**🔧 REMAINING BOTS: REQUIRED INPUTS**

**🟠 1. Trustee Services Bot**

**Purpose**: Manage trustee appointments, resignations, replacements, decision logs, and compliance actions.

**🔹 Questions:**

1. What actions must trigger trustee replacement (e.g. death, incapacity, resignation)?

Death, Insolvency, Incapacity, Conviction of Financial Crime, Resignation, Removal of a Trustee by a majority

1. Should the system allow clients to request trustee services digitally?

Yes, but an annual fee of 2% of the annual income of the trust will be applicable.

1. What legal or procedural steps must be followed to appoint or remove a trustee?

Where a trustee has been removed by any of the reasons as set out in No 1 above. The removal and replacement must be communicated to the Master of the High Court in the Jurisdiction where the trust has been registered. This must be done on the official forms of the Master. You can pull these files from the Department of Justice South Africa Website to it populate it. This will then need to be accompanied by the proof of removal, which will differ based on the reason for said removal. It will also need to be accompanied by the minutes of the meeting appointing a new trustee and the acceptance of appointment of the new trustee.

1. Do you require ongoing trust resolution logging (e.g. minutes, resolutions)?

I will only need it where I am acting as one of the trustees. Otherwise, there is no need for any further involvement from my side.

1. Will your firm act as a trustee? If yes, what are the onboarding requirements for that service?

No, only an individual (natural person) can act as a trustee.

**🟠 2. Education Subscription Bot**

**Purpose**: Handle gated educational content, paid access, and recurring billing.

**🔹 Questions:**

Generate a generic bot for this for the time being. I am uncertain how or even if I will be making use of this at this point in time.

1. What types of content are being offered (e.g. articles, videos, webinars)?

\*Webinars/Live Q&A Sessions\*: Monthly sessions where experts discuss specific topics, allowing for audience interaction.

-\*Polls and Surveys\*: Engage audiences by asking their opinions on common misconceptions regarding tax liability and protection strategies.

\*Q&A Sessions\*: Weekly posts inviting questions about corporate restructuring, answering them in the comments or in follow-up posts.

1. What pricing models apply (e.g. monthly, annually, free tier)?

Free tier is 1 session, then monthly payment. Uncertain how to price it though.

1. Do you want to support free trials?

See above.

1. What access control is needed (e.g. drip-feeding, sequential unlocking)?

Give me a recommendation.

1. What platforms or plugins (e.g. LearnDash, MemberPress) will this integrate with?

Give me a recommendation

**🟠 3. Content Repurposing & Scheduling Bot**

**Purpose**: Turn long-form content (e.g. blog/podcast/video) into a drip feed of posts (LinkedIn, Twitter, etc.)

**🔹 Questions:**

Work through the following first and then I will answer any remaining questions.

\*1. Goal:\*

The primary goal of this social media plan is to create awareness and educate the target audience about asset protection and tax minimisation strategies through corporate restructuring, specifically utilising provisions under Section 42 to 47 of the South African Tax Income Act, International Business Corporations (IBCs), trusts, and companies. Secondary goals include generating leads for consultancy services and establishing the brand as an authority in corporate restructuring and tax optimisation. Determine if this summary is correct based on the information already provided or if you think it needs to be expanded.

\*2. Target Audience:\*

- \*Business Owners\*: SMEs and large corporations seeking to minimise tax liability and protect assets.

- \*Financial Advisors\*: Professionals advising clients on tax minimisation and asset protection strategies.

- \*Accountants\*: Individuals and firms looking to expand their service offerings in corporate restructuring.

- \*Legal Professionals\*: Lawyers with clients needing corporate restructuring advice.

Again, determine if this is correct based on the information already provided or if you think it needs to be expanded.

\*3. Platform:\*

- \*LinkedIn\*: Primary platform for B2B engagement, suitable for reaching business owners and professionals.

- \*Facebook\*: For community building, discussions, and sharing informative content.

- \*Twitter\*: For real-time engagement, news updates, and connecting with influencers in finance and law.

- \*Instagram\*: For visually engaging content that simplifies complex concepts and showcases case studies.

- \*YouTube\*: Educational videos and webinars that dive deeper into corporate restructuring strategies.

Again, determine if this is correct based on the information already provided or if you think it needs to be expanded.

\*4. Content Strategy:\*

- \*Educational Posts\*: Carousel posts explaining key sections of the Tax Income Act (42-47) in digestible formats.

- \*Infographics\*: Visual representations of the benefits of IBCs, trusts, and restructuring for tax purposes.

- \*Case Studies\*: Real-life examples of successful corporate restructuring services to illustrate the effectiveness of the strategies.

- \*Blog Articles\*: In-depth articles hosted on the website shared through all platforms, focusing on detailed benefits and misconceptions related to tax minimisation, asset protection, and corporate law.

- \*Testimonials/Reviews\*: Sharing success stories from clients to build credibility and trust.

\*5. Engagement Strategy:\*

- \*User-Generated Content\*: Encourage clients to share their experiences with corporate restructuring using branded hashtags.

- \*Comment Engagement\*: Actively respond to comments and messages to build relationships and foster community.

\*6. Measurement & Analytics:\*

- \*Engagement Metrics\*: Track likes, shares, comments, and overall engagement rates on each platform.

- \*Website Traffic\*: Use Google Analytics to identify traffic sources and conversion rates from social media platforms.

- \*Lead Generation\*: Monitor the number of inquiries and sign-ups for webinars to assess interest and conversion efficacy.

- \*Audience Growth\*: Measure the growth of followers and connections on all platforms to ensure the target audience is being reached.

- \*Content Performance\*: Analyse which posts generate the most engagement and adjust the content strategy accordingly.

\*7. Conclusion:\*

Launching a product focused on corporate restructuring to protect assets and minimise tax liability requires a comprehensive, targeted social media approach. By identifying the right target audience and engaging them through meaningful content and interactions, we can build a strong brand presence. This plan will not only promote awareness of corporate restructuring solutions but also position our brand as a trusted authority in the industry.

1. Incorporating Podcasts

\*a. Podcast Concept:\*

- \*Title\*: Consider a catchy title that addresses corporate restructuring, asset protection, and minimising tax liability (e.g., "Asset Shield: The Corporate Restructuring Podcast"). Give me suggestions on this.

- \*Format\*: Plan for a mix of interviews with industry experts, client success stories, and educational episodes where you deep dive into tax minimisation strategies.

- \*Frequency\*: Weekly

\*b. Content Creation:\*

- \*Episode Topics\*: Start by drafting topics based on common questions, pain points, and key trends in corporate restructuring. Some examples:

- “Understanding Section 42: Corporate Restructuring Essentials”

- “Real Life Applications of IBCs for Tax Minimisation”

- Expert interviews with accountants or tax attorneys.

\*c. Distribution:\*

- Choose podcast hosting platforms (like Libsyn, Podbean, or Anchor) that distribute to major directories (Spotify, Apple Podcasts, Google Podcasts, etc.). Which hosting platform would you suggest?

### 2. Primary focus for content.

Given my target audience and the nature of the content, the focus to create content for should be LinkedIn. This platform allows you to reach business professionals effectively and can serve as the primary channel to promote your podcast episodes, share insights, and engage with decision-makers.

Again, determine if this is correct based on the information already provided or if you think it needs to be expanded.

3. Content Creation and Repurposing Strategy

\*a. Initial Podcast Recording:\*

- Conduct your first podcast episode on a key topic, ensuring it is informative and engaging.

\*b. Repurposing Content for Other Channels:\*

1. \*Blog Post\*:

- Transcribe the podcast episode and turn it into a blog post. Include key points, takeaways, and supplemental information to enhance understanding. Optimize it for SEO to drive organic traffic.

2. \*Social Media Snippets\*:

- Extract key quotes or short soundbites (30-60 seconds) from the podcast episode to share on LinkedIn, Twitter, and Facebook. Use engaging visuals or audiograms (animated graphics with audio) for Instagram and Twitter.

3. \*Infographics\*:

- Create infographics summarizing the main points of the episode, especially complex information such as tax strategies. Share these on all your social media platforms.

4. \*Email Newsletters\*:

- Include a link to the podcast episode in your email newsletters. Provide a brief summary and highlight the value listeners can gain from tuning in.

5. \*YouTube\*:

- If possible, upload the podcast episode on YouTube. How can I create a simple video with the audio and a static image or graphics that represent the topic? This can help reach audiences who prefer video content.

6. \*Feedback Engagement\*:

- Use the feedback and questions generated from the podcast on social media to create follow-up content, additional episodes, or FAQs.

### 4. Ongoing Strategy

Continue this cycle by producing new podcast episodes, while simultaneously using each episode as a springboard for various forms of content. Regularly monitor engagement metrics and audience feedback across platforms to refine your approach, ensuring that the content resonates with your audience and meets their needs.

By incorporating podcasts into my strategy, I can deepen your audience connection, provide valuable insights, and establish my brand as a thought leader in corporate restructuring and tax minimisation.

Again, determine if this is correct based on the information already provided or if you think it needs to be expanded.

1. What types of content need to be repurposed? (video, audio, blog, etc.)
2. What social platforms should the repurposed content be scheduled to?
3. Do you already use tools like Buffer, Hootsuite, or Publer? If yes, which?

No, I have used Hootsuite in the past, but am not currently familiar with them. Provide me with suggestions.

1. What frequency should be supported (e.g. daily, weekly)?

Podcasts Weekly, Blogposts every three days. Uncertain about the rest. Provide me with suggestions.

1. Should it support multilingual posting or repurposing?

Yes, on the repurposing. See above.

**🟠 4. Back Office Profitability & Reporting Bot**

**Purpose**: Track performance, quote breakdowns, EBITDA, efficiency metrics.

**🔹 Questions:**

1. What metrics are most important for your firm?

Profitability per service, Quote-to-close ratio, Cost per lead, Cost per close, Cost per conversion, Lifetime Value of the Client, Retention Rates, Returning Sales.

1. Do you need weekly/monthly reports or real-time dashboards?

Weekly

1. Should the bot calculate staff or team-based profitability?

Not at this point in time, definitely at a future date.

1. Do you want to compare projected vs actual quote values?

yes

1. Will this integrate with existing accounting tools (e.g. Xero, QuickBooks)?

Xero is nice, but I want to keep my overheads as low as possible. So, if this can all be done in the backend then I would prefer it.

**🟠 5. Booking & Payment Gateway Bot**

**(Already partially built — only crypto settings pending setup)**  
No further questions required right now. ✅

**🟠 6. Marketing Automation Engine Bot**

**Purpose**: Run email campaigns, onboarding flows, segmentation, smart CTAs.

**🔹 Questions:**

1. What email marketing tool do you use (e.g. Mailchimp, ActiveCampaign, ConvertKit)?

In trying to keep cost low, what would you suggest? Keeping in mind open rate as well as click trough rate. Can this be done in the bot? Is it advisable?

1. What client segments do you want to target? (e.g. new leads, registered clients, dormant clients)

All possible clients with a complete CRM that can channel emails to specific clients depending on where in the process they are. See tracking metrics above.

1. What actions should trigger emails? (e.g. form submission, quote accepted, trust registered)

Any action where an email address is put in needs to trigger emails and follow ups.

1. What types of campaigns are needed?

I can only think of educational drip series, any suggestions?

1. Do you want scoring logic for lead qualification?

yes