



# 1parkplace, Inc. Request for Proposal

PROJECT NAME: Setup [GetGeoSocial.com](http://GetGeoSocial.com) in GHL v.09 6/25/24

## Project Goal:

Launch a new sales funnel with automation and reporting for the [www.GetGeoSocial.com](http://www.GetGeoSocial.com) campaign. Success is met when we are converting visitors into leads, leads to Zooms and Zooms to closed sales.

## Developer Deliverables:

1. Ensure detailed workflow and pipeline specifications are included in scope.
2. Provide specifications and counts for all messaging, communication including email and texts.
3. Document workflow automation rules for selling, onboarding, scheduling, and nurturing workflows.
4. Configure an Affiliate page or tracking apparatus for Influencers to get paid
5. A product that can book appointments, track onboarding, nurture and monitor the customer journey

## Context:

This project involves configuring GoHighLevel to support a new sales funnel for [www.GetGeoSocial.com](http://www.GetGeoSocial.com), with the goal of converting visitors to leads, prompting them to schedule a Zoom meeting, and managing subsequent communication. The funnel will include triggering a retargeting campaign and possible integration with Asana for task management and TheGenie for 2-way order communication.

## Conversation Flow Steps:

### 1. Initial Contact and Lead Capture

**Explanation:** The funnel captures visitor information and tags them as leads. Suggested Message: "Thank you for your interest in GeoSocial marketing! Please enter your contact information to get started." Purpose: Capture lead details for follow-up.

### 2. 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.

### 3. Confirmation and Reminder Workflow

**Explanation:** Once a meeting is scheduled, send confirmation and reminder texts. Suggested Message: "Your Zoom meeting is confirmed for [Date and Time]. We will send you reminders leading up to the meeting." Purpose: Ensure the lead is aware and prepared for the meeting.



#### **4. Follow-up for Unscheduled Leads**

**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.

4a. Create a separate workflow for contact who missed the meeting

**Explanation:** If a lead does not SHOW for a scheduled a meeting, send follow-up messages. Suggested Message: "We noticed you had your head up your ass campaign."

#### **5. Drip Email Campaign to all**

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

**Purpose:** Keep leads engaged and informed.

#### **6. Post-Meeting Workflow**

**Explanation:** After the meeting, send a thank-you message and trigger onboarding workflow where each step has a milestone message. 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.

#### **7. Onboarding and Task Management**

**Explanation:** Integrate with Asana to automate onboarding tasks. Suggested Message: "We have created an onboarding plan for you. You will receive task updates and progress notifications."

**NOTE:** Please check to see if we can create an Asana type workflow for the 5 onboarding steps.

**Purpose:** Ensure structured and efficient onboarding.

#### **8. Nurturing Campaign for leads and purchasers**

**Explanation:** Send nurturing messages to all who we have contact info for and are tagged with "GeoSocial"campaign. Suggested Message: "massages send out every 2 weeks."

**Purpose:** Maintain engagement and provide additional information.

#### **9. Retargeting Campaign**

**Explanation:** Launch a retargeting campaign on Google, YouTube, and Facebook for leads who visited the funnel page.

**NEEDS:** Provide specs on design requ

#### **10. We're Sorry – will keep you posted**

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

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



## RFP Specifications for [GetGeoSocial.com](http://GetGeoSocial.com): v.09 6/25/24

### Project Scope

- Integrate and configure a new sales funnel under [www.GetGeoSocial.com](http://www.GetGeoSocial.com)

#### Funnel goals:

- convert visitors to leads, schedule Zoom meetings, manage follow-up communication

- Logic to check Area Coverage (**TBD from Genie Team**)
- Automation of follow-up via email and text
- Onboarding workflow for new customers
- Nurturing campaign for non-purchasers
- Retargeting campaign auto launched until order is placed
- KPI Dashboard in GHL with time tracking and workflow breakdown alerts
- Define report and monitoring requirements

### Sales Workflow and Pipeline Specifications

#### 1 Lead Capture:

- Multi Step Form fields: Email + Name, Phone Number, Company + Address, ST, Zip code
- Tags: Campaign source, Funnel stage

#### 2 Meeting Scheduling:

- Calendar widget integration
- Confirmation and reminder texts

#### 3 Follow-up Communication:

- Text messages: Initial follow-up, confirmation, reminders, rescheduling options
- Drip email campaign: Educational content about GeoSocial marketing
- Retargeting launched per prospect until they purchase (**needs 2 way w/ Genie**)

#### 4 Onboarding Workflow:

- Welcome Workflow launched – includes messages and task monitoring alerts
- Task list launched (ideally GHL offers a Task feature, otherwise API to Asana Onboarding)
- Checklist of 5 steps with automatic triggers for congrats and next step emails

#### 5 Nurturing Workflow:

- Text check-ins
- Invitation to join Facebook group
- 26 Nurture emails + Videos (every 2 weeks)

#### 6 Monitoring Workflow: (via GHL Dashboard)

- Workflow to monitor Sales pipelines and results
- Workflow to monitor Onboarding Tasks
- Workflow to monitor customer satisfaction
- Report generator for accountability management



## TheGenie EcoSystem and Integrations

### Integration Candidates:

- TheGenie: For 2-way communication via API or Zapier – contact mapping, orders & service
- 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)

### 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

### Marketing KPIs

- Facebook Insights on Traffic and Lead ads
- Google Analytics
- YouTube Insights

### PROJECT NOTES:

- Funnel is being designed by 3<sup>rd</sup> party designer
- For shortest time to market please break project into Iterations, with I1 being the MVP
- Genie integration requires collaboration with Genie tech team
- Advise on any alternative approaches, overlap of efforts or possible options for betterment

### ITERATION SCOPING SCHEDULE:

**Iteration 1:** Add sales funnel with multi step form + Scheduling & meeting confirmation workflow

**Iteration 2:** Onboarding Workflow

**Iteration 3:** Nurturing workflows

**Iteration 4:** KPI Dash and Monitoring/Reporting

### Discovery Needs:

- TheGenie.ai data feeds to monitor List Miner Orders, areas optimized and service request notes
- If GHL has Task Feature suitable for onboarding to replace launching Asana task
- Solution for receiving feedback, monitoring client satisfaction and generate positive reviews

**Project Leader:** Steve Hundley Text: 619.507.4404 e: [steve@hundley.com](mailto:steve@hundley.com)