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Handy Dudes Lead-to-Job Automation Platform Proposal

Prepared by **Fatherhood Tech Ltd**

This proposal outlines the design, build, and delivery of a centralized lead-to-job automation system for Handy Dudes. The solution is designed to simplify how customers request services, how sales staff manage inquiries, and how jobs are quoted, scheduled, completed, and monitored, all while using Handy Dudes' existing tools.

1. Solution Overview

Fatherhood Tech will implement a streamlined lead-to-job system centered around Go HighLevel (GHL) and Jobber, designed to cover the full customer journey from first contact to job completion and follow-up. GHL will serve as the central workspace for sales and management, handling lead capture from the website chat widget, Thumbtack, and phone calls, along with all customer communication, automation, pipeline tracking, and reporting. Sales staff will work entirely inside GHL to respond to inquiries, collect photos and notes, and clarify job details. Once sufficient information is gathered, the salesperson will use a single **Send to Jobber** action to create a pre-filled Request in Jobber without re-entering customer data.

Jobber will continue to handle all service execution workflows, including converting requests into formal quotes, sending quote links to customers by email or SMS, scheduling approved work, assigning technicians, tracking job progress, and managing invoicing and payments. As key events occur in Jobber, such as a quote being issued or approved, a job being scheduled or completed, or an invoice being created or paid, those

updates are synchronized back to GHL to keep the opportunity pipeline accurate and up to date. When a job is marked complete in Jobber, GHL automatically sends a post-job customer satisfaction survey and records the feedback on the opportunity. Low satisfaction scores trigger alerts and follow-up tasks for management, ensuring issues are addressed quickly. The overall system is designed to reduce manual work, maintain clear ownership between platforms, and give Handy Dudes real-time visibility into sales, operations, and customer experience.

2. Key System Features

Role-Based Dashboards

The system includes role-based dashboards inside Go HighLevel, ensuring each team member only sees what is relevant to their responsibilities.

Sales & Dispatch Dashboard

Sales staff work entirely from the GHL dashboard. They see all incoming chats, calls, SMS, and Thumbtack leads in one inbox. Each customer request is displayed as an opportunity with notes, photos, and conversation history. From this dashboard, sales staff can update request details, move leads through stages, and use a single Send to Jobber action to push confirmed requests into Jobber for quoting.

Manager Dashboard

Managers access a high-level dashboard in GHL that provides visibility into operations without needing to manage individual conversations. This dashboard shows lead volume, quote-to-job conversion rates, job status (requested, quoted, scheduled, completed, paid), and customer satisfaction scores. When survey ratings fall below a defined threshold, alerts and follow-up tasks are automatically generated for management review.

Technician Workflow

Technicians do not use GHL. All assigned jobs, schedules, notes, and photos appear directly in Jobber, allowing technicians to continue using the familiar Jobber mobile app.

Website Chat & Lead Capture

A mobile-friendly chat widget embedded on the Handy Dudes website allows customers to request service, upload photos, and communicate in real time.

Centralized CRM & Pipeline Tracking

All leads are tracked in GHL with clear stages such as New Request, Quoted, Scheduled, Completed, and Paid.

Seamless Jobber Integration

Customer details and job requests are sent to Jobber with a controlled "Send to Jobber" action, eliminating duplicate data entry while maintaining accuracy.

Automated Communication

GHL handles automated follow-ups, appointment reminders, and post-job surveys via SMS and email.

Quality Monitoring

Customer feedback is automatically collected after job completion. Low satisfaction scores generate manager alerts for timely intervention.

3. Project Phases & Timeline

4. Pricing & Payment Terms

Software System:

- Down Payment:
- Final Payment:

Payment via bank transfer or mutually agreed digital payment method.

5. Integrations

System Integrations

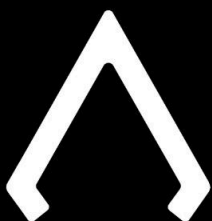
The solution integrates seamlessly with Handy Dudes' existing tools to avoid disruption and maximize efficiency:

- Go HighLevel (GHL): Central CRM, chat widget, communication hub, automation engine, dashboards, and reporting.
- Jobber: Service operations system for requests, quotes, scheduling, invoicing, and payments.

- Thumbtack: Lead source integrated directly into GHL.
- Phone, SMS, and Email: Managed centrally through GHL.

6. Conclusion

This solution gives Handy Dudes a modern, easy-to-use system that connects their website, Thumbtack, GHL, and Jobber into one seamless operational flow. It reduces manual work, improves customer experience, and gives management clear visibility into performance without replacing tools the team already uses.



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