Date: December 2, 2025

Revision History

Version	Date	Author	Description of Change
1.0	11/19/2025	Brooke Lanier	Initial draft of revised Opportunity & Proposal Workflow document.
1.1	12/02/2025	Brooke Lanier	Updates following internal Technical Review meeting

Version 1.1 Change Summary

Version 1.1 incorporates all decisions, clarifications, and technical direction resulting from the 11/20/2025 Technical Review Meeting. The changes strengthen accuracy, technical feasibility, and alignment with the long-term CRM Optimization roadmap.

- **Opportunity Intake (Section 5.1)**
  - Confirmed use of the **custom Opportunity Intake Form**, not the native GHL form.
  - Updated required fields (e.g., Proposal Date, Total Number of Employees).
  - Simplified or removed unused fields (e.g., RFP fields, optional Current Administrator).
  - Added rule for automated Opportunity Name generation based on Broker, Business Name, and Effective Date.
- **Product Line Item Table (Section 5.2)**
  - Added **broker-level negotiated pricing** logic and contact tagging.
  - Clarified single-product-per-line requirement.
  - Added line item Start Date rules and ordering requirements.
  - Enhanced Add-On flag behavior.
- **Pricing Catalog (Section 5.3)**
  - Added support for multiple preferred pricing tiers.
  - Added version control expectations and admin-only maintenance.
  - Added logic for pricing lookup based on Broker preferences.

- **Discount Validation & Approval Workflow (Section 5.4)**
  - Added Pending Approval pipeline behavior.
  - Added email/SMS approver notification support.
  - Added requirement to capture discount reason.
  - Clarified logic for blocking proposal send prior to approval.
- **Proposal Generation (Section 5.6)**
  - Documented Phase 1 constraint: retain current 17-page PDF (possible reordering only).
  - Added long-term Phase 2 vision for a web-based/microsite proposal experience.
  - Added requirement for conditional content inclusion based on selected products.
- **Proposal Delivery (Section 5.7)**
  - Added Sales rep CC requirement.
  - Added logging/storage rules for both Contact and Opportunity.
  - Added forwarding support expectation.
- **Service Agreement Foreshadowing (Section 5.8)**
  - Added future-state requirement for auto-generated Service Agreement on "Proposal Accepted."
  - Added pricing synchronization expectations.
  - Added Tax ID collection at SA stage.
  - Added Employer Portal signature workflow as future integration.
- **Non-Functional Requirements (Section 6)**
  - Added broker-initiated request expectations for future Broker Portal integration.
  - Added consistent date formatting requirements.
- **Dependencies (Section 7)**
  - Added dependency on abandoning native GHL Opportunity form.
  - Added dependency on Sales participation for UAT and workflow validation.

- **Phased Implementation Timeline (Section 10)**
  - Added clarity on Phase 1 (retain existing PDF), Phase 2 (microsite), and January timeline expectations.

1. Overview

This document outlines the future-state design for NueSynergy's Opportunity → Proposal → Service Agreement workflow in Go High Level (GHL). It incorporates user requirements gathered during the Sales SME design workshop and provides visibility into planned downstream stages to support technical readiness and strategic alignment across CRM development.

2. Scope

In Scope:

- Opportunity intake redesign
- Proposal configuration and generation
- Proposal delivery workflow
- Foreshadowed high-level Service Agreement workflow requirements

Out of Scope:

- Full Service Agreement automation (future phase)
- Implementation eForm redesign (future phase)
- Renewal workflow redesign (future phase)

3. Current State Summary

Sales currently creates proposals outside GHL due to inefficiencies, formatting limitations, and broker feedback. Opportunity entry is inconsistent, leading to poor visibility and incomplete reporting. GHL's native process requires multiple steps and is not aligned with Sales workflow.

4. Future End-to-End Client Experience Overview

Opportunity → Proposal → Service Agreement → Implementation → Renewal

All stages supported by structured data, consistent handoffs, automation, and GHL as the single system of record.

5. Functional Requirements

5.1 Opportunity Intake

- The custom Opportunity Intake Form, not the native GHL form. will be the required starting point for Opportunity creation.
- The custom form will map key fields directly into native GHL Opportunity fields (Business Name, Contact, Effective Date, etc.).
- The Opportunity Name should be automatically generated (Broker Name + Business Name + Effective Date). (Timestamp 7:09–7:52)
- “Opportunity Source” must be a selectable field, not free text. (Timestamp 8:09–8:54)
- Proposal Date remains required.
- Total Number of Employees must be required and used for fee calculations. (Timestamp 11:51–12:33)
- Current Administrator and Ben Admin System should be optional, not required. (Timestamp 17:59–18:44)
- All RFP_* fields are removed because Sales does not use the broker-facing RFP email workflow. (Timestamp 23:20–24:12)
- Auto-assignment of Sub-Account owner based on who created the account
- Data flows into Proposal stage

5.2 Proposal Configuration

- Single-screen pricing configuration
- Book pricing auto-populated
- Partner pricing selectable via dropdown.
- Some brokers have pre-negotiated pricing; system must auto-select preferred rate when chosen. (Timestamps 15:07–16:16)
    - When a Contact is tagged as Preferred Broker Pricing = Yes, the line-item “Pricing Source” field must display associated preferred rates.

    - Pricing logic must reference broker's negotiated pricing stored on the Contact.
    - Sales should not manually override preferred rate unless discount rules apply.
- Pricing adjustments (i.e., discounts) allowed with approval workflow above a threshold
- Auto-calculation of all fees and totals
- Each product must be entered as one line per product. (Timestamp 27:22–28:27)
- Start Date defaults to Opportunity Effective Date unless overridden.
- Add-On = Yes moves the line to the Add-On section of the proposal.

5.3 Pricing Catalog (Updated)

- Pricing Catalog must store:
    - Book Rate
    - Preferred Broker Rates
    - Max Discount %
    - Unit Type (per EE / per Group)
- Must support multiple preferred broker types across different agencies. (Timestamp 15:12–17:27)
- Broker-level negotiated pricing should be stored on the Contact record and used as lookup logic. (Timestamp 15:42–16:16)

5.4 Discount Validation & Approval Workflow (Expanded)

- Approval workflow must move Opportunity into a Pending Approval stage/pipeline. (Timestamp 29:11–29:28)
- Approval notifications may be delivered by email or SMS (SMS proven effective via Watco). (Timestamp 29:48–30:40)
- Approver (Josh) must have ability to click "Approve/Reject" with comments.
- Discount Reason must be captured so leadership understands why discount was applied. (Timestamp 14:50–14:51)

5.5 Multi-Product & Add-On Support (Clarified)

- Line item order must be preserved exactly as Sales enters it.

- Add-On items appear as separate section in proposal.
- Sales must be allowed to mix core products and add-ons in any order.(Timestamp 27:22–28:27)

5.6 Proposal Generation (Updated)

- In Phase 1 (November–January), the existing 17-page proposal document will remain **unchanged**, except possibly reordering the final two pricing pages to the front **if feasible**. (Timestamp 38:23–40:13)
- Long term: proposals should be a web-based microsite-style experience, not a static PDF. (Timestamp 4:45–5:17, 38:39–39:20)
- Proposal emails must link to the Proposal output — PDF attachment not supported. (Timestamp 3:11–3:34)
- Proposal stored in Opportunity and Contact record

5.7 Proposal Delivery

- Native GHL link-based delivery accepted
- Sales can edit the **email introduction**, but not the proposal template body.
- Sales rep must be copied on the outbound email. (Timestamp 6:04–6:45 for behavior around proposal initiation)
- System must log sent proposal email & link in both Contact & Opportunity.
- Must support forwarding — brokers often forward to clients. (Timestamp 31:40–31:59)

5.8 Service Agreement (Foreshadowed Requirements)

- When Opportunity is moved to “Proposal Accepted,” system should prepare a draft Service Agreement automatically (future phase). (Timestamp 32:15–32:38)
- Automation to be designed in early 2026.All proposal data flows directly into SA
- Tax ID collection during SA stage
- Pricing synchronization maintained
- Future digital signature workflow via Employer Portal

6. Non-Functional Requirements

- Reliable data storage and audit logging
- Consistent performance across all stages
- Ability to track delivery status and user actions
- Minimal manual re-entry across stages
- Must allow broker-initiated proposal request via future Broker Portal form. (Timestamp 24:40–25:25)
- Must support consistent date formats to eliminate user inconsistency (January vs "Jan" vs "01").(Timestamp 9:00–9:48)

7. Dependencies

- Successful build requires abandoning the native Opportunity form in favor of the custom intake. (Timestamp 10:08–11:12)GHL configuration capabilities and limitations
- Sales must commit to adequate testing — past delays came from lack of participation. (Timestamp 36:44–37:45)
- Availability of Sales Ops and CRM Developers
- Approval workflow configuration
- PDF generation capabilities
- Employer Portal future integration

8. Acceptance Criteria

- Users can create Opportunities via the simplified intake
- Proposal generation requires no manual formatting
- Pricing logic functions correctly
- Proposal can be previewed, linked, logged, and downloaded
- Data flows correctly into early Service Agreement shell

9. Roles & Responsibilities

- Executive Sponsor: Josh (CEO)
- Project Lead: Brooke Lanier
- Technical Lead: Brian Acquisto
- Sales SMEs: Marie Foley, Ginger Lester
- Sales Ops Analyst: Reporting and data validation

10. Phased Implementation Timeline

Target production timeline: first two weeks of January (post-holidays). (Timestamp 34:32–37:45)

Phase 1: Opportunity Intake Design and Build. Keep current proposal PDF, only reordering pages if system allows. (Timestamp 38:23–40:13)

Phase 2 (2026): Proposal Workflow Redesign and Build. Introduce microsite-based proposal experience.

Phase 3: Technical Review and Configuration

Phase 4: Pilot Testing and Refinements

Phase 5: Service Agreement Integration (future phase)