

Master plan

SEND NO

NEVER FULLER

DEMO DID +1 (650) 476-2005 ONLY

WEB RENDER · LEADS REDACTED

AT A GLANCE

THE living execution plan. Every task named Barry or Sage; phases 0-4 to customer #1.

Updated 2026-09-20 07:12 PT · full detail in the sections below — jump straight to one:

Where we are (one glance)

Phase 0 — Compliance + plumbing prep

Phase 1 — Make the promise real (after Barry Batch #1)

Phase 2 — Open the funnel

Phase 3 — First close + go-live

Phase 4 — After customer #1 (not before)

Barry's total footprint to customer #1

What Sage needs from Barry to keep these docs true

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DETAILS

This is THE plan. One row per task, every row named **Barry** or **Sage** (Helen/CoS only where real).

Convention (Barry, 2026-09-19): discussion → update the plan. After every discussion with Barry that changes scope, order, or ownership, the agent updates THIS file (and the SOP docs it points at) in the same session, stamps the "Updated" line, and logs the change in the journal. Never let a decision live only in chat. Sister docs: `SELLING-SYSTEM.md` (how the machine works), `production-readiness-2026-09-19.md` (the frozen audit this plan grew from).

Updated: **2026-09-19 ~10:55 PM PT** by Sage@miniPC Project home: <https://apex.socialtokens.site/projects/ai-assistance/> · Dashboard: [.../dashboard/](#) · Customer site: [.../website/](#) · Leads pipeline: [.../leads/](#)

Update 2026-09-19 (site restructure, per Barry): the project URL now splits by audience — root = PROJECT HOME (title, link cards, locks), `/dashboard/` = live status (leads counts, phase table, monitor), `/website/` = the CUSTOMER-FACING site (4-offering menu with honest available/coming-soon labels, demos, \$199 pricing — no internal project info), `/webapp/` = the booking prototype. Plan docs are each a webpage + downloadable PDF under `/docs/` (PRD · marketing research · financial · SOP · master plan · selling system · production readiness — new canonical sources `PRD.md`, `marketing-research.md`, `financial.md`, `SOP.md` in this folder, rendered by `bin/publish-docs.py`). The 4 HELD outreach drafts now link

.../ai-assistance/website/. Monitor aiassist-callpath-watch checks both root and /website/.

Standing locks (every row inherits these): AUTHORIZE SEND NO until Barry names the shop · Never Fuller (+1 650 460-1036 never dialed/texted/linked) · demo DID **+1 (650) 476-2005** only · no purchases without Barry · no Trackmint.

Where we are (one glance)

- Phase 0 Sage prep: **DONE 2026-09-19** (disclosures, legal-page drafts, onboarding runbook, intake form, call-path monitor live, cost model).
- **Next move is Barry's: Batch #1 (~30 min, step 0.6).**
Everything below Phase 1 is blocked on it.
- Funnel inventory: 17 keeps / 5 metro batches · 4 legally cleared drafts HELD (Lead A (DFW plumbing), Lead B (DFW plumbing), Lead C (Houston-metro plumbing), Lead D (Houston-metro plumbing)) · 0 sent ever.

Phase 0 — Compliance + plumbing prep

#	TASK	OWNER	STATE
0.1	AI + recording disclosure lines in every greeting (template flow + all 8 demo verticals; paste doc <code>greeting-disclosures.md</code>)	Sage	☐ DONE 9-19
0.2	Privacy policy, ToS, data-retention drafts (<code>docs/legal/</code>) — unlinked until approved	Sage	☐ DONE 9-19 (needs Barry's entity + postal to finalize)
0.3	Onboarding runbook + customer intake form + carrier forwarding one-pager	Sage	☐ DONE 9-19
0.4	Demo-DID call-path monitor wired into fleet alerting (<code>aiassist-callpath-watch</code> , 15-min)	Sage	☐ DONE 9-19 — burning in
0.5	Cost model + usage-alert threshold (<code>cost-model.md</code> : 100 calls/mo $\approx$ \$42 $\rightarrow$ \$157 margin at \$199)	Sage	☐ DONE 9-19
0.6	BARRY BATCH #1 (~30 min, one sitting): (a) postal/mailing address for CAN-SPAM footers · (b) entity name or "sole prop for pilot" · (c) create Stripe account · (d) create Twilio account + start toll-free SMS verification (fast) and A2P 10DLC (slow, background) · (e) authorize purchase of 1 production DID (~\$2-5/mo)	Barry	☐ WAITING BARRY — the single blocker for Phase 1
0.7	Leads status live on the project page, regenerated from <code>agents/leads/leads-data.json</code> (<code>bin/update-leads-status.py</code>)	Sage	☐ DONE 9-19
0.8	Master plan (this doc) + selling-system doc written and kept living	Sage	☐ DONE 9-19

Phase 1 — Make the promise real (after Barry Batch #1)

#	TASK	OWNER	STATE
1.1	Insert Barry's postal address into the 4 held drafts; final QA pass (incl. Lead D (Houston-metro plumbing) surname check)	Sage	blocked on 0.6a
1.2	Stripe \$199/mo subscription Payment Link + signup webhook; prove in test mode first	Sage	blocked on 0.6c
1.3	Booking persistence: Retell post-call webhook → small VPS service → store booking + owner SMS (toll-free) · 48 h burn-in on demo line	Sage (VPS side may ride Helen's host — Sage owns build)	blocked on 0.6d
1.4	Provision "pilot plumber" agent from plumber template on a second staging config; end-to-end proof (call → booking stored → SMS received)	Sage	blocked on 1.3
1.5	Proof pack to Barry: test-call recording, SMS screenshot, Stripe test receipt	Sage	after 1.2-1.4

Phase 2 — Open the funnel

#	TASK	OWNER	STATE
2.1	BARRY BATCH #2 (~10 min): review 4 drafts, AUTHORIZE SEND per shop by name (Lead A (DFW plumbing) · Lead B (DFW plumbing) · Lead C (Houston-metro plumbing) · Lead D (Houston-metro plumbing))	Barry	blocked on 1.1

#	TASK	OWNER	STATE
2.2	Send the 4 Track A emails from Barry's Gmail (one per shop, per held drafts); log sends; honor opt-outs ≤10 days	Sage (with Barry's named auth)	blocked on 2.1
2.3	Reply watch: draft responses within the hour (demo links + demo DID); book live demo slots	Sage drafts / Barry approves sends	after 2.2
2.4	Next lead batches through Leads→Legal→Marketing→QA→CoS-hold (Houston Track B revisit; next metro) so the funnel isn't 4 emails deep	Sage (CoS holds the queue)	can run any time — not blocked
2.5	Backfill: take all 7 dossier-only Track A keeps through Legal review + Marketing draft + QA → HELD in <code>receptionist/docs/</code> — Austin (Lead E (Austin plumbing), Lead F (Austin plumbing)) · Columbus (Lead G (Columbus auto), Lead H (Columbus auto)) · Lead I (Jacksonville HVAC) · Lead J (Indianapolis electrical) · Lead K (Louisville plumbing/HVAC). (G9 resolved 2026-09-19: the Austin/Columbus "held drafts" never existed on any host — re-verify sites + draft from scratch)	Sage	can run any time

Phase 3 — First close + go-live

#	TASK	OWNER	STATE
3.1	BARRY BATCH #3: the human close — one phone/email exchange per interested owner; take the yes (~30 min each)	Barry	driven by reply rate
3.2	Customer pays via Stripe link → provision: buy their DID (Barry auths spend), clone vertical template with their greeting/hours/escalation, disclosures on, monitor on	Sage (Barry: DID spend auth)	after 3.1
3.3	Customer sets conditional call-forwarding from our one-pager; joint test call; Barry pinged at go-live	Customer + Sage	after 3.2
3.4	48 h burn-in: every call monitored, transcripts reviewed daily, fallback verified — then declare customer #1 LIVE with numbers, not assurances	Sage	after 3.3

Phase 4 — After customer #1 (not before)

Multi-tenant backend + auth · owner dashboard · calendar/CRM write · marketing site/SEO/self-serve checkout · scale outreach beyond hand-held sends · build the text-assistant and website offerings into real SKUs (see `SELLING-SYSTEM.md` §8 gaps G1–G3). All **Sage**, sequenced with Barry.

Barry's total footprint to customer #1

Three batches $\approx$ **70 minutes** + one sales conversation per prospect.
Everything else is Sage, with proof at each gate.

What Sage needs from Barry to keep these docs true

1. **Postal/mailling address** (0.6a) — unblocks the 4 drafts' CAN-SPAM footers.
2. **Entity name** or "sole prop for pilot" (0.6b) — finalizes privacy/ToS drafts.
3. **Stripe + Twilio accounts** (0.6c/d) — only Barry can (identity/bank).
4. **DID purchase authorization** (0.6e) — money = Barry.
5. **Confirm the four-offering menu + pricing** for the non-voice SKUs (text assistant / web app / website) — today only voice has a decided price (\$199/mo). See `SELLING-SYSTEM.md` §2.
6. **Send authorizations, per shop by name** (2.1) — the gate stays closed until then.

Web-version note: specific lead business and owner names are redacted here to "Lead A-K (metro, vertical)" labels. Full names live in the private repo registry (`agents/leads/leads-data.json`) and the live **leads pipeline**.

Generated 2026-09-20 07:12 PT from `receptionist/docs/MASTER-PLAN.md` by
`bin/publish-docs.py`. Republish: `python3 ~/apex/bin/publish-docs.py` then
`rsync docs/` per `COS-DEPLOY.md`. Never Fuller.