**Santiago Family User Manual**

**AI Automation Sales Platform & Tools**

*Version 12.0 | Last Updated: August 2025*

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**Getting Started**

**Quick Launch (15 Minutes)**

**Step 1: Access the Platform**

1. Navigate to your Replit URL: https://your-replit-url.replit.app
2. Click "Sign in" using Replit Auth
3. Verify your name and email in the profile header (top-right)

**Step 2: Initial Setup**

1. **Environment Configuration**
   * Open Replit → Tools → Secrets
   * Add these required API keys:
     + OPENAI\_API\_KEY - For GPT-4 mentor and content generation
     + ELEVENLABS\_API\_KEY - For voice synthesis
     + HEYGEN\_API\_KEY - For video avatar generation
     + RETELL\_API\_KEY - For AI call automation
     + DATABASE\_URL - PostgreSQL connection string
2. **Integration Connections**
   * Navigate to /setup-guide
   * Connect HubSpot (OAuth or Private App token)
   * Optional: Connect Apollo.io and LinkedIn Sales Navigator

**Step 3: Verification Test**

1. Visit /health to verify all services show "OK"
2. Create a test AI Mentor session with your own information
3. Import 3 sample leads via CSV
4. Generate a test voice message and video
5. Confirm data appears in HubSpot

**Platform Overview**

**Navigation Map**

| **Section** | **URL Path** | **Purpose** |
| --- | --- | --- |
| **Home** | / | Dashboard and announcements |
| **AI Mentor** | /ai-mentor | Career counseling and prospect qualification |
| **Lead Engine** | /lead-engine | Lead management and pipeline |
| **AI Automation** | /ai-automation | Voice, video, and call generation |
| **Team Dashboard** | /team | Performance metrics and leaderboards |
| **Spanish Tools** | /spanish-tools | Bilingual resources and translations |
| **Workflow** | /workflow-visualization | Process optimization |
| **Admin** | /admin | Settings and configurations (owners only) |

**AI Career Mentor**

**Starting a Mentor Session**

1. **Navigate to AI Mentor**
   * Go to /ai-mentor
   * Click "Start New Session"
2. **Create Prospect Profile**
   * Enter required fields:
     + Full Name
     + Email
     + Career Stage (Entry/Mid/Senior)
     + Primary Interest
     + Location
3. **Select Mentor Personality**
   * **Pablo**: Law enforcement background, confident approach
   * **Nolly**: Telecommunications background, warm style
   * **Team**: Combined expertise
4. **Engage in Conversation**
   * Use suggested prompts or type custom questions
   * Save important notes using "Save Note" button
   * Convert insights to lead tasks with "Actions" menu

**Best Practices**

* Always mention prospect's background for personalized guidance
* Request 30/60/90 day plans for specific situations
* Use Spanish mode by typing: "Responde en Español"

**Sample Questions to Ask**

* "What career paths with WFG fit my law enforcement background?"
* "Show me the training milestones for new associates"
* "Create a 90-day action plan for building my team"

**Lead Generation Engine**

**Dashboard Overview**

The Lead Engine has five main sections:

1. **Dashboard** - Real-time statistics and revenue projections
2. **Targeting & Import** - Data source connections
3. **Lead Board** - Kanban-style pipeline management
4. **Scripts & Sequences** - Email/SMS/LinkedIn templates
5. **Analytics** - Conversion metrics and ROI analysis

**Importing Leads**

**Method 1: CSV Import**

1. Navigate to /lead-engine → "Targeting & Import"
2. Click "Upload CSV"
3. Ensure CSV includes these headers:
   * firstName (required)
   * lastName (required)
   * email (unique recommended)
   * phone (E.164 format)
   * title
   * company
   * industry
   * city, state, country
4. Map fields on the mapping screen
5. Choose duplicate handling: "Skip" or "Update existing"
6. Click "Import" and review summary

**Method 2: HubSpot Integration**

1. Click "Connect HubSpot"
2. Follow OAuth flow or paste Private App token
3. Required scopes:
   * crm.objects.contacts.read/write
   * crm.objects.deals.read/write

**Method 3: Apollo.io Integration**

1. Paste Apollo API key
2. Select target list
3. Preview and import leads

**AI Lead Scoring**

The system automatically scores leads based on:

| **Factor** | **Weight** | **Example** |
| --- | --- | --- |
| **Title Seniority** | 1.0-2.5x | C-Suite (2.5x), VP (2.0x), Director (1.5x) |
| **Industry Fit** | 1.0-2.2x | Finance (2.2x), Tech (1.8x), Healthcare (1.6x) |
| **Geographic Priority** | 1.0-1.5x | NY Metro (1.5x), FL Major (1.2x) |
| **Intent Signals** | 0-40 points | Email opens, link clicks, profile views |

**Pipeline Management**

**Stage Progression:**

1. **New** → Initial contact, no response
2. **Qualified** → Responded or high AI score
3. **Appointment** → Meeting scheduled
4. **Proposal** → Solution presented
5. **Closed Won** → Client onboarded

**Daily Pipeline Actions:**

* Drag cards between stages to update probability
* Click lead cards to add notes and set next actions
* Use "Estimate" to preview deal value
* Click "Automate" to attach sequences

**Email & Message Templates**

**Welcome Email (Day 0)**

Subject: Quick intro, {firstName}?

Hi {firstName},

I lead the Santiago Team at WFG. We help {industry} professionals

create protection-first financial plans without pressure or jargon.

If helpful, I can share a 2-minute video tailored to {company}.

Open to a quick intro?

{bookingLink}

Best,

{repName}

**LinkedIn Connection (Day 1)**

Hi {firstName} — fellow {industry} pro here. I share short,

practical frameworks on protection, retirement, and debt-free

growth. Would love to connect.

**Follow-up Sequence**

* **Day 3**: Share personalized video with CTA
* **Day 7**: Share calculator result screenshot
* **Day 14**: Request permission for 10-minute call

**AI Automation Hub**

**Voice Generation (ElevenLabs)**

1. **Navigate to Voice Tool**
   * Go to /ai-automation → "Voice"
2. **Configure Settings**
   * Select voice: Pablo (confident), Nolly (warm), or Neutral
   * Set speed: 1.0 (normal)
   * Set emotion: Friendly
3. **Create Script**
   * 120-150 words = ~1 minute audio
   * Use personalization tokens: {firstName}, {company}
4. **Generate and Deploy**
   * Click "Generate"
   * Download MP3
   * Attach to email or LinkedIn message

**Sample 30-Second Script**

Hi {firstName}, Pablo from the Santiago Team. We help families

build protection-first plans in under 30 minutes. If you'd like

a short walkthrough personalized for {company}, I'm happy to

send it over. My calendar's here: {bookingLink}. Talk soon.

**Video Generation (HeyGen/Tavus)**

1. **Setup Video**
   * Go to /ai-automation → "Video"
   * Choose avatar: Pablo, Nolly, or Team
   * Upload company logo (optional)
2. **Script Guidelines**
   * Keep under 180 words for optimal processing
   * Use tokens for personalization
   * Include clear CTA
3. **Processing**
   * Generation time: 2-5 minutes
   * Output formats: MP4 or shareable link

**AI Calls (Retell)**

1. **Configure Call Campaign**
   * Go to /ai-automation → "Calls"
   * Select script type:
     + Intro (first touch)
     + Qualification (discovery)
     + Appointment (booking)
     + Follow-up (nurture)
2. **Campaign Settings**
   * Choose voice personality
   * Upload lead list or select from CRM
   * Set call window (respect time zones)
   * **Enable consent prompt** (required)
3. **Monitor Results**
   * View real-time status in "Call Logs"
   * Successful connects auto-log to HubSpot
   * Appointments sync with Calendly

**Spanish Language Tools**

**Available Resources**

1. **Tutorial Español** (/tutorial-espanol)
   * Interactive lessons with audio
   * Cultural context for Hispanic families
   * Progress tracking by user
2. **Translation Assistant** (/localization-wizard)
   * Paste English or Spanish text
   * Select region: México, Caribe, Cono Sur, España
   * Review financial terminology
   * Save as template
3. **Interactive Dictionary** (/diccionario)
   * Key terms with audio pronunciation:
     + Seguro de Vida (Life Insurance)
     + Anualidad (Annuity)
     + Educación Financiera (Financial Education)
     + Libertad Financiera (Financial Freedom)

**Team Performance Dashboard**

**Accessing Metrics**

1. **Navigate to Dashboard**
   * Go to /team/leaderboard
2. **Key Metrics Tracked**
   * Conversion rate (%)
   * Meetings booked
   * Revenue generated
   * New associates recruited
3. **Team Management**
   * Click rep name for individual stats
   * Add coaching notes
   * Set weekly focus areas
   * Export data as CSV

**Performance Benchmarks**

| **Metric** | **Target** | **Top Performer** |
| --- | --- | --- |
| Weekly Calls | 50 | 75+ |
| Conversion Rate | 15% | 25%+ |
| Meetings Booked | 5 | 10+ |
| Videos Sent | 20 | 35+ |

**Daily Operations Checklist**

**Morning (9:00 AM)**

* [ ] Review overnight AI Mentor sessions
* [ ] Check pipeline for urgent follow-ups
* [ ] Confirm day's appointments in calendar
* [ ] Review team dashboard for yesterday's metrics

**Midday (12:00 PM)**

* [ ] Send 5 personalized videos to top prospects
* [ ] Generate 5 voice messages for warm leads
* [ ] Move pipeline cards and update stages
* [ ] Launch afternoon call automation campaign

**Evening (5:00 PM)**

* [ ] Log all interactions in HubSpot
* [ ] Set tomorrow's priorities
* [ ] Review Spanish language inquiries
* [ ] Update team on wins/challenges

**Weekly Tasks**

* [ ] Monday: Team leaderboard review
* [ ] Tuesday: A/B test new email subject line
* [ ] Wednesday: Audit 10 records for data quality
* [ ] Thursday: Update Spanish content
* [ ] Friday: Conversion analysis and script updates

**Troubleshooting Guide**

**Common Issues and Solutions**

**AI Mentor Not Responding**

1. Check /health endpoint - GPT should show "OK"
2. Verify OPENAI\_API\_KEY in Secrets
3. Clear browser cache
4. Check for rate limit errors (429) - wait 2-3 minutes

**Voice Generation Failures**

1. Check ElevenLabs character quota
2. Remove special characters/emojis from script
3. Try switching to Neutral voice
4. Shorten script if over 200 words

**Video Processing Delays**

1. Check HeyGen/Tavus status page
2. Try during off-peak hours (early morning)
3. Reduce script to under 150 words
4. Disable overlays for faster processing

**HubSpot Sync Issues**

1. Verify API token has correct scopes
2. Check for duplicate email addresses
3. Ensure phone numbers are in E.164 format
4. Test with 5 records before bulk import

**Database Connection Errors**

1. Verify DATABASE\_URL in Secrets
2. Check PostgreSQL is accessible from Replit
3. Restart application in Replit console
4. Review server logs for specific errors

**Compliance & Legal**

**Required Disclaimers**

**Standard Disclaimer (Copy/Paste):**

This message is for educational purposes only and does not

constitute financial advice. Santiago Team associates are

independent contractors affiliated with WFGIA. Products and

services vary by state and carrier. See disclosures for details.

**Communication Guidelines**

1. **Title Usage**
   * Always use: "Independent contractor affiliated with WFGIA"
   * Never claim to be an employee of WFG
2. **Educational Focus**
   * Emphasize financial literacy and protection
   * No promises of specific returns
   * Focus on process, not outcomes
3. **Record Keeping**
   * Log all automated interactions to CRM
   * Retain call consent records
   * Include opt-out in all messages: "Reply STOP to unsubscribe"

**Data Privacy**

* PII access restricted by role
* 24-month retention for prospects
* 7-year retention for clients
* Nightly database backups

**Support Resources**

**Internal Support**

* Technical Issues: Contact Replit workspace admin
* Training Questions: Review AI Mentor sessions
* Script Updates: Submit to team lead for approval

**External Resources**

* API Documentation: Check provider dashboards
* Compliance Questions: Refer to WFGIA guidelines
* System Status: Monitor /health endpoint

**Emergency Contacts**

* Platform Down: Check Replit status
* API Failures: Review provider status pages
* Data Issues: Contact database administrator

*Remember: Consistency creates momentum. Use these tools daily to build your protection-first practice.*

**Detailed Script Library**

**Initial Outreach Scripts**

**Script 1: Young Professional (25-35)**

Hi {firstName},

I noticed you're building your career at {company}. At your stage,

most professionals overlook the protection side of wealth building.

I specialize in helping {industry} professionals create tax-efficient

protection strategies that grow with your career. No products pushed -

just education on options you might not know exist.

Worth a quick coffee chat? Here's my calendar: {bookingLink}

Best,

{repName}

Santiago Team, WFGIA

**Script 2: Growing Family (35-45)**

Hi {firstName},

As a {title} at {company}, you're likely focused on growth while

juggling family responsibilities. Most families in {city} don't

realize they're one unexpected event from financial disruption.

I help families create "sleep-well" protection plans in under 30

minutes. No jargon, no pressure - just clear options for your situation.

I have a few slots open this week: {bookingLink}

Regards,

{repName}

**Script 3: Pre-Retiree (50-65)**

{firstName},

After your career at {company}, you've built something worth protecting.

The next 5 years are critical for tax-efficient wealth transfer and

retirement income planning.

I specialize in helping {industry} executives maximize what they keep

and pass on. Happy to share 3 strategies most advisors miss.

Free to connect this week? {bookingLink}

{repName}

Santiago Team

**Objection Handling Scripts**

**"I Already Have an Advisor"**

That's great, {firstName}! Most successful professionals work with

multiple specialists. I focus specifically on protection strategies

that complement investment planning.

Would you be open to a 15-minute call to ensure you're not leaving

any gaps? No obligation - just a second opinion on your protection

structure.

**"Not Interested"**

Understood completely, {firstName}. Before I go, would it be helpful

if I sent over our one-page protection checklist? It helps identify

gaps without any sales conversation.

If not, no worries at all. Wishing you the best!

**"Is This MLM?"**

Great question, {firstName}. WFG is a financial services firm where

professionals can build agencies. I focus on client protection planning

first - building a team is optional and only for those interested in

the business side.

Would you prefer to discuss protection strategies for your family, or

are you also curious about the business opportunity?

**Appointment Confirmation Scripts**

**Email Confirmation**

Subject: Confirmed: {day} at {time} - Protection Planning Session

Hi {firstName},

Looking forward to our conversation on {day} at {time}.

We'll cover:

• Your current protection gaps

• Tax-efficient strategies for your situation

• Simple next steps (no pressure)

Please have handy:

• Most recent pay stub (for income protection calculations)

• Current insurance declarations (if any)

• Questions about your financial protection

Zoom link: {meetingLink}

See you soon!

{repName}

P.S. If anything changes, just reply to reschedule.

**SMS Reminder (Day Before)**

Hi {firstName}! Quick reminder about our protection planning session

tomorrow at {time}. Zoom link in your email. Reply Y to confirm or

R to reschedule. -{repName}

**Spanish Language Scripts**

**Introducción Inicial**

Hola {firstName},

Vi que trabajas en {company}. Me especializo en ayudar a familias

hispanohablantes a crear planes de protección financiera sin jerga

complicada.

¿Te gustaría una conversación breve en español sobre cómo proteger

el futuro de tu familia? Sin presión, solo educación.

Mi calendario: {bookingLink}

Saludos,

{repName}

Equipo Santiago, WFGIA

**Seguimiento Cálido**

Hola {firstName},

Gracias por tu interés en aprender sobre protección financiera.

Como prometí, aquí está el video personalizado para {company}.

[Video Link]

Los próximos pasos son simples:

1. Revisar el video (2 minutos)

2. Anotar tus preguntas

3. Agendar una llamada de 15 minutos

¿Qué día te funciona mejor esta semana?

**Quick Reference Card**

**🌅 Morning Routine (15 mins)**

□ Open: /ai-mentor

└─ Review overnight sessions

└─ Flag hot prospects (score >70)

□ Open: /lead-engine/board

└─ Check "Appointment Today" filter

└─ Verify contact info accurate

□ Open: Email

└─ Send confirmations for today's meetings

└─ Reply to overnight responses

**🏃 Power Hour Checklist (10am & 2pm)**

□ CALLS (20 mins)

├─ Launch Retell campaign (25 prospects)

└─ Monitor first 5 connections live

□ VIDEOS (20 mins)

├─ Generate 5 personalized videos

└─ Send via email with tracking

□ VOICE (20 mins)

├─ Create 5 voice messages

└─ Deploy via LinkedIn/SMS

**📊 Pipeline Actions by Stage**

NEW → QUALIFIED

• Send welcome video

• Add to email sequence

• Set 48-hour follow-up task

QUALIFIED → APPOINTMENT

• Send calendar link

• Generate personalized video

• Create pre-meeting worksheet

APPOINTMENT → PROPOSAL

• Log meeting notes in HubSpot

• Send thank you + summary

• Schedule proposal delivery

PROPOSAL → CLOSED WON

• Send docusign links

• Schedule onboarding call

• Trigger welcome sequence

**🔥 Hot Keys & Shortcuts**

Platform Navigation:

Ctrl+1 → AI Mentor

Ctrl+2 → Lead Engine

Ctrl+3 → AI Automation

Ctrl+4 → Team Dashboard

Quick Actions:

Alt+N → New lead

Alt+V → Generate video

Alt+C → Start call campaign

Alt+S → Save to HubSpot

**📱 Mobile Quick Actions**

From Phone:

1. Open mobile browser

2. Go to: [platform]/mobile

3. Use these quick links:

• "Add Lead" → Quick form

• "Send Video" → Pre-made library

• "Check Pipeline" → Mobile view

• "Voice Note" → 30-sec recorder

**💰 Commission Calculation Quick Ref**

Protection Products:

• Life Insurance: 55-95% first year

• Annuities: 5-7% of premium

• Disability: 40-50% first year

Team Building:

• Direct Recruit: 10% override

• 2nd Generation: 5% override

• 3rd Generation: 3% override

**🚨 Emergency Procedures**

System Down:

1. Check: replit.com/status

2. Backup: Use mobile app

3. Manual: Export contacts to phone

API Limit Hit:

1. Switch to backup account

2. Reduce batch size to 10

3. Wait 15 minutes

CRM Sync Failed:

1. Check API token expiry

2. Manual export → Import

3. Contact tech support

**Expanded Spanish Language Section**

**Guía Completa en Español**

**Configuración Inicial**

1. **Acceso a la Plataforma**
   * Navegar a: https://tu-url-replit.replit.app
   * Iniciar sesión con Replit Auth
   * Verificar nombre y correo en el encabezado
2. **Configurar Idioma Predeterminado**
   * Ir a /configuracion
   * Seleccionar "Español" como idioma principal
   * Guardar preferencias

**Herramientas Principales en Español**

**Mentor de IA - Modo Español**

Comandos útiles:

• "Háblame en español" - Cambia el idioma

• "Explica WFG simple" - Resumen básico

• "Plan para latino" - Estrategia cultural

• "Términos financieros" - Glosario

**Plantillas de Correo en Español**

***Correo de Bienvenida***

Asunto: {firstName}, protejamos el futuro de tu familia

Hola {firstName},

Soy {repName} del Equipo Santiago. Ayudamos a familias latinas

a crear planes de protección financiera sin complicaciones.

Nuestro enfoque:

✓ Educación primero, sin presión de ventas

✓ Explicaciones en español simple

✓ Estrategias adaptadas a nuestra cultura

¿Te gustaría una consulta gratuita de 20 minutos?

Agenda aquí: {bookingLink}

Un abrazo,

{repName}

***Mensaje de WhatsApp***

Hola {firstName}! 👋

Soy {repName} del Equipo Santiago/WFG.

Ayudo a familias hispanohablantes con:

• Protección de ingresos

• Ahorro para educación

• Retiro sin preocupaciones

¿Tienes 5 minutos esta semana para una llamada rápida?

Sin compromiso, solo educación financiera en español 📚

**Diccionario Financiero Español-Inglés**

| **Español** | **English** | **Uso en Conversación** |
| --- | --- | --- |
| **Seguro de Vida** | Life Insurance | "Protección para tu familia" |
| **Prima** | Premium | "Inversión mensual en protección" |
| **Beneficiario** | Beneficiary | "Quien recibe la protección" |
| **Póliza** | Policy | "Tu contrato de protección" |
| **Cobertura** | Coverage | "Cantidad de protección" |
| **Anualidad** | Annuity | "Ingreso garantizado para retiro" |
| **Valor en Efectivo** | Cash Value | "Tu dinero disponible" |
| **Muerte Accidental** | Accidental Death | "Protección extra" |
| **Incapacidad** | Disability | "Protección de ingresos" |
| **Periodo de Gracia** | Grace Period | "Tiempo extra para pagar" |
| **Rescate** | Surrender | "Recuperar tu dinero" |
| **Indexado** | Indexed | "Crece con el mercado" |

**Preguntas Frecuentes en Español**

**¿Necesito SSN/ITIN?**

Respuesta: Para la mayoría de productos, sí necesitas SSN o ITIN.

Sin embargo, podemos empezar con educación financiera y planificación

mientras tramitas tu documentación.

**¿Puedo construir negocio sin inglés perfecto?**

Respuesta: ¡Absolutamente! Muchos de nuestros líderes más exitosos

comenzaron sirviendo a la comunidad hispanohablante. El Equipo Santiago

ofrece entrenamientos completamente en español.

**¿Cuánto cuesta empezar?**

Respuesta: La licencia de seguros cuesta aproximadamente $200-300

dependiendo del estado. WFG ofrece programas de reembolso después

de tu primera venta. La educación inicial es gratuita.

**Calendario de Eventos en Español**

**Lunes - Llamada de Equipo**

* 8:00 PM EST
* Zoom ID: [Proporcionado por líder]
* Temas: Casos de la semana, reconocimientos

**Miércoles - Entrenamiento BPM**

* 7:30 PM EST
* Enfoque: Presentación de negocio
* Práctica de scripts en español

**Sábado - Super Sábado**

* 10:00 AM EST
* Evento principal mensual
* Invitados especiales, historias de éxito

**Critical Team Workflows**

**New Associate Onboarding (First 30 Days)**

**Days 1-7: Foundation**

Day 1:

□ Complete WFG application

□ Order business cards

□ Set up email signature

□ Join team WhatsApp/Telegram

Day 2-3:

□ Attend first BPM

□ Create your 100 name list

□ Practice elevator pitch

□ Set up Calendly

Day 4-7:

□ Schedule licensing exam

□ Complete 5 practice approaches

□ Observe 3 client meetings

□ Set first 5 appointments

**Days 8-14: Skill Building**

□ Pass licensing exam

□ Complete platform training (this manual)

□ Generate first AI video

□ Import first 25 leads

□ Launch first email sequence

□ Attend team training calls

□ Practice F.N.A. presentation

□ Shadow senior associate

**Days 15-30: Launch**

□ Conduct first solo presentation

□ Submit first application

□ Generate 50+ leads weekly

□ Send 20+ videos weekly

□ Book 10+ appointments

□ Attend first Super Saturday

□ Set 90-day goals with upline

□ Begin recruiting conversations

**Weekly Team Rhythm**

**Monday - Planning**

9:00 AM - Review weekly scorecard

10:00 AM - Set individual targets

11:00 AM - Update pipeline stages

2:00 PM - Launch week's campaigns

8:00 PM - Team call (recorded)

**Tuesday-Thursday - Execution**

9:00 AM - Power Hour (calls/videos)

12:00 PM - Pipeline management

2:00 PM - Power Hour (follow-ups)

4:00 PM - Content creation

6:00 PM - Evening appointments

**Friday - Optimization**

10:00 AM - Week review metrics

11:00 AM - A/B test analysis

2:00 PM - Update scripts/sequences

3:00 PM - Clean data/pipeline

4:00 PM - Plan next week

**Saturday - Development**

10:00 AM - Super Saturday (monthly)

OR

Local team meetings

Skills practice

License study groups

**Monthly Business Review Template**

**Section 1: Metrics**

Activities:

• Calls made: \_\_\_\_\_ (Target: 200)

• Videos sent: \_\_\_\_\_ (Target: 80)

• Appointments set: \_\_\_\_\_ (Target: 20)

• Appointments kept: \_\_\_\_\_ (Target: 15)

Results:

• Applications: \_\_\_\_\_ (Target: 8)

• Premium: $\_\_\_\_\_ (Target: $10K)

• Recruits: \_\_\_\_\_ (Target: 2)

• Team premium: $\_\_\_\_\_

**Section 2: Pipeline Health**

• New leads: \_\_\_\_\_

• Qualified: \_\_\_\_\_

• In proposal: \_\_\_\_\_

• Closing ratio: \_\_\_\_\_%

• Avg deal size: $\_\_\_\_\_

• Sales cycle: \_\_\_\_\_ days

**Section 3: Improvements**

What worked:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What didn't:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next month focus:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Compliance Checkpoint System**

**Daily Compliance Check**

□ All emails include disclaimer

□ Titles use "affiliated with WFGIA"

□ No income promises made

□ Educational focus maintained

□ Opt-out included in messages

**Weekly Audit**

□ Review 10 random communications

□ Check HubSpot notes for compliance

□ Verify consent for calls logged

□ Update scripts if needed

□ Document any issues

**Monthly Compliance Training**

Topics rotation:

• Month 1: Proper titles and disclaimers

• Month 2: Educational vs sales approach

• Month 3: Documentation requirements

• Month 4: State-specific regulations

**Advanced Troubleshooting Matrix**

| **Problem** | **Symptoms** | **Solutions** | **Prevention** |
| --- | --- | --- | --- |
| **API Rate Limits** | 429 errors, slow generation | 1. Check usage dashboard<br>2. Upgrade plan<br>3. Implement queuing<br>4. Use backup API keys | Monitor daily usage<br>Set alerts at 80% |
| **Low Conversion** | <10% meeting rate | 1. A/B test subject lines<br>2. Shorten scripts<br>3. Change call times<br>4. Improve targeting | Weekly script reviews<br>Regular training |
| **CRM Sync Delays** | Data not appearing | 1. Check webhook status<br>2. Verify API scopes<br>3. Manual sync<br>4. Clear cache | Daily sync verification<br>Test weekly |
| **Video Quality Issues** | Pixelated, audio sync | 1. Reduce resolution<br>2. Shorter scripts<br>3. Off-peak processing<br>4. Try alternate avatar | Test before campaigns<br>Have backup ready |
| **Spanish Display Errors** | Characters not showing | 1. Check UTF-8 encoding<br>2. Update browser<br>3. Clear cookies<br>4. Use standard characters | Test all templates<br>Avoid special chars |

**Resource Library**

**Training Videos**

* Platform Overview: /training/platform-basics
* AI Mentor Mastery: /training/ai-mentor
* Pipeline Management: /training/pipeline
* Spanish Market: /training/spanish-market

**Download Templates**

* Email Templates: /resources/email-templates.docx
* Voice Scripts: /resources/voice-scripts.pdf
* Video Scripts: /resources/video-scripts.pdf
* Spanish Materials: /resources/spanish-kit.zip

**API Documentation**

* Platform API: /api/docs
* Webhook Setup: /api/webhooks/guide
* Integration Guide: /api/integrations

**Support Contacts**

* Technical Support: tech@santiagoteam.wfg
* Compliance Questions: compliance@wfgia.com
* Training Support: training@santiagoteam.wfg
* Spanish Support: español@santiagoteam.wfg

**Santiago Family Team - Building Financial Protection, One Family at a Time**