

GORDON MYERS · THREE-BRAND ACQUISITION & FULFILLMENT SYSTEM

The whole business on one page.

This board is the single place we both work from, instead of a project tool neither of us opens. What is live, what is open and who owns it, every app and its cost, and what ships when. Every change is written down and every version stays online.

LIVE **IN BUILD** **QUEUED** **KEEP** **HAVE** **HAVE, UNREAD** **NEED YOU**

Left chip: where the build is. Right chip: whether we can get in.

WHERE WE ARE

Move 1 done: every lead is caught. Move 2 in build: the Katalyst replacement.

Jul 24 · The form used to discard the lead. Now it saves and alerts. Anything before Jul 24 is gone.

Access · We hold Katalyst, GoDaddy, JobTread and Mailchimp. Not read yet. The Katalyst audit is the first job in Move 2.

Missing · The Meta ad account. Until we see it we cannot tell you what your spend buys.

1 · Catch every lead → **2 · Work the lead** → **3 · Turn the ads up** → **4 · Compound it**

THE FLOW: HOW ONE LEAD TRAVELS

01 DEMAND

Meta Ads

Running, per you. We have not seen it.

NEED YOU

02 THE PAGES

Cloudflare Pages

Four SB 721 / SB 326 pages. Hidden from Google.

LIVE

03 CAPTURE

Cloudflare Workers

Saves the lead before it answers. Never drops one.

LIVE

04 YOUR DATABASE

Cloudflare D1

Every lead and building, with source and next due date.

LIVE

05 INSTANT ALERT

Cloudflare Email

Fires on arrival. Target: contact under 5 minutes.

LIVE

06 WORK THE LEAD

Lead board · Claude

See it, stage it, mark it won or lost.

BOARD LIVE

07 DO THE JOB

JobTread

Your system of record. We connect and leave it alone.

KEEP

08 THE BOOKS

QuickBooks Online

Profit and loss per brand, plus job costs.

MOVE 4

↻ **Two loops make it compound. Won-job feedback:** a closed job sends its value back to the ad platforms, so bidding chases revenue, not form fills. **The re-inspection clock:** every inspection records its next due date, so each building becomes a dated future job.

THE ORDER OF BUILD

MOVE	WHAT SHIPS
1·Catch Shipped Jul 24	Nothing gets lost. Your lead database is live. Every submission is saved with the ad or search that produced it, and alerts on arrival.
2·Workit Aug 3 - Aug 8	Every lead answered fast. Stages, automatic first reply, follow-up until a human connects, reminders. Plus the Katalyst audit and the move off it.
3·Ads up Aug 10 - Aug 15	Spend more, see what it bought. Pages on your own domain, open to Google. Ad source tracked to the won job. <u>Local Services Ads sit outside your signed scope.</u>
4·Compound Aug 17 - Sep 5	Growth without more ad spend. The scorecard, plus re-inspection outreach to past customers. <u>Map listings, reviews, SEO, QuickBooks and entity work sit outside your signed scope.</u>

A working plan, reviewed weekly, not a guarantee. Moves 3 and 4 also wait on Google's own approval times. What each Move needs from you is in the open list below.

THE APPS: WHAT EACH ONE IS FOR

APP	WHAT IT DOES	~ \$ / MONTH	STATUS
GETTING FOUND · GENERATES DEMAND			
Meta Ads YOURS	Facebook and Instagram ads. Running, per you. Your budget goes straight to Meta, never through us.	your budget	NEED YOU
Google Business Profile YOURS, TO CLAIM	Your listing on Maps. The widest gap: a competitor shows 613 reviews, you have close to none.	free	MOVE 4
Google Local Services YOURS, TO OPEN	The Google Guaranteed badge above normal results. Google verifies your license first.	per lead	MOVE 3
Google Search Console YOURS, TO OPEN	Which searches show your pages, and where you rank. Feeds the SEO engine.	free	MOVE 3
THE PAGES AND THE CATCHER · NO LEAD LOST			
GoDaddy YOURS	Where your domains are registered. The move is on us now. Which name is your call.	your current bill	MOVE 3 HAVE
Cloudflare Pages OURS → YOU	Hosts the four landing pages, tools and blog. Temporary address, hidden from Google.	free	LIVE
Cloudflare Workers OURS → YOU	Receives a form, saves it, fires the alert. Tested Jul 24. Never drops a lead.	~\$5 all Cloudflare	LIVE
Cloudflare D1 OURS → YOU	Your lead and property database. Every lead and building, with brand, source and next due date.	included	LIVE
Cloudflare Email OURS → YOU	Sends the instant lead alert. Reaches us and we relay, until you want it direct.	included	LIVE
WORKING THE LEAD · YOU HOLD IT			
Lead board ON YOUR DATABASE	Every lead, its source, its stage, won or lost with its value. The part of Katalyst you actually use.	included	LIVE
CRM automations ON YOUR DATABASE	Reminders, stage moves and the seven automations in your scope, plus reply and follow-up.	included	MOVE 2

APP	WHAT IT DOES	~ \$ / MONTH	STATUS
Claude BILLED AT COST	Reads an inquiry, answers it, qualifies it, drafts follow-ups. Cents per lead.	~\$5-100 usage	MOVE 2
Katalyst (GoHighLevel) YOUR VENDOR	What you pay for today. The audit is the first job in Move 2, then contacts and automations move off it. Do not cancel it before we have your emails out. Anything built inside it goes when the subscription does.	your current bill	MOVE 2 HAVE, UNREAD
Mailchimp YOURS	New to this map. Email marketing. May hold the past-customer list that Move 4 outreach runs on.	your current bill	MOVE 4 HAVE, UNREAD

DOING THE WORK AND GETTING PAID · WHERE MONEY LANDS

JobTread YOURS	Estimating, job costing, scheduling, purchase orders, retainage. Your system of record, and it stays.	your current bill	KEEP HAVE, UNREAD
QuickBooks Online Plus YOURS, TO SET UP	Per-brand profit and loss. Syncs both ways with JobTread. The entity question comes first.	~\$115-140	MOVE 4
Stripe YOURS, TO OPEN	Card and bank payments, per brand, so advisory and repair invoices never share a merchant record.	per transaction	MOVE 4
Business phone line YOURS, TO OPEN	A number per brand. Caller ID is right, and it ports out with you.	~\$23 / brand	MOVE 4

MEASURING IT · READS ACROSS ALL

Scorecard ON YOUR DATABASE	Leads in, speed of answer, cost per booked appointment, won repair revenue.	included	MOVE 4
Won-job feedback META & GOOGLE	Sends closed jobs and their value back to the ad platforms. Katalyst cannot do this.	free	MOVE 3
SEO engine OURS, RUN FOR YOU	Measures pages weekly, proposes moves, reverts what hurt. It never publishes.	included	MOVE 4

Software is opened in your name and billed to you at cost. We never mark it up. Cloudflare and Claude together run \$10 to \$110 a month on volume. QuickBooks rises Aug 1. Prices as of 2026-07-23.

WHAT IS OPEN · ONE LIST, BOTH SIDES

ITEM	OWNER	BY	STATUS
WITH YOU · THESE ARE THE ONES THAT UNBLOCK US			
Your contractor license number. Required on every repair ad and page (B&P \$7027.1), and Google verifies it before Local Services Ads will run. The number on your sites is the wrong format, so we repeat it nowhere until you confirm. Our four pages carry the same gap. How: text or email us the number exactly as it reads on your CSLB record. Takes: a minute.	YOU	Before Move 3	NEED YOU
Meta ad account access. The last account we are missing, and the reason we cannot tell you what your ad spend is buying. How: in Meta Business Settings, add us as a Partner with view access to the ad account. Ask us for the ID to paste. Takes: about two minutes, and you can revoke it in one click.	YOU	Before Move 3	NEED YOU

ITEM	OWNER	BY	STATUS
Which domain the pages live on. We have GoDaddy, so the move is on us. We need the name. On your own domain the traffic is yours. How: tell us which one to use, an existing name or a new one we register inside your account. Takes: a decision, not a task.	YOU	Before Move 3	NEED YOU
One business, or an entity per brand? Blocks QuickBooks, so it comes before Move 4, and it decides one payment account or several. How: one conversation with your accountant and attorney, then tell us the answer. We will lay out both options first if that helps. We file nothing. Takes: one call.	YOU	Before Move 4	NEED YOU
Your past-customer and building lists. Starts the review drive and re-inspection outreach now, instead of waiting years for the clock to fill. How: any format, a spreadsheet, an export out of JobTread or Mailchimp, even a folder of old invoices. Do not tidy it first, we clean it. Takes: however long the export takes.	YOU	Before Move 4	NEED YOU
The "3 impartial estimates" line on your Balcony & Deck site. Decided Jul 24 and still live there. That site is not one of ours to edit. How: your team removes the line, or gives us WordPress access and we do it. Takes: a five-minute text edit.	YOU	Open	NEED YOU
WITH US · WHAT WE ARE DOING NEXT			
Get your ~10 Balcony & Deck funnel emails out of Katalyst. You told us about them on Jul 25. They are finished copy you already paid for, and they live inside the system we are moving you off, so they come out first. We copy them, we change nothing.	US	Move 2, first	NEXT UP
Read the rest of your Katalyst account. The read-only audit: contacts, live automations, funnels. It decides what the migration costs.	US	Move 2	NEXT UP
Review your Mailchimp account. Runs with the Katalyst audit. May hold the past-customer list Move 4 needs.	US	Move 2	NEXT UP
Build the CRM automations. Stages, instant reply, follow-up, reminders. The seven automations in your scope.	US	Move 2	IN BUILD
Send the lead alert straight to you. It reaches us and we relay today. Ends the relay once our sending domain is onboarded and you say go.	US	Move 2	IN BUILD
Move the database and workers into an account in your name. They run in ours because they were built first. This is the handover.	US	Move 3	QUEUED
Connect JobTread for the won-job loop. Needs the API connection, which is a separate grant from the login. Confirming which we hold.	US	Move 3	QUEUED

This list is the whole to-do list. Nothing lives in a separate tool, and nothing is tracked anywhere you cannot see. If it is not on this board, we are not doing it.

HOW WE WORK

Weekly 30-minute session. Shipped, needs-you, numbers, next, risks.

This board is the shared board. Updated every time anything changes, with every change written down.

Every change is reviewable before it goes live.

Everything documented. Every account and automation, and how to run it.

Nothing ships without your yes. Nothing sent, published or paid.

You own it. Every account in your name. What sits in ours is marked above.

BILLING

\$1,800 a month, month to month. \$900 received 2026-07-23, **\$900 due 2026-08-06.** Monthly invoicing begins **2026-08-23.** Labor at \$100 an hour, software at cost, no build fee. Scope covers the CRM, automations, funnel, reactivation, scorecard and docs. **Dotted items** sit outside it.

THE HOUSE, KEPT HONEST

"Impartial estimates": decided Jul 24. Your call, and the right one. It comes off Balcony & Deck Advisors and LA Construction Consultants, staying only with Soft Story Advisors, whose bids go to real outside contractors. Offering it from a brand that also owns the repair is real exposure (FTC Act §5, CA B&P §§17200 and 17500). The line is still live on your own Balcony & Deck site, which is not ours to edit.

The review drive has a federal rule attached. Since 2024 the FTC prohibits asking only your happy customers (16 CFR Part 465). The ask goes to every completed job, unfiltered. We automate the timing, never who receives it.

EVERY VERSION · THE PAPER TRAIL

v7	2026-07-25	Current. Every item we need from you now says how to hand it over and how long it takes.	VIEW	PDF
v6	2026-07-25	Your ~10 Balcony & Deck funnel emails come out of Katalyst first, before anything else in the audit.	VIEW	PDF
v5	2026-07-25	Renamed the LACC / BDA Board. One open list covering both sides replaces the separate asks.	VIEW	PDF
v4	2026-07-25	Access shown per app as a chip. Mailchimp added. Cut back to something you can scan.	VIEW	PDF
v3	2026-07-25	Access update, before the trim.	VIEW	PDF
v2	2026-07-24	Every app named, the build order dated, the capture gap called out.	VIEW	PDF

v1	2026-07-23	First map. Systems grouped A to D, objectives and open decisions.	VIEW	PDF
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PaperSt.AI

LACC / BDA Board · **v7** · updated 2026-07-25 · latest always at [lacc-system-map.pages.dev](#) · joseph@paperst.ai
Built on the signed Scope of Work (2026-07-22).