

STATEMENT OF WORK

Value Academy Build

Six integrated systems that turn the Value Academy pillar from a positioning concept into a working membership product.

PROJECT B OF TWO · BUILD SECOND

PREPARED FOR

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PREPARED BY

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DATE

May 2026

ENGAGEMENT

Founding Client Rate

01 / 11 THE ENGAGEMENT

Six integrated systems. One named sub-brand.

This Statement of Work covers **Project B — Value Academy Build**: the six interlocking systems that turn the Value Academy pillar into a working membership product. With the new website live from Project A, this project builds the engine behind it — a voice-trained content engine, a smart application pipeline, a Stripe-driven membership, social automation, community-call infrastructure, and the foundational assessment.

Project B follows Project A and bills independently. It is scoped as a **6-week build** plus an ongoing retainer for content operations. This document commits only Project B.



The System is the spine — Value Academy transmits it

Savvy is organized around one proprietary IP, the System of Value Creation, expressed through three pillars: Media, Value Academy, and Embedded Executives. Value Academy is the only **named** sub-brand. Project B builds it as a product, while Embedded Executives stays the firm's load-bearing revenue engine throughout. This is a shift of focus, not a replacement.

WHY THE VALUE ACADEMY HAS TO BE A PRODUCT, NOT A PAGE

THE SHIFT

A page describes. A product runs.

Application gating, recurring billing, content automation, community calls, a trained AI voice agent. A website can host marketing for these. It cannot operate them. Project B is the operating engine; the website from Project A is the storefront.

THE ENGINE

The content already exists.

Jill's book, podcast appearances, and 50+ recorded owner conversations are one of the deepest brand-voice libraries we have worked with. Project B turns that library into a year of content that publishes itself, in her voice.

THE FUNNEL

One front door, smart routing.

A single firm-level application replaces disconnected funnels, routing each owner to the Academy, to Embedded Executives, or to staying in the audience. The Academy becomes the top of the funnel for the whole firm.

THE MISSION

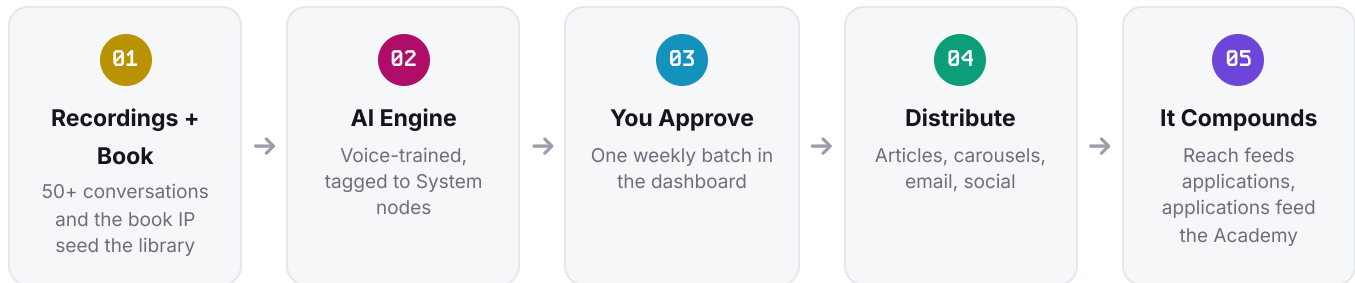
Built on one question.

"What would it look like if you didn't have to run your business day-to-day?" Every system serves owner-operators who want to see, and close, their freedom gaps — whether they sell, step back, or double down.

02 / 11 THE CONTENT FLYWHEEL

Your day job is the content engine.

The entire system runs on one insight: Jill does not need to "create content." She keeps doing client work and having ideas — the engine turns both into a content calendar that never goes dark.



THE TWO INPUTS THAT KEEP IT SPINNING

INPUT 01

Ongoing client calls

Every conversation surfaces new themes, pain points, frameworks, and "how I went from trapped to free" stories. These feed the content calendar without Jill writing a word.

INPUT 02

Jill's real-time ideas

A thought after a call, a trend, something heard in a meeting. She drops it in — voice note, Slack, a quick text — and the system turns it into a finished article and carousel set, scheduled to publish.

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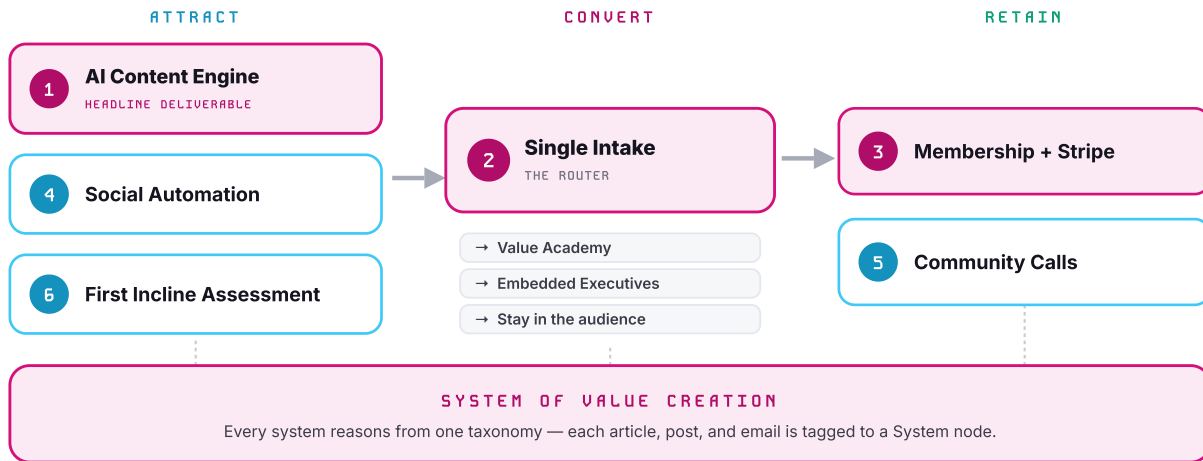
The retainer pitch that sells itself

When Jill is active, the engine accelerates. When she is quiet, it fills gaps from the recording library and evergreen frameworks. Her weekly commitment is one batch approval. The story she tells a referral: "I didn't hire a marketing team. I kept doing my job, and the content showed up."

03 / 11 THE SIX SYSTEMS

How the six systems connect.

These are not six separate tools. They are one funnel — attract, convert, retain — with the System of Value Creation as the taxonomy running underneath all of it. The next three pages spec each system in full.



One funnel, not six tools. Demand is generated, routed by fit, and retained — all tagged to the same proprietary IP.

<p>ATTRACT</p> <p>Generate demand</p> <p>Voice-trained content, social distribution, and the viral assessment bring qualified owners in.</p>	<p>CONVERT</p> <p>Route by fit</p> <p>One application sorts every owner to the Academy, Embedded Executives, or the audience.</p>	<p>RETAIN</p> <p>Members stay</p> <p>Stripe-gated membership and bi-weekly community calls keep members engaged and paying.</p>
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04 / 11 THE SIX SYSTEMS · I

The headline deliverable, and the front door.

System 01 AI Content Engine

HEADLINE DELIVERABLE

Jill's book, podcast appearances, and 50+ client recordings become a year of content — automatically, in her voice, tagged to System nodes. The engine drafts articles, generates image carousels, and writes email sequences. **No other vendor in her world can do this.**

- Brand-voice training on the book, podcasts, and 50+ recordings
- AI agent configured for article drafts, carousel generation, and email sequences
- **10 seed articles + 20 carousel sets** generated at launch — two weeks of content ready on day one
- 4 reusable branded carousel templates (tips, frameworks, case studies, quotes)
- Marketing dashboard — a rolling 2-week content buffer, approved in weekly batches
- Quick-entry idea pipeline: voice note, Slack, or text becomes a finished, scheduled article + carousel
- Draft → review → approve workflow, 48-hour review window before publish
- Outputs reason from the System of Value Creation as canonical taxonomy

System 02 Single Intake, Smart Routing

One application at the firm level. Conditional logic routes each owner to the Value Academy, to Embedded Executives, or to staying in the audience. It replaces disconnected dual funnels with one intentional front door.

- Application form lives off-page — keeps the site clean, makes qualification feel serious
- Conditional logic on business size, pain points, and readiness level
- Commitment-based qualification filter screens for fit
- Pillar routing: Academy, Embedded Executives, or audience
- Application-to-close pipeline: auto-notification to Jill, applicant follow-up sequence, qualifying-call calendar link
- Integrates with a CRM or tracked spreadsheet via Zapier or Make
- Application data feeds the AI-powered onboarding sequence

05 / 11 THE SIX SYSTEMS · II

The membership engine.

System 03 Membership + Stripe

Recurring billing, a member portal, and access gated by payment state. The moment someone is accepted and joins, an onboarding sequence runs and the guided "first incline" path begins.

- Stripe integration for recurring billing after acceptance
- Member portal with content access controls
- Access gated by payment status
- Article-level commenting as the lightweight interaction layer — no standalone forum at launch
- Personalized welcome sequence on join
- Engagement emails 2–3× per week — calibrated for busy owners, not daily noise
- Content hosting platform (Skool, Teachable, or equivalent) confirmed at kickoff

System 04 Social Automation

LinkedIn plus one additional platform. Posts auto-queue from approved Content Engine output and carry System-node tags, so analytics show which ideas convert. Jill approves once; distribution handles itself.

- LinkedIn + 1 platform — TikTok, Instagram, or Facebook (Jill's choice)
- Carousel-first format, optimized for LinkedIn and Instagram swipe behavior
- Scheduling and distribution automation pulling from the marketing dashboard
- System-node tagging so post performance maps back to conversion
- Posts auto-queue from approved content — no second approval step



Email automation runs across these systems

Beyond onboarding, the engine produces a nurture sequence for applicants who don't convert, a re-engagement drip for dormant members, and a weekly content digest for active members. Cadence stays at 2–3× per week.

06 / 11 THE SIX SYSTEMS · III

Community, and the top of the funnel.

System 05 Community Call Infrastructure

Bi-weekly structured calls — a teaching session and a hot-seat case review — are the retention engine. We set up the scheduling, reminders, and replay hosting; Jill and the faculty run the room.

- Bi-weekly structured call system: teaching session + hot-seat / case review
- Minimum 4 calls per month — the validated retention cadence
- Calendar integration and automated reminders
- Replay hosting on the content platform
- M–F office-hours booking widget (technical setup; Jill manages faculty availability)
- Faculty / advisor scheduling page

System 06 First Incline Assessment

A scored, visual, shareable assessment that shows owners where their freedom gaps live. It is the firm-level entry point into the System and the viral top-of-funnel asset. **Ships post-launch** as a deliberate "second launch moment."

- 90-minute working session with Jill to define the framework — questions, scoring logic, freedom-gap categories, output
- Scored digital assessment with a visual results output
- Designed as a standalone shareable asset — owners screenshot and share their results
- Results route to whichever pillar fits the owner
- Framework due within 30 days of go-live; assessment ships within 2 weeks of the finalized framework
- Re-engages the audience after the initial launch



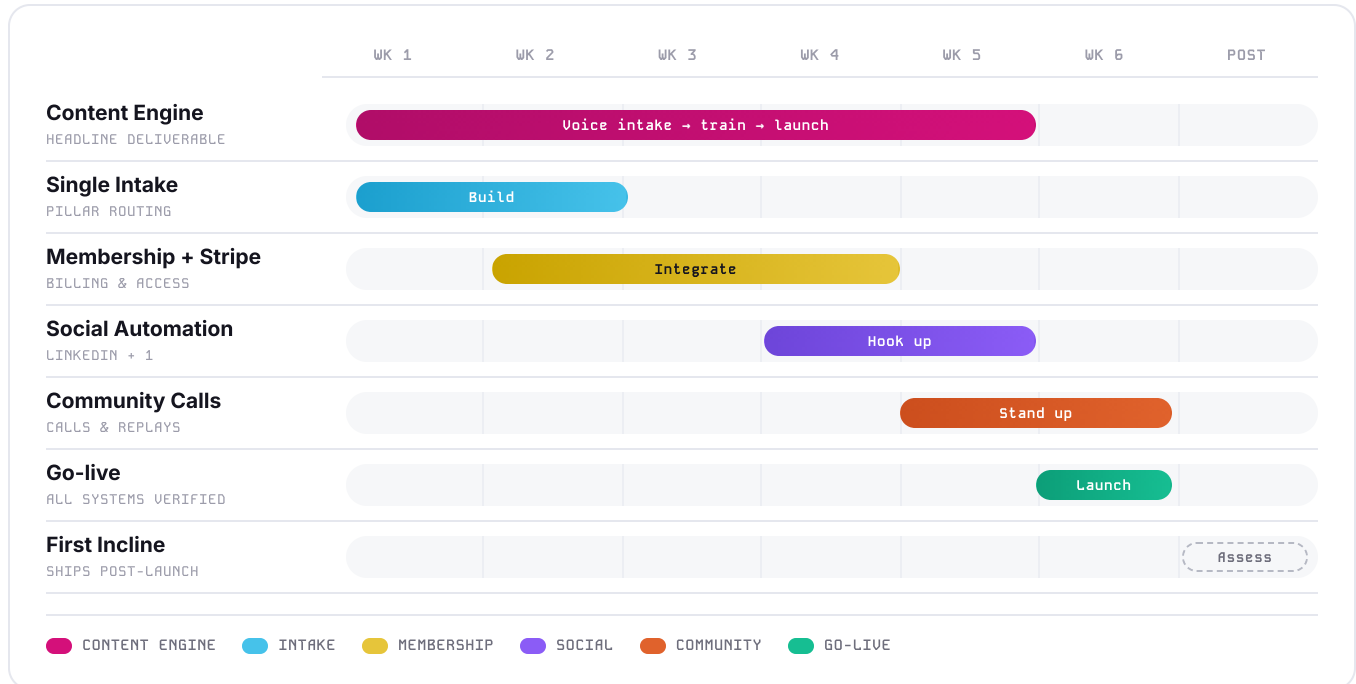
One scheduling note on the assessment

The assessment is sequenced post-launch so it never blocks the critical path. If the finalized framework arrives more than 30 days after go-live, the assessment build moves to additional scope — this keeps the 6-week timeline honest for everyone.

07 / 11 TIMELINE & INVOLVEMENT

6 weeks. About an hour a week from you.

The build is deliberately staggered so the six systems never collide. Week 1 is heavy — voice intake for the content engine — then the project runs on roughly one hour a week of approvals.



Your involvement: front-loaded, then light

Week 1 needs real attention — the voice intake for the content engine sets the quality of everything downstream. After that, it is roughly one hour a week for batch approvals. The 90-minute assessment working session is scheduled whenever it suits you between Weeks 2 and 4. Once live, your standing commitment is a single weekly batch approval in the dashboard.

08 / 11 INVESTMENT

The build, and how it's paid.

One build price for all six systems, then an ongoing retainer for content operations. Pricing reflects Savvy's role as the founding client on the new productized stack.

PROJECT B · BUILD

\$4,850

Six integrated systems · 6-week build

+ \$725/mo

Content operations retainer
Detailed on the next page

WHAT THE BUILD INCLUDES

- AI content engine, voice-trained on the book and recordings
- Marketing dashboard with a rolling 2-week buffer
- 10 seed articles + 20 carousel sets at launch
- Single intake with pillar routing
- Membership, Stripe, and access control
- Social automation across 2 platforms
- Community call infrastructure
- Email automation — nurture, re-engage, digest
- First Incline assessment (ships post-launch)

PAYMENT SCHEDULE

At kickoff 60% · build begins	\$2,910
At launch 40% · all systems live & verified	\$1,940
Build total	\$4,850

The \$725/mo retainer begins on the 1st of the month after launch, billed monthly and due within 15 days.

\$

A founding-client rate, named on purpose

A six-system build of this depth — voice-trained AI, membership and billing, automation, community infrastructure — is genuinely **\$12,000–\$20,000** of work at agency rates. The founding rate reflects Savvy proving the productized stack as the first client. The labor is priced honestly; the discount is a deliberate, visible founding-client allowance on the positioning and strategy layer, not a quiet undercharge.

09 / 11 THE ONGOING RETAINER

\$725/mo. The engine, kept running.

The retainer is what keeps the content flywheel spinning and the membership platform healthy. It begins the month after launch, with a 6-month initial term.

WHAT THE RETAINER COVERS

Content operations

- Daily content generation maintaining the rolling 2-week buffer
- Client calls and ad-hoc ideas fed into the pipeline alongside engine output
- Weekly batch queued for your approval

Engine & distribution

- AI engine monitoring and brand-voice tuning
- Social scheduling and distribution across both platforms
- Email automation management and deliverability

Platform & community

- Membership platform and Stripe monitoring
- Community call support — reminders, replay hosting, scheduling

Reporting & support

- One-page monthly metrics report
- Priority support by email or Slack — 24-hour response, business days
- Quarterly 30-minute strategy check-in



The website is not double-billed

Website hosting, security, and maintenance are covered under Project A's separate \$175/mo fee. This \$725/mo retainer is content and platform operations only — there is no overlap between the two monthlies.

TERM & CANCELLATION

Billed monthly on the 1st, due within 15 days. A 6-month initial term, then month-to-month with 30 days' written notice to cancel.

TRIGGERS ADDITIONAL SCOPE

- Each additional social platform — \$475 one-time setup
- Community forum buildout — \$1,250 one-time
- New feature builds or major redesigns — scoped and quoted separately

10 / 11 THE ROADMAP

Phase 1 is the foundation. Here's where it goes.

Projects A and B together are Phase 1 — the new front door and the working engine. The architecture is built to grow. The phases below are the vision, each scoped separately when the data supports it.

PHASE 2 — MONTH 3 AND BEYOND

Scale: agentic expansion & member depth

Members are engaged; now we deepen and automate. Agentic marketing expands beyond content into outreach and follow-up. A member forum surfaces when comment volume proves demand. Learning paths branch based on where each owner is in the freedom journey.

Agentic outreach

Member forum

Learning-path branching

Additional platforms

Advanced analytics

Paid media integration

Unlocks when Phase 1 data supports it · scoped separately

PHASE 3 — MONTH 6 AND BEYOND

Multiply: the movement

A physical magazine with real member case studies — owners who went from trapped to free. An annual in-person gathering. A full custom LMS. Licensing the System of Value Creation framework to other firms. This is where the IP becomes a movement, not just a membership.

Physical magazine

Annual event

Custom LMS

Framework licensing

Video production

Unlocks when community scale and revenue justify it · scoped separately

NOT INCLUDED IN PROJECT B

- The website build and migration — that is Project A
- Physical magazine design and print production
- Video or sizzle-reel production (provided by Jill, we integrate)
- Additional social platforms beyond the initial two
- Standalone community forum (Phase 2 trigger)
- Custom LMS — Phase 1 uses a Skool-style platform
- Paid advertising setup or management
- Annual event planning or logistics

11 / 11 CLIENT INPUTS & ASSUMPTIONS

What we need from you.

The build moves fast because the inputs are staggered. Here is everything we need, in the order it unblocks the work — so nothing stalls the 6-week timeline.

INPUTS, IN PRIORITY ORDER

WHEN	WHAT	WHY IT'S FIRST
Week 1	50+ client recordings (or a representative subset) + brand assets — logo, palette, fonts	Blocks the content engine — voice training cannot start without them
Week 1-2	Application questions and qualification criteria (we draft, you approve) + 3-5 client testimonials with permission to use names	Blocks the single intake and the membership credibility layer
Week 2	4-5 named faculty / advisors with headshots and bios	Blocks the community and credibility sections
Week 2-4	The 90-minute assessment working session with Reu	Blocks the First Incline assessment build
At kickoff	Stripe account (or willingness to set one up) + content hosting platform decision	Blocks membership billing and content hosting



Plus roughly one hour a week

Beyond the inputs above, the build needs about an hour a week of your time for feedback and approvals. The assessment framework is finalized by you within 30 days of go-live.

ASSUMPTIONS

- Existing recordings and content exist for voice training — we are not building a brand voice from scratch
- Value Academy pricing and tier structure are defined by Jill before the membership build begins
- V1 onboarding is a single guided path; learning-path branching is deferred to Month 3+
- The content hosting platform is confirmed at kickoff
- Project B follows Project A; the new website is the home for the Academy pillar page
- The assessment framework is finalized within 30 days of go-live, or it moves to additional scope

TERMS & ACCEPTANCE

The fine print, kept honest.



Satisfaction Guarantee

If the Project B deliverables don't meet the agreed scope, we revise at no cost within 14 days of launch. We don't ship work we wouldn't put our name on.

INTELLECTUAL PROPERTY & SESSION RECORDING

Strategic frameworks, system architectures, and process designs created by Local Nerds remain Local Nerds IP. Jill receives a perpetual, non-exclusive license to use all deliverables for Savvy and Value Academy operations.

Jill retains full ownership of her content, brand voice, client recordings, the **Unseen Forces** IP, the System of Value Creation, the First Incline assessment framework, and all business-specific materials.

All working sessions — kickoff, the 90-minute assessment session, and strategy check-ins — are recorded so ideas and decisions are captured accurately, and are shared with both parties.

ENGAGEMENT SUMMARY

PROJECT	BUILD	RETAINER
Value Academy Build (B)	\$4,850 · 6 weeks	\$725/mo · 6-mo term

This Statement of Work covers the initial Project B engagement. As the Value Academy grows, additional work is scoped collaboratively — no surprises, no scope creep. Project B follows the completion of Project A (Website Transfer), covered under its own Statement of Work.

Let's build the engine.

To move forward, reply to confirm and we'll send a one-page agreement and the kickoff schedule. Project B begins once the website transfer is live — both projects launched before the end of summer.

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