Immigration Sales OS — Master Playbook (Lead → Paid → Case Opened)

Executive Introduction

This playbook is a step-by-step, implementation-ready blueprint to build a world-class, scalable end-to-end sales engine for an immigration firm. It covers the entire journey from marketing promotions, lead capture, qualification, appointments, and closure, to payment and the final "Case Opened" handoff.

It is written so that any competent operator (Sales Ops, Marketing Ops, Systems Engineer, or agency partner) can implement it end-to-end without external explanations or guesswork.

High-Level Flow

```
Promotions (Google/Meta/LinkedIn) + Website + WhatsApp + Outbound
↓
Lead Capture / Import
↓
Dedupe + Enrich + Categorize + Score (AI + rules)
↓
SQL Created → Routed to Setter
↓
Appointment Set → Reminders → Show-up → Consult Completed
↓
Offer Sent → Payment Link → Paid
↓
Case Opened Event → Case Ops Tool (separate)
```

✅

Boundary Statement

The Sales OS is responsible for the entire marketing-to-payment journey and sales governance. It explicitly ends at the moment a verified **Paid** status triggers a clean **Case Opened** event. Case management, document collection, and IRCC submission are intentionally separate and downstream processes.

How to Use This Playbook

This playbook is structured as a series of interconnected pages, designed to be read in order. Each page builds upon the last, moving from high-level strategy to detailed, micro-level implementation steps. Use the Table of Contents below to navigate through the core components of the Sales OS.

Table of Contents

1. Proposition & High-Level Overview

Purpose

This page outlines the core business problem, the proposed solution (the Immigration Sales OS), and the fundamental principles that guide its design and implementation. It serves as the executive summary for the entire playbook.

Scope

Included: The business problem, the Sales OS concept, the target operating model, core design principles, and key definitions.

Excluded: Detailed technical architecture and implementation steps, which are covered in subsequent pages.

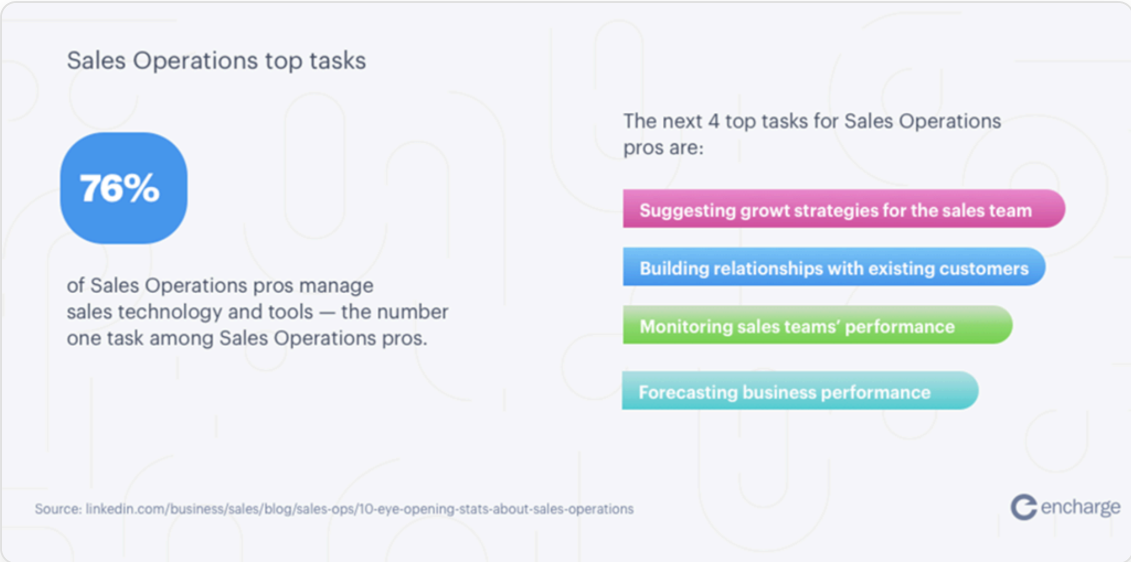
1.1 The Problem We're Solving

Immigration firms often scale revenue slowly because their sales process becomes fragmented and chaotic as they grow. Common pain points include:

- Leads arrive from multiple channels but are not attributed cleanly, making ROI calculation impossible.
- Lead follow-ups are inconsistent, with reps often cherry-picking "favorite leads" while others go cold.
- Qualification is subjective and inconsistent, wasting valuable closer time on low-fit prospects.

- Scheduling is a manual, high-friction process, leading to high no-show rates.
- Payment is "chased" without a system, delaying cash flow and creating a poor client experience.
- Handoffs to the case operations team are messy, incomplete, and cause significant rework.

The **Immigration Sales OS** fixes this by transforming sales from an art into a controlled, measurable, and scalable conversion machine.



Sales Operations teams are central to managing the technology and strategy that drive sales efficiency.

1.2 The Proposition: Immigration Sales OS™

We are building a standardized, scalable "Sales Operating System" that orchestrates the entire client acquisition journey. It systematically:

1. **Captures** leads from Google, Meta, LinkedIn, website forms, WhatsApp, and outbound efforts.
2. **Categorizes and scores** every lead using a hybrid of deterministic rules and AI.
3. **Routes** qualified leads to the right sales rep based on language, region, and capacity.
4. **Automates** appointments, reminders, follow-ups, and payment collection.
5. **Tracks** every interaction and state change until the client has paid.
6. **Emits** a clean, structured "Case Opened" handoff event to your existing case management process.

ℹ️

Why This Matters (Business Outcomes)

- **Predictable Revenue Growth:** Move from inconsistent results to a forecastable sales engine.

- **Lower No-Shows:** Automated confirmation, reminders, and reschedule workflows dramatically increase attendance.
- **Higher Close Rates:** Closers spend their time on highly qualified, well-prepared prospects.
- **Increased Sales Capacity:** Scale the team without adding chaos or relying on "tribal knowledge."
- **Full Visibility:** Gain a single source of truth for targets, rep performance, and funnel leakage.
- **Faster Payment Conversion:** Systematize the "consult-to-cash" cycle.

1.3 High-Level Visuals

1.3.1 End-to-End Flow (Lead → Paid → Case Opened)

```
Promotions (Google/Meta/LinkedIn) + Website + WhatsApp + Outbound
↓
Lead Capture / Import
↓
Dedupe + Enrich + Categorize + Score (AI + rules)
↓
SQL Created → Routed to Setter
↓
Appointment Set → Reminders → Show-up → Consult Completed
↓
Offer Sent → Payment Link → Paid
↓
Case Opened Event → Case Ops Tool (separate)
```

1.3.2 Bow-Tie Funnel (Prevents Post-Close Chaos)

```


Acquisition Funnel                                      Delivery Handoff
========================================================================
Awareness → Lead → SQL → Consult → Paid → Case Opened → Ops
   ^                                          |
```

```
  |                                          |
  +--------- Nurture & Reactivation Loop ----+
       (education, reminders, win-back)
```

1.4 Sales OS Design Principles

✅

Non-Negotiables

- **One Source of Truth:** A single, canonical definition for sales stages, owners, and KPIs.
- **Stage Gates:** A prospect cannot advance to the next stage without meeting required data and event criteria.
- **Automation-First Coordination:** Humans sell and advise; systems handle scheduling, reminders, and data movement.
- **Setter/Closer Specialization:** Setters (SDRs) are responsible for maximizing qualified show-ups; Closers (Consultants) are responsible for converting consultations into paid clients.
- **All Activity Logged:** If it's not in the system, it didn't happen. All calls, messages, and emails must be logged.
- **Verified Payment:** A deal is "Paid" only when a payment webhook from the processor is received, not when a client claims they have paid.
- **Clean Handoff:** Case management is a separate, downstream process triggered by a structured, clean handoff event.
- **Measurable Workflows:** Every part of the process must be measurable for conversion, SLA compliance, and cycle time.

1.5 Glossary (Core Definitions)

Term	Definition
Lead	A raw, unprocessed contact record captured from any channel (e.g., a form submission).

Term	Definition
Prospect	A deduplicated person record. One person can be the source of multiple leads over time.
SQL (Sales Qualified Lead)	A lead that has been vetted and meets the minimum criteria to be worked by the sales team.
Setter (SDR/Hunter)	The sales role responsible for first human contact, qualification, and booking the appointment. Their primary objective is a successful show-up.
Closer (Consultant/AE)	The sales role that conducts the consultation and is responsible for converting the prospect into a paid client.
Opportunity/Deal	The revenue record that tracks a prospect's journey through the sales pipeline.
SLA (Service Level Agreement)	A time-based requirement for a specific action (e.g., "first response to a hot lead within 10 minutes").
Case Opened Event	The explicit, system-generated signal sent to the case operations team after a payment is successfully verified.

1.6 Role Model & Lifecycle Summary

1.6.1 Role Responsibilities

The Setter/Closer split is mandatory for scaling. It creates leverage: setters protect closer time, and closers convert that protected time into revenue.

Role	Primary Job	Success KPIs	Non-Responsibilities
Marketing Ops	Generate and attribute high-quality demand.	Cost per SQL, SQL Rate	Selling, payment chasing

Role	Primary Job	Success KPIs	Non-Responsibilities
Setter (SDR)	First response, qualification, booking, and ensuring show-up.	Show-up %, SQL→Appointment %	Deep consultation, negotiating offer terms
Closer (Consultant)	Conduct consultation, present offer, and secure payment.	Close %, Revenue, Time-to-Paid	Data entry, chasing documents
Sales Manager	Manage targets, coaching, SLAs, and forecasting.	Rep Scorecards, Funnel Health	Doing the reps' work for them
Sales Ops / Systems	Own workflows, routing, and system quality assurance.	SLA Compliance, System Uptime	Closing deals

1.6.2 Lifecycle Stage Summary

Stage Group	What it means	Primary Owner	Key Output
Lead Capture	Leads are imported from all channels and attributed.	System / Marketing Ops	Lead record with source metadata.
Qualification	Leads are categorized, scored, and a decision is made to qualify, nurture, or disqualify.	System + Setter	SQL, Nurture Tag, or Disqualified Status.
Execution	The core sales motion: contact, consult, offer, and payment.	Setter / Closer	A paid client.
Handoff	A clean, structured event is triggered to pass the client to the delivery team.	System / Ops	A confirmed "Case Opened" record.

Next Page: 2. Sales OS Architecture (Data Model + State Machine + Events)

2. Sales OS Architecture

Purpose

To define the canonical architecture of the Sales OS, ensuring it can be implemented once and reused across teams, tools, and clients—without ambiguity or vendor lock-in.

Scope

Included: The canonical data model (objects & relationships), the state machine (stages & transitions), the event-driven design philosophy, and the tool-agnostic adapter pattern.

Excluded: Case execution details (documents/forms/IRCC) and marketing creative strategy (covered in Page 3).

2.1 Architectural Principles

✅

Non-Negotiables

- **Canonical First:** Define objects, stages, and events independent of any specific tool (like HubSpot or Salesforce). The canonical model is the source of truth.
- **Event-Driven:** Meaningful state changes (e.g., a lead becoming an SQL, a payment succeeding) emit events. Automations subscribe to these events, decoupling logic from monolithic workflows.
- **Idempotent:** The system must be resilient. The same event firing twice should not break data or create duplicates.
- **Auditability:** Every transition (e.g., stage change, owner change) is logged with who, when, and why.
- **Replaceable Tools:** CRMs, calling systems, and other vendors are treated as "adapters." The core logic (the "brain") of the Sales OS remains independent and portable.

⚠️

Common Mistakes to Avoid

- Letting the CRM's default deal stages dictate your business logic.
- Burying critical business rules (like scoring or routing) deep inside vendor-specific workflows, making them impossible to audit or change easily.
- Mixing sales execution data (e.g., pipeline stages) with case delivery data (e.g., document submission status) in the same object.

2.2 Canonical Data Model (Objects & Relationships)

This model represents the core entities that exist within the Sales OS. It is the blueprint for your database and CRM custom objects.

2.2.1 Core Objects

Object	What it Represents	Cardinality
Account	The tenant or client organization (for multi-tenant SaaS).	1
User	A sales user (Setter, Closer, Manager).	N per Account
Lead	A raw, inbound or outbound contact record.	N
Prospect	A deduplicated person record. The single source of truth for an individual.	1 per person
Opportunity	The revenue journey or "deal" for a prospect.	N per Prospect
Activity	A touchpoint: call, WhatsApp message, email, or meeting.	N
Appointment	A scheduled consultation.	N per Opportunity
Offer/Quote	A versioned proposal with specific pricing and terms.	N per Opportunity
Payment	A verified financial transaction.	N per Opportunity

Object	What it Represents	Cardinality
CaseOpen	The final handoff event record.	1 per Paid Opportunity

2.2.2 Relationship Diagram

```
Account
 ├─ Users (Setter/Closer/Manager)
 ├─ Leads ──┐
 │          │
 ├─ Prospect ── Opportunities ── Offers ── Payments
 │      │            │              │           │
 │      │            ├─ Appointments           │
 │      │            └─ Activities             │
 │      └─ (dedupe)                            └─ CaseOpen (emitted after Payme
 └─ RawPayload (immutable store)
```

2.2.3 Required Fields (Minimum Contract)

- **Lead:** `source_channel`, `utms`, `consent`, `intent_guess`, `spam_score`
- **Prospect:** `language`, `geo`, `engagement_level`
- **Opportunity:** `stage`, `owners (setter/closer)`, `value_estimate`, `probability`
- **Appointment:** `scheduled_at`, `status`
- **Offer:** `price`, `currency`, `terms_version`, `expires_at`
- **Payment:** `provider`, `amount`, `status`, `paid_at`
- **CaseOpen:** `opened_at`, `handoff_payload_ref`

2.3 State Machine (Stages & Gates)

The Sales OS is built around a formal state machine. An Opportunity can only exist in one stage at a time, and transitions are governed by strict entry/exit criteria ("stage gates").

2.3.1 Canonical Opportunity Stages

1. **SQL_ASSIGNED**
2. **CONTACT_ATTEMPTING**
3. **CONTACTED**
4. **QUALIFIED**
5. **APPOINTMENT_SET**
6. **APPOINTMENT_COMPLETED**
7. **PROPOSAL_SENT**
8. **NEGOTIATION** (optional)
9. **PAYMENT_PENDING**
10. **PAID**
11. **CASE_OPENED**

Terminal States: `CLOSED_LOST` / `DISQUALIFIED`

2.3.2 Stage Gates (Examples)

- To move to **QUALIFIED**, the Opportunity must have mandatory qualification fields completed (intent, geo, timeline, contact verified).
- To move to **APPOINTMENT_SET**, a booking confirmation event must be received from the scheduling tool.
- To move to **PAID**, a successful payment webhook must be received and verified. Manual updates are forbidden.
- To move to **CASE_OPENED**, the Opportunity must be in the PAID state AND the handoff payload must be successfully generated.

2.3.3 State Machine Visual

```
SQL_ASSIGNED
     ↓
CONTACT_ATTEMPTING ──┐
     ↓               ├─ DISQUALIFIED
CONTACTED            │
     ↓               └─ CLOSED_LOST
QUALIFIED
     ↓
APPOINTMENT_SET → APPOINTMENT_COMPLETED
```

```
      ↓
PROPOSAL_SENT → NEGOTIATION
      ↓
PAYMENT_PENDING
      ↓
PAID
      ↓
CASE_OPENED
```

2.4 Event-Driven Design

Instead of building one giant, brittle workflow, the Sales OS uses an event-driven model. This means small, independent automations are triggered by specific events.

Category	Event name	Definition	Type	Parameters	NOTES
EXAMPLE	select_content	User naviagtes to any content page/ screen from an in-app menu.	Recommended	content_type content_id	Applies to any menu

Each event is a structured message with a clear definition and parameters, forming the contract for automations.

2.4.1 Core Events

Event	Fires When...
`LeadCaptured`	A new lead is ingested from any channel.
`LeadEnriched`	The lead is enriched with geo/language data.
`SQLCreated`	A lead passes all qualification gates.

Event	Fires When...
`OwnerAssigned`	A setter or closer is assigned to an opportunity.
`AppointmentBooked`	A meeting is successfully scheduled.
`AppointmentNoShow`	A prospect misses a scheduled appointment.
`PaymentSucceeded`	A payment webhook is successfully verified.
`CaseOpenTriggered`	The system initiates the handoff to operations.
`SLA_Breach_*`	A time-based service level agreement is missed.

2.4.2 Event Flow Example

When a `PaymentSucceeded` event occurs, it triggers multiple, parallel automations:

1. Update the Opportunity stage to `PAID`.
2. Generate the `CaseOpen` handoff payload.
3. Emit the `CaseOpenTriggered` event.
4. Notify the Sales and Ops teams via Slack/email.

2.5 Adapter Pattern (Tool-Agnostic Execution)

To avoid vendor lock-in, the Sales OS communicates with external tools via a standardized "adapter" layer. The core logic of the OS doesn't know it's talking to HubSpot or Salesforce; it only knows it's talking to the "CRM Adapter."

2.5.1 Adapter Types

Adapter	Responsibility
CRM Adapter	Create/update contacts, deals, and activities.
Ads Adapter	Receive leads from Google, Meta, and LinkedIn.

Adapter	Responsibility
Scheduler Adapter	Book meetings and send reminders.
Calling Adapter	Log calls, recordings, and summaries.
Messaging Adapter	Send WhatsApp, email, and SMS templates.
Payment Adapter	Create payment links and receive payment webhooks.
Case Adapter	Send the final handoff payload to the operations tool.

2.5.2 Adapter Contract

Each adapter must implement a standard set of functions, such as:

- `create_or_update()`
- `log_activity()`
- `send_message()`
- `book_appointment()`
- `handle_webhook()`

This ensures the Sales OS logic remains stable even if you switch from Calendly to Chili Piper, or from HubSpot to Salesforce.

Next Page: 3. Marketing & Promotions Engine

---

3. Marketing & Promotions Engine

Purpose

To define how demand is created, structured, tracked, and handed into the Sales OS, ensuring every dollar spent on promotions results in attributable, actionable leads—not noise.

Scope

Included: Channel strategy, campaign taxonomy, lead capture methods, UTM standards, ownership split (Marketing vs. Sales), and compliance/consent.

Excluded: Creative design details (ad copy/visuals) and post-payment client communications.

3.1 Core Principle: Attribution is Everything

✅

Non-Negotiables

- Every promotion must be attributable to a specific campaign and channel.
- Every lead must enter the Sales OS with its raw payload and metadata preserved for auditing.
- Marketing's primary success metric is the generation of **Sales Qualified Leads (SQLs)**, not just raw leads or clicks.
- Consent for communication is mandatory, explicit, and auditable.
- No "manual uploads" of lead lists are permitted without complete source metadata.

3.2 Channel Strategy & Intent Fit

Different channels are used to attract leads with different levels of intent. The strategy should align the channel with the expected lead type.

Channel	Primary Use Case	Typical Lead Type	Common Intent
Google Search	Capture high-intent demand	Hot Inbound	Urgent PR / Work Permit needs

Channel	Primary Use Case	Typical Lead Type	Common Intent
Meta (Facebook/IG)	Volume generation and education	Warm Inbound	Study Permit planning, general PR interest
LinkedIn	Professional and B2B targeting	Targeted Inbound	Work Permits, Employer-sponsored
Website (SEO)	Build authority and capture organic traffic	Mixed Inbound	All types
WhatsApp Inbound	Handle direct, immediate inquiries	Hot Inbound	Immediate questions, ready to start
Outbound (Call/WA)	Proactive pipeline creation	Cold → Warm	Targeted Work Permits, Referrals

Channel-to-Sales OS Ingestion Map

```
Google / Meta / LinkedIn Ads
           ↓
Lead Forms / Landing Pages
           ↓
Sales OS Ingestion Layer
           ↓
Categorize + Score + Route
```

3.3 Campaign Taxonomy (Naming Standard)

Without a strict naming convention, attribution breaks, dashboards lie, and optimization is impossible. All campaigns across all platforms MUST follow this structure.

3.3.1 Canonical Campaign Hierarchy

```
Region
 └─ Intent Family
     └─ Program Family
         └─ Offer
             └─ Channel
                 └─ Month/Quarter
```

3.3.2 Mandatory Campaign Naming Standard

Format: `{Region} | {Intent} | {Program} | {Offer} | {Channel} | {YYYY-MM}`

Example: `India | PR | Express Entry | Eligibility Check | Google | 2025-12`

This exact name must be used in the ad platform, the CRM campaign object, and all reporting dashboards.

3.4 Lead Capture Methods

Method	Best For	Pros	Cons
Platform Lead Forms (Google, Meta, LinkedIn)	High-volume campaigns, high-intent keywords.	Low friction, high conversion rate, native validation.	Limited fields, requires strong post-capture qualification.
Website Landing Pages	Complex programs, high-ticket consults, SEO traffic.	Full control, better pre-qualification, more educational content.	Higher friction, lower conversion rate.
WhatsApp Chat Intake	Direct inquiries from website CTAs or ads.	Immediate, conversational, high engagement.	Requires structured bot/human flow to capture data.

3.5 Mandatory UTM & Attribution Standards

UTM parameters are non-negotiable for tracking the effectiveness of online marketing. All links pointing to your website must be tagged.

Parameter	Required?	Example
`utm_source`	Yes	`google`
`utm_medium`	Yes	`cpc`
`utm_campaign`	Yes	`india_pr_ee_jan`
`utm_content`	Yes	`ad_variation_1`
`utm_term`	Yes (for Search)	`express_entry_points`

3.6 Ownership Model (Marketing vs. Sales)

A clear division of responsibilities is crucial to prevent finger-pointing and ensure accountability.

R=Responsible, A=Accountable, C=Consulted

Activity	Marketing	Sales	Sales Ops
Campaign Setup & Naming	R	C	A
UTM & Attribution Standards	R	C	A
Lead Capture & Ingestion	R		A
Lead Quality & SQL Rate	A	R	C
SQL Definition	C	R	A
Feedback Loop (Disqualify Reasons)	A	R	C

3.7 Compliance & Consent

✅

Compliance & Consent

Every lead capture point (form, chat, etc.) must:

- Clearly state the purpose of contact.
- Include a consent checkbox for marketing communications, **unchecked by default**.
- Provide a clear link to the privacy policy.
- The consent timestamp and source must be stored as an auditable record on the lead.
- WhatsApp messaging must only use pre-approved templates for business-initiated conversations.
- All communications must respect opt-out requests immediately and system-wide.

Rule: No consent means no proactive outbound follow-up.

Next Page: 4. Lead Capture & Import

---

4. Lead Capture & Import

Purpose

To define exactly how every lead enters the Sales OS—from ads, website, WhatsApp, and outbound—so that ingestion is real-time, attributable, deduplicated, auditable, and reliable.

Scope

Included: Ingestion methods (native sync, webhooks, low-code), field mapping, deduplication logic, error handling, and auditability.

Excluded: Campaign strategy (Page 3) and lead scoring/segmentation logic (Page 5).

4.1 Core Ingestion Principles

✅

Non-Negotiables

- All leads must enter through a single, canonical intake layer. No side doors.
- The raw, unaltered payload from the source platform must be stored for audit and replay purposes.
- Identity must be resolved (deduplication) before the lead is touched by a sales rep.
- Consent must be validated upon ingestion.
- The ingestion process must not block on slow, secondary processes like AI enrichment (these must be asynchronous).

4.2 Ingestion Architecture

4.2.1 High-Level Ingestion Flow

```
Ad Platforms / Website / WhatsApp / Outbound
                  ↓
        Ingestion Endpoints
                  ↓
      Raw Payload Store (immutable)
                  ↓
Normalize → Dedupe → Create/Update Lead
                  ↓
      Emit LeadCaptured / LeadEnriched
```

4.2.2 Why a Canonical Intake Layer?

- **Prevents CRM-specific coupling:** Your business logic isn't tied to HubSpot's or Salesforce's implementation.
- **Enables replay and backfills:** If a rule changes, you can reprocess historical raw payloads.

- **Supports SaaS multi-tenancy:** A central layer can handle routing to different client accounts.
- **Keeps attribution clean:** A single point of entry enforces UTM and source tracking standards.

4.3 Ingestion Methods

Method	When to Use	Pros	Cons
Direct Webhooks (Preferred)	Primary method for a productized/SaaS OS.	Full control, fastest, most auditable, real-time.	Requires initial development setup.
CRM Native Sync	Fast onboarding for new clients; initial MVP.	Low setup effort, leverages vendor integrations.	Less control, potential latency, vendor lock-in.
Low-Code Bridge (Make/n8n)	MVP, transitions, or connecting obscure platforms.	Quick to build, flexible.	Adds extra hops, can be a point of failure, potential cost.

Recommendation: Build Direct Webhooks as the default, robust method. Allow CRM Native Sync as a "quick start" option for faster client onboarding.

4.4 Channel-by-Channel Ingestion Steps

1. **Google Ads (Lead Form Assets):**
   - Create a webhook endpoint in your Sales OS (e.g., `/webhooks/google/leadform`).
   - Configure the Google Lead Form asset to send data to this webhook.
   - On receipt, store the raw JSON payload, normalize fields, create the Lead, and emit `LeadCaptured`.
   - **Note:** Acknowledge the webhook immediately with a 200 OK response and process the payload asynchronously in a queue.
2. **Meta (Facebook/Instagram) Lead Ads:**
   - Subscribe to Meta's `leadgen` webhooks for your page/form.
   - When the webhook fires, use the provided info to call Meta's Graph API to retrieve the full lead payload.
   - Store the raw payload, normalize, dedupe, and emit `LeadCaptured`.

    - **Note:** Expect duplicate webhook deliveries; your endpoint must be idempotent.
3. **LinkedIn Lead Gen:**
    - Enable Ads Lead Sync API access for your LinkedIn developer app.
    - Pull leads via the API or configure notifications.
    - Store raw payload, normalize, dedupe, and emit `LeadCaptured`.
    - **Fallback:** Use the CRM's native LinkedIn sync for rapid onboarding.
4. **Website Forms & Chat:**
    - Configure forms to POST to a canonical endpoint (e.g., `/ingest/web`).
    - Enforce required fields (e.g., email) and consent client-side and server-side.
    - Ensure all UTM parameters and the page URL are included in the payload.
5. **WhatsApp Inbound:**
    - Receive messages via a WhatsApp Business API provider webhook (e.g., Twilio).
    - Capture the sender's ID and message text.
    - Create a new Lead with `source_channel = WhatsApp` and store the conversation thread reference.
6. **Outbound Lists:**
    - Provide a controlled import endpoint or UI.
    - Require metadata for each list (e.g., source, date, consent proof).
    - Validate format, run deduplication, and create Leads in a dedicated "Outbound" channel.
    - **Rule:** No ad-hoc CSV imports by reps. All lists must go through this controlled process.

4.5 Field Mapping & Normalization

Data must be cleaned and standardized before it can be used.

- **Phone Numbers:** Normalize to E.164 format (e.g., +14155552671).
- **Emails:** Convert to lowercase and trim whitespace.
- **Names:** Convert to Title Case.
- **Country:** Standardize to ISO 3166-1 alpha-2 codes (e.g., US, CA, IN).

4.6 Deduplication & Identity Resolution

This process ensures you have one Prospect record for each unique person.

4.6.1 Deduplication Logic (in order of priority)

1. Exact match on primary email address.

2. Exact match on normalized phone number.
3. Match on the platform-specific lead ID (if available).
4. Fuzzy match on name + phone (as a last resort).

4.6.2 Deduplication Flow

```
Incoming Lead
     ↓
Check for existing Prospect with same Email
     ↓
Check for existing Prospect with same Phone
     ↓
Check for existing Prospect with same Platform ID
     ↓
Create New Prospect or Link to Existing Prospect
```

4.7 Error Handling & Reliability

⚠️

Error Handling Strategy

- **Retries:** Use exponential backoff for transient failures (e.g., temporary network issues).
- **Dead-Letter Queue:** If a payload fails repeatedly, move it to a separate queue for manual inspection. Do not discard it.
- **Alerts:** Notify the operations team if ingestion latency exceeds a threshold (e.g., >5 minutes) or if the failure rate spikes.
- **Replayability:** Because you store the raw payload, you can always re-run the ingestion process for a specific lead if a bug is fixed.

Next Page: 5. Lead Categorization, Scoring & Segmentation

5. Lead Categorization, Scoring & Segmentation

Purpose

To convert raw, undifferentiated leads into a prioritized, explainable queue of Sales Qualified Leads (SQLs) by applying a canonical categorization framework, a transparent scoring model, and a segment library that drives all subsequent actions (campaigns, routing, and SLAs).

Scope

Included: The canonical categorization schema, the use of AI for classification, the lead scoring model, the formal SQL definition, and the segment activation feedback loop.

Excluded: Campaign execution details (Page 3) and routing/SLA logic (Page 6).

5.1 Core Principles

✅

Non-Negotiables

- **Framework First:** Segments are predefined and fixed. AI's job is to map leads into this existing framework, not to invent new segments on the fly.
- **Explainable Scores:** Every lead score must be traceable back to the specific signals that contributed to it. No "black box" scores.
- **Rules > AI > Human:** The classification process follows a strict order of operations: apply deterministic rules first, use AI to fill the gaps, and allow human override as a final, audited step.
- **No Silent Reclassification:** All changes to a lead's category, score, or segment must be logged in the audit trail.

- **SQL is a Decision, Not a Feeling:** A lead becomes an SQL by passing a clear, system-enforced set of criteria.

5.2 Canonical Categorization Schema

These fields are mandatory on the Lead/Prospect object and form the basis for all intelligent automation.

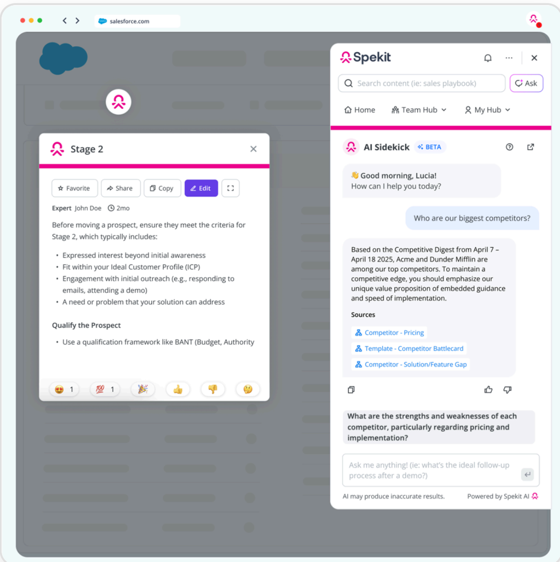
Category	Field Name	Allowed Values (Examples)
Intent & Pathway	`intent_family`	PR, Work, Study, Visitor, Citizenship, Refugee, Other
	`program_family`	Express Entry, PNP, LMIA, Study Permit, Visitor Visa, Mixed
	`eligibility_confidence`	High, Medium, Low, Unknown
	`complexity_tier`	Simple, Medium, Complex
Buyer Readiness	`timeline_bucket`	0-30 days, 31-90 days, 3-6 months, 6+ months
	`budget_signal`	Strong, Medium, Weak
	`doc_readiness`	Ready, Partial, Not Ready
Risk & Quality	`no_show_risk`	Low, Medium, High
	`lead_quality`	Premium, Standard, Low

5.3 AI + Rules Classification Flow

A hybrid approach provides the best balance of speed, accuracy, and control.

5.3.1 Classification Architecture

```
Raw Lead Data (Forms, WhatsApp, Calls)
                 ↓
Deterministic Rules (from form answers, UTMs, URLs)
                 ↓
AI Classifier (reads free text, call transcripts)
                 ↓
Confidence Threshold Check (is AI sure?)
                 ↓
Segment Mapping (maps outputs to fixed framework)
                 ↓
Human Override (optional, logged)
```



AI assists by classifying unstructured data and providing insights, which are then fed into the structured Sales OS framework.

5.3.2 AI Guardrails

✅

AI Guardrails

- AI **infers intent** from free text; it does not give legal advice.
- AI **estimates urgency**; it does not make promises.
- AI **predicts no-show risk**; it does not decide who to ignore.

- All AI outputs must pass a confidence threshold to be used automatically; low-confidence outputs are flagged for human review.
- AI prompts and models are versioned and tested to prevent drift.

5.4 Lead Scoring Model (0-100)

The score provides a simple, at-a-glance prioritization metric.

Signal	Points
Supported Intent Match (PR/Work/Study)	+20
Timeline ≤ 90 days	+20
Budget Signal = Strong	+15
Document Readiness = Ready/Partial	+15
Engagement Level = High	+15
Source = Referral	+10
Spam Risk Detected	-40
Unreachable Attempts > 5	-20

Score Bands:

- **80-100 (Hot):** Create SQL immediately, route for priority handling.
- **50-79 (Warm):** Assign to a nurture sequence and a setter for follow-up.
- **<50 (Cold):** Place in a long-term educational sequence or recycle.

5.5 SQL (Sales Qualified Lead) Definition

A lead is formally promoted to an SQL, and an Opportunity is created, only when **ALL** of the following criteria are met:

1. `intent_family` is a supported service.
2. `geo` is within a supported region.
3. `consent` is valid and opted-in.
4. `lead_score` is ≥ the defined threshold (e.g., 70).
5. Contactability is verified (valid phone/email).
6. The lead is not already disqualified.

This transition is a system-driven event, not a manual rep decision.

5.6 Segment Activation & Feedback Loop

Segmentation is not static. It's a dynamic process where system actions and prospect behavior continuously refine the classification.

```
1. Categorize + Score
        ↓
2. Assign to Segment (e.g., "Hot PR")
        ↓
3. Trigger Segment-Specific Actions (Campaign, SLA, Routing)
        ↓
4. Monitor Behavioral Feedback (Clicks, Replies, No-Shows)
        ↓
5. Re-evaluate Score & Segment (Promote, Cool Down, Escalate)
```

Example Feedback Loop: A prospect in the "Warm Study" segment clicks a booking link twice but doesn't book. The system detects this high-intent behavior, increases their `engagement_level` and `lead_score`, potentially promoting them to a "Hot Study" segment and triggering a direct call from a setter.

Next Page: 6. Routing, Assignment & SLA Management

6. Routing, Assignment & SLA Management

Purpose

To ensure every SQL and Opportunity is owned by the right person, worked within defined time SLAs, and escalated automatically when standards are breached—so performance does not depend on individual heroics.

Scope

Included: The Setter/Closer ownership model, routing rules and decision logic, capacity management, SLA definitions, and breach detection/escalation.

Excluded: Appointment booking mechanics (Page 7) and sales scripts (Pages 8-9).

6.1 Operating Model: Setter/Closer Specialization

✅

Non-Negotiables

- **Setters own speed and show-up.** Their job is to qualify and secure attended appointments.
- **Closers own consult quality and payment.** Their job is to advise and convert.
- No Opportunity has more than one active owner per role (one Setter, one Closer) at any given time.
- All ownership changes are event-driven and logged in the audit trail.

Ownership by Stage Group

Stage Group	Primary Owner
SQL_ASSIGNED → QUALIFIED	Setter
APPOINTMENT_SET → APPOINTMENT_COMPLETED	Setter → Closer (Handoff)
PROPOSAL_SENT → PAID	Closer
CASE_OPENED	System / Ops

6.2 Routing Logic

Routing is a systematic process, not a manual free-for-all. It follows a strict order of operations to match the best available rep to a new SQL.

6.2.1 Routing Decision Tree

```
New SQL
   ↓
Language Match?
   ↓ yes
Geo Match?
   ↓ yes
Program Skill Match?
   ↓ yes
Capacity Available?
   ↓ yes
Assign Rep
   ↓
Round-Robin Fallback
```

6.2.2 Routing Rule Priority

1. **Hard Constraints:** Must match language and any geo-compliance rules.

2. **Skill Alignment:** Prefer reps with expertise in the specific program family (e.g., "PNP" expert).
3. **Capacity Threshold:** Only consider reps who are below their max open opportunities limit.
4. **Performance-Weighted Round Robin (Optional):** Distribute leads in a round-robin fashion, but give slightly more to top performers. Use with caution to avoid burnout.
5. **Default Round Robin:** The final fallback to ensure even distribution.

6.3 Capacity Management

Capacity management prevents rep burnout and protects conversion rates by ensuring no one is overloaded.

Capacity Metric	Description
`max_open_opportunities`	The maximum number of active deals a rep can own at once.
`daily_sql_limit`	The maximum number of new SQLs a rep can receive per day.
`active_appointments_cap`	The maximum number of appointments a rep can have in a given week.

⚙️

Manager Levers

Managers can adjust capacity in real-time:

- Adjust capacity caps for individual reps.
- Temporarily pause assignments to a rep who is on vacation or overwhelmed.
- Manually override routing for a specific high-value lead (this action must be logged).

6.4 SLA Definitions

SLAs are the heartbeat of the Sales OS. They are timers that, when breached, trigger automated escalations.

SLA Name	Target	Segment Example
Automated First Response	< 2 minutes	All Inbound
First Human Attempt (Hot SQL)	< 30 minutes	"Hot PR" Segment
First Human Attempt (Warm SQL)	< 4 hours	"Study Education" Segment
Follow-up Cadence	Active touches on Day 0, 1, 2-3, 4-7	All SQLs
Payment Chase	Reminders on Day 1, 3, 7	"Payment Pending" Stage

6.5 SLA Monitoring & Escalation

6.5.1 Escalation Ladder

```
SLA Timer Starts
      ↓
   SLA Breach
      ↓
Auto-Reminder to Rep (via Slack/Email)
      ↓
Reassign or Escalate to Manager (after X minutes)
      ↓
Manager Intervention
```

6.5.2 Escalation Actions

- **Notify Rep:** An automated, non-punitive reminder.
- **Notify Manager:** Alert the manager that an SLA was breached and by whom.
- **Reassign Opportunity:** Automatically move the opportunity to the next available rep in the queue.
- **Flag for Coaching:** Add the incident to the rep's scorecard for their next 1:1.

⚠️

Common Mistakes to Avoid

- Routing based only on simple round robin, ignoring skills and capacity.
- Ignoring language and region fit, leading to poor prospect experiences.
- Overloading top performers, leading to burnout and declining overall team performance.
- Manual reassignment of leads without an audit trail, creating "shadow pipelines."
- Having no automated SLA alerts, leading to reactive, fire-fighting management.

Next Page: 7. Appointment & Show-Up Engine

---

7. Appointment & Show-Up Engine

Purpose

To maximize the appointment show-up rate and protect valuable closer time by enforcing a disciplined booking system, multi-channel reminders, and automated no-show prediction and recovery.

Scope

Included: Booking rules, confirmation/reminder cadences, no-show prediction signals, no-show recovery SOPs, and measurement.

Excluded: Setter scripts for booking the appointment (Page 8) and the closer's consultation structure (Page 9).

7.1 Core Principles

✅

Non-Negotiables

- Appointments are booked **only after** a lead is formally qualified (SQL). No booking for unqualified leads.
- A single owner (the Setter) is accountable for the show-up rate of the appointments they book.
- Multi-channel reminders (WhatsApp + Email) are mandatory. Email-only is not sufficient.
- A "no-show" is an event that triggers an immediate, automated recovery process, not silence.
- All appointment outcomes (Completed, No-Show, Rescheduled, Cancelled) must be logged in the system on the same day.

7.2 Booking Architecture

Appointments are created through controlled, system-driven methods.

Booking Source	Description
Auto-booking Links (Preferred)	The setter provides a pre-configured scheduling link (e.g., Calendly, Chili Piper) that routes to the correct closer's calendar.
Manual Booking by Setter (Fallback)	Used only when the prospect cannot use the link (e.g., on a call). The setter books on their behalf.
Inbound Reschedule Links	Automated links sent in reminder messages that allow prospects to self-serve rescheduling.

Booking Rules (System-Enforced)

- **Qualified Only:** The system blocks the generation or use of a booking link until the opportunity is in the `QUALIFIED` stage.
- **Correct Owner:** The booking link is dynamically routed to the calendar of the assigned Closer.
- **Capacity-Aware:** The scheduling tool hides slots if a Closer is at their weekly appointment capacity.
- **Timezone-Safe:** The system must auto-detect the prospect's timezone and display availability accordingly.

- **Single Active Booking:** The system prevents a prospect from having more than one active appointment for the same opportunity.

7.3 Booking to Outcome Loop

```
Qualified Opportunity
        ↓
  Booking Link Sent
        ↓
  Appointment Booked
        ↓
Confirmations + Reminders
        ↓
Outcome Logged (Completed / No-Show / Rescheduled / Cancelled)
```

7.4 Confirmation & Reminder Cadence

⚙️

Automation Rules

The reminder cadence is fully automated. If a prospect does not reply "YES" to the 24-hour confirmation request, the system can be configured to automatically trigger an additional reminder or a task for the setter to place a confirmation call.

Timing	Channel	Message Type & Content
Immediately	WhatsApp + Email	Booking Confirmation (Date, Time, Link, What to Prepare)
T-24 hours	WhatsApp	Reminder + "Please reply YES to confirm"

Timing	Channel	Message Type & Content
T-2 hours	WhatsApp	Final Reminder + Meeting Link
T-10 minutes (Optional)	WhatsApp	"We’re looking forward to speaking with you in 10 minutes!"

7.5 No-Show Prediction & Mitigation

The system can predict the risk of a no-show based on behavioral signals and adjust the reminder strategy accordingly.

- **Signals Used:** Late booking (same-day), no reply to confirmation messages, low historical engagement score, prior no-shows.
- **Risk Levels & Actions:**
    - **Low Risk:** Standard reminder cadence.
    - **Medium Risk:** Add a personal confirmation call from the setter at T-24h.
    - **High Risk:** Enforce a double confirmation (must reply YES) and add a personal call reminder.

7.6 No-Show Recovery SOP

A no-show is not a dead end; it is a trigger for a rapid, automated recovery attempt.

7.6.1 No-Show Recovery Flow

```
No-Show Detected (5 mins past start)
             ↓
Auto-send WhatsApp: "Hi [Name], we missed you. Is everything okay? Here is a
             ↓
Setter receives task: "Call [Name] - No-Show Recovery" (SLA: 10 mins)
             ↓
Setter calls to understand the reason and assist with rescheduling.
             ↓
```

```
Outcome Logged: Rescheduled or Closed-Lost.
```

Rules: The first no-show gets one free reschedule attempt. A second consecutive no-show requires manager review before another appointment can be booked.

7.7 Measurement & KPIs

- **Booking Rate:** % of SQLs that result in a booked appointment.
- **Show-Up Rate:** % of booked appointments that are attended. (Target: 70-85%)
- **No-Show Recovery Rate:** % of no-shows that are successfully rescheduled. (Target: 30-50%)
- **Show-Up Rate by Segment/Channel:** Identifies which lead sources produce the most committed prospects.

⚠️

Common Mistakes to Avoid

- Allowing unqualified leads to book appointments, wasting closer time.
- Relying on email-only reminders, which have low visibility.
- Having no owner accountable for the show-up rate.
- Ignoring timezones, leading to confusion and missed meetings.
- Treating a no-show as a lost deal without an immediate recovery attempt.

Next Page: 8. Sales Execution (Setter Playbook)

---

8. Sales Execution (Setter Playbook)

Purpose

To define exactly how Setters (SDRs) operate to convert qualified demand into attended consultations—with speed, consistency, and zero ambiguity.

Scope

Included: First response standards, contact cadence, standardized call outcomes, the qualification checklist, booking rules, and disqualification standards.

Excluded: The Closer's consultation delivery and closing techniques (Page 9).

8.1 The Setter Mandate

✅

Non-Negotiables

- **Setters do not sell; they qualify and secure show-ups.** Their goal is to generate a pipeline of well-prepared, committed prospects for the Closers.
- **Speed beats persuasion.** At this early stage, rapid response is more effective than a perfect pitch.
- Every interaction (call, message, email) must be logged in the system on the same day.
- If a lead is not qualified, it must be disqualified cleanly and quickly. Protecting the Closer's time is a primary function.

8.2 First Response Standards

The first few minutes after a lead is created are the most critical.

8.2.1 First Response Timeline

```
Lead Captured
     ↓
(0–2 minutes)
Automated Acknowledgement (WhatsApp/Email)
     ↓
```

```
(≤30 min for Hot SQLs / ≤4h for Warm SQLs)
First Human Contact Attempt (Call or personalized WA)
```

Channel Priority: 1. WhatsApp (Primary), 2. Call, 3. Email (Supporting).

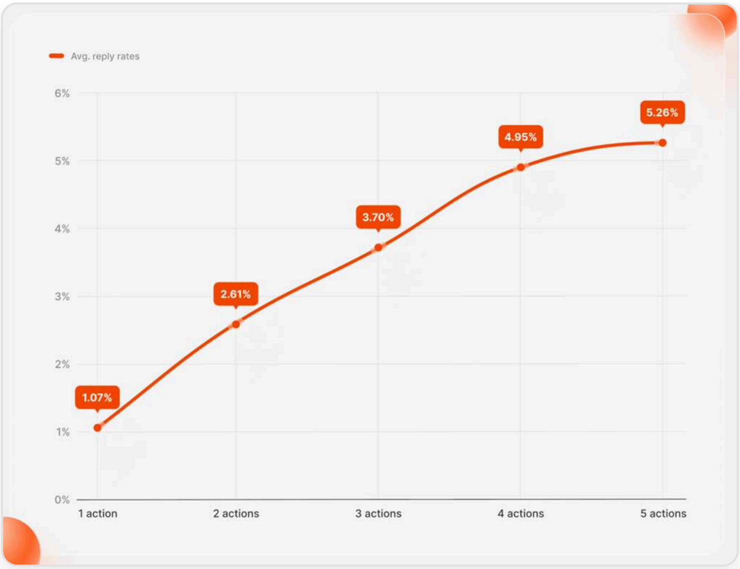
> ⚙️
>
> **Quality Bar**
>
> The first human message must not be generic. It should reference the prospect's likely intent and source (e.g., "Hi [Name], saw you downloaded our Express Entry checklist...").

8.3 Contact Cadence (Mandatory)

This multi-channel, multi-day sequence is designed to maximize contact rates without spamming prospects.

Day	Touches	Channels
Day 0	3	WhatsApp + Call + Email
Day 1	2	WhatsApp + Call
Day 2-3	1 per day	WhatsApp or Call
Day 4-7	1 per day	WhatsApp
After Day 7	Cool Down	Move to automated nurture sequence

Stop Rules: The cadence stops immediately if the prospect is contacted, disqualified, or opts out.



Data shows that a persistent, multi-touch cadence significantly increases contact and reply rates.

8.4 Standardized Call Outcomes

To keep data clean for reporting, Setters must select an outcome from a predefined list after every call.

Outcome	Meaning
Connected	A two-way conversation occurred.
Voicemail	No answer, and a voicemail was left.
No Answer	The call rang but was not answered.
Wrong Number	The contact information is invalid.
Not Interested	The prospect explicitly declined to proceed.
Call Back Later	A specific time was agreed upon for a follow-up call.

Rule: No free-text outcomes. This ensures data is structured and analyzable.

8.5 The Qualification Checklist

Before an appointment can be booked, the Setter must confirm the following information.

8.5.1 Mandatory Questions

1. What immigration pathway are you primarily exploring? (PR / Work / Study / Other)
2. What is your desired timeline to apply?
3. What is your current country of residence and nationality?
4. Have you had any prior visa refusals?
5. How prepared are you with the necessary documents? (Ready / Partial / Not Ready)
6. Are you comfortable with the concept of a professional consultation fee or retainer to secure expert guidance? (This is a budget signal, not a price negotiation).

8.5.2 Qualification Decision Flow

```
Contact Made
     ↓
Is Qualification Checklist Complete?
     ↓ yes
Does Prospect Meet Minimum SQL Criteria?
     ↓ yes
  Book Appointment
     ↓ no
Disqualify or Move to Nurture
```

8.6 Disqualification Standards

Disqualifying a bad-fit lead early is a success, as it protects the Closer's valuable time.

Valid Disqualification Reasons:

- **Out of Scope:** The prospect's needs do not align with the firm's services.
- **No Budget Signal:** The prospect is unwilling or unable to invest in professional services.
- **No Timeline:** The prospect has no intention of applying in the foreseeable future.
- **Unreachable:** The prospect did not respond after the full contact cadence was completed.
- **Duplicate** or **Spam**.

8.7 Handoff to Closer

Once an appointment is booked, the Setter's final job is to provide a clean, concise handoff summary for the Closer.

Handoff Summary Template:

- **Prospect Intent & Urgency:** (e.g., "Wants to apply for Express Entry within 3 months.")
- **Key Risks/Constraints:** (e.g., "Has a previous refusal from 2 years ago.")
- **What They Care About Most:** (e.g., "Speed and certainty are their top priorities.")
- **Anything to Avoid:** (e.g., "Do not mention the PNP program for Ontario; they are not interested.")

8.8 Setter KPIs

- **First Response SLA Compliance %** (Leading)
- **Contact Rate %** (Leading)
- **SQL → Appointment Rate %** (Leading)
- **Show-Up Rate %** (Lagging)

Next Page: 9. Sales Execution (Closer Playbook)

---

9. Sales Execution (Closer Playbook)

Purpose

To standardize high-quality consultations that convert qualified demand into paid clients—ethically, consistently, and fast—while protecting compliance and brand reputation.

Scope

Included: The consultation structure, risk framing, offer selection, objection handling, and the payment push.

Excluded: Appointment scheduling (Page 7), payment processing mechanics (Page 10), and post-handoff case execution.

9.1 The Closer Mandate

✅

Non-Negotiables

- **Closers do not re-qualify basics.** They trust the Setter's handoff and use the consultation to deepen understanding and provide strategic advice.
- **Advice is strategic, not legal.** Closers frame options and risks; they never make guarantees of outcome.
- Every consultation must end with a clear next step: a decision to pay, a scheduled follow-up, or a clean close-lost.
- **The payment conversation is part of the consult**, not an awkward follow-up email.
- Structured consultation notes must be logged in the system on the same day.

9.2 The Consult Structure (Timeboxed Agenda)

A structured agenda ensures every consultation is efficient, valuable, and moves towards a decision.

Segment	Time (45-60 min)	Outcome
Context & Goals	5–10 min	Establish rapport and a shared understanding of the prospect's goals.
Situation Assessment	10–15 min	Uncover facts, risks, and constraints. Go deeper than the Setter's qualification.
Pathway Options	10–15 min	Present 1-2 clear options with their respective trade-offs (e.g., speed vs. cost).

Segment	Time (45-60 min)	Outcome
Recommendation	5–10 min	Provide a primary recommended path and explain the "why" behind it.
Offer & Payment	5–10 min	Present the corresponding service package and move to a payment decision.

Consult Flow

```
Intro & Goals
     ↓
Assessment (Facts & Risks)
     ↓
Options (A vs. B, with trade-offs)
     ↓
Recommendation (Why this path is best)
     ↓
Offer + Payment Decision
```

9.3 Risk Framing & Expectation Setting

⚙️

Quality Bar

A successful consultation is one where the prospect can accurately explain your recommendation and its associated risks back to you. This demonstrates true understanding and alignment.

What Must Be Covered:

- **Eligibility Uncertainty:** Clearly state any areas where eligibility is not 100% certain.
- **Timelines:** Provide realistic best-case, typical, and worst-case timelines.
- **Client Effort:** Explain what documents and information the prospect will need to provide.
- **External Dependencies:** Mention factors outside your control (e.g., government processing times, draw scores).

9.4 Offer & Package Selection

Avoid decision paralysis by presenting a clear, limited set of options.

Scenario	Primary Offer	Fallback Offer (if applicable)
High-confidence PR candidate	Full PR Application Package	Strategy-Only Consultation Package
Complex case with prior refusal	Comprehensive Review + Filing Package	Phased Engagement (Review first, then file)
Standard Study Permit	Standard Intake + Filing Package	Intake-Only Service

9.5 Objection Handling

Use a structured approach to handle objections, turning them into opportunities for clarification.

Objection	Response Strategy
"It's too expensive."	Reframe the cost against the financial and emotional risk of a refusal. Anchor to value, not price.
"I need to think about it."	Acknowledge, then clarify: "What specific part of the plan are you unsure about?" Isolate the real concern.
"I need to talk to my family."	Support their process: "That's a great idea. Let's schedule a brief follow-up for tomorrow to answer any questions they might have."

Objection	Response Strategy
"Can you guarantee the outcome?"	Explain compliance limits clearly: "No one can guarantee a government decision, but our process is designed to build the strongest possible case to maximize your chances."

9.6 The Payment Push (Ethical & Firm)

The transition to payment should be a natural conclusion to a valuable consultation.

Payment Decision Tree

```
Is Recommendation Accepted?
        ↓ yes
   Payment Link Sent
        ↓
      Is it Paid?
        ↓ yes
     Handoff to Ops
        ↓ no
Objection / Needs Time
        ↓
Follow-up or Close-Lost
```

Payment Rules:

- Use only system-generated, trackable payment links.
- No off-platform payment promises or arrangements.
- No case work begins before payment is verified by the system (unless an explicit exception policy is in place).

9.7 Closer KPIs

- **Consult → Paid Conversion Rate %** (Lagging)
- **Average Time-to-Paid** (Leading)
- **Average Revenue per Consult** (Lagging)
- **Discount & Exception Rate %** (Guardrail)

Next Page: 10. Payments & Revenue Recognition

---

10. Payments & Revenue Recognition

Purpose

To ensure payments are collected, verified, and recorded in a compliant, auditable, and automated way, so that sales outcomes translate directly into real, recognized revenue, not just assumptions.

Scope

Included: The offer-to-payment workflow, payment link generation, webhook-based verification, failure handling, and revenue recognition signals for finance.

Excluded: Specific refund policies (which are organization-dependent) and case execution billing.

10.1 Core Principles

✅

Non-Negotiables

- **No Work Before Verification:** Unless an explicit, approved policy exists, no case work begins before payment is verified by an automated webhook.
- **System-Derived Status:** Payment status is determined by system webhooks, not by manual updates from reps. A "Paid" status is non-negotiable and immutable once set by the system.

- **Single Source of Truth:** The payment processor (e.g., Stripe) is the ultimate source of truth for payment status. The Sales OS reflects this truth.
- **Traceability:** Every payment must be traceable to a specific Offer and Opportunity.
- **Exceptions Require Approval:** Any deviation, such as a manual payment record, requires manager approval and leaves a clear audit trail.

10.2 Offer → Payment → Verification Flow

```
Offer Sent (by Closer)
        ↓
Payment Link Created (by System)
        ↓
Client Pays via Link
        ↓
Payment Webhook Received (from Stripe)
        ↓
Payment Verified → Opportunity Stage = PAID
        ↓
CaseOpened Event Triggered
```

10.3 Canonical Payment States

State	Meaning	Next Action
`PAYMENT_LINK_SENT`	A valid payment link has been generated and delivered.	Start the payment chase cadence.
`PAYMENT_PENDING`	The client is awaiting payment.	Continue reminders.
`PAID`	A success webhook has been received and confirmed.	Trigger the Case Opened handoff.

State	Meaning	Next Action
`FAILED`	A payment attempt was declined.	Initiate the failure recovery flow.
`REFUNDED`	A full or partial refund has been processed.	Update financial records and opportunity status.
`EXCEPTION`	A manual override or special case has been logged.	Requires manager approval and review.

10.4 Payment Link Generation

Payment links are created automatically by the system to ensure consistency and trackability.

- **When to Create:** After an offer is selected, its terms are version-locked, and the price is validated.
- **Link Rules:**
  - Only one active link per opportunity at a time.
  - An expiry date is set (e.g., 7-14 days) to create urgency.
  - Currency is locked to the offer.
  - **Metadata is embedded:** The link must contain `opportunity_id`, `offer_id`, and `account_id` for webhook reconciliation.

10.5 Webhook Verification (The Critical Step)

> 💰
>
> **Finance Control**
>
> Never, under any circumstances, should an opportunity be marked as "Paid" based on a client's screenshot, an email confirmation, or a rep's verbal confirmation. The only acceptable proof is a verified, cryptographically signed webhook from the payment processor.

Required Webhooks (from Stripe):

- `payment_intent.succeeded`
- `payment_intent.payment_failed`

- `charge.refunded`

Verification Steps:

1. Validate the webhook signature to ensure it's genuinely from the payment provider.
2. Match the metadata (`opportunity_id`) in the webhook payload to an opportunity in the Sales OS.
3. Update the Payment and Opportunity records with the new status.
4. Emit the corresponding event (`PaymentSucceeded` or `PaymentFailed`).

10.6 Failure Handling & Recovery

```
Payment Failed Event
        ↓
Notify Client + Closer (automated)
        ↓
Send Retry Link (with alternate payment options if possible)
        ↓
Did Second Attempt Succeed?
        ↓ yes
     PAID → Handoff
        ↓ no
Close-Lost or Manual Follow-up by Closer
```

Retry Rules: Set a maximum number of automated retries (e.g., 3) and a cool-off period between attempts. Escalate to the Closer for manual intervention after the first failure.

10.7 Finance Controls & Reconciliation

The Sales OS must provide signals that enable easy reconciliation for the finance team.

Report/Process	Frequency	Purpose
Daily Reconciliation	Daily	Match payment records in Stripe against PAID opportunities in the Sales OS.

Report/Process	Frequency	Purpose
Monthly Reconciliation	Monthly	Ensure all PAID deals correspond to a Case Opened record and match revenue reports.
Exception Report	Weekly	Flag all deals with discounts, manual overrides, or refunds for review.

⚠️

Common Mistakes to Avoid

- Marking deals as "Won" or "Closed" before payment is verified.
- Accepting screenshots or forwarded emails as proof of payment.
- Having multiple, untracked payment links active for the same deal.
- Allowing manual status changes to "Paid" without an audit trail and approval.
- Having a poor or non-existent retry process for failed payments.

Next Page: 11. Case Opened Handoff (Sales → Ops)

---

11. Case Opened Handoff (Sales → Ops)

Purpose

To guarantee a clean, auditable, and zero-ambiguity handoff from the Sales team to the Case Operations team only after payment is verified, enabling the delivery process to start quickly and without rework.

Scope

Included: Handoff trigger rules, the canonical handoff payload schema, the operations confirmation loop, and exception handling.

Excluded: The specific workflows of case execution, document collection, and IRCC submission steps.

11.1 Core Principles

✅

Non-Negotiables

- **Payment Verified Before Handoff:** The handoff process cannot begin until a successful payment is confirmed by a system webhook.
- **Single Handoff Event:** There is one, and only one, official "Case Opened" handoff event per paid opportunity.
- **Structured Payload:** The handoff is a structured data payload (e.g., JSON), not a free-text email or a verbal conversation.
- **Explicit Ops Confirmation:** The loop is not closed until the Operations team acknowledges receipt and confirms the case has been opened in their system.
- **Sales Disengages:** After a successful handoff, the sales team's involvement ends. The client relationship is now owned by Operations.

11.2 Handoff Trigger Rules

A `CaseOpened` handoff is automatically triggered when **ALL** of the following conditions are true:

1. The Opportunity stage is `PAID`.
2. The associated Payment status is `PAID` (verified by webhook).
3. The Offer terms version is locked.
4. Mandatory consultation notes are completed and stored.

When triggered, the system automatically generates the handoff payload, emits a `CaseOpenTriggered` event, creates a ticket in the Ops queue (or makes an API call), and notifies both Sales and Ops.

11.3 Sales → Ops Handoff Flow

```
Payment Verified (Opportunity Stage = PAID)
                     ↓
System Generates Handoff Payload
                     ↓
System Emits `CaseOpenTriggered` Event
                     ↓
Payload is Sent to Case Tool / Ops Queue
                     ↓
Ops Confirms Receipt → System records `CaseOpenedConfirmed`
```

11.4 Canonical Handoff Payload Schema

This is the data contract between Sales and Operations. If any mandatory field is missing, the handoff must fail and alert the sales team to complete the data.

Section	Fields	Description
Client	Name, Email, Phone, Language, Timezone	Core contact and identity information.
Intent	Intent Family, Program Family, Urgency	What the client bought and why.
Context	Consult Summary, Risks Discussed, Constraints	The "why" behind the recommendation.
Offer	Package Name, Price, Currency, Terms Version	The commercial agreement.
Payment	Payment ID, Amount, Paid At Timestamp	Auditable proof of payment.
Notes	Link to consult summary, attachment references	Supporting documentation.
Internal	Closer ID, Priority Flag (if any)	Internal routing and context for Ops.

11.5 Ops Confirmation & Exception Loop

⚙️

Ops Readiness

The Operations team must have a system (even a simple ticketing queue) capable of receiving the handoff payload and sending a confirmation signal back to the Sales OS. This confirmation can be via webhook or a manual status update in a shared system.

Confirmation & Exception Flow

```
`CaseOpenTriggered` Event
          ↓
Ops Team Validates Payload
          ↓
Is Payload Complete?
          ↓ yes
Ops Opens Case → Emits `CaseOpenedConfirmed`
          ↓ no
Return to Sales (with reason) → Fix within SLA
```

SLAs: Ops validation should occur in < 24 hours. If a payload is rejected, Sales must fix it within < 8 business hours.

11.6 What Sales Must NOT Do After Handoff

⚠️

Hard Stop Rules for Sales

Once the `CaseOpenedConfirmed` event is received, the sales role is complete. Sales reps must immediately cease:

- Collecting any further documents from the client.
- Making promises about case processing timelines.
- Discussing case strategy or giving procedural advice.

- Attempting to change pricing or service scope.
- Giving instructions to the Ops team outside of the official handoff payload.

All client communication is now owned by the assigned case manager/ops team member.

11.7 Measurement & Governance

- **Paid → Case Opened Time:** Measures the efficiency of the handoff process. (Target: < 24 hours).
- **Handoff Rejection Rate:** % of handoffs returned to Sales for correction. Measures data quality. (Target: < 2%).
- **Payload Completeness %:** Automated check on the percentage of handoffs with all mandatory fields filled.

Next Page: 12. Sales Management & Performance

---

12. Sales Management & Performance

Purpose

To give leaders complete control and predictability over revenue by standardizing targets, scorecards, coaching rituals, and forecasting—without relying on micromanagement.

Scope

Included: Target setting, KPI framework, scorecards and dashboards, coaching cadences, and revenue forecasting methodology.

Excluded: Compensation plan design and hiring/onboarding processes.

12.1 Management Philosophy

✅

Non-Negotiables

- **Manage the system, not just the people.** If a rep is failing, first ask where the system (process, training, tools) failed them.
- **KPIs measure leading indicators first, outcomes second.** Track activities (calls, meetings) to predict revenue, don't just react to closed deals.
- **Coaching is scheduled and structured, not reactive.** It's a core management ritual.
- **Forecasts are probability-weighted and data-driven, not based on hope.**
- Every performance miss has a diagnosable root cause.

12.2 The Sales Management Control Loop

```
1. Targets Set (Top-down)
        ↓
2. Capacity Planned (Bottom-up)
        ↓
3. Activity Executed (by Reps)
        ↓
4. KPIs Measured (by System)
        ↓
5. Coaching & Adjustments (by Manager)
        ↓
6. Forecast Updated (for Leadership)
```

12.3 Target Setting & Capacity Planning

Targets are set top-down from a revenue goal, then validated bottom-up with a capacity and conversion model.

Example Bottom-Up Math:

1. **Paid Deals Needed** = Revenue Target / Average Deal Size
2. **Consults Needed** = Paid Deals / Closer Close Rate %
3. **Appointments Needed** = Consults / Show-Up Rate %
4. **SQLs Needed** = Appointments / SQL-to-Appointment Rate %
5. **Leads Needed** = SQLs / Lead-to-SQL Rate %

This model must be visible to managers and reps to show how individual activity drives the company's goals.

12.4 KPI Framework (Role-Specific)

Each role is measured by a small set of KPIs that they directly control.

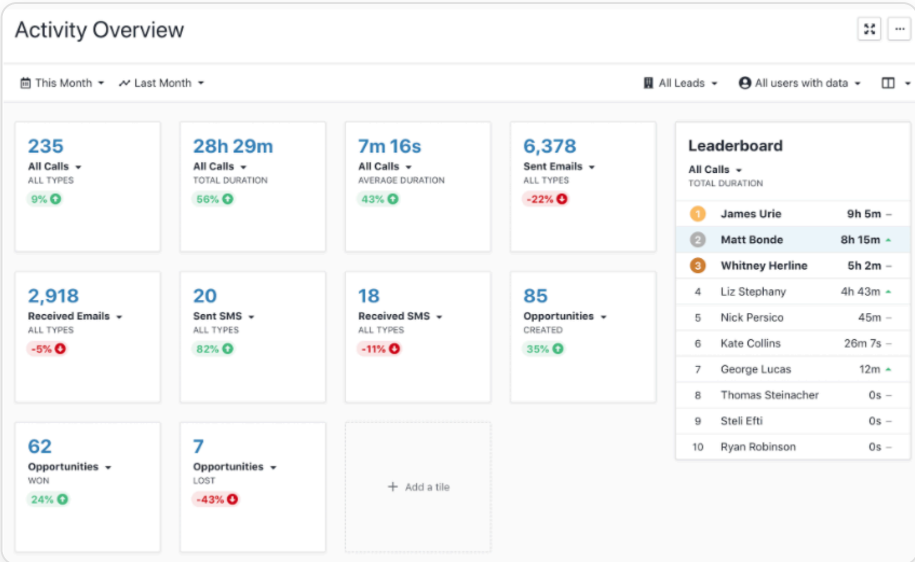
Role	KPI	Type	Why it Matters
Setter	First Response SLA %	Leading	Measures speed-to-lead.
	Contact Rate %	Leading	Measures effectiveness of cadence.
	SQL → Appointment Rate %	Leading	Measures ability to book.
	Show-Up Rate %	Lagging	Measures quality of booking.
Closer	Consult → Paid Rate %	Lagging	Measures closing effectiveness.
	Average Time-to-Paid	Leading	Measures deal velocity.
	Average Revenue/Consult	Lagging	Measures value creation.
	Compliance Issues	Guardrail	Measures adherence to rules.
Team	Cost per SQL	Efficiency	Measures marketing effectiveness.
	Paid / SQL %	Health	Measures overall funnel health.
	Forecast Accuracy	Predictability	Measures management control.

12.5 Scorecards & Dashboards

👑

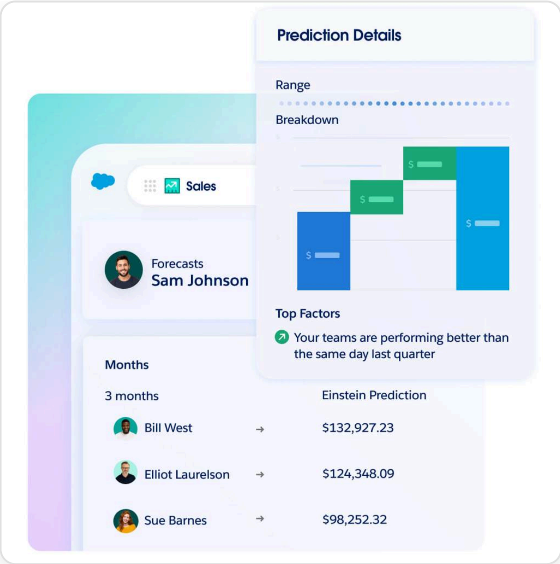
Manager Rituals

Dashboards are not for passive viewing. They are tools to be used in mandatory weekly reviews. The rhythm of review is what drives performance, not the dashboard itself.



Activity dashboards provide managers with real-time leading indicators of team performance.

- **Individual Rep Scorecard (Weekly):** Shows a single rep's Target vs. Actual for their core KPIs, SLA compliance, and a log of coaching notes.
- **Manager Funnel Dashboard:** Visualizes the entire funnel by stage, highlighting conversion rates and bottlenecks. Allows filtering by channel, segment, and rep.
- **SLA Breach Dashboard:** A real-time view of all active SLA breaches, their owners, and their age.



Modern forecasting tools use AI to provide more accurate, data-driven predictions and highlight key contributing factors.

12.6 Coaching & Performance Management

Coaching is a structured, data-driven process.

Meeting	Frequency	Focus
1:1 Rep Coaching	Weekly	Diagnose KPI gaps, review calls/messages, agree on 1-2 skill actions.
Pipeline Review	Weekly	Review deal progression, identify stuck deals, and strategize next steps.
Team Review	Monthly	Identify team-wide patterns, share best practices, and celebrate wins.

12.7 Revenue Forecasting

Forecasts are built from a probability-weighted pipeline, not from reps' optimistic guesses.

Forecasting Waterfall

```
Total Pipeline Value
        ↓
(multiplied by stage probability %)
        ↓
Weighted Pipeline Value
        ↓
+ Commit (high-probability deals)
        ↓
= Forecast (Commit + Weighted)
```

Forecasting Rules: Probability is set by stage, not by rep. Only deals in the `PAID` stage count as actual revenue. The forecast is locked and reviewed weekly.

⚠️

Common Mistakes to Avoid

- Managing only on lagging indicators like revenue.
- Ignoring leading indicators like contact rate and appointment setting.
- Overloading top performers and burning them out.
- Conducting ad-hoc, reactive coaching instead of scheduled sessions.
- Allowing reps to manually adjust deal probabilities ("forecasting by gut feel").

Next Page: 13. Tool Stack, AI & Automation Blueprint

---

13. Tool Stack, AI & Automation Blueprint

Purpose

To define a future-proof, vendor-agnostic stack that delivers the Sales OS using best-in-class tools, AI for leverage, and automation for coordination—while preserving your IP and enabling SaaS packaging.

Scope

Included: Canonical stack layers, tool options with ratings, AI use cases, low-code orchestration patterns, and the "buy vs. build" framework.

Excluded: Deep dives into security (Page 14) and hiring (Page 15).

13.1 Stack Design Principles

✅

Non-Negotiables

- **Logic lives in the OS, not the tools.** Routing, scoring, and SLA rules are owned by your central logic layer, not hard-coded into CRM workflows.
- **Adapters isolate vendors.** The system is designed to easily swap out one CRM or calling tool for another without rewriting core logic.
- **Events trigger workflows.** Automation is based on subscribing to canonical events, not on brittle, point-to-point tool integrations.
- **AI assists decisions; rules enforce policy.** AI provides inputs (like an intent guess), but a deterministic rule makes the final decision (like creating an SQL).
- **SaaS-ready from day one.** The architecture is designed with multi-tenancy and configuration in mind.

13.2 End-to-End Tool Architecture

```
Channels (Google/Meta/LinkedIn/Web/WA/Outbound)
                        ↓
Ingestion Layer (Webhooks via n8n/Make)
                        ↓
```

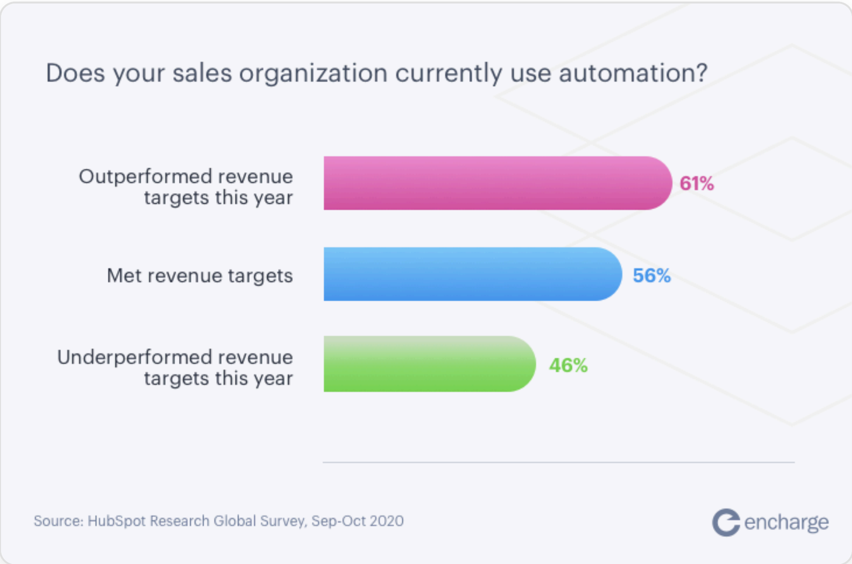
```
Canonical Sales OS (Your IP: DB + Rules + Events)
  ↓                    ↓                    ↓
CRM Adapter ↔ AI Services ↔ Automation Engine
  ↓                    ↓                    ↓
Execution Tools      Classifiers/Summaries  Notifications/Tasks
(HubSpot, Aircall,   (OpenAI/Claude)        (Slack/Email)
 Calendly, Stripe)
                    ↓
Case Tool (via CaseOpen event)
```

13.3 Canonical Stack Layers & Options

The following table provides recommended tools for each layer of the stack.

Layer	Tool	Rating	Pros	Cons
CRM	HubSpot	⭐⭐⭐⭐☆	Fast setup, great APIs, good UI.	Can get expensive at scale.
Low-Code Orchestration	n8n / Make	⭐⭐⭐⭐☆	Visual, fast, flexible. n8n can be self-hosted.	Complex logic can be hard to manage vs. code.
Messaging (WhatsApp)	Twilio API	⭐⭐⭐⭐⭐	Reliable, scalable, full API control.	Requires development.
Calling	Aircall / Dialpad	⭐⭐⭐⭐☆	Good CRM integration, call logging, transcription.	Can be costly per seat.
Scheduling	Calendly / Chili Piper	⭐⭐⭐⭐⭐	Excellent routing and timezone handling.	Another tool to manage.
Payments	Stripe	⭐⭐⭐⭐⭐	Best-in-class webhooks, APIs, and reliability.	Fees.

Layer	Tool	Rating	Pros	Cons
AI Services	OpenAI / Anthropic API	⭐⭐⭐⭐⭐	Powerful for classification, summarization.	Requires prompt engineering and cost management.



Organizations that leverage sales automation are significantly more likely to outperform their revenue targets.

13.4 AI Usage Map

AI is used for specific, high-leverage tasks, not as a generic "magic" layer.

Stage	AI Use Case	Tool/Model
Lead Intake	Classify intent, language, and geo from free text.	LLM Classifier (GPT-4.1/Claude 3.5)
Qualification	Predict no-show risk and readiness signals.	LLM + Rules Engine
Calls	Live transcription and automated summarization.	Native (Aircall) or Whisper API
Consult Notes	Generate structured summaries from transcripts.	LLM Summarizer

Stage	AI Use Case	Tool/Model
QA & Management	Detect anomalies and flag calls for review.	LLM + Rules

13.5 Event-to-Automation Map

This map is the core of the low-code orchestration layer.

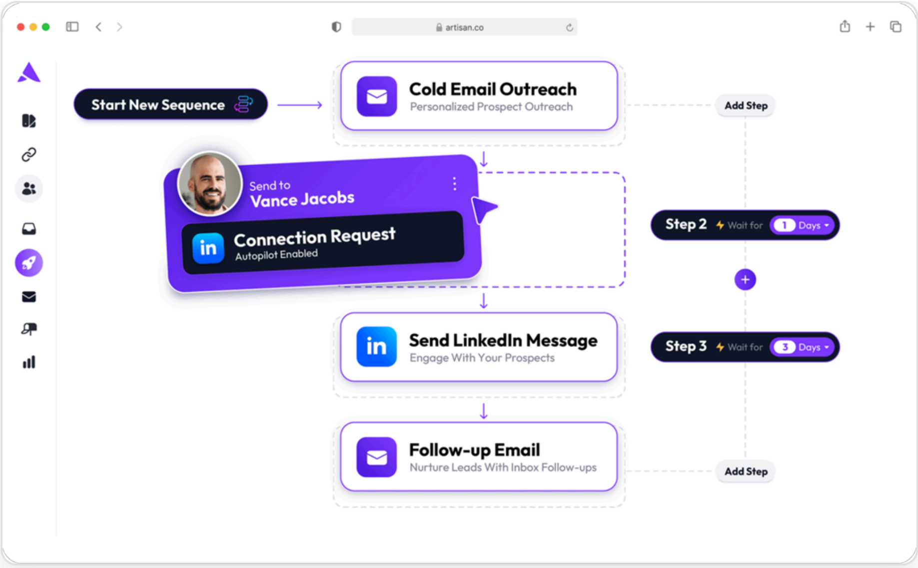
```
Event: `LeadCaptured`
→ Triggers: Enrich, Classify, Score, Auto-Acknowledge

Event: `SQLCreated`
→ Triggers: Route Setter, Start SLA Timer

Event: `AppointmentBooked`
→ Triggers: Schedule Reminders, Update Rep Capacity

Event: `PaymentSucceeded`
→ Triggers: Mark Opportunity as PAID, Emit `CaseOpenTriggered`

Event: `SLA_Breach`
→ Triggers: Escalate to Manager, Reassign Task
```



Low-code tools can orchestrate complex, multi-channel sequences triggered by canonical events.

13.6 Buy vs. Build Framework

> 💡
>
> ### Your IP is Your Logic, Not Your Tools
>
> Your intellectual property lives in the canonical schemas, the scoring models, the segmentation framework, the routing rules, the SLA governance, and the automation maps. The tools are merely replaceable execution engines.

- **BUY:** Capabilities that are commoditized and require high reliability.
  - **Examples:** Calling infrastructure, payment processing, email delivery, CRM database.
- **BUILD (or configure in low-code):** The logic that defines your unique business process.
  - **Examples:** The routing engine, the scoring model, the segment definitions, the event bus, the adapter contracts.

Next Page: 14. Security, Compliance & Data Governance

14. Security, Compliance & Data Governance

Purpose

To protect client trust, ensure regulatory compliance, and maintain brand reputation by enforcing strong security, privacy, consent, and audit controls across the Sales OS—by default, not as an afterthought.

Scope

Included: PII classification, access control, consent lifecycle management, auditability, and SaaS governance foundations.

Excluded: Jurisdiction-specific legal advice and compliance related to the case delivery process (owned by Ops).

14.1 Security & Compliance Philosophy

✅

Non-Negotiables

- **Collect Only What You Need:** Adhere to the principle of data minimization. If you don't need it for the sales process, don't ask for it.
- **Enforce Least-Privilege Access:** Users should only be able to see and modify data that is absolutely necessary for their role.
- **Consent Governs Every Outreach:** Every proactive communication must be backed by auditable consent.
- **Every Action is Auditable:** Assume the system will be audited by regulators or clients.

14.2 Data Classification

Not all data is equal. Classifying data determines how it's handled, stored, and accessed.

Class	Examples	Handling Requirements
Public	Marketing pages, general service descriptions.	No restriction.
Internal	Campaign names, internal KPIs, team performance.	Role-based access, not public.
PII (Personally Identifiable Information)	Name, phone number, email address.	Encrypted at rest and in transit, restricted access.
Sensitive PII	Passport numbers, date of birth.	**Avoid storing in the Sales OS.** This data belongs in the secure case management system post-handoff.
Financial	Payment IDs, transaction amounts.	Tokenized. Handled by PCI-compliant provider (Stripe).

14.3 Access Control & Segregation

14.3.1 Role-Based Access Control (RBAC)

Role	Primary Access Rights
Setter	Can view and edit assigned Leads and Appointments.
Closer	Can view and edit assigned Opportunities and Offers.
Manager	Can view all data for their team, access reports, and perform overrides.
Ops	Can only access the final CaseOpen handoff payload.

Role	Primary Access Rights
Admin	Can access system configuration and audit logs.

14.3.2 Data Access Layers

```
User
 ↓
Role (e.g., "Closer")
 ↓
Permission Set (e.g., "Can Edit Own Opportunities")
 ↓
Object / Field-Level Access
```

14.4 Consent Lifecycle Management

Consent is not a one-time checkbox; it's a lifecycle that must be managed.

14.4.1 Consent Lifecycle

```
1. Capture (Explicit opt-in)
        ↓
2. Store (with timestamp and source)
        ↓
3. Use (limited to the channel consented to)
        ↓
4. Withdraw (honor opt-outs immediately)
        ↓
5. Audit (prove consent for any message sent)
```

✅

Regulatory Lens

While this playbook provides the technical framework, all consent language, privacy policies, and data retention rules must be validated by legal counsel to ensure compliance with regulations like GDPR, PIPEDA, etc., in the jurisdictions you operate in. The Sales OS is designed to **enforce** policy, not create it.

14.5 Data Retention & Deletion

Data should not be kept forever. A clear retention policy reduces risk.

Data Type	Example Retention Period
Unconverted Leads	12–24 months
Paid Client Sales Data	As per finance/legal policy (e.g., 7 years)
Audit Logs	3–7 years

Deletion Rules: The system must support the "right to erasure." Deletion should be a soft-delete followed by a permanent purge after a grace period, with all actions logged.

14.6 Auditability & Monitoring

What Must Be Logged:

- Login attempts (success and failure).
- Access to sensitive data records.
- All stage changes, owner changes, and manual overrides.
- All changes to payment status.
- Consent status changes (opt-in and opt-out).

What Must Be Monitored:

- Alerts for unusual access patterns (e.g., a rep exporting a large number of contacts).
- Alerts for high rates of SLA breaches or data anomalies.

14.7 SaaS Governance Foundations

- **Data Isolation:** All records must be strictly segregated by `account_id`. A query should never be able to cross tenant boundaries.
- **Secrets Management:** Per-tenant API keys and credentials must be stored in a secure vault (e.g., AWS Secrets Manager, HashiCorp Vault), not in the database.
- **Webhook Security:** All inbound webhooks must be verified using signatures to prevent spoofing.

Next Page: 15. Hiring, Onboarding & Scaling the Sales Org

---

15. Hiring, Onboarding & Scaling the Sales Org

Purpose

To create a scalable, low-risk hiring and ramp system that produces consistent performance without relying on "star sellers," while preserving quality, compliance, and culture.

Scope

Included: Role definitions, hiring scorecards, onboarding and certification, ramp plans, and quality assurance.

Excluded: Compensation plan design and territory expansion strategy.

15.1 Operating Philosophy

✅

Non-Negotiables

- **Hire for coachability and process adherence**, not just past experience. A brilliant but uncoachable rep will break the system.
- **Certify before they fly.** No new rep touches a live lead until they have passed a formal certification on the process and tools.
- **Ramp-up is milestone-based, not time-based.** A rep is "ramped" when they hit performance milestones, not after 90 days.
- **Quality is inspected continuously, not assumed.** A formal QA process is required.
- Managers own the hiring and onboarding outcomes for their team.

15.2 Role Profiles

Role	Core Strengths	Must-Pass Skill	Not Required
Setter (SDR)	Speed, clarity, empathy, discipline.	Cadence execution, qualification checklist.	Deep immigration expertise.
Closer (Consultant)	Structured thinking, trust-building, decision facilitation.	Consult simulation, risk framing.	Sales theatrics, high-pressure tactics.
Sales Manager	Diagnosis, coaching, system thinking.	KPI interpretation, pipeline governance.	Being the #1 personal salesperson.

15.3 The Hiring Funnel

15.3.1 Hiring → Onboarding Pipeline

```
Sourcing (Inbound/Referrals/Outbound)
           ↓
Screening (Culture & Motivation Fit)
```

```
            ↓
Role Simulation (The Key Step)
            ↓
Scorecard Review & Debrief
            ↓
Offer
            ↓
Onboarding & Certification
```

15.3.2 Mandatory Role Simulations

- **Setter:** Given 3 mock leads, execute the first response and qualification checklist over a recorded call.
- **Closer:** Given a qualified lead profile, run a 30-minute mock consultation and handle two common objections.
- **Manager:** Given a dashboard with performance issues, diagnose the root cause and outline a coaching plan for a struggling rep.

15.4 Hiring Scorecards (Objective Evaluation)

Use a scorecard to remove bias and focus on the skills that matter for each role.

Setter Scorecard Example:

Dimension	Weight
Communication Clarity	25%
Process Discipline	25%
Coachability (in debrief)	25%
Empathy	15%
Experience	10%

Rule: No hire is made without a completed scorecard and a formal debrief among the interviewers.

15.5 Onboarding & Certification

Onboarding is a formal process with a pass/fail gate.

Phase	Outcome
Week 1: Orientation	Understands the company culture, systems, and the "why" behind the Sales OS.
Week 2: Process Mastery	Can articulate every stage of the playbook and knows how to use the core tools.
Week 3: Shadowing	Listens to live calls and consults, taking notes against the playbook.
Week 4: Certification	Passes a final role simulation and process quiz to gain access to live leads.

15.6 Ramp Plan (Milestone-Based)

A new rep's access and targets are gradually increased as they hit performance milestones.

Setter Ramp Example:

- **Month 1:** Achieve 50% of the standard SQL assignment, target is 80% SLA compliance.
- **Month 2:** Achieve 75% of SQL assignment, target is 50% of the appointment booking quota.
- **Month 3:** Full SQL assignment and 100% of quota.

15.7 Quality Assurance (QA)

Manager Rituals

QA is a management responsibility. Managers must dedicate time each week to reviewing a sample of calls, messages, and notes for their reps to ensure quality and identify coaching opportunities.

QA Feedback Loop

```
Interaction Logged in System
           ↓
Manager/QA Reviews (against checklist)
           ↓
Feedback Delivered in 1:1 Coaching
           ↓
Process/Template is Adjusted if Needed
```

15.8 Scaling Guardrails

Know when to hire and when to pause.

- **When to Add Headcount:** Rep capacity is sustained above 80%, SLA breaches are increasing due to volume, or lead flow consistently outstrips the team's ability to follow up.
- **When to Pause Hiring:** QA scores are dropping, manager bandwidth for coaching is exceeded, or the underlying process is unstable. **Do not hire to solve a process problem.**

Next Page: 16. Operating Rhythm, SOPs & Continuous Improvement

---

16. Operating Rhythm, SOPs & Continuous Improvement

Purpose

To ensure the Sales OS runs predictably, calmly, and continuously improves—without heroics—by defining non-negotiable rhythms, clear SOP ownership, and a structured improvement loop.

Scope

Included: Daily, weekly, and monthly operating rhythms; SOP ownership and change control; issue detection and root-cause analysis; and the continuous improvement cadence.

Excluded: Executive strategy resets and tool vendor roadmap decisions.

16.1 Operating Philosophy

✅

Non-Negotiables

- **Rhythm beats intensity.** Consistent, scheduled reviews are more effective than occasional, intense fire-fighting.
- **SOPs are living contracts, not static documents.** They must be owned, versioned, and updated.
- Every performance miss produces a learning artifact, not blame.
- Changes to the process are versioned, communicated, and trained.
- Improvement is a scheduled, formal process, not an optional activity.

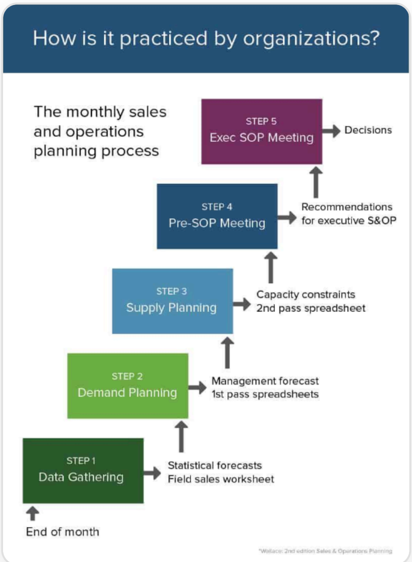
16.2 The Operating Rhythm

The operating rhythm is a cadence of meetings and reviews that keeps the entire sales engine aligned and performing.

16.2.1 Rhythm Overview

```
Daily Execution (Reps)
        ↓
```

```
Weekly Review (Managers)
       ↓
Monthly Calibration (Leadership)
       ↓
Quarterly System Upgrade (Ops)
```



A structured planning process, from data gathering to executive decisions, forms the backbone of a stable operating rhythm.

16.2.2 Daily Rhythm (Execution Layer)

- **Setters:** Work their assigned SQL queue, focusing on hitting first-response SLAs and booking appointments.
- **Closers:** Run their scheduled consultations, focusing on converting prospects to paid clients.
- **Managers:** Monitor real-time SLA and capacity dashboards, flagging any immediate issues.
- **Rule:** No unowned opportunities by the end of the day.

16.2.3 Weekly Rhythm (Control Layer)

Meeting	Owner	Focus	Output
Pipeline Review	Manager	Review stage-by-stage funnel conversion, identify stuck deals.	Action plan for key deals.

Meeting	Owner	Focus	Output
KPI Review	Manager	Analyze leading indicators (contact rate, booking rate) vs. targets.	Updated forecast.
QA Review	Sales Ops/Manager	Calibrate on quality, review flagged calls/messages.	Coaching priorities for 1:1s.

16.2.4 Monthly & Quarterly Rhythm (Optimization Layer)

- **Monthly:** Review segment and campaign performance to rebalance marketing focus and budget. Audit SOP adherence.
- **Quarterly:** Recalibrate the entire system. Review and tune stage definitions, SLA thresholds, and the lead scoring model. Plan for headcount based on capacity trends.

16.3 SOP Ownership & Governance

Every Standard Operating Procedure (SOP) must have a single, named owner responsible for its maintenance and performance.

SOP Area	Owner
Lead Intake & Attribution	Sales Ops
Qualification & SQL Definition	Sales Manager
Appointment & Show-Up Engine	Head of Setters
Consult & Closing	Head of Closers
Payment & Handoff	Finance Ops / Ops Manager

SOP Change Control Process:

1. Change is proposed in the Improvement Backlog.
2. Impact is assessed by the SOP owner and stakeholders.
3. The SOP document is updated with a new version number.

4. The change is communicated and trained to all affected users.
5. The new SOP is enforced from a specific go-live date.

16.4 Continuous Improvement Loop

This loop turns problems into systematic improvements.

```
1. Miss or Opportunity Identified (e.g., Show-up rate drops)
                      ↓
2. Root Cause Analysis (e.g., "Why? Reminder messages are unclear.")
                      ↓
3. SOP / Config Change (e.g., Update reminder template v1.1 → v1.2)
                      ↓
4. Training + Rollout (e.g., Announce change in team meeting)
                      ↓
5. Measure Impact (e.g., Track show-up rate for the next 2 weeks)
```

👑

Leadership Habits for Success

- Ask "Where did the system fail?" before asking "Who failed?"
- Fix patterns, not just one-off anecdotes.
- Enforce standards calmly and consistently.
- Protect the focus time of your sales reps from distractions.
- Celebrate clean execution and process adherence, not just big wins.

Next Page: 17. End-to-End Blueprint Summary & SaaS Productization

17. End-to-End Blueprint Summary & SaaS Productization

Purpose

To condense the entire playbook into a single, executable blueprint and provide a clear roadmap for how to package this intellectual property (IP) and sell it as a Software-as-a-Service (SaaS) product.

17.1 One-Page End-to-End Blueprint

This is the canonical Sales OS flow, summarizing the entire playbook.

```
[Marketing & Promotions]
         ↓
[Lead Capture & Import]
         ↓
[Categorize + Score (AI + Rules)]
         ↓
[SQL Creation → Routing + SLA]
         ↓
[Appointment & Show-Up Engine]
         ↓
[Consult (Setter → Closer Handoff)]
         ↓
[Offer → Payment Engine]
         ↓
[Case Opened (Ops Handoff)]
         ↓
[Management, QA & Improvement Loop]
```

17.2 What You Now Own as IP

💡

Your Defensible IP is Your Logic, Not Your Tools

Your intellectual property is not "a HubSpot setup." It is the complete, integrated system of logic that you can deploy on top of any tool stack. This is what competitors cannot easily copy and what clients will pay for.

IP Category	Specific Assets You Own
Architecture	The canonical objects, state machine, and event contracts.
Process	The stage gates, SOPs, and operating rhythms.
Intelligence	The segmentation framework and the explainable scoring model.
Automation	The event-to-automation maps and workflow logic.
Governance	The SLA definitions, QA checklists, and escalation rules.
Analytics	The KPI definitions, benchmarks, and dashboard templates.
Packaging	This playbook, configuration templates, and training materials.

17.3 SaaS Product Layers

To productize the Sales OS, you wrap your core logic in a service layer and treat underlying tools as pluggable adapters.

SaaS Layering Model

```
+-------------------------------------------+
```

```
|           Customer UI (Web App)                |
|  [Dashboards] [Config UI] [Audit Log Viewer]   |
+------------------------------------------------+
                         ↓
+------------------------------------------------+
|           Sales OS Core (Your Engine)          |
| [Objects] [Rules] [Events] [AI] [State Machine]|
+------------------------------------------------+
                         ↓
+------------------------------------------------+
|              Adapter Layer                     |
| [CRM] [WhatsApp] [Calling] [Scheduler] [Pmts]  |
+------------------------------------------------+
```

17.4 What You Build vs. What You Buy

- **BUILD (Your Moat):**
  - The Sales OS Core service (API-first).
  - The segmentation and scoring engine.
  - The routing and SLA engine.
  - The event bus and audit log.
  - The configuration UI for clients.
  - The analytics and benchmarking layer.
- **BUY (Commodities):**
  - CRM (initially, can be built later).
  - Calling provider (Aircall).
  - WhatsApp provider (Twilio).
  - Payment processor (Stripe).
  - Scheduling tool (Calendly).

17.5 SaaS Product Modules (Sellable Units)

You can bundle your SaaS offering into tiers based on these modules.

Module	Description
Lead Intelligence	AI-powered categorization and scoring.
Sales Execution	The core pipeline, routing, and SLA engine.
Appointment Engine	Automated booking, reminders, and show-up optimization.
Revenue Engine	Offer-to-payment automation and verification.
Ops Handoff	Clean, automated case opening.
Management Suite	Targets, KPIs, coaching workflows, and forecasting.

17.6 Go-to-Market Options

ℹ️

Go-to-Market Strategy

The recommended path is to evolve from internal use to a full SaaS product. This approach is lowest risk and provides the fastest learning loop.

1. **Internal-First:** Run your own sales organization on the OS to prove its ROI and refine the playbook.
2. **Done-for-You (DFY) OS:** Sell the system as a premium implementation service plus a recurring license fee. You manage the tech for the client.
3. **Pure SaaS:** Offer a self-service product with tiered pricing, where clients connect their own tools.

17.7 What to Do Next (30-60-90 Day Plan)

- **First 30 Days:** Implement the Sales OS internally using a low-code stack (e.g., HubSpot + Make). Lock down the segmentation framework and SLA definitions. Instrument all funnel metrics.
- **Next 60 Days:** Stabilize performance, focusing on improving show-up and close rates. Document performance benchmarks. Begin extracting core logic (scoring, routing) into reusable templates or

functions.

- **Next 90 Days:** Begin building the "Sales OS Core" as a separate service. Replace the most critical low-code workflows with calls to your new service. Pilot the "Done-for-You" model with 1-2 trusted external firms.

End of Playbook.