



# BLACK WALLET

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## Solo to CEO System Automation Proposal

Thank you so much for your interest in our automation services. In this proposal is a detailed description of our process and fees. Should you have any further questions, please note them in the appropriate section below and submit the form. If you'd like to move forward, simply check the service you'd prefer, submit the form, and we'll be in contact with you shortly.

First Name \*

Last Name \*

Client Email \*



## Step 1

First, you'll complete your Welcome Packet. This Welcome Packet includes next steps in the process and a form that includes login credentials. Once I'm granted access I will peruse your current system setup so that I can sketch a final implementation plan. This email will also include an appointment scheduler for all of our future video calls.

## Step 2

I consider everything we've discussed in our meeting, mix it with my expertise, then create a digital timeline that provides step-by-step instructions for executing your technology strategy. Your plan is simple to understand and is visually digestible so you don't worry about being overwhelmed. This plan is what I will follow and implement when setting up your systems, as well as your reference guide once we conclude services. This stage usually takes less than 1 week.

## Step 3

This is where the magic happens! I'll begin working on your setup, from start to finish, create Client Training Videos so you and your team will know exactly how to use your systems at their full potential. This stage usually takes 2-3 weeks per system.

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## Step 4

We'll host a Conclusion Training Video Session. During this meeting we'll review every part of your Dubsado setup including all of the customization and workflows. This video will be recorded for your future reference. This meeting usually lasts 2 hours.

## Step 5

This is the last and final stage where you've had time to analyze your new system. You have three weeks following our last video session to let me know of any changes you would like to make to your Dubsado system. I will update any issues you've come across during this time period.

## Step 6

Once your three weeks have passed, we'll contact you for one last follow-up to make sure you're confident and successful. By this time, you should be thoroughly enjoying your new processes and systems and be leading an efficient business.



## Part 3: Services

### Clickup

Click is a robust project management system. For your business, we will use Clickup to monitor tasks and manage business operations in their entirety.

### Dubsado

Dubsado is a client relationship management tool. We will use this to thoroughly execute a high-performing client experience using custom-branded forms and detailed workflows.

### Employee Onboarding

Your employee, Tiffany, will begin receiving live onboarding meetings and training videos to adopt and maintain your new software protocols.

### Video Training

As each software setup is complete, training videos will be recorded to provide a detailed reference to explain specifically how your system does, and should continue to, work for you.

### Copper Lead Generation

While this system is a tentative service, that may or may not be completed based on its overall fit to your business, it remains on your plan due to its high probability of implementation.

### General System Consolidation

After major systems have been implemented, smaller systems may be added, subtracted, or adjusted based on your real-time business needs.

### SOP Documentation

As software installations are completed, a standard record of your business' operating procedures will be documented, stored, and reviewed to simplify the learning curve for future business' operations and employee onboarding.

### System Maintenance

For 45 days post-implementation, I will be on stand-by to answer questions, tweak processes, and adjust current systems to best fit live-action business activities.



## Step 1: Choose Your Package

### Package Options:

Custom Client Package \$4,300.00

Consultation Rebate \$-147.00

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## Steps 2 - 4: Submit, Sign, & Pay

### Next Steps:

Submit Proposal

Sign Contract

Pay Invoice

# That's It!

You've reached the end of your proposal, so sad. But good news! The party isn't over. Once you sign the contract and pay your deposit, you'll receive your Client Welcome Packet in your email.

Your Welcome Packet will explain expectations of working with me, the best ways to keep our communication open, and important forms that need to be filled out so I can begin your services.

If you're still on the fence, just need some personal time for an explanation, or have any further questions, comments, or concerns you can type them below, send an email directly to

[jasmine@theblackwallet.com](mailto:jasmine@theblackwallet.com), or click to schedule a short call.

Schedule

*Thank you!*

*It's an honor to simply be considered because I know there are so many available options for your business. Your consideration is everything to me, as is providing you with a superb client experience. Business services are reciprocal relationships so if at any time I'm not living up to this expectation, please feel free to communicate with me.*

*Sincerely,*

*Jasmine Tiara*