



Your Expertise. A Platform To Carry It.

Cima Launch Package | \$1,000 Total Project Fee Prepared for Rasheeda S. Williams / Cima Tax Pro, LLC.
Proposal TBP-CIMA-2026-01



Al Alexander | Founder & Creative Director

01 / A LETTER FROM THE FOUNDER

Built Around Your Purpose.

Dear Rasheeda,

Your expertise deserves a digital experience that carries the same care you bring to your clients. Cima is now taking shape as a connected brand family: Cima Tax Solutions for tax clients, Cima Tax Pro for professional opportunities, and Cima Tax Academy for learning.

We have built more than a collection of pages. The work connects your founder story, audience-specific landing pages, software offers, enrollment demonstration, customer desk, original learning content and branded communication templates. The purpose is to help someone understand where they belong and what to do next.

This proposal brings that work together in a \$1,000 Cima Launch Package, including a guided platform onboarding and a project management plan for the decisions and activations still ahead. The plan deliberately separates a feature that has been built from a service that has been verified for live operation.

You will not be handed a login and left to interpret the platform alone. We will walk through the customer journey and your daily administrative tasks, identify the steps that require your judgment, and leave you with a clear checklist for operating the experience.

Thank you for trusting me with the presentation of your business. Our next step is to review the scope together, resolve the open decisions and bring Cima into its next chapter with clarity and confidence.

With Appreciation,



Al Alexander

Founder & Creative Director, Tax Branding Pro

02 / THE LAUNCH PACKAGE

One Connected Cima Experience.

Brand & Public Experience

Distinct Tax Pro, Tax Solutions and Tax Academy logos; founder presentation; homepage and audience-specific landing pages; software covers; primary share artwork; clearer calls to action and mobile navigation.

Commerce & Learning

Four-tier WooCommerce enrollment demonstration; account and My Cima Desk routes; original starter lessons and knowledge checks; Academy and private orientation connections; provider support destinations.

Operations & Handoff

Administrator overview, inquiry records, agreement review drafts, demo acknowledgments, lifecycle email templates and guided owner onboarding. The following plan identifies activations and decisions still required.

Scope Boundaries

Third-party software, payment fees, e-signature subscriptions, hosting/domain renewals, legal review and continuing management are separate unless agreed in writing. No recurring subscription is activated by this proposal. No provider access or regulatory approval is implied by the website build.

03 / PROJECT MANAGEMENT & LAUNCH PLAN

Built. Pending. Accountable.

Brand Family & Founder Presentation

STATUS: Built For Review

Tax Pro, Tax Solutions and Tax Academy logos; founder portraits, page identity and community story.

OWNER: Rasheeda + TBP

COMPLETION CHECK: Approve final names, imagery and public wording.

Website & Audience Journeys

STATUS: Built / Links Checked

Home, filing, packages, Academy, founder, answers, preparer, ERO, office and bureau pages.

OWNER: TBP + Rasheeda

COMPLETION CHECK: Review each audience journey on phone and desktop.

Four-Tier Software Store

STATUS: Demo Configured

Four product covers, audience descriptions and Start Now links to WooCommerce enrollment.

OWNER: Rasheeda + Upstream

COMPLETION CHECK: Confirm final scope, retail prices, recurring fees, provider costs and tier permissions in writing.

03 / PROJECT MANAGEMENT & LAUNCH PLAN

Built. Pending. Accountable.

Payments & Refund Workflow

STATUS: Activation Required

No-charge demonstration checkout; receiving destinations were placeholders.

OWNER: Rasheeda

COMPLETION CHECK: Verify actual business Cash App/Zelle/Apple Cash accounts and authorize a supervised live test. Keep collection closed until verified.

Agreements & E-Signatures

STATUS: Review Drafts / Demo Only

Eight downloadable draft PDFs and demo acknowledgment records.

OWNER: Rasheeda + Counsel + TBP

COMPLETION CHECK: Supply notice address; review schedules and agreement terms; obtain a production signing license and test audit/download access.

Academy & Orientation

STATUS: Built / Training Required

Original introductory lessons, examples, checks, private orientation and student-management connections.

OWNER: Rasheeda + TBP

COMPLETION CHECK: Review syllabus and run a new-student test. Approved upstream training stays on its authorized platform.

03 / PROJECT MANAGEMENT & LAUNCH PLAN

Built. Pending. Accountable.

My Cima Desk & Accounts

STATUS: Demo Available

Customer sign-in/registration, enrollment status, documents and next-step links.

OWNER: TBP + Rasheeda

COMPLETION CHECK: Test a new customer account, access boundaries and a full order-to-orientation journey.

Branded Emails

STATUS: Templates Built / Delivery Pending

Lifecycle and Academy enrollment designs with Rasheeda sender identity.

OWNER: TBP + Rasheeda

COMPLETION CHECK: Verify mailbox, authentication, replies and inbox delivery; test each trigger before opening the live sender gate.

Software Provisioning

STATUS: Manual Upstream Milestone

Provider support destinations and a recorded setup step; no provisioning API connected.

OWNER: Rasheeda + Provider

COMPLETION CHECK: Confirm the actual edition and credentials workflow, provision approved users and record completion.

03 / PROJECT MANAGEMENT & LAUNCH PLAN

Built. Pending. Accountable.

Administration & Lead Records

STATUS: Built / Owner Training Required

Brand overview, WooCommerce orders, leads, Academy students and enrollment controls.

OWNER: TBP

COMPLETION CHECK: Train Rasheeda to review requests, approve milestones and manage order status safely.

SEO & Sharing

STATUS: Configured / Device Check Pending

Page copy and primary division sharing images; product covers assigned.

OWNER: TBP + Rasheeda

COMPLETION CHECK: Check fresh iMessage/social previews and remaining mobile flows. Previously shared links may retain cached previews.

Tax Branding Pro Referral Route

STATUS: Coming-Soon Route Built

Specialist marketing, branding, websites and systems kept separate from Cima services.

OWNER: TBP + Rasheeda

COMPLETION CHECK: Replace the coming-soon route with the approved live Tax Branding Pro destination.

03 / PROJECT MANAGEMENT & LAUNCH PLAN

Built. Pending. Accountable.

Production Readiness

STATUS: Acceptance Pending

Demo order #153 and prior test evidence retained.

OWNER: Rasheeda + TBP

COMPLETION CHECK: Run the launch checklist after all dependencies are resolved; approve the release and receive the handoff.

04 / GUIDED OWNER ONBOARDING

Know How To Run Your Platform.

Session 1 / The Customer Journey

Walk through the three divisions, software package selection, demonstration checkout, accounts, documents and first lesson. Practice answering where a customer should go next.

Session 2 / The Daily Desk

Review inquiries, order status, payment verification, enrollment approvals, Academy students, email previews and the human software-provisioning milestone. Never mark an order paid from an unverified receipt alone.

Session 3 / Ownership & Launch

Review account ownership, updates, backups, approved content changes, support escalation and release checks. Receive a written operations guide and a recorded walkthrough with consent. Provider-specific training remains with the provider.

Scheduling

Sessions and release targets are agreed after scope acceptance and dependency review. Missing accounts, licenses or approvals move dependent milestones. No unverified provider turnaround is promised.

05 / PAGE & ADMINISTRATOR DIRECTORY

Your Platform At A Glance.

Home - cimataxpro.com/

Tax Solutions - cimataxpro.com/start-filing/

Packages - cimataxpro.com/packages/

Academy - cimataxpro.com/academy/

Meet Rasheeda - cimataxpro.com/about/

Ask Rasheeda - cimataxpro.com/ask-rasheeda/

Starter Lessons - cimataxpro.com/learn/

Customer Account - cimataxpro.com/cima-enrollment-account/

My Cima Desk - cimataxpro.com/cima-enrollment-account/cima-desk/

Onboarding - cimataxpro.com/onboarding/

Partner Resources - cimataxpro.com/partner-resources/

Terms & Documents - cimataxpro.com/terms-and-documents/

Preparer Journey - cimataxpro.com/preparer/

ERO Journey - cimataxpro.com/ero/

Office Journey - cimataxpro.com/tax-office/

Bureau Journey - cimataxpro.com/service-bureau/

Brand Administration - cimataxpro.com/wp-admin/admin.php?page=cima-overview

Enrollment & Email Settings - cimataxpro.com/wp-admin/admin.php?page=cima-enrollment

Orders - cimataxpro.com/wp-admin/admin.php?page=wc-orders

Leads - cimataxpro.com/wp-admin/edit.php?post_type=cima_inquiry

Academy Students - cimataxpro.com/wp-admin/admin.php?page=manage_students

06 / PROPOSED INVESTMENT & ACCEPTANCE

Cima Launch Package: \$1,000.00

Total project fee for the described build, refinement and guided owner onboarding. This is a proposal, not a receipt, issued invoice or statement that payment has been made. Any legally applicable tax will be identified before an invoice is issued.

The Release Sequence

1. Confirm the scope, tier economics, business information and open decisions. 2. Activate verified payment accounts, mail delivery and production signing. 3. Rehearse a new-customer journey and owner operations. 4. Resolve defects, obtain written acceptance and document ongoing care.

Before Payment

Confirm the written scope, service terms, acceptance checks and separate costs. The standard final-sale policy is available at TaxBrandingPro.com/service-terms/. This proposal does not create an order or accept an agreement on Rasheeda's behalf.

Evidence Baseline

Prepared from the September 26, 2026 Cima handoff: Editorial 3.20.2 and Enrollment 1.9.1. Sixteen destinations were checked in that pass, all four principal Start Now links targeted checkout, and eight draft document links were present. Demo order #153 and earlier records remain separate from a live acceptance test. Actual message delivery, binding signatures and provider activation were not certified.

Your Next Step

Review this plan with Al Alexander, resolve open decisions and confirm the scope. Contact team@taxbrandingpro.com or use TaxBrandingPro.com/start/. Mailing address: 396 West Greens Road, Houston, Texas 77060.