of scheduled Zoom meetings
- Leads to Sales Ratio
- Track throughput at each pipeline stage
- Follow-up engagement rates (email opens, text responses)
- Onboarding completion rate
- Customer retention and satisfaction
- Facebook Insights on Traffic and Lead ads
- Google Analytics
- YouTube Insights