

SCOPE & ROADMAP · V2.0 · 12 MAY 2026

Everingham Legal — website scope & phased roadmap

The canonical website scope and roadmap. Phase 1 commercials were signed in **Proposal v1.0 (4 May 2026)** and are restated here, not re-quoted. Phases 2–4 mapped per Matthew’s 12 May call request:

“Recommend everything into the future, then I’ll approve phase one and two and leave phase three and four for down the track.”

PHASE 1 · ACCEPTED

\$4,000

Signed 4 May 2026 · 4–5 wks

PHASE 2A · COHORT 1

~\$0

Login + Drive · Month 4–6

PHASE 2B · PORTAL

\$2,500

Indicative · trigger-based

PHASE 3 · EDUCATION

TBD

Premium (\$10k+ certs) · M6–9

PHASE 4 · ADVISORY

TBD

ABM / case studies · M9+

↓ PDF

All Everingham documents →

What this document is

Three things to read before anything below makes sense.

01

It's the canonical roadmap

Supersedes the **Phase 2 Roadmap (4 May 2026)**. From this point forward, this document is the single source of truth for website + adjacent platform phases.

02

It restates Phase 1, doesn't re-quote

Phase 1 (WordPress migration) was signed in **Proposal v1.0 (4 May 2026)** at **\$4,000 fixed fee, 2 × \$2,000**. That commercial is unchanged. Nothing in this document supersedes it.

03

It separates website from marketing

Marketing engagement (Month-1 roadmap, ongoing retainer, content cadence, ads) runs **parallel** to this build but is priced and managed separately. Visible on the calendar; not priced here.

WHAT CHANGED SINCE V1.0 (4 MAY)

Service nav slots named. Per 12 May call: three services on the new site — **Consulting · Education · Membership**. Resolves the homepage-vs-services-tab disconnect Matthew flagged in his 4 May reply.

Phase 2 split into 2a + 2b. Per 12 May call: cohort 1 runs on **login + shared Google Drive** (Phase 2a, ~\$0) before any portal build. The \$2,500 portal becomes Phase 2b, triggered when Matthew elects to launch self-serve memberships with credit-card processing.

Phase 3 positioning sharpened. Education / certification is a **premium service line at \$10k+ per certification, delivered live or in-person** — not recorded self-serve. Build implication: low-volume high-touch admin tooling, not a high-throughput LMS.

Future-line item added. AI Agent product (legal-niche fine-tuned agent, token-markup commercial model) added to the future roadmap per Matthew's 12 May permission — exploratory, no price, separate scope when ready.

PHASE 1 · ACCEPTED 4 MAY 2026

WordPress migration + service-page alignment

\$4,000 fixed fee · 2 × \$2,000 · 4–5 weeks from sign-off · already in flight.

✓ Commercial restated, not re-quoted

FIXED FEE

\$4,000 ex-GST

SOURCE OF TRUTH

Proposal v1.0

4 May 2026 (signed)

SCHEDULE

2 × \$2,000

on kickoff · on go-live

STANDARD RATE

\$12,500

Discounted as relationship investment

1.1 — Deliverables (per Proposal v1.0, unchanged)

PHASE A · DISCOVERY

- Current-state audit (already complete)
- Content & URL mapping (196 URLs)
- IA workshop with Matthew (90 min)
- Design direction (like-for-like)
- Technical architecture doc

PHASE B · BUILD

- WP staging on Synergy (AU host)
- Custom child theme
- 4 CPTs + taxonomies
- Gutenberg block patterns
- Rank Math + schema.org
- HubSpot forms verified
- Calendly · LinkedIn Insight · GA4 · Meta Pixel

PHASE C · CONTENT MIGRATION

- 32 articles imported
- 38 static pages rebuilt
- 670 images migrated
- 166 contact profiles → HubSpot list
- Full 301 redirect map at Cloudflare edge

PHASE D · QA, LAUNCH, HANDOVER

- SEO parity QA (per URL)
- WCAG 2.1 AA pass
- Lighthouse + Core Web Vitals report
- 7-day parallel forms run
- DNS cutover (Saturday AEDT)
- Search Console change-of-address
- 60-min handover + Loom + PDF
- 30-day post-launch monitoring

1.2 — Service-page architecture (12 May clarification)

Matthew flagged in his 4 May reply: *“homepage shows 2 service offerings, services tab shows 3.”* Resolved on the 12 May call: the new site presents **three services** consistently across homepage and services tab. Each service has a dedicated landing page in Phase 1 build — even where Phases 2–4 will later expand the service’s capability.

SERVICE 1

Consulting

Top-tier service line. Fractional growth officer, transformation partner, legal-ops embedded engagements. Matthew-led. The work that funds everything else.

SERVICE 2

Education

Premium certifications. \$10k+ per cert. Live or in-person delivery. Maturity Programme · Procurement Mastery · AI for Legal Leaders. Phase 1 =

landing page describing the offer. Phase 2a = first cohort run. Phase 3 = full LMS.

SERVICE 3

Membership

Layer 2 community for senior legal-ops leaders. Per-seat annual subscription (indicative **\$2,000/yr/seat**, team licensing).
Phase 1 = landing page describing the offer + waitlist.
Phase 2b = self-serve commerce build.

*All three service pages ship in Phase 1 as **marketing surface**. Education and Membership move from “landing page only” to “working capability” in Phases 2–3 respectively. Consulting is fully operational on Day 1 because it’s how the firm earns today.*

1.3 — Status

COMMERCIAL

Signed 4 May 2026

BUILD

In progress

DISCOVERY

Complete

TARGET LAUNCH

Within 4–5 weeks of kickoff

PHASE 2 · MONTH 4-6+

Education delivery + member portal

Two sub-tracks. Phase 2a runs first on near-zero infrastructure. Phase 2b builds the commerce platform when Matthew is ready to go self-serve.

PHASE 2A

Cohort 1

~\$0 INCREMENTAL

First cohort runs on login + shared Drive

Per Matthew's 12 May call: *"I don't think that needs to be any fancier than probably having login details and like a shared Google Drive where it just says like one materials, week two materials, week three materials."* First cohort runs end-to-end on this stack — learn from it before any platform build.

- Cohort 1 enrolment via Calendly + manual confirmation
- Payment by invoice (existing flow)
- Materials in shared Drive folder, login-gated
- Live sessions via Zoom or in-person
- Certificate issued manually (PDF + LinkedIn-shareable badge)
- Post-cohort retro feeds Phase 3 LMS scope

PHASE 2B

Member portal

~\$2,500 INDICATIVE

Self-serve membership with credit-card commerce

Per Matthew's 12 May call: *"The much bigger piece of work is when we go to set up the memberships and we're now processing credit cards on the website, we now need people to be able to self serve."*

- Auth (email + SSO optional), member directory, profile management
- Subscription billing (Stripe) — per-seat annual, team licensing (5+ seats)
- Indicative pricing: **\$2,000/yr/seat** (per Matthew's call — final pricing locked at scope)

→ Gated content area: resources, member-only articles, KPI library, event archive

→ HubSpot 2-way sync (member ↔ contact)

→ Cascade entitlement: Phase 3 cert holders get 6 months free membership (per Matthew's call)

→ Community forum / discussion (BuddyBoss or lightweight alternative)

Trigger to start: Matthew's decision to go self-serve. The 12 May call positioned this as *after* cohort 1 has run — so Phase 2b is cocked but not yet fired. Indicative price held at \$2,500 from the original Phase 2 Roadmap; final fixed quote at scope kickoff.

PHASES 3 & 4 · FUTURE · NOT COMMITTED

Education platform - Advisory capture engine

Mapped per Matthew's 12 May request. Each gets its own scope and quote at the prior phase's close. No commitment to spend in this document.

PHASE 3 · MONTH 6-9

Education platform (Layer 3)

Triggered when cohort 1 (Phase 2a) completes and Matthew elects to scale beyond manual delivery. **Scope adjusted from earlier roadmap** per 12 May call: this is a **premium high-touch** capability, not a high-throughput LMS.

- Cohort management UI (enrolment, progress, completion)
- Live-session scheduling + attendance tracking
- Automated certificate issuance (PDF + LinkedIn-shareable)
- Cert price point: **\$10,000+** per cert (per Matthew's 12 May call)
- Stripe checkout for cert purchases
- Cascade: cert purchase auto-grants 6 months Layer 2 membership
- Alumni programme + co-credentialing partnerships

Build implication: low-volume, high-touch admin tooling. Not LearnDash + Stripe at scale. Closer to a custom WP admin extension than a commercial LMS install.

PHASE 4 · MONTH 9+

Advisory capture engine (Layer 4)

The enterprise revenue layer. Where 6-figure consulting and PE/GE diligence relationships start. Builds on the audience and data accumulated in Phases 1-3.

- Case-study production system (5-8 anchor studies)
- Gated proposal flow · Procurement Playbook lead magnet
- ABM-driven page personalisation for named accounts
- HubSpot deal pipelines aligned to Layer 4 offer types
- PE/GE diligence landing pages + ABM targeting
- Industry / sub-segment landing pages (build on existing IA)

Funded substantially by the parallel marketing engagement (ABM list, paid amplification). The website work is the capture surface for what marketing brings in.

FUTURE COMMERCIAL LINE · EXPLORATORY

AI Agent product (legal niche)

Per 12 May call: a fine-tuned Claude-based agent embedded on Everingham's site (or a dedicated subdomain), monetised on token mark-up. Matthew already has Claude skills built around legal franchising agreements — productionising that IP is the seed.

Listed here per Matthew's permission (*"happy for you to put that into our roadmap"*). No price, no timeline. Triggered separately when both parties have bandwidth and the underlying 121 Group agent infrastructure is shipped.

Calendar — all lanes, six months

Website phases (this document) running parallel to the marketing engagement (priced separately). Designed so Matthew can see how the build sequences against the content / LinkedIn / ads cadence already underway.

| MONTH | WEBSITE (THIS DOC) | EDUCATION / MEMBERSHIP | MARKETING SEPARATELY |
|--------------------|---------------------------------|--|-------------------------|
| M1 (May) | Phase 1 — build + launch | — | Month-1 de (measurem |
| M2 | Phase 1 30-day monitor | Cohort 1 scoping conversation | Content cac |
| M3 | — | Cohort 1 brief finalised | Retainer rev window |
| M4 | — | Phase 2a — cohort 1 enrolment opens | Content eng |
| M5 | — | Phase 2a — cohort 1 runs (live + Drive) | First whitep |
| M6 | — | Phase 2a cohort 1 retro · Phase 2b trigger decision | Vendor ben |
| M7–9 | — | Phase 2b portal build (if triggered) · Phase 3 education platform discovery | Cohort 2 re build |
| M9+ | — | Phase 4 advisory capture · case studies | ABM at sca live |

The marketing-engagement column is shown for context only. Pricing, deliverables, and KPIs for that lane live in the **Month-1 Detailed Roadmap (28 Apr)** and the ongoing retainer agreement — not in this document.

Stage gates — what triggers each next phase

Per Matthew's 12 May call: *"The roadmap and the depth and the sort of indicators to know that when we get to the next stage gate."* No phase auto-progresses; each requires Matthew's signal.

PHASE 1 → PHASE 2A

Trigger: WordPress site live, 30-day monitor period clean (no SEO regression, no broken forms), Matthew elects to recruit cohort 1.

Gate decision: Cohort 1 dates locked, enrolment opened. Phase 2a is near-zero infrastructure cost so the gate is operational, not commercial.

PHASE 2A → PHASE 2B

Trigger: Cohort 1 has run end-to-end, post-cohort retro complete, Matthew decides to launch self-serve membership commerce.

Gate decision: Phase 2b SOW issued at \$2,500 indicative (or revised based on retro learnings). Stripe + auth scope locked.

PHASE 2 → PHASE 3

Trigger: Cohort 1 (and ideally cohort 2) have demonstrated demand at the \$10k+ price point. Manual delivery is becoming the bottleneck.

Gate decision: Phase 3 SOW scoped from cohort 1+2 retros — not from a feature wish-list. Build only what manual delivery proved necessary.

PHASE 3 → PHASE 4

Trigger: ABM list mature (target: 500 named accounts enriched), inbound demand for advisory engagements outstripping ad-hoc capture.

Gate decision: Phase 4 SOW scoped from advisory-pipeline data, not from speculative buyer-journey design.

Assumptions & what's deliberately not in this document

A scope document earns its keep by being clear about what it is *not*.

Assumptions (Phase 1)

- Brand assets (logo, fonts, colours, photo library) supplied by Matthew before Week 1 close
- HubSpot admin access granted to 121 Group team
- Cloudflare DNS access (or delegated authority) granted before Week 4
- Google Search Console ownership confirmed
- Squarespace subscription kept active 90 days post-launch as failsafe
- Single decision-maker (Matthew) for approvals
- Like-for-like visual rebuild — not a brand redesign

Not in scope of this document

- ✗ Marketing-engagement pricing (lives in retainer agreement)
- ✗ Content-cadence pricing (Scenario A → B trigger lives in retainer)
- ✗ Brand redesign (separate brief if requested, +\$8.5–15k)
- ✗ Copywriting / new content (sits in retainer)
- ✗ Photography commission (separate, ~\$3–5k)
- ✗ 121 Group dashboard build (separate product, no client charge)
- ✗ HubSpot lead-vs-contact behaviour fix (separate, ad-hoc)
- ✗ AI Agent product commercials (future scope when triggered)
- ✗ Non-WordPress integrations (Salesforce, custom CRM)

What we need from Matthew — per phase

Only items relevant to this document. Marketing-engagement asks live in

the Month-1 roadmap.

| PHASE | WHAT WE NEED | BY WHEN |
|-----------------|--|----------------------------|
| Phase 1 | Brand asset pack (logo SVG, fonts, colours, photo library) | Week 1 close |
| | Sign-off on IA + URL map after Week 1 workshop | End Week 1 |
| | Cloudflare DNS access (or delegated authority) | Before Week 4 |
| | Sign-off on staging site + 301 redirect map | Before cutover |
| Phase 2a | Cohort 1 dates, target enrolment number, syllabus outline | M3 |
| | Cohort price point lock | M3 |
| Phase 2b | Trigger signal: "launch self-serve memberships" | When ready (post-cohort 1) |
| | Confirm membership pricing model (per-seat / team licensing tiers) | At Phase 2b kickoff |
| Phase 3+ | Cohort 1 retro outputs (what manual delivery proved necessary) | Post-cohort 1 |

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Document references: **Proposal v1.0 (4 May 2026 · signed)** · Phase 2 Roadmap (4 May 2026 · superseded by this document) · Month-1 Detailed Roadmap (28 Apr 2026) · Business Plan v2.0 · Marketing Brief v1.0 · 12 May 2026 sync call.

Confidential — prepared for the named recipient. Permanent canonical URL:

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