

NSITE GROWTH ENGINE PROJECT CHECKLIST

Combo: AI Suite & Leads System

Your step-by-step guide to managing a bundled build — two products, two fulfillment paths, one client relationship.

Nsite Spark Connectors · Project Manager Quick Guide · Updated July 13, 2026

Your Role

You manage the client relationship for both products at once, since they build in parallel, not one after the other. Your job is to run two different fulfillment paths through a single onboarding, a single training call, and a single point of contact — you.

The two sides work differently. AI Suite is fulfilled by RocketDriver, Sonia's whitelabel partner — you gather what's needed and hand it to Sonia, who's RD's sole point of contact. You never contact RocketDriver directly. Leads System is self-service inside WLS — no ticket, no third party — your job there is making sure the client actually completes their mandatory Business Profile, since the AI research and outreach tools don't work without it.

The Step-by-Step Process

- **Confirm signed client + Combo tier.** Starter, Growth, or Authority.
- **Confirm AI Suite location count (Authority only)** and any multi-location add-ons.
- **Collect the client's business info for the AI Suite Fulfillment Form** — goals, preferred greeting, hours, and services.
- **Submit the Fulfillment Form to Sonia.** She opens the ticket with RocketDriver for the AI Suite side — you don't submit to RocketDriver directly.
- **Confirm the client has completed their Leads System Business Profile.** This happens on their own at signup, but it's mandatory and non-skippable — the AI research and personalized outreach tools don't function without it. Don't assume it's done; check.
- **Secure backend website access.** AI Suite's chatbot and lead capture form can't be installed without it — line this up now, not after.
- **Book one onboarding call covering both products.** Don't split this into two calls — the client should walk away understanding both sides in one conversation.
- **Run the onboarding call.** Define the AI Suite's knowledge base and lead-capture workflow, and confirm the Leads System search criteria — role, industry, location — the client actually needs.
- **Track setup on both tracks.** AI Suite: Sonia and RocketDriver handle branding, install, and configuration, typically about two business days. Leads System: account access and search criteria configured directly in WLS.
- **Run one training call covering both products.** Walk the client through their AI Suite shared Inbox and their Leads System search tools together — not as two separate sessions.
- **Run the 30-day check-in.** Review AI Suite conversation performance and Leads System delivery together — the whole point of Combo is that these two things work as one system.

Your Responsibilities

- Being the client's single point of contact for both products — including support after launch
- Completing the AI Suite Fulfillment Form accurately and submitting it to Sonia
- Confirming the Leads System Business Profile is actually completed, not just assumed
- Securing backend website access for the AI Suite build team
- Booking and running one combined onboarding call
- Running one combined training call
- Running the 30-day check-in across both products

Info Check — Before Submitting the Fulfillment Form

Combo builds stall when either side is missing something. Confirm every item before you submit.

AI Suite side:

- Client name, primary phone, and primary email
- Combo tier confirmed — Starter, Growth, or Authority
- Number of AI Suite 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 and conversations synced into
- Backend website access arranged, or a clear plan to get it before the onboarding call
- Legal business details collected, if U.S.-based and the client wants SMS — required for A2P registration, which RocketDriver completes on their behalf
- Scheduling tool confirmed, if direct appointment booking is wanted — only BookMeNow, Google Calendar, and Microsoft Calendar are supported
- Client's country confirmed — SMS and voice only work in the U.S. and Canada; international clients get web chat and WhatsApp only, not phone or text

Leads System side:

- Business Profile confirmed complete — what they sell, who they serve (powers both products' AI tools)
- Search criteria discussed — target role, industry, company size, or location
- Client's expectation set on lead delivery timing and volume for their tier

Everything confirmed against the Nsite Combo One Pager's package table.

Two Fulfillment Paths — Know the Difference

	AI Suite side	Leads System side
Fulfilled by	RocketDriver (via Sonia)	WLS — self-service
Your role	Gather info, hand to Sonia	Confirm Business Profile done
You contact RD directly?	Never	N/A — no RD involvement
Typical timeline	~2 business days after onboarding call	Live once Business Profile + criteria set

Full detail on the AI Suite side's chain of custody — who talks to whom and why — lives in the RD Fulfillment Workflow doc.

Do Not

- Promise a setup timeline shorter than about two business days for the AI Suite side
- Contact RocketDriver directly — everything routes through Sonia
- Attempt the technical AI Suite build or website install yourself
- Let a client skip the onboarding call for either side — both AI Suite's knowledge base and Leads System's search criteria depend on it
- Assume the Leads System Business Profile is done just because the client signed up — confirm it
- Split the onboarding or training call into two separate sessions — the value of Combo is that it's one system, not two
- Promise the AI Suite's \$59/month support fee is temporary — it renews monthly with no end date

Your PM Fee

30% is a Leads-only rate. Nsite Combo has its own, decoupled PM rate: 12% of the setup fee, one-time, paid once at the build. This single fee covers overseeing both fulfillment tracks together — it does not stack with AI Suite's 12.5% or Leads System's 30% rates, since Combo isn't sold as two separate transactions. Note: the PM fee is separate from — and stacks with — the Connector's sales commission.

Support After Launch

For help after launch, the client reaches out to their PM or salesperson, or emails Contact@NsiteTechStudios.com. You stay the client's single point of contact for support on both products — issues on the AI Suite side route to Sonia, not directly to RocketDriver; issues on the Leads side you can often resolve directly since there's no third party involved.

Success Formula

One combined Fulfillment Form + a completed Business Profile + backend access ready on day one = both sides live together, not on two different timelines.

Quick Pitch

“We'll get your AI answering every call and chat, and fresh verified leads flowing in every month — one onboarding, one bill, one team to call.”

Helping Businesses Grow. Building Recurring Income Together.

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