

AI SUITE PROJECT CHECKLIST

Your step-by-step guide to getting a client's AI Suite live and answering every lead.

Nsite Spark Connectors · Project Manager Quick Guide · Updated July 11, 2026

Your Role

You manage the client. Nsite manages the technical build. Your job is to gather what the build team needs, keep the client on schedule, and make sure they know how to use their AI Receptionist before you hang up the final call.

Working a Nsite Combo deal? This checklist covers the AI Suite side only. The client also gets the Leads System as part of the bundle — coordinate with the Leads System PM Checklist for that build, since it's a separate workflow with its own steps and timeline.

Who actually builds it: AI Suite is fulfilled by RocketDriver, Sonia's whitelabel partner — you never contact them directly, and neither does the client. Everything you gather goes to Sonia; she's the one working with RocketDriver on install, launch, and support. Full detail in the RD Fulfillment Workflow doc.

The Step-by-Step Process

- **Confirm signed client + package.**
- **Confirm the number of locations (Authority only) and any extra-location add-ons.**
- **Collect the client's business info for the Fulfillment Form** — goals, preferred greeting, hours, and services.
- **Submit the Fulfillment Form to Sonia** — under the correct package, using the Info Check below so nothing's missing. Sonia opens the ticket with RocketDriver from there; you don't submit to RocketDriver directly.
- **Secure backend website access.** The chatbot and lead capture form can't be installed without it — line this up now, not after.
- **Book the onboarding call** with a setup specialist once the Fulfillment Form is in.
- **Run the onboarding call.** Define the AI's knowledge base and lead-capture workflow together.
- **Track setup.** Nsite brands, installs, and configures the AI Receptionist, missed-call text-back, and CRM sync — typically two business days.
- **Run the training call.** Show the client their shared Inbox, how to manage conversations, and how to assign tasks to their team.
- **Run the 30-day check-in.** Review conversations and performance together.

Your Responsibilities

- Being the client's main point of contact — for everything, including support after launch
- Completing the Fulfillment Form accurately and on time, and submitting it to Sonia
- Securing backend website access for the build team
- Getting the client through the onboarding call
- Running the training call
- Running the 30-day check-in

Info Check — Before Submitting the Fulfillment Form

AI Suite builds stall without backend access or a complete Fulfillment Form. Confirm every item before you submit.

- Client name, primary phone, and primary email
- Package confirmed — AI Suite Starter, Growth, or Authority (or Nsite Combo Starter/Growth/Authority, if bundled with Leads)
- Number of locations confirmed (Authority only), plus any extra-location add-ons
- Business goals and preferred greeting/tone for the AI

- Knowledge base details — services, hours, and common pricing questions it should be able to answer
- CRM the client wants leads synced into
- Backend website access arranged, or a clear plan to get it before the onboarding call
- Legal business details collected, if the client is U.S.-based and wants SMS — required for A2P registration, which RocketDriver completes on the client's behalf once you've gathered the info
- Scheduling tool confirmed, if the client wants the AI to book appointments directly — only BookMeNow, Google Calendar, and Microsoft Calendar are supported; if they use something else, set expectations before the onboarding call
- Existing phone number identified — will it forward to the AI, or does the client want a new dedicated number?
- Client's country confirmed — SMS and voice only work in the U.S. and Canada; international clients get web chat and WhatsApp, not phone or text. Don't sell “AI answers your phone” to a client outside the U.S./Canada
- Client's expectation set: setup typically takes about two business days once the onboarding call is done
- Missed-call text-back and voice capabilities explained, so nothing on the training call is a surprise
- Everything confirmed against the AI Suite Pricing & Guidelines package table

Backend Access Is Non-Negotiable

The AI Receptionist can't go live without backend website access. That's how the chatbot and lead capture form get installed — line this up before or during the onboarding call, not after, or setup stalls.

Do Not

- Promise a setup timeline shorter than about two business days after the onboarding call
- Attempt the technical build or website install yourself — that's Nsite's (RocketDriver's) job, not yours
- Contact RocketDriver directly — everything routes through Sonia
- Let a client skip the onboarding call — the AI's knowledge base depends on it
- Promise the \$59/month support fee is temporary — it renews monthly with no end date
- Promise the unlimited calling bonus indefinitely — it's currently extended through mid-2026, confirm before quoting further out

Account Setup & Access

You collect, Sonia's team builds. You collect the client's business details, goals, and website backend access, and hand it to Sonia. Sonia opens the ticket and works directly with RocketDriver, who handles branding, installing, and configuring the AI Receptionist — voice, chat, missed-call text-back, and CRM sync. Note: the PM fee is separate from — and stacks with — the Connector's sales commission.

Launch & Client Handoff

At the training call, once setup is live, a live walkthrough confirms the client knows how to use it:

- You walk the client through their shared Inbox — how calls, chats, and messages all land in one place.
- You show the client how to assign conversations to their team.
- You confirm they know what happens on a missed call, and how voice capabilities work.

Support Isn't Optional Anymore — Every new AI Voice Receptionist activation now includes ongoing monthly support (\$59/mo) — mandatory for the first three months and renewing month to month after that, with no end date. Set this expectation at signup, not at the first bill.

Support After Launch

For help after launch, the client reaches out to their PM or salesperson, or emails Contact@NsiteTechStudios.com. The PM stays the client's point of contact for support too — issues get routed to Sonia, not directly to RocketDriver.

Good to Know

A few platform realities worth knowing before you pitch or onboard:

- AI Suite's real cost is \$358/month regardless of tier — RocketDriver's own \$299/mo wholesale rate plus the \$59/mo support fee, which Sonia deliberately keeps on every client's plan permanently rather than treating it as optional. This is part of why higher tiers carry stronger margin.
- Authority is priced per location — each additional location is its own setup, number, and configuration, at \$1,000 setup + \$1,000/month
- The unlimited calling bonus is currently extended through mid-2026 — confirm before promising it further out
- Minute allowance is up to 300 minutes/month, based on ten-minute calls — a client with longer calls gets fewer total calls before hitting it
- Full channel list, confirmed: web chat, web forms, SMS, WhatsApp, Facebook Messenger, Instagram, email, and phone via the AI Voice Receptionist — broader than “calls and chat,” worth knowing when a prospect asks what's actually covered
- The website widget installs on WordPress, Wix, Squarespace, and Shopify — confirm the client's platform is one of these before promising a timeline
- Starter's margin thins fastest at higher Connector levels, since the real cost is flat — worth knowing before quoting aggressively at Premier

Success Formula

A complete Fulfillment Form + backend access ready on day one = a build that's live in two business days, not two weeks.

Quick Pitch

“We'll brand it, build it, and have your AI answering every call and chat within about two business days — then we'll train your team on exactly how to use it.”

Helping Businesses Grow. Building Recurring Income Together.

Nsite Spark Connectors · AI Suite Project Checklist · Page