BrandVX — End-to-End User Experience (Plain-Language Spec)

This is how the whole platform should feel and behave from a **user's** point of view. Hand this to GPT-5 in Cursor and say "build what this document describes."

Who's who

- **Operator (your client)**: a beauty professional (e.g., vivid colorist, lash artist) who uses BrandVX.

- **End client**: their customer booking services.

- **BrandVX (master agent)**: orchestrates everything.

- **Specialists**: Appointment Manager, Treatment Manager (Vivid Hair/Lash), Content Creator, Inventory Manager, Admin/Revenue.

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1) Onboarding — what the operator does first

1. **Create account** → name, business name, phone, email.

2. **Connect tools** (all optional but guided):

   - **HubSpot** (for CRM sync)

   - **Square/Acuity** (calendar & booking)

   - **SendGrid** (email)

   - Optional: **Shopify/Square POS** (products/inventory), **QuickBooks** (revenue)

3. **Import data**:

- Upload CSV/PDF/"export" from current system (clients, booking history, products).

- Map fields (we show a preview and auto-match common columns).

- Confirm.

4. **Business preferences**:

   - Services, duration, prices, availability, cancellation policy.

   - Reminder settings (default: **7d / 3d / 1d / 2h** before appointments).

   - "Soonest vs Anytime" preference defaults.

5. **Trial setup** (optional):

   - Enable **free week** onboarding (white-glove).

   - Choose welcome message template.

6. **Sharing & Time Saver**:

   - Toggle **"Show Time Saved"** widget to clients (on/off).

   - Toggle **"Allow share prompts"** (on/off).

   - Connect socials if they want one-click posting later.

7. **Finish screen**:

   - "You're live."

   - Optional **Share** button ("I just launched with BrandVX") that creates a ready-to-post card.

   - Next steps checklist: "Import complete", "Templates set", "First campaign scheduled".

Expected outcome: They land in the **Operator Dashboard** with cards (Time Saved, Revenue Uplift, Usage Index, Referrals) and a short guided tour.

2) Day-to-day — what happens automatically

A) New leads arrive

- **Inbound (warm)** via HubSpot form, referral, or manual add → BrandVX sends a friendly intro text (email if no phone).

- **Outbound (cold/scraped)** → BrandVX waits a short delay, then sends a short, value-first text.

Branching from first touch:

- **Replies** → they become **Engaged**.

- **No reply** → they enter the **Never Answered** cadence.

- **"Not interested"** → they go to **Retargeting (Disinterested)** for a polite two-step counteroffer.

B) Never Answered cadence (SMS-first, emails layered)

- **Day 1** after no-answer: send email (if available).

- **2.1 (2 days)**: follow-up text.

- **2.2 (1 week)**: text + emails on days 5, 9, 12, 17, 20, 23, 28.

- **2.3 (2 weeks)**: text + emails on days 17, 20, 23, 28.

- **2.4 (1 month)**: text + weekly emails.

- **2.5 (Monthly/Quarter)**: text at month 2, month 3, and a more emotional text at quarter end.
  If still no reply → **Retargeting (No Answer)** for one last emotional counteroffer.

Any reply at any time moves them to **Engaged**.

C) When someone is engaged

- **Interested, no meeting yet** → gentle nudges to book (respectful cadence).

- **Meeting booked** → reminders: **7d / 3d / 1d / 2h**.

- **Rescheduling**:

  - BrandVX asks "**Soonest vs Anytime**".

  - If **Soonest**, the client is added to a **notify-list**; when a cancellation opens, a targeted SMS goes out so they can grab the slot.

- **After the meeting**:

  - If they accept the trial → they're **Onboarded** and enter **Retention**.

  - If not → they drop into **Retargeting** with a simple, value-based follow-up.

D) Retention & loyalty

- **Trial week (5.1)**: white-glove support (BrandVX helps but doesn't spam).

- **Month 1 paid (5.2)**: white-glove continues; light educational content.

- **Ongoing (5.3)**: friendly nurture cadence (same tempo as Never Answered, but warm tone).

- **Ambassador/Partner monitoring (5.4)**:

  - When they hit **$25k+ monthly revenue after BrandVX**, **moderate usage**, and **≥5 referrals**, they're flagged as **Ambassador Candidate**.

  - The operator gets a task/notification to reach out with rev-share/partnership options.

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3) Content, Inventory, Admin — what the operator can "do"

Content Creator (easy wins)

- Upload a before/after → pick a template (e.g., **Vivid Hair** / **Lash**).

- BrandVX drafts a caption, short video idea, and three story prompts.

- One-click **Schedule** (IG/FB) or **Export** assets.

- When a post over-performs, the dashboard surfaces it and offers a **Share** moment.

Inventory Manager (no stock surprises)

- Sync products from Shopify/Square POS.

- BrandVX tracks usage (appointment-linked) and forecasts **par** levels.

- When low: show a **Reorder** suggestion and can draft a PO; optionally update product listings across sites.

Admin/Revenue (proof you're winning)

- Pulls QuickBooks snapshots for baseline vs current revenue.

- Shows **Revenue Uplift** and **Time Saved** (see below) and a clean funnel:

  - impressions → clicks → waitlist → demo booked → show rate → trial → paid → retained

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4) Time Saver — baked-in, visible, shareable

- Each automated action has a **baseline minutes** value and an **automation minutes** estimate (kept realistic).
  Example:

  - booking 6 → 1 min, reminder 1 → 0.1, follow-up sms 2 → 0.3, caption 10 → 2, inventory update 4 → 0.5

- **Time saved** = baseline − automation, summed over the day/week/month/lifetime.

- Milestones at **10h / 25h / 50h / 100h** unlock a **shareable badge**.

- The **Time Saved** card is on the dashboard with a sparkline, and can be shown to end clients if the operator enables it.

- Select **inflection points** (not spammy) surface a **Share** button with a prefilled caption and branded image.

Default share inflection points (toggleable):

- End of onboarding

- Trial week complete

- First fully booked week

- **$25k month** achieved

- **5 referrals** reached

- Best performing post this month

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5) Operator Dashboard — what they see every day

- **Top cards**:

    - **Time Saved (hrs)**

    - **Revenue Uplift ($)**

    - **Usage Index** (sessions, reply speed, tasks)

    - **Referrals (30d)**

- **Funnel** area: impressions → clicks → waitlist → demo → show → trial → paid → retained

- **Buckets** breakdown: how many contacts are in 1..7 right now

- **Ambassador Candidates**: those meeting the thresholds (with contact links)

- **Cadence Queue**: next 50 scheduled sends (who, channel, bucket.tag, when)

- Inline **Share** prompts only at the moments listed above.

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6) How communication feels (tone & safety)

- **Texts** are short, human, and contextual ("Hey {first}, I can hold Friday 2pm or notify you if sooner pops up—prefer soonest or anytime?").

- No wall-of-text; any emotional copy is still respectful.

- **STOP/HELP** always works; BrandVX records consent and backs off immediately.

- If there's **no phone**, BrandVX uses email and doesn't nag.

- Rate-limits avoid spamming; one fresh attempt per cadence step max.

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7) Settings — what operators can change anytime

- **Reminders**: on/off and timing.

- **Cadence**: use defaults or tweak copy/intervals per bucket.tag.

- **Templates**: edit SMS and email copy; preview before publishing.

- **Share**: enable/disable each inflection point; connect/disconnect socials.

- **Time Saver**: adjust baseline minutes per task (we provide sensible defaults).

- **Thresholds**: tweak Ambassador criteria (we default to $25k/mo + moderate usage + 5 referrals).

- **Privacy**: opt-in/opt-out policies, data export/delete, audit trail.

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8) Edge cases — what happens when things go sideways

- **Double-booking conflict**: BrandVX proposes the next two closest slots and updates the notify-list.

- **Calendar outage** (Square/Acuity): BrandVX apologizes, collects availability preference, and retries later; operator gets a heads-up.

- **SMS blocked / carrier error**: BrandVX switches to email if allowed, and logs the failure.

- **Client says "not interested"**: immediate tag to **Retargeting (Disinterested)** with a single thoughtful counteroffer; then park unless they engage.

- **Client silent 6 months**: moves to **Dead**; we keep minimal audit only.

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9) The quiet plumbing (what's stored, at a glance)

- **Entity** (preferences, notes), **Summary** (tight history), **Vector** (semantic recall), and an **Events Ledger** (every send/reply/state change).

- **Lead Status** keeps `bucket`, `tag`, and `next_action_at` so cadences run like clockwork.

- HubSpot properties stay in sync so operators can work there if they prefer.

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10) Definitions of Done (per area)

Onboarding

- Can connect HubSpot, Square/Acuity, SendGrid without leaving the flow.

- CSV import maps common columns automatically; errors are clear and fixable.

- "Finish" screen shows exactly what's live and offers an optional Share.

Lead handling

- Inbound/outbound first text always uses the correct tone and personalization.

- No phone → email fallback; no email → log and continue without nagging.

Cadences

- Every step respects `next_action_at` and consent.

- One attempt per step; reply instantly re-routes the contact to Engaged.

Booking

- "Soonest vs Anytime" is asked at the right moments.

- Notify-list works: opening hits a small batch of best candidates, first to accept wins.

Time Saver

- Numbers add up and feel believable; operator can tune baselines.

- Milestones trigger once, create a shareable asset, and never nag again.

Sharing

- Only appears at defined inflection points; one click to copy/post/share.

- All shares are logged as events (prompted, accepted/declined).

Ambassador flag

- Triggers when **all** three criteria are met.

- Creates a HubSpot task + in-app nudge.

Dashboard

- Cards never feel stale (update at least daily; Time Saved live).

- Cadence Queue is accurate and actionable.

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11) Minimal template names (for GPT-5 to wire)

- **Emails (SendGrid)** keyed by `bucket.tag`, e.g., `email_2_2_followup`, `email_3_2_counteroffer`.

- **SMS** templates keyed similarly, e.g., `sms_4_2_reminder_3d`.

- **Share cards**: `share_onboarding`, `share_trial_done`, `share_fully_booked`, `share_25k_month`, `share_5_referrals`, `share_top_post`.

That's the entire UX in plain language. If the system behaves exactly like this, it'll feel respectful, helpful, and "alive" — and you'll have clean proof of impact (time and revenue) without the operator lifting a finger.