Time & Scope Quotation

Swim Academy CRM – GoHighLevel Implementation

Group Lesson Registration & Payment System

1. Summary

This quotation covers the implementation of GoHighLevel (GHL) as the primary system for swimmer registration, payments, and communications for 6-week group swim lesson sessions. The implementation replaces WooCommerce and manual spreadsheets with a streamlined, repeatable workflow.

Total Estimated Time: 25 hours

2. Time Estimate Summary

Phase	Estimated Hours
Phase 1: Core Registration & Payment (MVP)	15 hrs
Phase 2: Session Management & Communications	10 hrs
TOTAL	**25 hrs**

3. Phase 1: Core Registration & Payment (MVP)

MVP launch enabling online registration and payment for 6-week group swim lessons.

Task	Deliverable
Pipeline, custom fields, tags setup	Data Model
5 Group calendars (Levels 1–5) with availability	Calendars
Registration form + field mapping + waivers	Form
Payment flow configuration	Payments
Core booking workflow (contact/opp, tags, email/SMS)	Automation
Roster views / Smart Lists	Rosters
Testing + admin walkthrough (Loom)	QA + Docs

4. Phase 2: Session Management & Communications

Repeatable session setup, reminders, bulk messaging, and basic reporting.

Task	Deliverable
Session template/cloning process + checklist	Template
Weekly reminder automation (email + SMS)	Workflow
Smart Lists (session/day/time filters)	Lists
Cancellation/change email + SMS templates	Templates
Basic reporting (enrollment/revenue by session)	Dashboard

5. What GoHighLevel Handles Well

The following functionality is native to GHL and will be implemented without custom development:

- Pipeline + opportunity custom fields for swimmer/session data
- Group calendars with capacity limits per time slot
- Form builder with field mapping to contacts/opportunities
- Native Stripe integration for payment processing
- Workflow automations (triggers, actions, tagging, email/SMS)
- Smart Lists for filtering contacts by session/level/day
- Email and SMS templates for bulk communications
- Review generation campaigns
- Private lesson workflows and calendars
- Automated progress/performance emails via instructor input forms
- Basic dashboard widgets for enrollment counts

6. Out of Scope

The following items are explicitly excluded from this engagement:

- Instructor/staff tools (on-deck skill tracking, instructor dashboards)
- Swim team platform integrations
- Makeup class tracking and automated rescheduling logic
- Deep historical data migration and deduplication
- Custom-coded portals or web applications

7. GHL Platform Limitations

Be aware of this platform constraint:

- **No native child records:** Swimmers are tracked via Opportunity fields, not as separate child contacts. Multi-child families require multiple opportunities.

8. Assumptions

This estimate assumes:

- Client provides all required assets before work begins (see below)
- **The client will complete Stripe integration, or will provide us with the Stripe account access, or we can guide them on this integration.**
- GHL account is active with the required subscription level
- Single round of revisions included per phase
- Existing website remains the marketing front-end (links to GHL for registration)

9. Client Prerequisites

To meet the estimated timeline, the following must be provided before kickoff:

- Finalized 6-week session pricing
- Approved liability waiver text (from legal/insurance)
- Photo/media consent text
- Class capacity limits by level and time slot
- Weekend schedule (days, times, duration per class)
- GHL account admin access
- Session start/end dates for initial setup

10. Deliverables Summary

Phase 1 Deliverables

1. Configured Swim Lessons pipeline with custom fields and tags
2. 5 group lesson calendars (Levels 1–5) with correct availability/capacity
3. Registration form with waiver/consent integration
4. Payment flow configured (client completes Stripe connection)
5. Core booking workflow (contact/opportunity creation, tagging, confirmation email/SMS)
6. Roster Smart Lists for each session/time slot
7. Admin walkthrough video (Loom)

Phase 2 Deliverables

1. Session naming convention implemented across the system
2. New Session Setup Checklist document
3. Weekly reminder workflow (email + optional SMS)
4. Smart Lists for session-wide, day-based, and time slot filtering
5. Email/SMS templates for cancellations and schedule changes
6. Basic enrollment/revenue reporting views
7. Admin training on session setup and bulk communications