



GetGeoSocial.com v1- Specifications for Integration RFP:

Project Scope

- Integration of a new sales funnel under www.GetGeoSocial.com
- Funnel goals: convert visitors to leads, schedule Zoom meetings, manage follow-up communication
- Automation of follow-up via email and text
- Onboarding workflow for new customers
- Nurturing campaign for non-purchasers
- Retargeting campaign setup

Sales Workflow and Pipeline Specifications

Lead Capture:

- Multi Step form
- Form fields: Name, Email, Phone Number, address, company
- Tags: Campaign source, Funnel stage

Meeting Scheduling:

- Zoom Calendar widget integration
- Confirmation and reminder texts

Follow-up Communication:

- Text messages: Initial follow-up, confirmation, reminders, rescheduling options
- Drip email campaign: Educational content about GeoSocial marketing

Onboarding Workflow:

- Welcome message and text and launch Onboard workflow
- Checklist of 5 steps with automatic triggers for congrats and next step emails

Nurturing Workflow:

- Text check-ins
- Invitation to join Facebook group
- Occasional nurture emails

Integration Requirements

- Asana: For task management during onboarding
- TheGenie: For 2-way communication via API or Zapier
- Google, YouTube, Facebook (META): For retargeting campaigns

Desired KPIs

- Conversion rate of visitors to leads to sales
- Rate of scheduled Zoom meetings
- Follow-up engagement rates (email opens, text responses)
- Onboarding completion rate by step
- Customer retention and satisfaction reviews and surveys