

Automated Lead Intake System

What's Included:

1. Lead Capture Setup

- Connection of 1 primary lead source (Website, Facebook, or Funnel)
- All new leads are automatically added to dashboard
- Standardized contact fields – name, phone, email
- Zero missed leads, clean, structured data

2. Smart Contact Organization

- Custom CRM pipeline with clear stages: (New Lead, Contacted, Active, etc.)
- Automatic lead tagging
- Internal visibility into lead status
- Built to maintain clarity and control as lead volume increases.

3. Instant Lead Confirmation

- Automated SMS confirmation sent immediately after submission
- Automated email confirmation sent immediately after submission
- Message copy written and customized to your business
- Designed to reassure the lead, increase response rate, & reduce drop-off

4. AI Follow-up Automation

- AI-powered SMS follow-up for up to 7 days
- Friendly, non-spammy conversational follow-up (*if needed*)
- Automation stops immediately once lead responds
- Helps recover leads that don't reply right away & eliminates manual follow-up effort

5. Internal Alerts & Tasking

- Instant internal notification when a new lead is received
- Automatic task created for manual follow-ups (*if needed*)
- Ensures the business owner is always aware of new interest

6. Dashboard Access

- CRM dashboard access to view:
 - New Leads
 - Conversations
 - Lead Status
 - Workflows
 - Hundreds of additional features

Pricing

One-Time Setup Fee: \$497

Non-Refundable once setup work begins

Monthly Subscription: \$97/month

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What is not Included

1. Ad management
2. Lead generation services
3. Custom AI training beyond lead follow-up
4. Complex or enterprise CRM builds
5. Multi-location setups
6. Phone call answering services

Delivery Timeline

1. Setup Start
 - Begins within 48hrs of:
 - Payment being received
 - Completed intake form
2. Build & Configuration
 - Once started all the following will be completed;
 - Lead Source is connected
 - CRM pipelines are configured
 - SMS & email confirmations are set up
 - AI follow-up is enabled
 - Internal notifications are configured
 - System is tested end to end
3. Go-Live
 - System is live within 5-7 business days of setup start

Safeguards & Conditions

- Delays caused by missing access or credentials **extend the timeline**
- Timeline applies to **one lead source**
- Business days only

Refund & Cancellation

- Setup fee is non-refundable once work begins
- Monthly subscription can be cancelled at any time