

PRD

SEND NO

NEVER FULLER

DEMO DID +1 (650) 476-2005 ONLY

WEB RENDER · LEADS REDACTED

AT A GLANCE

Product requirements: definition, the 4 offerings, personas, requirements, roadmap.

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

1. Product definition

2. The four offerings (mix & match menu)

3. Target customer (personas / ICP)

4. Requirements

5. Current state (frozen 2026-09-19 audit)

6. Roadmap (phases from MASTER-PLAN)

7. Success metrics

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DETAILS

Product Requirements Document (LIVING) · 2026-09-19 (PST) ·

Sage@miniPC Derived from: `production-readiness-2026-09-19.md` ·

SELLING-SYSTEM.md · progress records. Sister docs: MASTER-PLAN.md (execution) · financial.md (unit economics) · SOP.md (operations).

Standing locks: 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.

1. Product definition

AI Assistance is an after-hours AI receptionist for owner-run service shops. When the shop closes, its number forwards to an AI voice agent that answers in the shop's name, discloses it is an AI, qualifies the caller, captures name + callback number, books the next open slot, and texts the owner a morning recap. The owner wakes to confirmed appointments instead of voicemails.

One line: "**When you close, it answers.**" Pitch: one extra completed job pays the month.

2. The four offerings (mix & match menu)

#	OFFERING	WHAT THE CLIENT GETS	STATUS TODAY	PRICE
1	AI voice assistant	Their number answered after hours: greet, qualify, book next open slot, text the owner the window	Closest to real — Retell staging agent live on the demo DID, 8 vertical flows, AI + recording disclosures in every greeting. Gaps: no per-customer number; booking SMS + persistence are stubs	\$199/mo decided (Bay Area \$249 · test-city \$99)
2	AI text assistant (SMS / WhatsApp)	Same assistant over text: missed-call text-back, SMS/WhatsApp Q&A + booking	Not built. Demo shows owner-side stubs only. Needs Twilio + toll-free verification or A2P 10DLC (entity/EIN, days-weeks); WhatsApp needs Business API approval	not priced — contact us
3	Web app	Booking/ops web app for the shop: book engine, owner board, morning recap	Working prototype — 8 verticals on a shared book engine at <code>webapp/</code> ; browser-session state only, no persistence/auth/multi-tenancy	not priced — contact us
4	Website	A proper website for shops with none/bad ones (often the wrapper the assistant lives in)	Planned only. Our own demo sites prove the craft; no client-website product yet	not priced — contact us

Bundles (e.g. voice + text; website + web app + voice) are intended but unpriced — Barry decision.

3. Target customer (personas / ICP)

- **Owner-operator tradesperson** ("the name on the truck"): plumbing, HVAC, electrical, roofing, auto. 1–5 staff, printed hours with a real dark window (no 24/7 claim), owner's name printed on the official site. The owner IS the after-hours dispatcher today. Pain: the 5:15 PM burst-pipe call hits voicemail; the job goes to a competitor by morning.
- **Small practice / storefront**: dental office, laundromat, single-location restaurant, small law firm. Same after-hours capture problem, different booking vocabulary (appointment / reservation / callback).
- **Who it is NOT for**: chains, mega-ops, shops with staffed night lines, shops already on Jobber / Housecall Pro / ServiceTitan AI answering.

4. Requirements

4.1 Functional — voice v1 (customer #1 scope)

1. Answer forwarded after-hours calls in the shop's name within 2 rings.
2. Greeting MUST lead with AI + recording disclosure (fixed clause, non-customizable — `greeting-disclosures.md`).
3. Qualify: capture issue, name, callback number; read them back.
4. Book: offer only configured windows; no double-booking within a session.
5. Notify: store the booking server-side and SMS the owner the window (Phase 1 build — today this is the stubbed core promise).

6. Escalate: life-safety callers told to hang up and dial 911; named escalation cell for urgent-but-not-911.
7. Never quote prices, never diagnose, never claim to be human.
8. Spam/robocall filter: junk dropped without owner attention.
9. Per-customer provisioning: own DID, cloned vertical template with their greeting/hours/ escalation (Phase 3; template-per-client architecture exists in `retell-flow`).

4.2 Non-functional

- **Cost bound:** 10-min max call duration on every agent; 300 answered-min/customer/month alert threshold (`cost-model.md` / `financial.md`).
- **Monitoring:** call-path monitor per line, 15-min cycle, fleet alerting (`aiassist-callpath-watch`) — live for the demo DID today.
- **Fallback:** carrier no-answer timer falls to the shop's voicemail, never dead air.
- **Compliance:** AI + recording disclosure in-greeting; privacy policy / ToS / retention drafts (`docs/legal/` , finalize on Barry's entity + postal); CAN-SPAM footers on all outreach; email-only outreach (no TCPA exposure); transcripts 90-day default retention.
- **Proof over claims:** 48-hour burn-in with daily transcript review before any customer is declared LIVE.

5. Current state (frozen 2026-09-19 audit)

Works today: voice agent answers the demo DID · 8-vertical demo hub (real sales asset) · web-call prototype (11/11 tests) · pricing decided · lead pipeline machinery with 4 legally cleared drafts HELD ·

deploy + monitoring ops. Blockers B1-B5: no production call path per customer · booking SMS/persistence stubbed · no live Stripe · compliance pack needs Barry's entity/postal · SEND gate closed. Honest framing: **demo-grade single-tenant product, production-grade sales pipeline, closed gate**. Full detail: `production-readiness-2026-09-19.md`.

6. Roadmap (phases from MASTER-PLAN)

- **Phase 0 — Compliance + plumbing prep: DONE 2026-09-19.** Disclosures, legal drafts, onboarding runbook, intake form, call-path monitor, cost model, status machinery.
- **Barry Batch #1 (~30 min) — the single blocker:** postal address · entity name · Stripe account · Twilio account + SMS registrations · 1 production DID authorization.
- **Phase 1 — make the promise real:** Stripe payment link · booking persistence + owner SMS · pilot-plumber agent end-to-end proof.
- **Phase 2 — open the funnel:** Barry authorizes the 4 held sends by name; reply watch; next lead batches.
- **Phase 3 — first close + go-live:** Barry closes; provision; forwarding; 48 h burn-in; customer #1 LIVE with numbers.
- **Phase 4 — after customer #1:** multi-tenant backend, owner dashboard, calendar/CRM write, self-serve checkout, build offerings #2-#4 into real SKUs.

7. Success metrics

- Customer #1 LIVE after 48 h burn-in with zero interventions.
- $\geq 90\%$ of after-hours calls answered; booking summary delivered for 100% of bookings.
- Per-customer monthly cost $\leq \$42$ at 100 calls/mo (margin $\geq \$157$ at \$199).
- Barry's total footprint to customer #1 ≈ 70 minutes + one sales conversation.

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](#).

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