

AI Sequence Generator Upgrade Summary

Issue Fixed

The AI sequence generator was hardcoded to **always generate email-only sequences**, even when users selected SMS or Mixed type. This prevented users from creating SMS campaigns or multi-channel sequences.

Solution Implemented

1. Updated AI Sequence Generator Library (`lib/ai-sequence-generator.ts`)

- Added `preferredType` parameter to `generateSequenceForLead()` function
- Completely rewrote `buildSequencePrompt()` to support three channel types:
 - **Email**: Detailed messaging with subject lines and full content
 - **SMS**: Brief, conversational messages (160 char limit guidance)
 - **Mixed**: Strategic combination of email and SMS for maximum engagement
- Each type now has specific instructions and best practices

2. Enhanced AI Generation API (`app/api/ai/generate-sequence/route.ts`)

- Now accepts `preferredType` parameter from the client
- Builds channel-specific prompts dynamically
- Updated system prompt to support multi-channel marketing (not just email)
- Improved fallback sequence generation

3. Improved User Interface (`app/dashboard/crm/sequences/new/page.tsx`)

- Added UI hint: "Select type below, then generate"
- Enhanced type selector with descriptive labels:
 - Email - Detailed messaging
 - SMS - Quick, direct messages
 - Mixed - Best of both worlds
- Added helper text: "AI will generate steps based on your selected type"
- Now passes `formData.type` to the AI generation API
- Added SMS-specific field with character counter (160/320 char limits)
- Better toast notifications showing which type is being generated

4. New SMS Field Support

- Character counter for SMS steps (shows X/160 chars)
- Maximum 320 character limit (double SMS)
- Warning when message is too long
- SMS-specific placeholder and guidance text
- Merge tag support for personalization

How It Works Now

1. **User selects sequence type** (Email, SMS, or Mixed) in the dropdown
2. **User clicks “AI Generate”**
3. **System reads the selected type** and passes it to the AI
4. **AI generates appropriate content:**
 - Email: Long-form with subjects
 - SMS: Short, punchy messages under 160 chars
 - Mixed: Strategic combination of both channels
5. **Steps are populated** with type-appropriate content
6. **User can edit or save** the sequence

Key Features

- ✓ **Respects user’s channel preference** - No more forcing email-only
- ✓ **SMS-aware content** - AI generates concise, mobile-friendly messages
- ✓ **Mixed channel strategy** - AI knows when to use each channel effectively
- ✓ **Character limits enforced** - SMS stays within 160/320 char limits
- ✓ **Better UX** - Clear guidance and feedback throughout the process
- ✓ **High-converting sequences** - AI uses best practices for each channel

Example Use Cases

SMS Sequence (New!)

Step 1: Hi {{firstName}}! Thanks for reaching out 🙌 Ready to grow your business?
Step 2: Quick question - what's your biggest marketing challenge right now?
Step 3: We helped 50+ businesses like yours. Free consult? Reply YES

Mixed Sequence (New!)

Step 1 (Email): Detailed welcome with case study
Step 2 (SMS): Quick reminder - "Saw you opened our email! Have 5 min to chat?"
Step 3 (Email): Full proposal and pricing
Step 4 (SMS): "Thoughts on the proposal? Quick call?"

Email Sequence (Improved)

Still works as before, but now with better AI prompting

Technical Implementation


- **Backward compatible** - Existing email sequences still work
- **Type-safe** - TypeScript ensures correct data flow
- **Fallback handling** - Graceful degradation if AI fails
- **Production-ready** - Tested and deployed

Benefits

1. **More engagement options** - Reach leads where they are
 2. **Higher conversion rates** - Right message, right channel
 3. **Better user experience** - AI actually does what you ask
 4. **Mobile-first approach** - SMS is essential in 2025
 5. **Strategic campaigns** - Mix channels for optimal results
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Fixed by: CDM Suite Development Team

Date: October 14, 2025

Status:  Deployed and tested