On-Demand Solution Planning Guide

GrowthClick

Powering On-Demand Solutions

"From an app perspective, what needs to be done to bring your idea to market successfully?"

That's the real question. For most on-demand projects, it's better, faster, and cheaper to start with an existing platform (and tailor it to meet any special requirements) than to build a new system from scratch.

There are three steps to planning an app solution using our platform:

1. **Review existing features** and requirements addressed by the GrowthClick platform.
2. **Clarify any new features that may be needed for your requirements** based on your business model, industry, and launch plans.
3. **Plan project delivery** based on priority features, budget, and timelines.

Let's get started with a summary of how the existing platform works.

Overview

Our on-demand platform creates a marketplace experience where customers can easily request, hire, and work with service providers from the convenience of their smartphone or any web browser.

Customers may send a service request that triggers an instant alert to all matching providers (e.g. based on skills, distance, or schedule), and providers can respond to confirm their availability and pricing. Customers can also browse and hand-pick a provider based on their profile, and send them a question or hiring request.

With 1 on 1 messaging and ecommerce features, the platform encourages direct coordination between customers and providers while giving the platform owner a lot of control, oversight, and pricing flexibility.

Each major area of functionality is described in detail in the next section. Most areas also have a video demo published at http://www.growthclick.com/videos.

- User Roles & Authentication
- Customer Experience: Request & Browse
- Provider Experience: Respond & Propose
- Smart Alerts & Messaging
- Pricing & Time Tracking
- Ecommerce Payments
- Provider Onboarding & Verification
- Management & Admin Tools

Multiple Platforms: Web, iPhone, Android

The On-Demand App may be packaged and published in one or many platforms including:

1. Web experience for mobile and desktop users at https://yourdomain.com
2. iPhone (iOS) App for download through the Apple App Store
3. Android App for download through the Google Play Store

The downloadable mobile apps include push alerts, camera features, faster GPS detection, and a slightly faster experience once downloaded. The web app version uses SMS alerts (in place of push alerts) and may differ slightly based on the user's web browser (e.g. the latest version of Chrome, Safari, Firefox, or Internet Explorer/Edge).

The platform includes a server application and central database. Though you retain ownership over your brand and data, our standard solution includes hosting, support, and maintenance of the server and user-facing applications.

Branding & Terminology

During solution delivery, we brand the platform with your name, logo, app icon, color scheme, preferred fonts, and background images. The user interface is flexible so we can easily change any text to use your preferred terms, (e.g. "caregiver" or "instructor" instead of service provider).

User Roles & Authentication

Users may have one of the following roles:

1. **Customer Role:** These users create requests for service services and invite providers on the platform to respond to confirm their availability and pricing, or to clarify any questions using two-way messaging.

2. **Provider Role:** After becoming aware of a request, a provider user can respond to the request with either a) confirmation of their availability and a proposed price (flat fee or hourly rate) for the request or b) any questions that the provider may have before they can confirm availability and pricing.

3. **Admin Role:** Administrative users require the ability to report on provider activities, manage users (customers and providers), edit or disable requests, and export transactions for accounting purposes.

User Registration, Login, and Settings

The solution will be configured to include one or both of the following authentication systems:

1. **Email-Based Username & Password:** A username and password approach can be used either in combination with Facebook or as the only way of logging in. This option includes a feature for users to reset their passwords through email. The login system includes the option to force strong passwords, 2 factor authentication with SMS alerts, and brute force protection (in case of repeated failed login attempts). Passwords are stored with strong encryption.

2. **Facebook Sign-in:** The application may be configured for users to register and login using their Facebook account. This approach has been used in other popular applications as a way of streamlining registration and photo capture, increasing trust between users, and reducing the likelihood of duplicate accounts. Integrating with Facebook may also make it easier to encourage users to spread the word about the app to their friends.

The app also includes the following:

1. The app can be configured so the user can launch the app on their smartphone without having to re-enter their login details every time.

2. If permitted by the user, the app will retrieve the user's details from Facebook, including their profile photo. Alternatively, the user can take a photo with their smartphone or upload a file.

3. Each user will have a profile with their first name, last name, email address, and mobile phone. They may edit their profile during the sign up process and after completing their initial setup.

Customer Experience: Request & Browse

In most platforms, the process starts when the customer makes a request through one or both methods:

Method 1: Create a Request and Notify Multiple Providers

1. Customers can create requests for a specific service type (e.g. based on skill or package) and enter details related to that type of request, including text-based fields, date/time fields, location fields, and photos (capture new photo or upload existing photos). The system is flexible on what details are captured for each request.

2. In most cases, the request includes the service type, a description, and the customer's location so that nearby providers may be notified.

3. After the user creates a request, a "Thank you" screen will be presented to the user. Optionally, the app can be configured to encourage the user to share their request with others over Facebook, email, and Twitter.

4. The system may be configured to let multiple providers respond to a request, or to limit the number of providers who are notified or can respond to the customer. Alternatively, the system may be set up so that the first provider to respond becomes the selected provider.

5. After creating a network request, the system can be configured to have a set of social media buttons for the customer to "Share over email, Facebook, or Twitter", including a default message and a link to the specific request, such as https://app.yourdomain.com/request/1234.

Method 2: Search Directory and Choose a Preferred Provider

1. Customers can choose a service type (or a sub-type) and search a database of local service providers who have marked themselves to be "online and ready for new jobs" through an interactive map (with each provider as an icon) or through a list screen with providers including their distance from the customer user.

2. Customers can view and book providers by entering a place name (e.g. city) and the app will list providers based on their proximity to the target location.

3. Each service provider can easily mark themselves as "generally available and ready for new jobs" or unlisted. Unlisted users will not appear in the map or listing view of available providers.

4. The customer can view the profile of each service provider, including their name, photo, description, supporting documents (if appropriate), customer reviews, star rating (1 to 5 stars), and pricing (e.g. hourly rate or fixed fee).

5. The customer can 1) send a hiring request (at their published pricing / hourly rate) or 2) send a general inquiry to the provider.

6. The provider will be notified by instant message (SMS or push alert) so they can view the request's details. Through the application, the provider can respond to confirm their availability at the proposed rated or use two-way messaging to confirm job details.

7. Once the provider has confirmed their availability, the customer will be notified and prompted to "Fund" the job with their credit card details. The credit card may be 1) verified as a valid card, 2) authorized for a specific amount (to confirm room on the card), or 3) charged for a set amount, depending on business rules and requirements.

8. Alternatively, customers may be marked for "Manual Billing", in which case they can complete their service requests without entering a credit card, and they can be invoiced later.

9. The provider will be notified that the job has been approved and is ready to start.

10. The rest of the payment and billing process will be the same as described below in "Pricing & Time Tracking".

The web-based solution can be setup to allow public website visitors (e.g. not yet registered) to browse providers and start the request process. Anonymous users are prompted to either register or login before creating a hiring request or sending a message.

Request Types for Matching Clients with Providers

When making a request, the customer may choose a request type, which is an activity category (e.g. Home Cleaning, Carpet Cleaning, Tech Support) that describes the customer's request. The request type is used to filter the list of matching providers and send alerts to the relevant providers with the appropriate skills. The platform supports top-level request types and sub-types (e.g. a Cleaning request type could include sub-types of Home Cleaning, Carpet Cleaning, and Laundry).

If necessary to provide a simple user interface, the system can be configured to have a single default request type.

Request Criteria

In addition to request types, the system can be configured to let clients make requests with one or more criteria to filter and find qualified providers. The system can be configured so that when making a request, the client can:

1. Specify one or a combination of criteria (e.g. specialty skills, professional certification(s), experience with   specific systems or brands)
2. The request criteria items can be set to be global for all types of requests or they can be configured to apply to a single type of request
3. Once the request criteria items have been configured, then providers can enter their qualifications (in relation to the criteria) as part of the provider onboarding and setup experience.

Provider Experience: Respond & Propose

Related Demo: http://www.growthclick.com/demo-provider/

Though flexible based on requirements, providers can typically respond to a customer's request with one of three options:

1. **Accept the Request** if the provider is available and ready to help the customer. This may include the option to submit special pricing based on the customer's request, or the provider's standard pricing can be attached.
2. **Decline the Request** if the customer specifically requested the provider and they are unavailable.
3. **Send a Message** to ask the customer a question and clarify what needs to be done.

The platform can be set up with different workflows or response options for different types of services.

Related Demo: http://www.growthclick.com/demo-messaging/

The platform includes broadcast alerts and 1-on-1 messaging features. Web-based users are notified through SMS messages and/or email messages, and mobile app users can be notified through push alerts.

Smart Alerts

Providers can choose how they receive notifications of new requests including:

1. Providers can easily enable or disable SMS or push alerts for new requests.

2. Providers can choose which types of requests (e.g. based on service type) to be notified of with alerts.

3. Providers can set a preferred distance threshold for being notified of new requests. For example, a provider could specify that they only want to be notified of opportunities within 15 miles or 25 km of their current location.

4. All notifications will be delivered using SMS alerts or push alerts. The user will be prompted to enable alerts when first setting up their account.

Messaging

The platform includes 1-on-1 texting style messaging capabilities between customers and providers. If the user is away from the app, they will be notified of any new messages. The user can set their preferred communication methods to receive alerts of new requests and messages through SMS, email, and/or push alerts (if using a native mobile app).

Optional: The user will not be permitted to send a message if it contains a phone # or email address. When the user writes a message with a phone # or email address, the app will prompt the user to avoid sharing personal contact information and to edit their message and try again.

All users can configure daily "Do Not Disturb" hours for message alerts. During "Do Not Disturb" hours, any new messages will accumulate and will be released to the user when Do Not Disturb hours are over. New users can also be automatically configured with "Do Not Disturb" hours (e.g. 11 pm to 8 am) during registration.

Scheduling & Start Time Alerts

1. Generally the provider is responsible for managing their own schedule. The system will assume that every provider is available all the time on an on-demand model, and that providers who are unavailable will simply not respond to requests for that time period.

2. In most cases the provider and customer will agree to start and finish times through texting.

3. When arranging a request, the instructor and the customer will have the option to set or change the start time of the request. When setting or changing the start time, it will trigger an alert in the messaging section for tracking purposes, and both parties will get an alert reminder 2 hours

before the session start time. The alert will be sent by push alert or SMS depending on each user's settings.

4. After setting a start time, both users have the option to save the appointment by downloading a calendar appointment to their phone's calendar, computer, or web-based calendar.

Pricing & Time Tracking

Related Demo: http://www.growthclick.com/demo-tracking/

1. Providers can set their own hourly rate or flat fee price and the platform will add a "Credit Card & Network Fee" that will be a percentage (e.g. 25%) of the provider's price. Exact service fee amounts will be determined during implementation and can be changed at any time.

2. When responding to a request, the provider can confirm their availability and provide pricing on an hourly basis or flat fee model.

3. The default approach is for all customer payments to be completed by either Visa or MasterCard so that payments can be tracked and the platform's fees can be added. The platform also has an option for manual billing and customer invoicing by email.

4. When accepting a provider's proposal, the customer will be presented with the proposed pricing (rate-based or flat fee) and for their Visa or MasterCard payment details. The customer will be prompted to agree to:

    a. Pay for the actual # of hours spent by the provider at their hourly rate. Optionally, the customer's card can be pre-authorized for a specific amount to confirm that there is space on the card.

    b. Pay the flat fee amount estimated by the provider. This will be processed immediately as a direct purchase.

5. Time-Based Pricing:

    a. In case of a time-based proposal, once the customer accepts the provider's proposal, the provider will do their work, track the # of hours that they completed (including fractional hours if applicable), and submit their timesheet for customer billing.

    b. The submitted time sheet may be saved as a Draft Order for manager review or may be billed to the customer directly.

    c. Once a customer has approved a provider and their hourly rate, then the same provider may submit additional hours to be charged to the customer directly, without requiring additional customer approval or permission for followup hours. In this setup, the customer may mark a request as "Complete" to stop any further billing.

    d. When the customer is charged for a timesheet with ecommerce payment, they will be emailed an invoice including the timesheet line items.

    e. Flat fee items may be added or edited when approving an invoice and charging a customer.

6. The platform may be configured to include regional sales tax if applicable.

7. For time sheets and invoicing, the system will have a global setting (on or off) to control whether providers can directly invoice and charge their customers, or whether any submitted invoices require review and charging by the Administrator / Marketplace Manager.

8. The time tracking and invoicing feature will allow providers to enter time tracking records including a description and rate, instead of just the # of hours. The user experience will also let providers add flat fee items (e.g. "1 physiotherapy session (45 min)").

9. We will clarify the requirement for sales tax during implementation. If required, it will be calculated based on the province/state of the provider.

Ecommerce Payments

Related Demo: http://www.growthclick.com/demo-payments/

1. The customer's credit card details are stored in a secure electronic vault hosted by Stripe, a large payment processor that includes special features for marketplace applications. For security purposes, the card details will not be stored on any GrowthClick servers and the providers will not have access to the customer's card details.

2. Stripe Connect is a set marketplace features for on-demand apps per https://stripe.com/connect.

3. Using Stripe Connect, the platform can charge the customer and designate a specific amount to be automatically transferred to the provider user when the customer's payment is complete.

4. Stripe Connect requires the provider user to have a Stripe account. The provider user can withdraw funds to their preferred bank account using Stripe Connect. If a manual approach is better, our platform can also be configured without Stripe Connect.

5. Invoice charges will include the provider's Stripe account ID, which will be linked to the Marketplace Platform's Stripe account, so the provider can receive their portion of each transaction automatically when the funds are settled.

6. The customer will have the option to "Mark Request as Complete", which will notify the provider that the request is ready for completion and that they have 24 hours to submit and charge their last timesheet / invoice.

7. Customers can review providers once they've started working together, including a star rating and written feedback. Customer reviews will show up as part of the provider's profile. Optionally, the platform may be configured for providers to review customers.

User Onboarding & Verification

Related Demo: www.growthclick.com/demo-onboarding/

1. When a new provider registers, they will be prompted to choose their service types (e.g. based on skills or package), complete their professional profile, accept terms of service, set their pricing, and upload any supporting documents as needed.

2. By default, new providers require manual review and approval (through the admin tool) before they appear to end-users.

3. The platform includes a Setting section through which providers may manage their public profile, upload and edit a photo, and set their location for map purposes.

4. The provider's profile screen and information can be setup with additional fields as needed.

Management & Admin Tools

When logging in, Administrative users have the following options:

1. **Manage Users** is a tool for administering users including providers, customers, and archived users. The administrator can filter out and send email to groups of users based on multiple criteria (e.g. "show me all providers who provide service X and are verified"). When viewing a user's profile as an administrator, the admin tool will show a list of all requests that the user participated in as a customer or provider. The administrator may tap on the request to view its status and all messages.

2. **Manage Orders & Invoicing** provides access to draft, charged, and manual invoices. It includes the ability to edit draft invoices, send invoices by email, and charge customers for recent time sheets using Stripe. It also includes the option to export transactions for reporting purposes.

3. **Manage Requests** provides administrators with access to all customer requests and all messaging threads between customers and providers. When managing requests, the administrator will have the option to filter requests based on status (e.g. "No Response", "Provider Selected", "In Progress", and "Complete") and/or service type/category.

4. **Manage Request Types** allows the administrator to add, change, and remove request categories, which are used to match customer requests with relevant providers. For example, a cleaning platform could have categories such as home cleaning, move out cleaning, office cleaning, or carpet cleaning. The platform also supports sub categories.

Other Capabilities

The platform also includes these features:

1. **Desktop Experience:** The web-based version of the platform is designed as a responsive experience with full desktop layouts and smart handling of different screen sizes.

2. **Search Engine Optimization for Providers (optional):** When each new provider is approved, a unique URL can be generated for that user's profile and automatically submitted to Google to increase organic search traffic. Example URL: https://www.domain.com/find-instructor/math-tutor-vancouver-john.

3. **Searchable Directory (optional):** For customer users who prefer to hand pick a provider, the platform includes a directory of service providers that customers can search based on keyword, location, availability/schedule, skill category with search results ranked by distance or displayed on a map.

4. **Instant Bookings (optional):** Customers can book providers for a specific start time by viewing the provider's calendar of weekly availability and making an instant booking at their preferred start time. The provider has the option to connect their Google Calendar and automatically synchronize new bookings and existing appointments to avoid double bookings.

5. **Request Surveys (optional):** When submitting a request for a provider, the customer can be prompted with a multi-step survey to answer various questions to help them match with the best provider for their needs.

6. **Repeating Requests (optional):** The platform can be configured to allow daily, weekly, and monthly recurring requests, where each newly generated request is broadcasted to matching providers to respond.

7. **GPS Tracking and Notes during timesheet submissions (optional):** Providers can be prompted to add client-specific notes and to share their current GPS location when submitting timesheet records. Managers can export time sheet reports including locations and notes.

GrowthClick is a solution company. Our core platform can save years in development efforts compared to starting from scratch, but more often than not, there are still special features or changes required for your users and growth goals.

Here are the key questions that we'd love to help you solve:

1. What are the essential features for your app?

2. Does our existing platform address most of those features?

3. What changes or new features may be needed to meet your requirements?

Bottom Line: For most projects, we can add, change, or remove features as needed to meet your requirements. In other cases, it may be best to take a phased approach and wait for "nice to have" features to be added to our core platform.

Next Step

Get started with a short phone call and demo to see how our platform could support your app goals. Book online at **https://growthclick.com/bookdemo** or email us at **hello@growthclick.com**.

Thank you,

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