

The SAVA Group Systems Designers

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Clayton, MO 63105



**SERVICES  
AND PRICING GUIDE**





# HI!

I'm Shequana, the Systems Integrator of The SAVA Group Efficiency Firm.

Not long ago I was just like you, an overworked CEO ready to scale her business but could not afford to add another thing to my plate. That was until I discovered two of the best business management tools on the market.



ClickUp is the project management tool of your dreams (or it has been for us:)). Manage your team, your projects, and your time.



Dubsado is a Customer Relationship Management (CRM) tool that takes the scheduling, client onboarding, client management, and so much more off of your hands.



Being a newbie to these systems, or if you've never used them, starting from a blank slate can be daunting and overwhelming, and that's where we come in (we've got your back).

# OUR SERVICES AND PRICING

**ClickUp** manages your business and projects, while **Dubsado** manages your clients. Here's how we can help you achieve optimum efficiency in your business.

With ClickUp you can map and track everything from your marketing strategy to each of your client projects. ClickUp is a system that allows you to get as granular as you would like with each of your projects. With Spaces, Folders, Lists, and Task; each project, task, and document will have a home here.

*Your ClickUp Intensive Includes - A 4-hour session with Shequana where you will set-up:*

1  
WORKSPACE

4  
SPACES

10  
FOLDERS

*Investment: \$1000 (or 2 payments of \$525)*

Dubsado is the ultimate client experience (like the one you will have with us:)). It seamlessly guides your lead through your process from start to finish; without you having to do much throughout the process. We will assist with the setup of your system and wow your clients with customized forms and a client portal.

*Your Dubsado Setup Includes - A Workflow equipped with:*

1  
LEAD CAPTURE  
FORM

4  
SCHEDULERS

4  
CUSTOMIZED  
FORMS

30  
CANNED  
EMAILS

1  
WORKFLOW

*Investment: \$2000 (or 2 payments of \$1100 or 3 payments of \$733)*

# OUR SERVICES AND PRICING

## I WANT IT ALL!

*Your ClickUp Intensive Includes*

1  
WORKSPACE

4  
SPACES

10  
FOLDERS

+

*Your Dubsado Setup Includes - A Workflow equipped with:*

1  
LEAD CAPTURE  
FORM

4  
SCHEDULERS

4  
CUSTOMIZED  
FORMS

30  
CANNED  
EMAILS

1  
WORKFLOW

*Investment: \$2500 (or 2 payments of \$1350 or 3 payments of \$900)*

### What you're responsible for?

- Completing your system questionnaires
- Providing a contract to upload (if needed)
- Copy for forms (we will be happy to help develop copy for your forms if needed)
- Canned email examples

### What we're responsible for

- Capturing the essence of your brand and making sure it comes across to your clients throughout your process
- Making sure all things associated with the features listed above work together and seamlessly in your system

**For more information on these systems  
please visit us at  
[www.thesavagroup.com](http://www.thesavagroup.com)**



# OUR SERVICES AND PRICING

CANNED EMAILS are email templates that are housed in your Dubsado System that will make it easy to communicate with your clients using automation. Below is an example of a canned email.



Hey Kelly!

It's official. We're so excited to be working with you on your Dubsado setup. Here's what happens next.

**Step 1: Pay your invoice** - Whether you have chosen to make your payment in full or a payment schedule we do require payment before we begin your project, please make your payment as soon as possible (*disregard if you have already done so...THANK YOU!*).

[Invoice](#)

**Step 2: Check Out Your Client Portal**

Your client portal is where you will find your contract, invoice, and documents all in one place! This will also be where you will upload any information we will need from you (more about that later). You can use the details below to log in. Be sure to bookmark the link so that you can easily find it in the future.

[Portal](#)

Your login is your email address  
0116

**Step 3: Work on your client questionnaire** - Please take some time to fill out the questionnaire at the link below. It will help us get all of the information we need to get started.

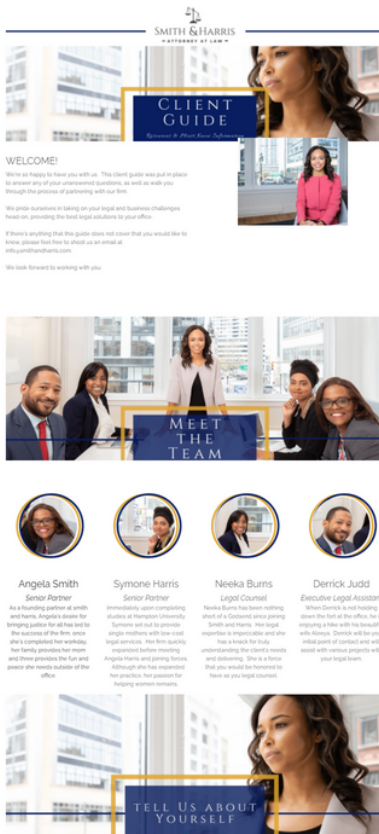
[Phase 1 \(Brand, Scheduler, Packages, and Forms Questionnaire.\)](#)

Again, we're so excited to have you with us. Please don't hesitate to reach out to us with any questions by replying to this email.

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please visit us at  
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# OUR SERVICES AND PRICING

FORMS can be used as contracts, proposals, as a communication tool, and to gather information on your client. Check out some forms below.



**SMITH & HARRIS**  
ATTORNEY AT LAW

### CLIENT GUIDE

**WELCOME!**

We're so happy to have you with us. This Client Guide was put in place to answer any of your unanswered questions, as well as walk you through the process of partnering with our firm.

We pride ourselves in taking on your legal and business challenges head-on, providing the best legal solutions for your office.

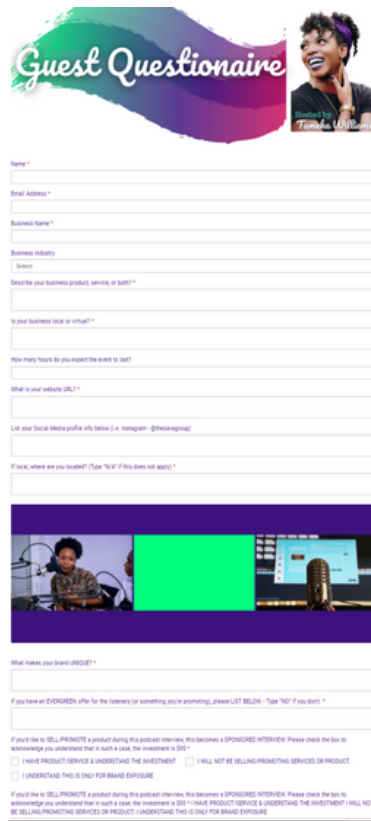
If there's anything that this guide does not cover that you would like to know, please feel free to shoot us an email at [info@smithandharris.com](mailto:info@smithandharris.com).

We look forward to working with you.

### MEET THE TEAM

- Angela Smith**  
Senior Partner  
As a founding partner of Smith and Harris, Angela desires for bringing justice for all those who are the accused of the firm, since she completed her working, her family provides her support and have provided her for and peace she needs outside of the office.
- Symone Harris**  
Senior Partner  
Immediately upon completing studies at Hampton University, Symone set out to provide single mothers with low cost legal services. She has quickly expanded before meeting Angela Harris and joining Smith and Harris. Although she has expanded her practice, her passion for helping women remains.
- Neeka Burns**  
Legal Counsel  
Neeka Burns has been working out of a Counsel since joining Smith and Harris. Her legal expertise is impeccable and she has a knack for truly understanding the client's needs and delivering. She is sure that you would be honored to have as your legal counsel.
- Derrick Judd**  
Executive Legal Assistant  
When Derrick is not helping out of a Counsel since joining Smith and Harris, he is enjoying his time with his beautiful wife, Henry. Derrick will be your initial point of contact and will assist with various projects with your legal team.

### TELL US ABOUT YOURSELF



## Guest Questionnaire

Name \*

Email Address \*

Business Name \*

Business Industry

Select

Describe your business product, service, or both? \*

Is your business local or online? \*

How many hours do you expect the event to last? \*

What is your website URL? \*

List your Social Media profile info below (i.e. Instagram: @smawagang)

If there, where are you located? (Type "N/A" if this does not apply) \*

What makes your brand special? \*

If you have an EVERGREEN offer for the listeners (or something you're promoting), please LIST BELOW - (Type "N/A" if you don't) \*

If you'd like to SELL/PROMOTE a product during this podcast interview, this becomes a SPONSORED INTERVIEW. Please check the box to acknowledge you understand that in such a case, the investment is \$15! \*

I HAVE PRODUCT/SERVICE I UNDERSTAND THE INVESTMENT IS \$15!  I WILL NOT BE SELLING/PROMOTING SERVICES OR PRODUCT.

UNDERSTANDING THIS IS ONLY FOR BRAND EXPOSURE.

If you'd like to SELL/PROMOTE a product during this podcast interview, this becomes a SPONSORED INTERVIEW. Please check the box to acknowledge you understand that in such a case, the investment is \$15! I HAVE PRODUCT/SERVICE I UNDERSTAND THE INVESTMENT IS \$15! I WILL NOT BE SELLING/PROMOTING SERVICES OR PRODUCT. UNDERSTANDING THIS IS ONLY FOR BRAND EXPOSURE.



## THE SEGAL LAW FIRM

### Master Agreement

This agreement is made on [Date: {month}/{year}] between

[Client name] [Client company name] [Client address - address] [Personnel: "Who?"]

and

[Law firm name] [Law firm address - address] [Personnel: "Business Owner"]

Your representation agreement should clearly include the attorney's fees, associated costs, and how and when the money is to be paid. In addition, lawyers work on different pay structures, so be sure that the terms are included in the agreement. In general, attorneys will either work on an hourly, fixed-fee or contingency fee basis.

**Hourly fee** - For many types of cases, this is the most common way that an attorney will be paid. Just like paying an hourly employee, clients will be expected to pay their attorney for each hour, or part of that hour that the lawyer works on the case. Rates typically vary from an \$150 per hour to more than \$300 per hour. In addition, a client should be expected to pay for time spent on the case by other people in the office, such as paralegals. The rates for these workers will usually range in between \$50 and \$80 per hour.

If you and your attorney have agreed upon an hourly fee arrangement, then the representation agreement should list out some of the terms. For instance, the contract should state how often the lawyer will be paid, weekly, monthly, quarterly, after the case is over, etc., and how much the fee will include before some was spent on other matters. In addition, there should also be some mention of how the client could go about challenging the attorney's fees spent on some task.

**Fixed fee** - This is a fairly new method that attorneys sometimes use to bill their clients. Under this fee structure, an attorney will charge a client a fixed amount for a certain type of case. This is generally used by attorneys that do one type of case or transaction multiple times. For example, an attorney may charge a client \$10,000 for handling a new real-estate closing case. For this type of arrangement, the representation agreement should include terms that do not allow the attorney to charge more than the agreed-upon amount.

**Contingency fee** - This type of arrangement is often used in personal injury cases. This is great for clients that do not have a lot of money to pay attorneys up front. Instead, the attorney agrees to take the case on exchange for a certain percentage of whatever award is issued at the end of the representation. If the client loses the case, then the attorney does not get paid.

If you have agreed upon a contingency fee arrangement, your representation agreement should include terms that set out what percentage of the eventual award will be the attorney will receive. Contingency fees range from 20% to 40%. In fact, some attorneys charge their percentage depending on whether the case goes to trial, or if the case is settled (out-of-court). This should also be included in the agreement.

**Credit card fees** - Your representation agreement should also include clauses that cover credit cards and how associated with your case. These clauses can include things like the card fees, various fees, bank expenses, filing and copying fees and more. It should be no shock that litigation can be quite expensive, even including the credit card an attorney charges.

There are many other types of cases, and your representation agreement should specify from whom. If you are expected to pay for all fees, then that should be in the contract you have with your lawyer. Attorneys working under a contingency fee basis will often have all of their costs and fees and simply include them from the eventual award.

**Other terms** - Even though fee arrangements and terms dealing with money are the primary reason for having representation agreements, there are other no-fee important terms that should be included as well, such as:

The extent of the representation. The contract should make clear how far your attorney will represent you in your case. For example, some attorneys will not handle an appeal of a case, and if it is so, your agreement should include such a term.

Ending the attorney-client relationship. The representation agreement should include a term regarding the ending of the relationship, and how a can be brought about. For example, a contract may state that the client has the right to fire the attorney at any time, without reason, or that the client can only fire the attorney for just cause.

Check fees. The contract should specify how and at what cost the client can obtain a complete copy of their client file held by the attorney.

The contract should specify who does the work, meaning who will also be responsible for the case, and who will appear in court if litigation is necessary.

The contract should fully identify what powers, if any, the client gives to the attorney. For example, if a client does not think that he or she has the ability to make a judgment call on something, the agreement can give this to the attorney.

Client:

I agree to the terms and conditions of this contract.  
First name \_\_\_\_\_ Last name \_\_\_\_\_ 25/01

Business Owner:

The below signature field is for you, the business owner, to sign.  
This will only be for chosen your own sign to let you know that your clients can sign here. If you'd like to change it, just click this box and uncheck the box below.

I agree to the terms and conditions of this contract.  
First name \_\_\_\_\_ Last name \_\_\_\_\_ 25/01

For more information on these systems please visit us at [www.thesavagroup.com](http://www.thesavagroup.com)

# OUR SERVICES AND PRICING

Your **WORKFLOW** is where the magic happens. Use it as a guide or checklist, or add automation and turn your hour-long client experience into a 5-minute click of a button.

Checkout a workflow example below.

## Sample Workflow

- send email **Inquiry Response - General** immediately after all previous actions complete
- create todo **Review `[[client.name]]`'s lead capture and check ca...** immediately after all previous actions complete
- send form **Sample Package Selection Proposal** immediately after all previous actions complete
- send form **Sample Intake Questionnaire** immediately after invoice paid in full
- activate portal immediately after form **Sample Intake Questionnaire** completed.
- send email **Clients - Portal Welcome/Onboarding** immediately after all previous actions complete
- create todo **Complete work for `[[client.name]]`** immediately after all previous actions complete
- send email **Clients - Thank You** immediately after all previous actions complete
- archive project immediately after all previous actions complete

## Sample Lead Follow Up with Approval

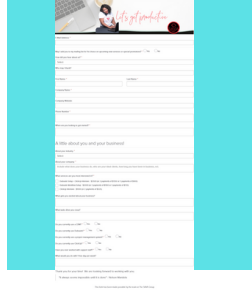
- send email **Thanks for reaching out!** immediately after all previous actions complete
- create todo **Review `[[client.name]]`'s Lead Capture and Check Ca...** immediately after all previous actions complete
- send form **Sample Package Selection Proposal** immediately after all previous actions complete
- send form **Sample Intake Questionnaire** immediately after invoice paid in full
- send email **Two Weeks Out** 2 week(s) before project start date
- create todo **Get ready for event with `[[client.name]]`** immediately after all previous actions complete
- send email **Thank You!** 1 day(s) after project end date
- archive project immediately after all previous actions complete
- send form **Sample Intake Questionnaire** if **Sample Intake Questionnaire** is not completed in 3 day(s)

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# OUR SERVICES AND PRICING

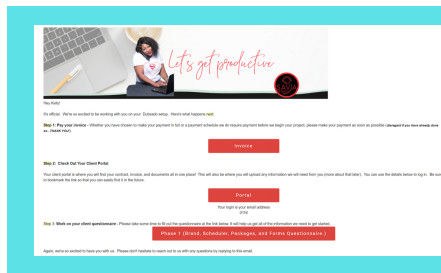
## YOUR CLIENT EXPERIENCE

Nurture/Inform The Client



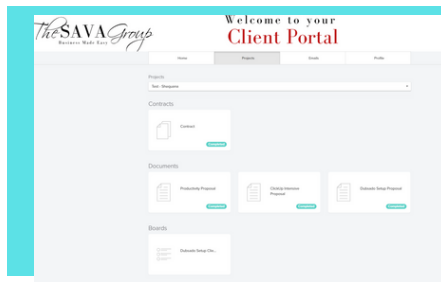
Lead Capture Forms

Onboard



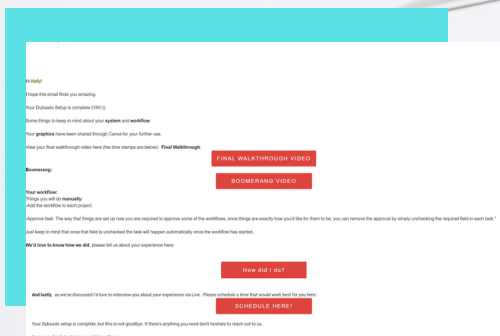
Next Steps Canned Email

Deliver



Your Client Portal

Offboard



Offboarding Canned Email

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please visit us at  
[www.thesavagroup.com](http://www.thesavagroup.com)



# SHE

# WHAT

# SAID



## ClickUp Intensive

It feels good to have your step by step encouraging teaching and familiar voice to walk me thru the live Intensive and beyond. Your passion and commitment to excellence shows in your well thought out Intensive where you project ahead of time the guidance you client would need once the session is over. I can work late at night or early when the home is quiet and no distractions. You Delivered and I know you have even more in your awesome packages and services you offer. You did a great job with me and I enjoyed the privacy of one on one so I could learn from the comfort of my home will all ears on you. Continued success as SAVA grows!

Thank you,

*Mary H Fernandez, CEO of Women of Help and Influence*

## Dubsado SetUp

Yes! Working with Shequana and The SAVA Group has given me peace of mind and my Dubsado back end systems are completely set up. Before I was struggling to find the time to teach myself and decided to stop wasting my time and hire Shequana and her team. By far the best decision I ever made! I now have a workflow to see what stages my leads are in as well as what I need to do for my clients within their projects. My favorite piece that has added so much value to my clients is the client portal!!! My client love that they can find everything for their project in one place! Working with Shequana is vital to enriching your business.

*Kelly Peck, Emerson Reese Creative*

# HOW



# THIS

# WORKS

Discovery Call

Make It Official  
Proposal/Contract/  
Invoice

Information  
Gathering

Kickoff Call/  
Intensive

Deliverables

Off-Boarding

We want you to:  
"Experience freedom  
in your personal life  
because of our  
business"



**SCHEDULE  
YOUR  
DISCOVERY CALL  
TODAY!**



*Click the link in the email associated  
with this guide to experience the freedom  
you've always dreamed of.*



*The SAVA Group Systems Designers*



*The SAVA Group*