Conversation Flow: Workshop vs Consulting Routing

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Executive Summary

The system automatically routes leads to **Workshop** or **Consulting** pitches based on fit scores calculated during the scoring phase. The decision is made automatically, but can be influenced by explicit user preferences.

Flow Overview

```
START
  ↓
DISCOVERY (Discovery Agent)
  ↓ Collects: goals, pain, data, readiness, budget, success
  ↓
SCORING (Scoring Agent)
  ↓ Calculates: leadScore (0-100), fitScore.workshop (0-1), fitScore
  ↓
determinePitchType()
  ↓
  ├─→ WORKSHOP_PITCH (if workshop fit > 0.7 and > consulting + 0.1)
  |     └─→ Workshop Sales Agent
  |
  ├─→ CONSULTING_PITCH (if consulting fit > 0.7 and > workshop + 0.1
  |     └─→ Consulting Sales Agent
  |
  └─→ PITCHING (if unclear fit)
        └─→ Unified Pitch Agent (auto-detects based on fit scores)
  ↓
OBJECTION? (if detected)
  ↓ Objection Agent
  ↓
CLOSING (Closer Agent)
  ↓
BOOKED / SUMMARY
```

Stage 1: DISCOVERY

Agent: `discoveryAgent`

Purpose: Systematically qualify leads across 6 categories

Categories Covered:

- **GOALS** - What are they trying to achieve with AI?

- **PAIN** - What's broken or frustrating?

- **DATA** - Where is their data? How organized?

- **READINESS** - Team buy-in? Change management concerns?

- **BUDGET** - Timeline? Investment range?

- **SUCCESS** - What metrics would make this worthwhile?

Key Signals Collected:

- Role seniority (C-level, VP, Director, Manager, IC)

- Company size (startup, small, mid-market, enterprise)

- Budget signals (explicit mentions, urgency, timeline)

- Intent keywords:

- **Workshop signals:** "training", "teach team", "upskilling", "workshop", "learn"
- **Consulting signals:** "custom build", "implementation", "integrate", "scale", "automation"

Exit Conditions:

- Enough context collected (4+ categories covered)

- Moves to SCORING stage

Stage 2: SCORING

Agent: `scoringAgent`

Purpose: Calculate lead score and fit scores for workshop vs consulting

Lead Score Calculation (0-100)

Components:

- **Role Seniority (30 points max):**

- C-level/Founder: 30
- VP/Director: 20
- Manager: 10
- Individual contributor: 5

- **Company Signals (25 points max):**

- Enterprise (500+ employees): 25
- Mid-market (50-500): 15
- Small (10-50): 10
- Startup (<10): 5

- **Conversation Quality (25 points max):**

- All 6 categories covered: 25
- 4-5 categories: 15
- 2-3 categories: 10
- 1 category: 5

- **Budget Signals (20 points max):**

- Explicit budget mentioned: 20
- Timeline urgency (Q1/Q2): 15
- Just exploring: 5

- **Multimodal Bonuses:**

- Voice used: +10 points (commitment signal)
- Screen shared: +15 points (HIGH INTENT - showing pain points)
- Webcam shown: +5 points (comfort/trust)
- Documents uploaded: +10 points (prepared/serious)

Fit Score Calculation (0.0 - 1.0)

Workshop Fit Indicators:

- Manager/Team Lead role (not C-level)

- Mid-size company (50-500 employees)

- Mentions: "training", "teach team", "upskilling", "workshop"

- Budget range: $5K-$15K signals

Consulting Fit Indicators:

- C-level/VP role

- Enterprise or well-funded startup

- Mentions: "custom build", "implementation", "integrate", "scale"

- Budget range: $50K+ signals

Output:

```json
{
  "leadScore": 75,
  "fitScore": {
    "workshop": 0.3,
    "consulting": 0.8
  },
  "reasoning": "C-level executive at enterprise company seeking cust
}
```

Stage 3: Pitch Type Determination

Function: `determinePitchType()`
Location: `src/core/agents/client-orchestrator.ts`

Logic:

```
function determinePitchType(): 'WORKSHOP_PITCH' | 'CONSULTING_PITCH'
  if (!flowState.fitScore) return 'PITCHING'

  const { workshop, consulting } = flowState.fitScore

  // Clear workshop fit
  if (workshop > 0.7 && workshop > consulting + 0.1) {
    return 'WORKSHOP_PITCH'
  }

  // Clear consulting fit
  if (consulting > 0.7 && consulting > workshop + 0.1) {
    return 'CONSULTING_PITCH'
  }

  // Use generic pitch for unclear fit
  return 'PITCHING'
}
```

Decision Matrix:

Workshop Score	Consulting Score	Result
> 0.7	< workshop + 0.1	`WORKSHOP_PITCH`
< consulting + 0.1	> 0.7	`CONSULTING_PITCH`
Otherwise	Otherwise	`PITCHING` (unified)

Stage 4: Pitching

Option A: WORKSHOP_PITCH

Agent: `workshopSalesAgent`
Target: Mid-size companies, team leads/managers, $5K-$15K budget

Pitch Structure:

- Acknowledge pain from discovery

- Position workshop as solution (hands-on training)

- Show concrete value (e.g., "Training 10 people = $50K in productivity gains")

- Soft CTA with calendar link

Workshop Packages:

- **AI Fundamentals (1 day)** - $5,000

- For teams new to AI
- Covers: prompting, tools overview, use case identification

  - **AI Implementation (2 days)** - $10,000

- For teams ready to build
- Covers: workflow automation, custom GPTs, integration planning

- **AI Leadership (1 day)** – $7,500

- For executives and managers
- Covers: strategy, ROI measurement, governance, team enablement

Calendar Link: `CALENDAR_CONFIG.WORKSHOP`

Key Constraints:

- Don't mention consulting (different product)

- Keep pricing ranges, finalize in call

- Create urgency: "Next workshop is in [timeframe], spots are limited"

- Reference multimodal moments naturally

Option B: CONSULTING_PITCH

Agent: `consultingSalesAgent`
Target: C-level/VPs, enterprise companies, $50K+ budget

Pitch Structure:

- Acknowledge pain from discovery

- Position custom solution (implementation/integration)

- Show concrete ROI (e.g., "Automating this process = $200K/year savings")

- Strong CTA with calendar link

Consulting Engagement Tiers:

- **Strategy & Assessment** ($15K - $25K)

- 2-4 week engagement
- AI readiness assessment
- Implementation roadmap
- Technology recommendations

- **Pilot Implementation** ($50K - $100K)

- 8-12 week engagement
- Single workflow automation
- Proof of concept
- Team training included

- **Full Implementation** ($150K - $500K+)

- 3-6 month engagement
- Enterprise-wide AI transformation
- Multiple system integrations
- Ongoing support & optimization

Calendar Link: `CALENDAR_CONFIG.CONSULTING`

Key Constraints:

- Don't mention workshops (for smaller leads)

- Be direct about pricing: "Engagements typically start at $50K"

- Reference similar clients: "We did something similar for [industry] company"

- Executive-level, ROI-focused, direct

Option C: PITCHING (Unified)

Agent: `pitchAgent`
Purpose: Auto-detects primary product when fit is unclear

Logic:

```
const workshopScore = intelligenceContext.fitScore?.workshop || 0
const consultingScore = intelligenceContext.fitScore?.consulting ||
const isWorkshop = workshopScore > consultingScore
const product = isWorkshop ? 'workshop' : 'consulting'
```

Features:

- Dynamic ROI calculation using `calculateRoi()` tool

- References multimodal context naturally

- Uses exact company/role context

- Price guidance: only reveal if high interest (>0.75) or asked directly

Product Config:

- **Workshop:** $8K–$18K, 2–3 days, intensive hands-on

- **Consulting:** $80K–$400K+, 3–12 months, strategic partnership

---

Stage 5: Objection Handling (if detected)

Agent: `objectionAgent`
Trigger: Objection detected with confidence > 0.7

Objection Types:

- `price` - Budget concerns

- `timing` - Not the right time

- `authority` - Need to check with team/boss

- `need` - Not sure if we need this

- `trust` - Credibility questions

Flow:

- Handles objection with contextual rebuttal

- After 2+ objections → moves to CLOSING

- Otherwise → returns to PITCHING

Stage 6: CLOSING

Agent: `closerAgent`
Purpose: Close the deal, provide booking link

Tools Available:

- `calculate_roi` - Calculate ROI based on investment

- `create_calendar_widget` - Generate booking link

- `extract_action_items` - Extract key outcomes

- `generate_summary_preview` - Generate conversation summary

Key Rules:

- Reference multimodal experience: "You've already seen what our AI can do live"

- Create urgency: "Slots are filling fast"

- Remove friction: "Free call, no commitment"

- **CRITICAL:** Calendar widget returns `actuallyBooked: false` - only provides LINK

Stage 7: BOOKED / SUMMARY

Agent: `summaryAgent`
Purpose: Wrap up conversation, generate summary

Output:

- Structured conversation summary

- Multimodal interaction details

- Recommended solutions (workshop or consulting)

- Next steps

User Preference Override

Current Status: ⚠️ **Not explicitly implemented**

How it works now:

- System determines pitch type automatically based on fit scores

- User can express preference during discovery, which influences fit scores

- Explicit mentions like "I want a workshop" or "We need consulting" are captured in discovery

Potential Enhancement:

- Add explicit preference detection in discovery agent

- Override fit scores if user explicitly states preference

- Example: "I want a workshop" → force `WORKSHOP_PITCH` even if consulting fit is higher

Example Flows

Example 1: Workshop Lead

```
User: "I'm a team lead at a 50-person company. We want to train our

DISCOVERY:

  • Role: Manager

  • Company: 50 employees (mid-market)

  • Goal: Team training

  • Budget: $10K mentioned

SCORING:

  • leadScore: 65

  • fitScore: { workshop: 0.85, consulting: 0.25 }

determinePitchType():

  • workshop (0.85) > 0.7 ✅

  • workshop (0.85) > consulting (0.25) + 0.1 ✅

  • Result: WORKSHOP_PITCH

WORKSHOP_PITCH:

  • Pitches AI Implementation Workshop (2 days, $10K)

  • Focuses on hands-on training, team upskilling

  • Calendar link: CALENDAR_CONFIG.WORKSHOP
```

Example 2: Consulting Lead

```
User: "I'm the CTO at a 500-person company. We need to automate our

DISCOVERY:

  • Role: C-Level


  • Company: 500 employees (enterprise)


  • Goal: Custom automation


  • Budget: $100K+ mentioned

SCORING:

  • leadScore: 90


  • fitScore: { workshop: 0.2, consulting: 0.9 }

determinePitchType():

  • consulting (0.9) > 0.7 ✅


  • consulting (0.9) > workshop (0.2) + 0.1 ✅


  • Result: CONSULTING_PITCH

CONSULTING_PITCH:

  • Pitches Pilot Implementation ($50K-$100K)


  • Focuses on custom automation, ROI ($200K/year savings)


  • Calendar link: CALENDAR_CONFIG.CONSULTING
```

Example 3: Unclear Fit

```
User: "We're exploring AI for our business. Not sure what we need."

DISCOVERY:

  • Role: Director

  • Company: 100 employees

  • Goal: General exploration

  • Budget: Not mentioned

SCORING:

  • leadScore: 55

  • fitScore: { workshop: 0.5, consulting: 0.5 }

determinePitchType():

  • Neither score > 0.7

  • Result: PITCHING (unified)

PITCHING:

  • Auto-detects: workshop (0.5) vs consulting (0.5) → defaults to co

  • Presents both options or asks clarifying questions

  • Uses dynamic ROI calculation
```

Key Files

File	Purpose
`src/core/agents/scoring-agent.ts`	Calculates lead and fit scores
`src/core/agents/client-orchestrator.ts`	Routes to appropriate pitch type
`src/core/agents/workshop-sales-agent.ts`	Pitches workshops
`src/core/agents/consulting-sales-agent.ts`	Pitches consulting
`src/core/agents/pitch-agent.ts`	Unified pitch (unclear fit)
`src/core/types/funnel-stage.ts`	Stage definitions

Configuration

Calendar Links:

- Workshop: `CALENDAR_CONFIG.WORKSHOP`

- Consulting: `CALENDAR_CONFIG.CONSULTING`

- Default: `CALENDAR_CONFIG.DEFAULT`

Fit Score Thresholds:

- Clear fit: > 0.7

- Margin: > 0.1 difference between scores

- Default: Use unified pitch agent

Summary

✅ **System automatically routes based on fit scores**
✅ **Workshop vs Consulting decision made during SCORING stage**

✅ **Three pitch paths: WORKSHOP_PITCH, CONSULTING_PITCH, PITCHING (unified)**
✅ **User preferences captured during discovery influence fit scores**
⚠️ **Explicit preference override not yet implemented (but can be added)**

Status: Production-ready ✅

This document describes the automated conversation flow routing system.