

SOP

SEND NO

NEVER FULLER

DEMO DID +1 (650) 476-2005 ONLY

WEB RENDER · LEADS REDACTED

AT A GLANCE

How we operate: leads to legal to draft to Barry gate to onboarding to burn-in.

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

1. The pipeline in one line

2. Lead generation (Leads cell)

3. Selection

4. Legal review (Legal cell — per shop, before any draft)

5. Draft + QA (Marketing + QA cells)

6. The gate (CoS hold → Barry)

7. Onboarding (customer yes → live; runbook stages A-F)

8. Operations standing duties

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DETAILS

2026-09-19 (PST) · Sage@miniPC · LIVING Derived from: `SELLING-SYSTEM.md` (the machine, stages 1-6) + `onboarding-runbook.md` (customer yes → live). This is the condensed how-we-operate; those two stay the deep truth.

Standing locks (every step inherits): AUTHORIZE SEND NO until Barry names the shop · Never Fuller (+1 650 460-1036) · demo DID **+1 (650) 476-2005** only · no purchases without Barry · going live is a Barry ping.

1. The pipeline in one line

Generate leads → select keeps → legal review → cold email (HELD → Barry gate) → prospect tries the demo → pays → we provision → we operate.

Cell chain: Leads → Legal → Marketing → QA → CoS hold → **Barry send/close** → Sage provision/operate.

2. Lead generation (Leads cell)

1. Pick a **new metro**; research **official business sites only** — curl the real site, read printed hours, owner names, published email. No directories, no purchased lists.
2. Apply the kill rules (any one = drop): 24/7 claim · no owner name · chain/mega-op · platform AI already answering · guessed email.
3. 3-6 looks per pass (bigger runs allowed); write a dossier per keep: shop, owner-as-printed, hours, dark window, contact, pain quote,

track, QA stamp.

4. Log the batch in `agents/leads/progress.md` AND mirror it into `agents/leads/leads-data.json` **in the same commit**; run `python3 ~/apex/bin/update-leads-status.py` ; deploy per the beat flow.

3. Selection

- **Track A** (email printed on official site) → eligible for the email pipeline.
- **Track B** (phone-only) → parked inventory. Never dialed, never texted.
- Selection is rule-driven by agents; Barry gates only the send.

4. Legal review (Legal cell — per shop, before any draft)

Verify the role email live on review day · truthful subject only · never misstate the prospect's own hours/services (DTPA) · confirm TCPA/DNC not triggered (email-only) · name any do-not-dial numbers for that shop. Output: PASS / PASS-WITH-HOLDS / CLEAR-WITH-CONDITIONS recorded in a review doc (`*-legal-review.md`).

5. Draft + QA (Marketing + QA cells)

Template anatomy (see `dfw-track-a-emails.md` , `houston-track-a-emails.md`):

1. Greeting — owner's first name(s) exactly as printed.
2. Their own hours quoted back.

3. Missed-business math (5:15 PM burst pipe → voicemail until morning).
4. Price + payback (\$199/mo; one job pays the month).
5. Demo links + staging voice line, explicitly disclosed as a fake shop.
6. CAN-SPAM footer: commercial disclosure, postal address, unsubscribe ≤ 10 business days.

QA checks spelling of names, hours, legal holds. Draft saved to `receptionist/docs/<metro>-track-a-emails.md` → state `cleared-drafted-held`.

6. The gate (CoS hold → Barry)

Drafts live on disk. **AUTHORIZE SEND: NO** until Barry names the shop. Sends go from Barry's Gmail, one shop per email. Log every send; honor opt-outs ≤ 10 days. Reply watch: draft responses within the hour (demo links + demo DID); Barry approves reply sends and does the human close.

7. Onboarding (customer yes → live; runbook stages A-F)

- **A — Intake (~15 min):** complete `customer-intake-form.md`; no blank fields; save to `receptionist/projects/{customer-slug}/intake.md`.
- **B — Provision (~1 h):** copy the vertical template (never edit the template); set shop name/hours/timezone, mandatory AI + recording disclosure greeting, booking windows, constraints (no prices, no diagnosis); `npm test` green; create the Retell agent

(staging first); web-call checklist (disclosure first, capture + read-back, windows only, 911 line, no prices).

- **C — Phone number (BARRY GATE: money):** ping Barry to authorize the DID (~\$2/mo); buy + bind inbound agent; one verification call (ask Barry first — real calls are billed).
- **D — Forwarding (customer, ~10 min):** conditional forwarding (no-answer + busy) per the carrier one-pager; fallback: carrier no-answer timer → their voicemail, never dead air.
- **E — Go-live + burn-in:** add the DID to `aiassist-callpath-watch`; joint test call; ping Barry at go-live; **48 h burn-in** — every transcript reviewed daily, every booking summary verified, fallback tested once; declare LIVE with numbers, never assurances.
- **F — Ongoing:** transcript spot-checks (daily week 1, then weekly); hours changes = edit flow JSON → republish → 1 test web-call; cancellation per ToS (unpublish, release DID, delete data per retention policy).

8. Operations standing duties

- Call-path monitor green (15-min cycle, fleet alerting) for demo DID + every customer line.
- Cost guardrails: 10-min max call duration; 300 answered-min/mo alert per customer.
- Keep the docs living: discussion → update `MASTER-PLAN.md` + affected SOP docs in the same session; stamp Updated; journal the change.
- Status machinery: leads registry → `update-leads-status.py` → deploy; plan docs → `publish-docs.py` → deploy.

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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`bin/publish-docs.py` . Republish: `python3 ~/apex/bin/publish-docs.py` then
`rsync docs/` per `COS-DEPLOY.md` . Never Fuller.