CLIENT CLARIFICATION REQUIRED
Jorge Salas - GHL Real Estate AI Qualification Assistant

Date: January 3, 2026
Status: Awaiting Client Direction

PURPOSE OF THIS DOCUMENT

Based on our conversation and your Upwork messages, I need clarification on exactly what you want before proceeding. I've identified two possible paths and need you to confirm which one aligns with your vision.

I need a conversational AI that everyone can use based on a step/qualification of a lead that will then be determined to see if that lead needs to be handled by a real human. I also want to make sure that the conversational AI is then charging the user separately for each text and not billing the agency. The conversational AI should interact with high-level workflows.

The Ai should qualify if they are open to an offer(wholesale) or top dollar(listing)
PATH A VS PATH B

PATH A: STANDALONE DEMO (WHAT WE BUILT)

What It Is:
- Customer-facing chat interface (like a website)
- Leads interact directly with AI 24/7
- Real-time scoring dashboard
- Independent of your GHL workflows

Use Case:
- You embed this on your website
- Leads chat before entering GHL
- Works as a "pre-qualifier" before CRM
- Standalone product

Pros:
- Visual demo for stakeholders
- Easy to show/test
- Works independently

Cons:
- NOT integrated with your GHL automations
- Doesn't fit your "only during qualifying" requirement

- Requires leads to go to separate interface

PATH B: GHL WEBHOOK INTEGRATION (WHAT YOU ACTUALLY NEED?)

What It Is:
- Backend API (no UI)
- Listens for GHL webhook triggers
- AI activates ONLY when contact reaches "Needs Qualifying" disposition
- Sends messages back through GHL (not separate chat)
- Part of your existing automation flow

Use Case:
1. Contact responds positively to your outreach
2. GHL automation tags them "Needs Qualifying"
3. Webhook fires to our API
4. AI sends qualifying questions via GHL SMS/email
5. AI scores responses
6. When qualified, AI tags them "Hot Lead" and notifies your team
7. AI turns OFF, human takes over

Pros:
- Fits your "only during qualifying" requirement
- Integrates with existing automations
- Seamless for contacts (stays in SMS thread)
- Conditional engagement

Cons:
- No visual interface (backend only)
- Harder to demo without GHL access
- Requires GHL API credentials

it seems like option B is the best being that It will then work within GHL and trigger only when asked to essentially.

CRITICAL QUESTIONS (PLEASE ANSWER)

QUESTION 1: Which Path Do You Want?

[ ] Path A: Standalone demo with UI
[X] Path B: GHL webhook integration (backend only)
[ ] Both: Demo first, then integrate with GHL
[ ] Something else: _____

QUESTION 2: AI Engagement Trigger (for Path B)

When exactly should the AI start talking to the lead?

[X] Contact is tagged "Needs Qualifying"
[ ] Contact is in specific pipeline stage
[ ] Contact replies with specific keyword
[ ] Manual trigger by your team
[ ] Other: When the AI is turned on or off. I am also open to having it come in when it's tagged needs Qualifying.

QUESTION 3: AI Disengagement Trigger

When should the AI STOP and hand off to human?

[X] Lead score reaches threshold (e.g., 70+)
[ ] Lead provides phone number
[ ] Lead asks for human agent
[ ] After X qualifying questions answered
[ ] Other: _____

QUESTION 4: Qualifying Questions

What specific information should the AI extract? (Check all that apply)

[X] Budget range
[X] Property location preference
[X] Number of bedrooms/bathrooms
[X] Timeline (when ready to buy/sell)
[X] Pre-approval status
[X] Current situation (first-time buyer, relocating, etc.)
[X] Motivation (why buying/selling now)

[ ] Other: Condition of their home (sellers)

QUESTION 5: Lead Scoring Criteria

What makes a lead "Hot" vs "Cold"? (Pick one)

[ ] Pre-approved + specific timeline + clear budget
[X] Engaged in 3+ conversation turns
[ ] Provided phone number
[??] Your existing scoring logic from "Closer Control"
[ ] Other: A hot lead would be someone who has answered at least three of the qualifying questions above. A warm would be if they answered ⅔ And a code would be if they answered one or less

QUESTION 6: GHL Integration Details (for Path B)

Do you want me to:

[ ] Set up the webhook automation in your GHL
[ ] Just provide the API endpoint URL (you set up automation)
[ ] Full integration + testing in your account
[ ] Other: I'm open to any of these. I just want to make sure that every sub account that is on there and any sub account that is created in the future will have instant access to this AI. (or have it be very easy for my team to set it up For the new user)

QUESTION 7: Property Data Source

Where should the AI get property listings from?

[ ] I'll provide JSON file with listings
[ ] Pull from MLS API (requires API key)
[ ] Scrape from your website
[ ] Use generic California market data
[ ] Other: N/A

QUESTION 8: Tone & Personality

You mentioned "100% human, professional" - can you describe the ideal tone?

Examples:
• "Friendly neighbor who happens to sell real estate"
• "Professional consultant, data-driven"
• "Enthusiastic expert, high-energy"

Your preference: The tone of the bot should be professional, friendly, direct, and curious. an example for a follow up direct message that the button can send for either someone who is buying or selling would be…"Hey, are you actually still looking to sell or should we close your file?" or "Hey (name) just checking in, is it still a priority of yours to sell (or buy) or have you given up? "

QUESTION 9: Response Format

How should the AI communicate with leads? (Check all that apply)

[X] SMS (short messages, 160 chars)
[ ] Email (longer, formatted)
[ ] GHL chat widget
[ ] WhatsApp
[ ] Other: _____

QUESTION 10: Testing & Deployment

What's your preferred deployment approach?

[X] I host on Railway (recommended)
[ ] You host on your server
[ ] Deploy to GHL custom function
[ ] Test in staging GHL account first
[ ] Go live immediately in production
[ ] Other: _____

QUESTION 11: Budget Clarification

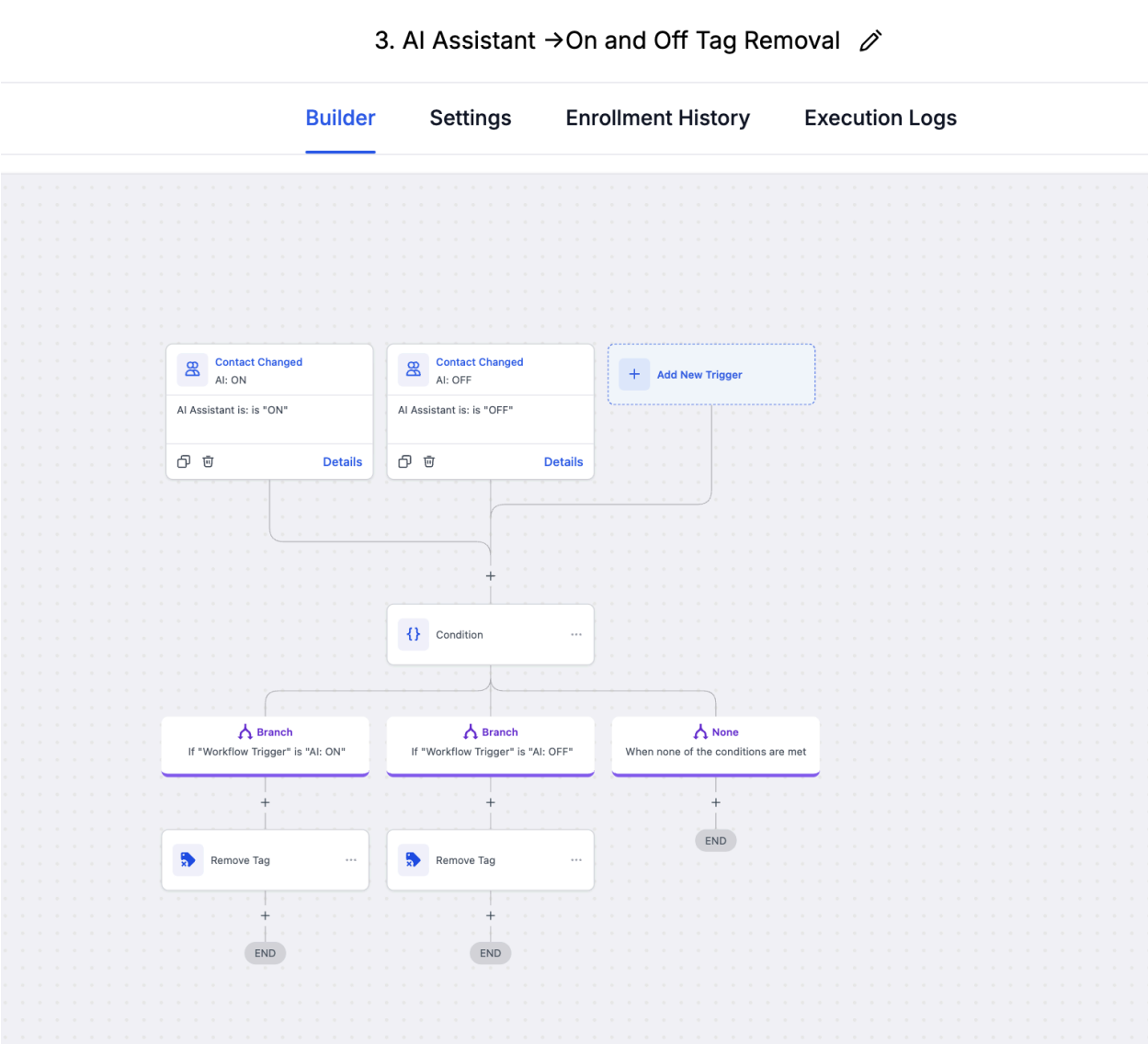
You mentioned $150 total. Does this include: (Check all that apply)

[X] Initial build & deployment
[ ] 1 month of hosting/monitoring
[X] Ongoing maintenance (how long?) (as needed…shouldnt be much)
[X] Iterations based on feedback
[ ] Training your team on how it works (just training me)
[ ] Other: _____

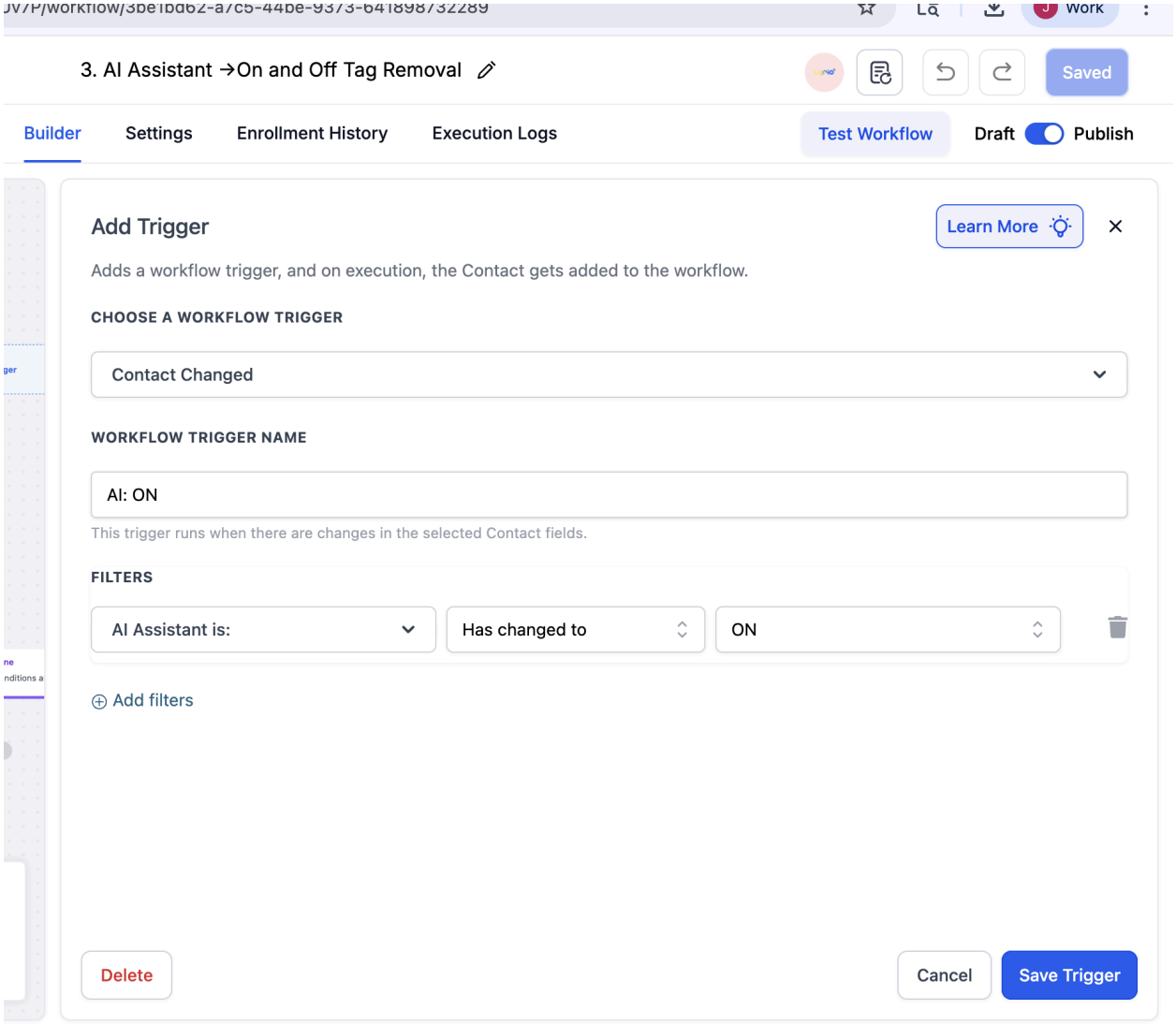
WHAT I NEED TO SEE

To build the right solution, please provide:

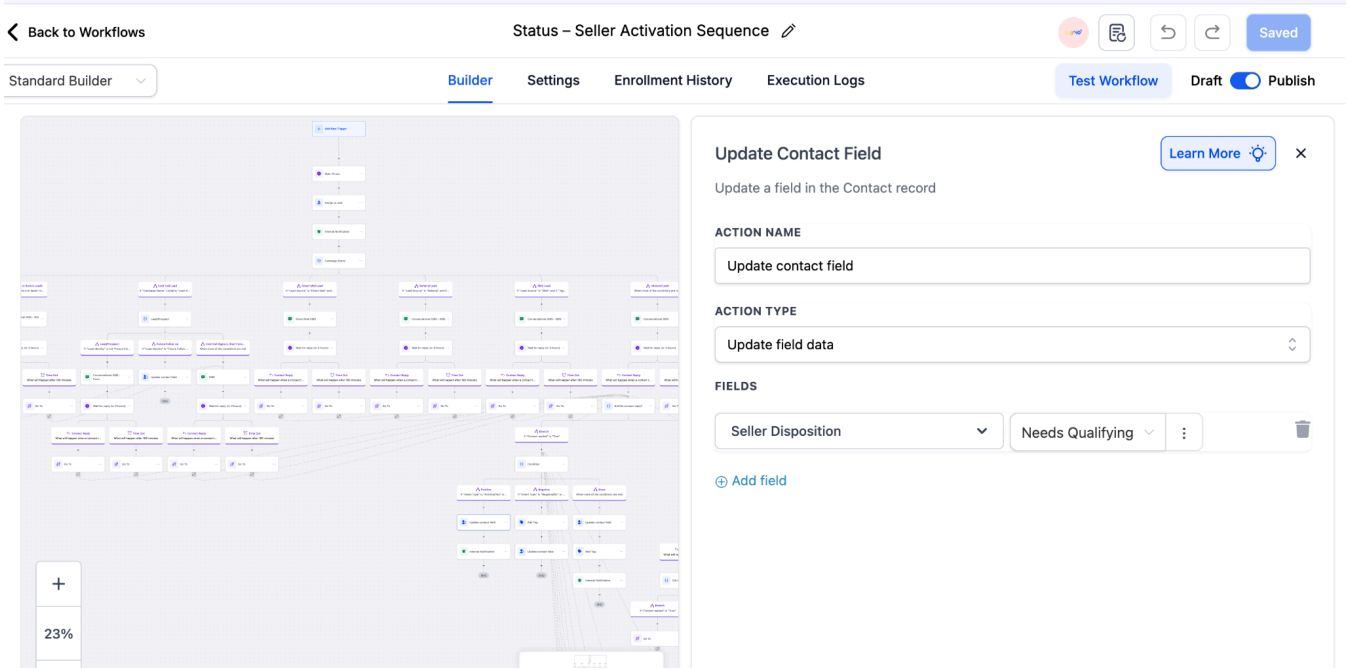
1. GHL Automation Screenshots:
   • Show me the "3. ai assistant on and off tag removal" automation



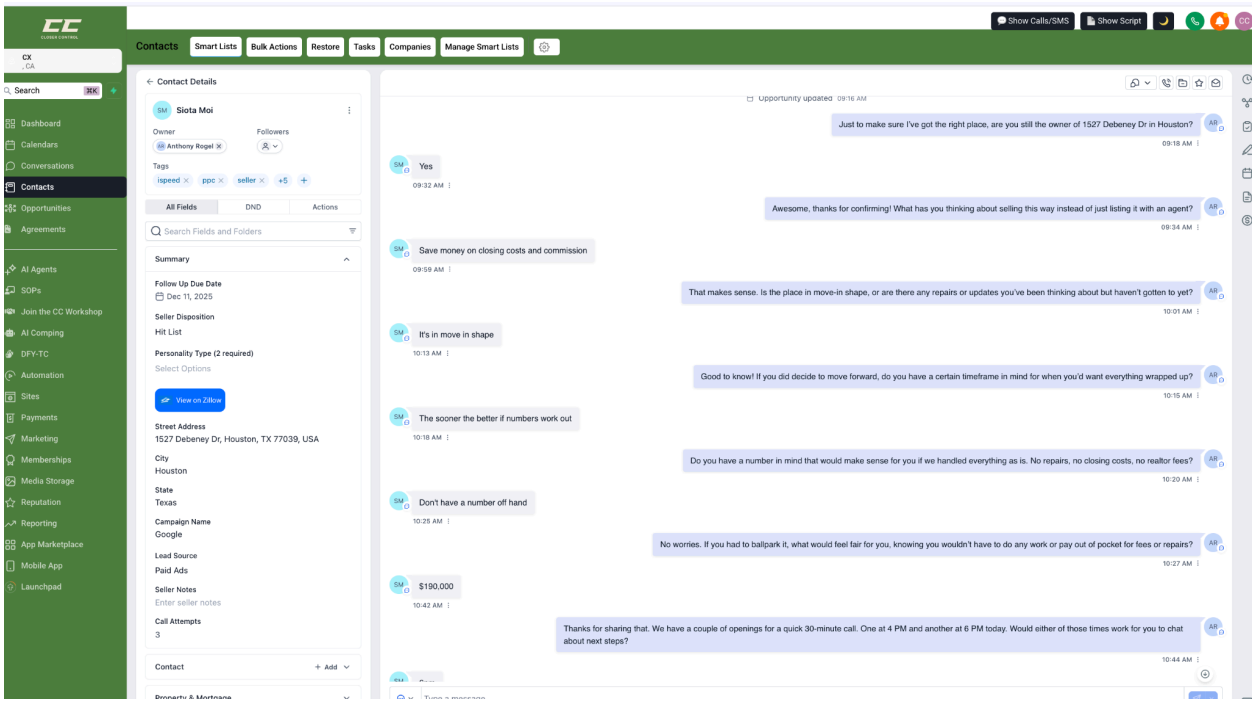
   • Show me the trigger conditions



- Show me what happens after AI engages



2. Sample Conversations:
   - Example of a "Hot" lead conversation



   - Example of a "Cold" lead conversation

Cold would be if they just responded to 2 or less and maybe it then waits a little bit before

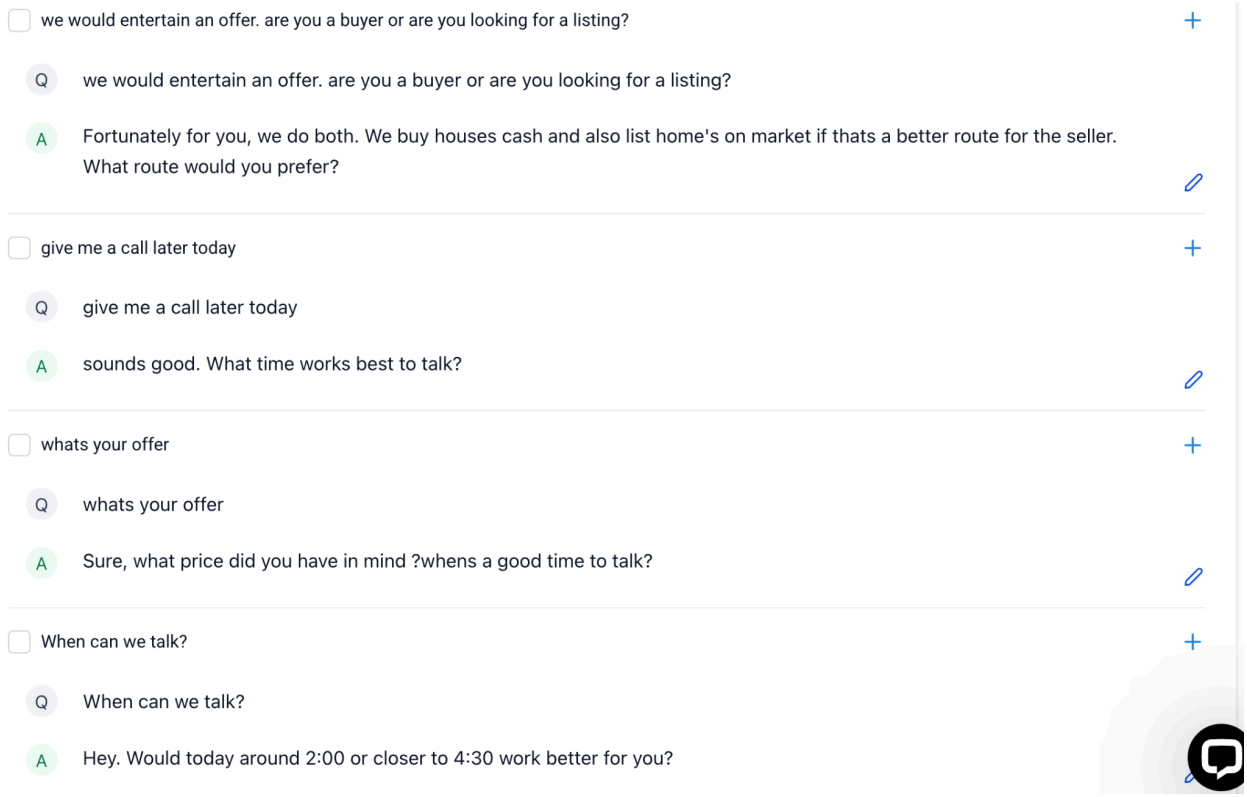
   - Show me the tone you want to match

3. Current Workflow Diagram:
   - Draw/screenshot how leads flow through your system

Heres how the automation works
https://www.loom.com/share/97ea17c38f85406a99437095d3603908

- Where does AI fit in this flow?

4. Qualifying Script:
   - Do you have existing questions your team asks? -NA
   - Any FAQs or objection handling scripts?



The last one, is for the ai to look at our calendar on ghl and find a time slot on there that gives the lead an option to select.

5. Property Listings:
   - Provide sample listings (JSON, CSV, or Google Sheet)
   - Or point me to where to pull them from

MY RECOMMENDATION

Based on your text messages, I believe you need Path B (GHL Webhook Integration).

Here's what I recommend:

PHASE 1: Quick Proof of Concept (Day 1)

1. Build minimal FastAPI webhook endpoint
2. Connect to your GHL "Needs Qualifying" trigger
3. Send ONE test qualifying question
4. Verify it works end-to-end

Deliverable: Working webhook that responds to GHL

PHASE 2: Full Qualification Logic (Day 2)

1. Implement full qualifying question sequence
2. Add lead scoring algorithm
3. Integrate property matching (RAG)
4. Add handoff logic (tags "Hot Lead" when done)

Deliverable: Complete qualification assistant

PHASE 3: Polish & Deploy (Day 3)

1. Tune tone to be "100% human"
2. Add error handling & logging
3. Deploy to Railway
4. Test with real leads in your account
5. Handoff & training

Deliverable: Production-ready system

TIMELINE AFTER YOU ANSWER

If you confirm Path B:
- Day 1: Set up FastAPI backend + GHL webhook
- Day 2: Build qualifying logic + lead scoring
- Day 3: Deploy + test + handoff

If you confirm Path A:
- Already done! Just needs your property listings

If you want Both:

- Demo is done (Path A)
- Proceed with Path B integration

NEXT STEPS

Please reply with:

1. Answers to the 11 questions above
2. Screenshots/samples requested
3. Confirmation of which path you want
4. Any additional requirements

Once I have this info, I can:
- Build the exact system you need
- Avoid wasting time on wrong approach
- Deliver within 72 hours as promised

CONTACT INFORMATION

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Upwork: Direct message

Status: Awaiting your clarification to proceed

NOTE: I've built a demo (Path A) but realized from your texts that you likely need Path B. I want to make sure we're aligned before spending your $150 on the wrong solution. Let's get this right!