

## Consulting-as-a-Service (CaaS) Platform Detailed Scope of Work Document

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### 1. Project Overview

**Business Model:** A fully automated online Consulting-as-a-Service (CaaS) platform targeted at owner-builders and renovators. The platform will enable users to purchase downloadable toolkits, receive structured guidance, and follow automated workflows tailored to their stage in the residential construction journey.

**Primary Goal:** To reduce reliance on manual consultation by offering templated, automated resources to guide users through all phases of construction, including planning, design, tendering, and building.

**Revenue Streams:** - One-off purchases of digital toolkits - Bundled offers and discounts - Premium upsells (advanced templates, calculators, or service calls) - Optional in-person consultation as an additional service - Subscription/membership model (optional)

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### 2. Platform Development

**Technology Stack:** - **Backend:** PHP (Laravel framework) - **Frontend:** Laravel Blade / Tailwind CSS or Bootstrap - **Database:** MySQL - **Optional Tools:** Zapier, Airtable, MailerLite, ConvertKit, OpenAI API

#### Core Features:

**2.1 Website Build** - Custom-branded responsive website (preferably Webflow, WordPress, or Laravel Blade) - High-conversion landing page explaining core offering - Project-stage guided journey (Planning, Design, Tender, Build) - Product pages for each toolkit - Secure payment gateway integration (Stripe, PayPal) - SEO optimized structure - Mobile-friendly design with fast loading speeds - Google Analytics + Meta Pixel integration

**2.2 Client Dashboard** - User account registration and login - Dashboard to access purchased resources and progress tracking - Automated delivery of toolkits post-purchase

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### 3. Content & Toolkit Development

**Deliverables Include:** - Subcontractor Pack (contracts, onboarding checklists, payment schedule) - Pre-construction checklist - Procurement strategy guide - Tender evaluation matrix - Budget tracker (Excel or Google Sheets) - Variation & EOT templates - Client onboarding pack - Photo evidence & compliance log - Risk management guide - Editable formats: Google Docs, Sheets, fillable PDFs - AI-powered calculators (markup estimator, trade comparison – optional)

**Copywriting & Media:** - Professionally written platform and product page copy - Blog content and SEO meta tags - Explainer video script (and optionally a short animation)

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### 4. Automation & CRM Integration

**Email Automation:** - Lead nurturing sequences - Onboarding emails - Abandoned cart recovery - Upsell/cross-sell sequences

**Tools:** MailerLite, ActiveCampaign, ConvertKit, Zapier

**CRM Integration:** - Airtable or Notion-based CRM - Lead capture via gated content, forms, or quizzes - Automated flow setup using Zapier (e.g., purchase → CRM → email)

**File Delivery:** - Immediate download link on payment success - Backup delivery via email

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## 5. Marketing Infrastructure

**Branding:** - Brand style guide (colours, fonts, tone) - Social media templates (Canva or similar)

**Content Marketing:** - Blog/news section - On-page SEO best practices

**Optional:** - Referral/affiliate tracking system - Social media profile setup and linking

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## 6. Optional Add-Ons (Quoted Separately)

- AI chatbot trained on platform content for 24/7 support
  - Interactive quiz/wizard to guide users to the correct toolkit
  - Subscription or membership model
  - Ongoing content uploads or maintenance
  - Monthly SEO and blog writing service
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## 7. Deliverables Summary

- Fully functional Laravel-based website with toolkits
  - Responsive design with all SEO basics and analytics configured
  - Client dashboard for toolkit access and updates
  - CRM and automation flows for email, onboarding, and upsells
  - Professionally written copy for all key pages
  - Toolkit files in multiple editable formats
  - Gantt chart-driven project management plan (12–14 weeks)
  - Notion-compatible task CSV and development SOP
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## 8. Timeline & Milestones

Project duration: **12–14 weeks**

Key milestones: - Week 1–2: Wireframes, copywriting, branding, project kickoff - Week 3–6: Core dev (frontend/backend), dashboard, payment flow - Week 6–8: Toolkit uploads, CRM, and copy integration - Week 8–10: Email automation and optional calculators/chatbot - Week 10–12: Social, blog, and quiz (if included) - Week 12–14: Testing, UAT, SOP handoff, and go-live

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**Prepared For:** Internal use for development team and stakeholders to follow a consistent roadmap.

**Prepared By:** [Your Team Name / Consultant Name] July 2025