



# Sales Team Guide For Our SaaS Offer

## Fast Overview

### Plan names and price

- **Launch** \$97 per month
- **Grow** \$297 per month
- **Scale** \$497 per month

### Seats

- **Three users included per account**
- **Extra seats** 50 each per month

### Core promise

One place to capture leads, talk to customers, book time, sell, and follow up. Start simple. Add power as you grow.

## Positioning Cheat Sheet

### When to pitch Launch

- New business or solo owner
- Wants one inbox, simple booking, and reviews
- Prefers clear setup and quick wins

### When to pitch Grow

- Team has leads but weak follow up
- Wants courses or community plus stronger sales tracking
- Ready for smarter automation and starter AI help

### When to pitch Scale

- Serious growth goals
- Wants deeper AI, pro reporting, and hands on help
- Needs more automation across more steps

### One line pitch for each plan

**Launch:** Capture, book, and follow up in one place.

**Grow:** Turn more leads into sales with smart follow up. Teach and build a fan base.

**Scale:** Automate more, sell more, support more with pro AI and systems.

## Value Stack and Deliverables

### Launch \$99

#### Plain language pitch

You get one clean home for leads, chats, booking, and reviews. It is easy to start and hard to outgrow.

#### Core features

- Roles and permissions templates for Owner, Manager, Staff
- Conversations inbox for SMS, email, and chat
- Contacts CRM with tags, notes, tasks
- Calendars with round robin and no show follow ups
- Forms and surveys
- Funnels and simple pages
- Products and orders
- Payments with basic payment settings
- Subscriptions basic
- Reputation basics for review asks and replies
- QR codes
- Dashboard and simple reports
- WordPress forms and tracking
- Integrations for email, phone, Stripe, Facebook
- Account settings and tools basics
- User management for up to three users

#### Extra that beats competitors

- Done for you welcome sequence installed
- Five proven funnel and form templates
- Ready to send review request kit for email and SMS

#### Snapshot automations included

- Welcome sequence from form to first reply
- Contact us form alerts and tagging
- Check in QR code follow up

- Facebook lead form to instant SMS and email
- Seven day email course outline with day one ready

## **Grow \$299**

### **Plain language pitch**

You get everything in Launch plus smart follow up, simple community and course tools, and stronger sales tracking.

### **Adds to Launch**

- Automation builder with branching and goals
- AI agents for email and chat basics
- Opportunities pipeline with stages and tasks
- Marketing broadcasts and simple journeys
- Memberships and courses with quizzes and certificates
- Communities starter space
- Blogs and media library
- Advanced subscriptions with dunning reminders
- Taxes and transactions tracking
- Payments advanced settings
- Products with variants and coupons
- Calendars advanced reminders and no show rescue
- Reputation guided setup and response prompts
- Launchpad custom quick start
- Integrations expanded including Zapier and webhooks
- WordPress plugin and single sign on

### **Extra that beats competitors**

- One done for you funnel or pipeline build each month
- Quarterly list clean up and domain warm up
- Community starter kit with welcome post, rules, and badges

### **Snapshot automations included**

- Lead magnet delivery with calendar invite step
- Nurture and re engagement series with task handoffs
- AI written follow ups for tagged leads
- Calendar and event reminders from three days before to fifteen minutes after with outcome steps

## **Scale \$499**

## Plain language pitch

You get the full growth stack. Deeper AI, pro reporting, and done for you setup help so you move fast.

## Adds to Grow

- AI agents advanced with voice handoffs and hours
- Multiple sales pipelines with forecast reports
- Communities pro with marketplace connection option
- Memberships pro with certificates and upsells
- Large automation library with audits
- Marketing rules and cross channel triggers
- Subscriptions pro with tax rules and retries
- Team management with best practice roles and field level permissions
- Launchpad tailored steps for your use case

## Extra that beats competitors

- Three done for you automations each month
- Quarterly automation audit and tune up
- Priority support and same day success call on request

## Snapshot automations included

- Advanced nurture that branches on open and reply with staff call tasks
- AI email thread that writes subject and body then keeps going until the goal
- Facebook comment reply to direct message to lead capture with AI assist
- Full event life cycle reminders, confirm link, reschedule flow, and post event follow up

# Roles and Permissions Talking Points

## Default roles

- **Owner** Full control
- **Manager** Build and manage inside the sub account
- **Staff** Do daily work only

## Simple module guidance for prospects

- **Owner** Can see and change everything
- **Manager** Runs Conversations, Contacts, Calendars, Funnels, Sites, Blogs, Communities, Memberships, Opportunities, Payments, Products, Subscriptions, Reputation, Automations, AI agents, and Integrations inside their sub account
- **Staff** Works assigned items only and cannot change global settings

## If asked for detail

- **Automation** Owner full. Manager build and run. Staff run only.
- **AI agents** Owner full. Manager edit prompts. Staff use only.
- **Sales and revenue** Owner and Manager manage. Staff creates orders and updates assigned deals.
- **Content** Owner and Manager publish. Staff drafts.
- **Reputation** Owner and Manager reply. Staff sends requests.

## Discovery Questions

### Outcomes

- What does success look like in ninety days
- How many new customers or bookings is that

### Volume

- How many new leads per week
- How many calls or meetings per week

### Follow up

- What happens after a lead fills a form or sends a message
- How many touches do you send today

### Sales

- Do you track stages such as new, working, won, lost
- Who needs tasks and when

### Learning and community

- Do you want to sell a course, run a group, or both

### Payments

- Do you sell one time, subscription, or both
- Do you need tax rules or payment retries

### Team

- Who will log in daily
- Who will build or approve content

## Objection Handling

### We already have tools

*Most teams do. This replaces many tools with one login and one view of the customer. It also adds the missing follow up that drives revenue.*

### Price feels high

*Match price to outcome. If one saved sale or one extra booking per month covers the plan, the rest is profit. The included flows help you get there.*

### Do you help set it up

*Yes. Each plan includes done for you items. Grow and Scale include monthly builds and audits. We are not just a tool. We are a setup partner.*

### How fast can we launch

*Launch can go live very fast with the included snapshot. Grow and Scale add builds that follow a simple onboarding path shown below.*

### Will I own my data

*Yes. Your contacts, messages, and payments are yours. Export is available on request.*

## Results and ROI Talk Track

### Simple framing

- Lead value times lift equals gain.
- If a customer is worth five hundred and smart follow up lifts close rate by only two wins per month, that is one thousand in new revenue.
- Launch is 97. Grow is 297. Scale is 497. The math works.

### Operational savings

One login replaces chat tool plus form tool plus calendar tool plus review tool. Less switching. Fewer missed steps. Faster team.

## First Thirty Days Plan To Share With Buyers

### Week one

- Connect phone, email, and payments

- Install the Launch snapshot
- Publish one lead form and one booking link
- Turn on the review request kit

### **Week two**

- Build one nurture flow
- Add pipeline stages
- Set calendar reminders

### **Week three**

- Add one funnel or page
- Start a weekly broadcast
- Train staff on the Conversations inbox

### **Week four**

- Review results
- Tune subject lines and messages
- Plan the next build or audit

## **Deliverables Checklist By Plan**

### **Launch**

- Installed snapshot flows listed above
- Welcome sequence live
- Review request kit live
- Five funnel and form templates loaded
- One hour handoff call

### **Grow**

- All Launch items
- One done for you funnel or pipeline each month
- Quarterly list clean up and domain warm up
- Community starter kit loaded
- Two hour onboarding call with quick start steps

### **Scale**

- All Grow items
- Three done for you automations each month
- Quarterly automation audit and tune up

- Priority support and same day success call on request
- Two hour strategy and build session each quarter

## Feature To Outcome Mapping

- **AI agents:** Writes replies and follow ups so leads get answers fast. Saves time for the team.
- **Automation:** Sends the right message at the right time. Cuts no shows and boosts show rate.
- **Calendars:** Makes booking simple. Fills the calendar and keeps it full.
- **Conversations:** All customer chats and emails in one place. Faster response and better records.
- **Opportunities and tasks:** Clear stages with next steps. Fewer lost deals.
- **Memberships, communities, and blogs:** Teach and gather your fans. Build trust and repeat sales.
- **Payments, products, subscriptions, taxes, transactions:** Sell once or on repeat. Track money in one view.
- **Reputation:** Ask for reviews and reply fast. More stars and more calls.

## Competitive Angle For Reps

- Most sellers stop at a template and a login
- We install working flows and give monthly builds on Grow
- We add audits and priority support on Scale
- We help the team use it day to day, not just buy it

## What Is Not Included By Default

- Custom code or custom app builds
- Paid ad management
- Copywriting outside the included flows
- Long form design work beyond provided templates

These can be quoted as add ons.

## Terms You Can Read On Calls

- **Seats:** Three users included. Extra seats are 50 each per month.
- **Contract:** Monthly. Cancel any time.
- **Support:** Help center and chat for all plans. Priority for Scale.



## Quick Scripts The Team Can Use

### Open:

Thanks for taking time today. In one minute, what outcome would make this a win for you

### Qualify:

How many leads a week and who follows up now

### Bridge:

Our platform puts capture, follow up, booking, and reviews in one place. Then we add a few done for you flows so you see wins fast.

### Close for Launch:

Let us start with Launch. We will install the snapshot today and turn on review requests. You can upgrade once you see the lift.

### Close for Grow:

Your team has leads but gaps in follow up. Grow adds one done for you build each month plus starter AI. It pays for itself with a few saved deals.

### Close for Scale:

You want deeper automation and pro reporting. Scale gives you advanced AI and three monthly builds with priority help. It is the fastest way to move.

## Final Reference Cards

### Launch \$97

- **Best for** New or small teams
- **Outcome** Capture leads, book time, request reviews
- **Access** Core CRM, inbox, forms, surveys, funnels, pages, products, orders, subscriptions basic, payments basic, taxes view, transactions view, QR, dashboard, WordPress, core integrations
- **Extras** Welcome sequence, five templates, review kit
- **Seats** Three included, 50 each extra

### Grow \$297

- **Best for** Growing teams
- **Outcome** Stronger follow up, simple courses and community, sales tracking
- **Access** All Launch plus automations with branches, AI basics, opportunities pipeline, broadcasts, memberships with quizzes and certificates, communities starter, blogs and media, advanced subscriptions and payments, products with variants and coupons, advanced calendars, guided reputation, custom launchpad, Zapier and webhooks, WordPress plugin and single sign on
- **Extras** One monthly build, quarterly list clean up and warm up, community starter kit
- **Seats** Three included, 50 each extra

## Scale \$497

- **Best for** Teams that want speed and scale
- **Outcome** Deep automation, pro AI, stronger reports, faster builds
- **Access** All Grow plus advanced AI with voice handoffs, multiple pipelines with forecast, communities pro with marketplace option, memberships pro with upsells and certificates, large automation library and audits, marketing rules and cross channel triggers, subscriptions pro with tax rules and retries, team field level permissions, tailored launchpad steps
- **Extras** Three monthly automations, quarterly audit and tune, priority support and on request same day success call
- **Seats** Three included, 50 each extra