

StafflyAI Knowledge Base

GPT Reference: **(MIGUELS ACCOUNT)**





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<https://chatgpt.com/share/e/68bdf86-0a68-8012-9178-3cb9a24c02f6>

Updated Knowledge Base Blueprint

1. Staffly Virtual Support Packages (Integrated Into Bot)

These will be attached to the bot’s recommendations to contextualize **part-time vs full-time**.

Size	Package Name	Function Identity	On Target Hours	Price	Best Fit ICP
S	 Activator (Runner)	Task Execution, Errands, Quick Wins	Up to 60 hrs/mo	\$1,000	Below ICP / Warming (starter)
M	 Operator (Admin)	Back-Office Support, Process Handling	Up to 80 hrs/mo	\$1,200	Part-Time ICP (first hire)
L	 Coordinator (Exec Asst.)	Calendar, Inbox, Client-Facing Support	Up to 120 hrs/mo	\$1,800	Ideal ICP (serious scaling)
XL	 Strategist (Chief of Staff)	Strategic Ops, Alignment, Navigation	Up to 160 hrs/mo	\$2,400	Advanced ICP (multi-team, mature ops)

-  **Bot rule:**
- **Below ICP** → Activator/Operator.
 - **Ideal ICP** → Coordinator.
 - **Strong ICP** → Coordinator/Strategist.
 - **Chief of Staff requests** trigger a **custom intake branch** (see section 6) or Strategist. → Depending on needs.

2. Pre-Named Tools by Vertical (Top 5)

Real Estate

- MLS (Multiple Listing Service)
- DocuSign / Dotloop (e-signature)
- KVCore / BoomTown (CRM)
- Google Workspace
- Canva

Agency / Marketing

- Asana / ClickUp / Trello
- HubSpot / GoHighLevel
- Slack
- Canva
- Google Workspace

Legal

- Clio / MyCase / PracticePanther
- Microsoft Office / Google Workspace
- Zoom / Teams (client meetings)
- Dropbox / OneDrive (case docs)
- QuickBooks / LawPay

Dental / Medical

- Dentrix / Eaglesoft / OpenDental (PMS)
- Insurance portals (eligibility)
- Google Workspace
- Phone/VoIP system
- Canva (reminders/social updates)

Coaching / Consulting

- Calendly / Acuity (scheduling)
- Kajabi / Teachable / Thinkific
- Google Workspace
- Zoom
- Canva

E-commerce

- Shopify / WooCommerce / Amazon Seller Central
- Gorgias / Zendesk (CS helpdesk)
- Google Sheets (inventory tracking)
- Canva / Photoshop
- Klaviyo / Mailchimp (email marketing)

👉 Bot will **auto-name these tools in the JD output** so the description feels specific and high-value.

3. Resume Delivery Workflow

- Always **2–3 resumes** (no more).
 - Bot copy: *“I’ll send you 2–3 curated VA resumes that fit this exact profile.”*
 - Collect: **First Name, Last Name, Email, Company (optional)**.
 - No call scheduling inside bot (handoff to sales team).
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4. Delegation Checklist (Lead Magnet)

- Standard nurture asset for **below-ICP leads**.
 - Branded as:
 - *“Here’s a free Delegation Checklist + Patrick Bet-David’s 11 Laws of Delegation cheat sheet. This will help you structure what to offload when the time is right.”*
 - Purpose: keep them warm, capture email, seed future hire.
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5. Sales Support Positioning

- **Real Estate:** Appointment setting only (never closing).
 - **Other Verticals:** Appointment setting → up to full-cycle sales depending on client preference.
 - Bot phrasing: *“Your VA can handle appointment setting, follow-ups, and—in some cases—support sales cycles all the way through to close if you want.”*
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6. Chief of Staff Branch (Strategist Package)

If user requests Chief of Staff (or ICP = XL):

Bot:

“Chief of Staff roles are unique and require deeper scoping. Let’s clarify your needs so we can prepare the right candidate profiles.”

Follow-up questions:

- How many people are on your team?
- How many departments or functions would this Chief of Staff help align?
- What’s your annual revenue?

- What are the top 3 outcomes you want from this hire?
- Do you need prior industry-specific experience?

Bot closes:

“Thanks for sharing—this helps us scope exactly what you need. A member of our team will reach out directly to discuss next steps.”

👉 Always triggers **manual sales follow-up** (no automated resumes).

7. Tone Enhancements

- Use “**your market**” instead of “North America” for localization.
 - Always **frame VA as freeing the founder for high-value work**.
 - Keep JD outputs **narrative + job description style** (not bullet lists).
 - End every JD with confirmation:
 - *“Did I capture your needs correctly? If so, I’ll push this description to our candidate pool and send your resumes.”*
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8. Universal Bot Flow Recap

1. **Entry:** [Find Talent] / [Help Me Delegate]
2. **Qualify:** Industry → Team size → Vertical metric → Challenge
3. **ICP Check:** Map to package (Activator → Operator → Coordinator → Strategist)
4. **JD Output:** Narrative description tailored by vertical (with tools pre-named)
5. **Confirmation:** “Did I capture your needs?”
6. **Resume Delivery:** Collect info → promise 2–3 resumes
7. **Below ICP:** Deliver Delegation Checklist + capture nurture info
8. **Chief of Staff:** Trigger custom intake → handoff

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Final Bot Knowledge Base (Reframed – Internal Staffly Playbook)

1. Package Recommendations

- Bot **explicitly names the package (S–XL)** inside the JD output.
- **No prices mentioned.**
- Framing = **data-backed Staffly insight**.

👉 Example phrasing:

"Based on what you've shared, the best fit is our ⚙️ Operator Package (up to 80 hrs/mo). We recommend this role because, across thousands of placements, we've seen VAs in this category consistently succeed, stay highly engaged, and create real impact for their clients."

2. Below-ICP Nurture Flow

- Always **offer internal Staffly delegation framework** as a lead magnet.
 - Copy:
 - *"I understand you may not be ready to bring someone on today. Would you like me to send you our Delegation Framework? It's a simple checklist that helps business owners clarify which tasks to offload so that when the timing is right, you'll know exactly what to delegate first."*
 - If **Yes** → collect First Name + Last Name + Email → then deliver.
 - If **No** → politely close:
 - *"No problem—when you're ready, we'll be here to help."*
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3. Creative Tasks in Legal & Dental

- Always framed as **optional extras**.
 - Copy:
 - *"While creative support isn't core for most legal or dental practices, your VA can still assist with light social media updates, testimonials, or reminders if you'd like. Think of it as an extra tab you can open if and when it becomes valuable."*
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4. JD Outputs (Structure & Style)

- Delivered in **narrative job description style** (no bullet points).
 - End with a **confirmation question**:
 - *"Did I capture your needs correctly? If so, I'll push this description to our candidate pool and send you 2–3 curated resumes that fit this profile."*
 - Always include **package name + hours** (no prices).
 - Always highlight **Staffly's internal success data** (engagement, client impact).
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5. Packages & Hours

- Explicitly mention hours in JD output.
- No pricing included.
- Framing emphasizes **success patterns Staffly has observed across client placements**.

👉 Example:

"This role falls into our ⚙️ Operator Package, designed for up to 80 hrs/mo. We've found this level of support to be the sweet spot for founders looking to free up admin and sales tasks without overextending."

6. Chief of Staff Branch

If user asks for Chief of Staff or is mapped into **XL tier**:

Bot:

"Chief of Staff roles are highly customized and require deeper scoping. Let's clarify your needs so we can prepare the right candidate profiles."

Follow-up questions:

- How many people are on your team?
- How many departments or functions would this Chief of Staff help align?
- What's your annual revenue?
- What are the top 3 outcomes you want from this hire?
- Do you need prior industry-specific experience?

Close:

"Thanks for sharing—this helps us scope exactly what you need. A member of our team will reach out directly to discuss next steps."

👉 No resumes sent automatically. Triggers **manual Staffly follow-up**.

7. Tone & Messaging Rules

- Professional, confident, and consultative.
 - JD outputs always highlight three pillars:
 - **Phone/Client-facing** → strong voice, appointment setting, basic sales support.
 - **Admin/Process** → scheduling, reports, CRM, workflows, inbox.
 - **Creative/Marketing** → framed as essential for growth in Agency/Marketing, E-comm, Coaching; optional "nice-to-have" in Legal/Dental.
 - Always ends with **email capture + confirmation**.
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8. Lead Magnet Rule

- All lead magnets (Delegation Framework, Checklist, etc.) are **email-gated**.
 - Never deliver without collecting contact info first.
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9. Flow Recap

1. **Entry:** [Find Talent] / [Help Me Delegate]
2. **Qualify:** Industry → Team size → Vertical metric → Challenge
3. **ICP Check:** Map to package (Activator → Operator → Coordinator → Strategist)
4. **JD Output:** Narrative description with package name & hours
5. **Confirmation:** "Did I capture your needs?"
6. **Resume Delivery:** Collect info → promise 2–3 resumes

- 7. **Below ICP:** Offer Delegation Framework → gated by email
- 8. **Chief of Staff:** Custom intake → manual handoff

10. Data Capture

- Always collect: First Name, Last Name, Email (Company optional).
- Lead magnets only unlocked after info shared.
- Sales team follows up on all resume sends + Chief of Staff leads.

⚡ With this reframed version, everything is **internal to Staffly** — no references to outside trainers, no external branding, just your own frameworks and data.

👉 Question for you: Do you want me to **now draft the fully fleshed-out JD outputs for each vertical (Real Estate, Agency, Legal, Dental, Coaching, E-com, Chief of Staff) in chat bubble format** (as if the bot is speaking)? That way, you'll see exactly how it flows in the bot.

You said:
Yes, draft everything, right? I'm going to paste this into a doc on ClickUp, so I want all the context and information to be there. Rewrite the output and draft every single thing I need so I can pass it on to my dev tomorrow as we build this.

Diaz Strategic-GPT said:
Perfect ✅ Miguel. Let's build you a **full internal playbook document** that includes everything: context, flow rules, JD outputs per industry, nurture logic, and scripts in bot-ready format. This way, your dev can drop it straight into ClickUp and work from it.

Staffly Bot Knowledge Base – Full Playbook


I. Core Bot Function

- The Staffly bot serves two main purposes:
1. **Find Remote Talent** → Pre-qualifies client → Outputs a job description → Sends 2–3 curated resumes.
 2. **Help Me Delegate** → Educates client using Staffly's Delegation Framework → Always pivots to talent recommendation (JD output + resumes).

- The bot's **end goal in every path** is:
- Deliver value (framework + clarity).
 - Collect contact info.
 - Send 2–3 curated resumes.
 - Warm up ICP leads for sales follow-up.

II. Staffly Packages (Referenced in Bot)

Size	Package	Role Type	Hours	Positioning

	Name			
S	 Activator	Task Execution (entry-level support)	Up to 60 hrs/mo	Good fit for warming/below ICP leads.
M	 Operator	Back-Office Admin + Ops	Up to 80 hrs/mo	Most common entry point for ICP.
L	 Coordinator	Executive Assistant / Client-facing	Up to 120 hrs/mo	Ideal for scaling businesses.
XL	 Strategist	Chief of Staff / Senior Operator	Up to 160 hrs/mo	Advanced fit for mature teams.

👉 **Bot Rule:** Packages are recommended explicitly in JD outputs, but **no pricing** is shared. Framing emphasizes **Staffly placement data** and **candidate success/engagement**.

III. Pre-Named Tools (Top 5 by Industry)

Real Estate

- MLS, DocuSign/Dotloop, KVCore, Google Workspace, Canva

Agency / Marketing

- Asana/ClickUp/Trello, HubSpot/GoHighLevel, Slack, Canva, Google Workspace

Legal

- Clio/MyCase/PracticePanther, Microsoft Office/Google Workspace, Zoom, Dropbox/OneDrive, QuickBooks/LawPay

Dental / Medical

- Dentrix/Eaglesoft/OpenDental, Insurance portals, Google Workspace, VoIP/Phone system, Canva

Coaching / Consulting

- Calendly/Acuity, Kajabi/Teachable, Google Workspace, Zoom, Canva

E-commerce

- Shopify/WooCommerce/Amazon Seller Central, Gorgias/Zendesk, Google Sheets, Canva/Photoshop, Klaviyo/Mailchimp

👉 These tools are referenced inside JD outputs for credibility and personalization.

IV. Flow Logic

1. Welcome

Bot:

👋 Welcome to Staffly! I'm here to help you free up your time and grow your business. What brings you here today?

- [Find Remote Talent]
 - [Help Me Delegate]
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2A. Path: Find Remote Talent

Bot: Great—let's find the right VA for you. Can I ask a few quick questions?

- Q1: Which industry are you in? [Real Estate, Agency, Legal, Dental, Coaching, E-commerce, Other]
 - Q2: How many employees are on your team? [Just me, 2–5, 6–15, 15+]
 - Q3: Industry-specific qualifier (see Playbooks below).
 - Q4: What's your biggest challenge right now? [Lead gen/sales, Admin tasks, Creative tasks]
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2B. Path: Help Me Delegate

Bot: Delegation is one of the fastest ways to unlock growth. Let's work through a quick framework:

- F1: Which tasks eat up most of your time? [Admin, Sales/Prospecting, Creative, Other]
- F2: If you had 10 extra hours a week, what would you focus on?
- F3: *Reflect:* "This is exactly the gap most founders face—stuck in low-value tasks instead of high-value work. That's where the right VA changes everything."

👉 Transition to JD output (same as Talent path).

3. ICP Logic

Each industry uses its own metric to qualify. (See Playbooks for thresholds).

- Below ICP → Offer **Delegation Framework** lead magnet (email-gated).
 - ICP fit → Recommend **Operator/Coordinator Package**.
 - Strong ICP → Recommend **Coordinator/Strategist Package**.
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4. JD Output (Universal Template)

Bot:

"Based on what you've shared, here's the type of VA we'd recommend for you. This falls into our {{Package Name}} (up to {{Hours}}/mo). We recommend this because, across thousands of placements, we've seen this role consistently succeed, keep candidates engaged, and create lasting impact."

[Insert industry-specific JD narrative – see below]

Bot (close):

👉 "Did I capture your needs correctly? If so, I'll push this description to our candidate pool and send you 2–3 curated resumes that fit this profile. What's your best email?"

5. Resume Delivery

- Always send 2–3 resumes.
 - Collect: First Name, Last Name, Email.
 - No scheduling—sales team calls manually.
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6. Below ICP Nurture

Bot:

“I understand you may not be ready to bring someone on today. Would you like me to send you our Delegation Framework? It’s a checklist to help you map out what to delegate so when the timing is right, you’ll know exactly how to maximize a VA.”

- If Yes → Collect info → Deliver checklist.
 - If No → “No problem—when you’re ready, we’ll be here.”
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7. Chief of Staff (Strategist Path)

Bot:

“Chief of Staff roles are highly customized. Let’s clarify your needs so we can scope the right candidates.”

- How many people are on your team?
- How many departments would this role help align?
- Annual revenue?
- Top 3 outcomes you want from this hire?
- Need prior industry-specific experience?

Bot (close):

“Thanks—this helps us scope exactly what you need. A member of our team will reach out directly.”

👉 No resume send. Trigger manual sales follow-up.

V. Industry Playbooks (JD Outputs)

1. Real Estate

Qualifier: How many transactions last year? [<5, 6–11, 11–20, 21–30, 30+]

- 21–30 = sweet spot (Operator, PT/FT).
- 30+ = strong ICP (Coordinator or Strategist).

JD Output Example:

“Your VA will sound polished on calls, able to coordinate with vendors, escrow, title, and clients as if they were local. They’ll manage MLS updates, email triage, document filing, and transaction coordination from contract to close. They’ll also handle light creative work—listing packets, flyers, property reels, and social media templates—to keep your brand visible. This role is part of our ⚙️ Operator Package (up to 80 hrs/mo). Did I capture your needs correctly?”

2. Agency / Marketing

Qualifier: Monthly revenue? [<20k, 21–35k, 36–50k, 50k+]

- 36–50k = ICP (Operator).
- 50k+ = Strong ICP (Coordinator).

JD Output Example:

“Your VA will be the operational backbone of your agency. They’ll manage task boards (Asana/ClickUp), keep your CRM (HubSpot/GoHighLevel) clean, and prepare client reports. They’ll sound great on client calls, manage follow-ups, and ensure deliverables move forward. On the creative side, they’ll handle light edits, templates, and scheduling to keep campaigns on track. This role is part of our 🗝️ Coordinator Package (up to 120 hrs/mo). Did I capture your needs correctly?”

3. Legal

Qualifier: Monthly revenue? [<25k, 25–49k, 50k+]

- 25–49k = Part-time Paralegal Admin.
- 50k+ = Full-time.

JD Output Example:

“Your VA will manage intake calls, appointment reminders, and client updates with a professional phone presence. They’ll maintain case files, prepare documents from templates, and track deadlines in Clio or your preferred system. While not core, they can also assist with optional marketing touches—social updates, testimonials, or announcements. This role is part of our ⚙️ Operator Package (up to 80 hrs/mo). Did I capture your needs correctly?”

4. Dental / Medical

Qualifier: Monthly practice revenue? [<30k, 30–60k, 60k+]

- 30–60k = Part-time.
- 60k+ = Full-time.

JD Output Example:

“Your VA will confirm appointments, manage recalls, and follow up on treatment plans with patients. They’ll handle eligibility checks, update Dentrix or OpenDental, and keep billing notes current. As an extra, they can help with reminder templates and light social posts. This role is part of our ⚙️ Operator Package (up to 80 hrs/mo). Did I capture your needs correctly?”

5. Coaching / Consulting

Qualifier: Clients per month? [<5, 5–10, 11–20, 20+]

- 11–20 = ICP.
- 20+ = Strong ICP.

JD Output Example:


“Your VA will manage your calendar, prep session notes, and send follow-ups to clients. They’ll sound great on discovery calls, qualify leads, and keep your CRM clean. They’ll also repurpose content, schedule posts, and prepare light creative assets. This role is part of our 🗝️ Coordinator Package (up to 120 hrs/mo). Did I capture your needs correctly?”

6. E-commerce

Qualifier: Monthly revenue? [<20k, 20–50k, 50k+]

- 50k+ = ICP.

JD Output Example:

“Your VA will handle customer support via Zendesk or Gorgias, coordinate returns, and manage VIP escalations with a professional phone presence. They’ll update Shopify or Amazon listings, track inventory in Google Sheets, and prepare performance reports. They’ll also support creative workflows with product images, social media templates, and light video edits. This role is part of our  Coordinator Package (up to 120 hrs/mo). Did I capture your needs correctly?”

7. Chief of Staff (Strategist)

No automated JD. Custom intake only.

VI. Data Capture & CRM Tags

Captured: First Name, Last Name, Email, Company (optional).

Tags: path_talent / path_delegate, icp_below / warming / icp_fit / strong, package_S/M/L/XL.

VII. Bot Copy Blocks (Reusable)

- **Welcome:**
- “Hi! I’m your Staffly Guide. I’ll help you match with the right Filipino VA so you can free up time and grow.”
- **Resume CTA:**
- “Perfect—pushing this description to our candidate pool. You’ll get 2–3 curated resumes within 24 hours. What’s your best email?”
- **Below ICP Offer:**
- “Would you like me to send you our Delegation Framework? It’s a simple checklist that helps you plan what to offload when the time is right.”