

# MASTER STRATEGY & IMPLEMENTATION ROADMAP

Full Lifecycle Business Infrastructure & Marketing

## MONTH 1: FOUNDATION & AUDIT

CRM	Setup organized, easy-to-monitor pipeline and customer management. Create a reporting dashboard.
Build Tool	Create a custom tool for Client use as a lead magnet/low-ticket offer.
Tech & Automations	Audit and stabilize existing workflows & setup.
Lead Generation	Establish a systematic source of leads.
Marketing	Audit/Setup platforms; Marketing strategy creation; Optimize/create websites & landing pages; Setup essential campaigns.
Retention	24hr real-person response turnaround; 24/7 AI bot; Knowledge-base; Engagement prompts plan.
Compliance	HIPAA Certification for Founders (Rio & Jay) covering tech and content infrastructure.

## MONTH 2: EXPANSION & CONTAINER 2

CRM (Container 2)	Build new snapshot for Container 2 (HIPAA Compliant Business Infrastructure & CRM).
Tech & Automations	Build systems for services not yet setup (Container 2 and Full Bundle).
Lead Generation	Ongoing identification and integration of new lead sources.
Marketing	Multi-platform campaigns; Content Calendar; Reactivation & follow-up campaigns; Promotion of new offers/products.
Retention & Support	Continuous 24/7 AI Bot; Weekly GHL Support Call for Container 2; High-ticket onboarding videos.

## MONTH 3+: MAINTENANCE & SCALE

Backend Ops	Maintenance and quality assurance of all established infrastructure.
Continuous Improvement	Proactive building of new tools/materials to improve customer experience.
Growth	Continuous strategic marketing campaigns.
Product Support	Ongoing support for new products/webinars (Note: Out-of-scope builds discussed separately).