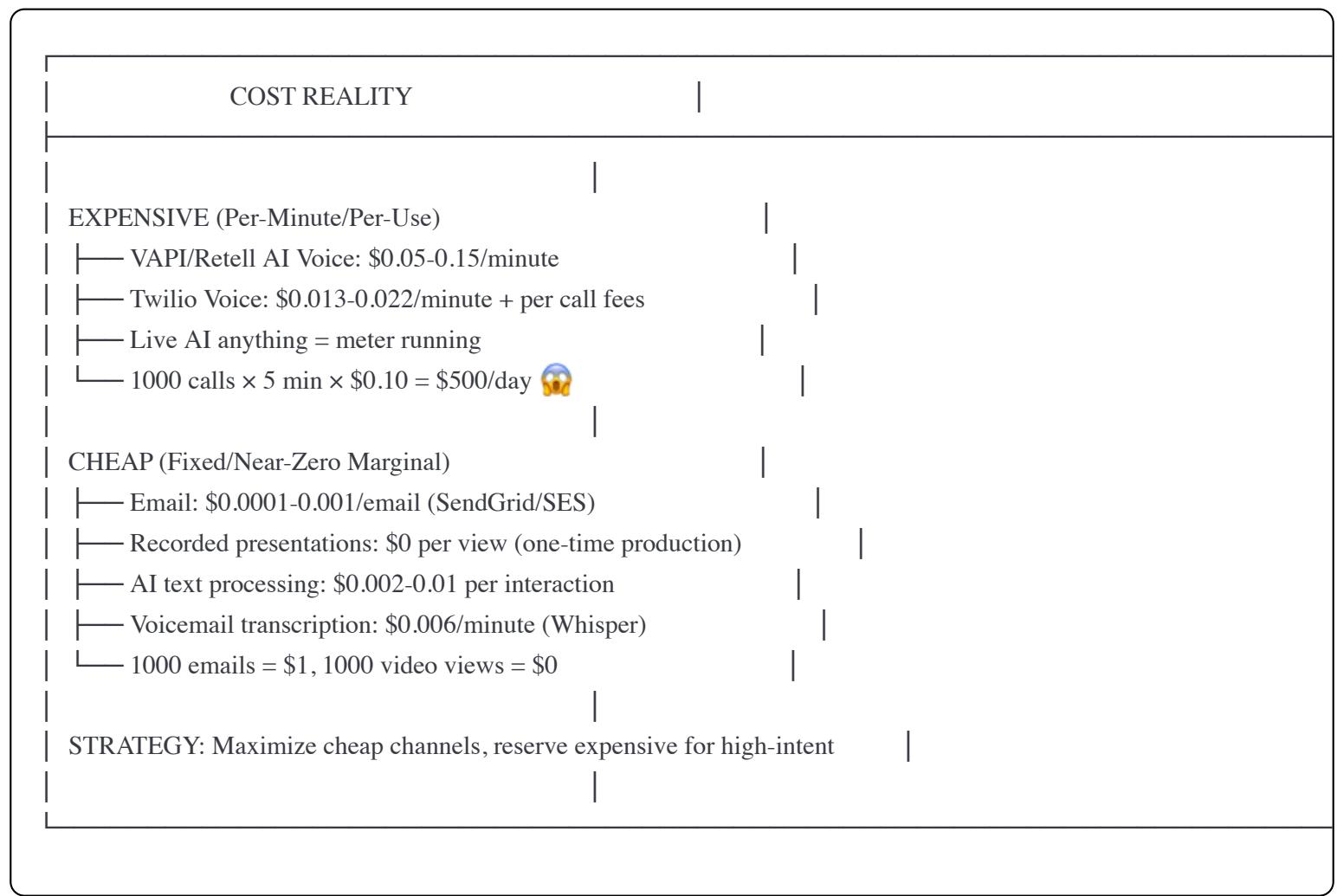


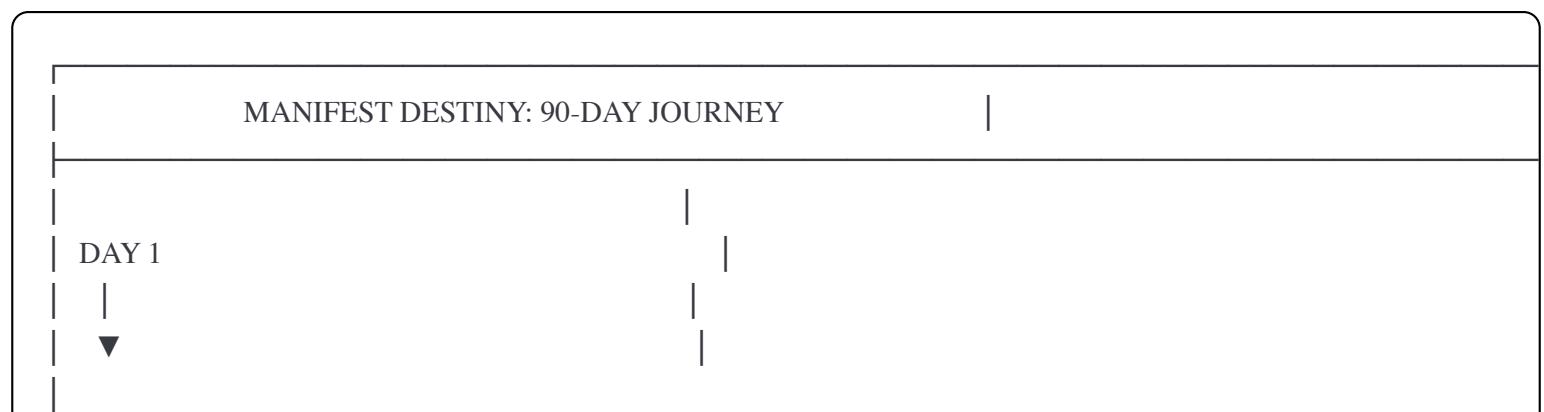
# FIBONACCO IB-OB SYSTEM

## Cost-Optimized Architecture for Manifest Destiny Rollout

## THE ECONOMICS



## MANIFEST DESTINY FUNNEL



EMAIL #1: "Your business is in our directory"  
[Claim Your Listing] → Learning Center  
[Meet Your AI Account Manager] → Schedule/Contact Page

IGNORES | LEARNING | CALL | NOW  
(most) | CENTER | | |  
→ Email | recorded | • Watches | • Picks time | • AI call |  
#2 | content | | • Gets conf | initiated |  
• FREE | at time | • AI calls | | |  
but high | | |  
• SCHEDULED | | intent |  
= budgetd | | |

CRM  
Tracks: engagement, content viewed, calls scheduled, outcomes

(Repeat with 60 emails over 90 days, adapting based on engagement)

"Hey, we just published an article about your community..."

- Only to warm leads (opened emails, viewed content)
- 1-2 calls in 90 days, not 60
- Short, specific purpose

## COST-OPTIMIZED CHANNEL STRATEGY

### The Hierarchy (Cheapest → Most Expensive)

#### CHANNEL COST HIERARCHY

##### TIER 1: FREE/NEAR-FREE (Use First, Use Most)

###### EMAIL

Cost: ~\$0.001/email

Use for: All outbound campaigns, notifications, follow-ups

Volume: Unlimited (within sender reputation)

###### LEARNING CENTER (Recorded Presentations)

Cost: \$0/view (one-time production cost)

Use for: Education, demos, how-tos, product tours

Volume: Unlimited

###### AI TEXT RESPONSES (Email/Chat)

Cost: ~\$0.01/interaction

Use for: Async Q&A, email replies, chat when available

Volume: High

## TIER 2: LOW COST (Use Strategically)

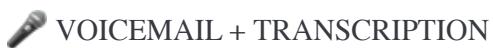


### SMS

Cost: ~\$0.0075/message

Use for: Appointment reminders, urgent notifications

Volume: Moderate (opt-in only)



### VOICEMAIL + TRANSCRIPTION

Cost: ~\$0.01-0.02/message received

Use for: Inbound calls → async processing

Volume: As needed

## TIER 3: EXPENSIVE (Reserve for High-Value)



### LIVE AI VOICE CALLS

Cost: \$0.10-0.20/minute (VAPI + Twilio)

Use for: Scheduled appointments only (predictable cost)

Volume: Limited, budgeted



### LIVE HUMAN CALLS

Cost: \$20-50/hour (staff) + telco

Use for: VIP customers, complex situations, closings

Volume: Minimal

# ACCOUNT MANAGER ACCESS SYSTEM

## How Prospects Reach AI Account Manager

AI ACCOUNT MANAGER ACCESS POINTS

FROM EMAIL/LEARNING CENTER:

"Meet Your AI Account Manager" → Landing Page

 SARAH - Your AI Account Manager

"Hi! I'm Sarah, your dedicated AI Account Manager at Fibonacco."

I'm here to help you get the most out of our platform."

 TALK NOW

 SCHEDULE CALL

Connect with me  
right now via  
voice call

Pick a time that  
works for you  
○ Today  
○ Tomorrow  
○ Pick a date...

[Call Now]

 SEND MESSAGE

 WATCH FAQ

I'll respond via  
email within  
24 hours

Quick answers to  
common questions  
(recorded)

[Type Message...]

[Watch Videos]

## COST IMPLICATIONS:

- "Talk Now" → AI voice call initiated = \$0.10-0.20/min (budget for this)
- "Schedule Call" → AI calls them at set time = same cost, but PLANNED
- "Send Message" → AI text response = \$0.01 (cheap!)
- "Watch FAQ" → Recorded video = \$0 (free!)

DESIGN FOR COST: Make "Watch FAQ" and "Send Message" prominent

"Talk Now" available but not the primary CTA

## INBOUND PHONE SYSTEM (Voicemail-First)

### Corporate Phone Number Architecture

CORPORATE PHONE: VOICEMAIL-FIRST MODEL

INCOMING CALL TO: 1-800-FIBONACCO

RECORDED GREETING (IVR)

"Thanks for calling Fibonacco! We use AI to ensure you get  
the fastest, most accurate response.

Press 1 for Sales

Press 2 for Support

Press 3 for Billing

Or stay on the line to leave a message and we'll call you back  
within 2 hours."

COST: ~\$0.02 (just Twilio, no AI)



### DEPARTMENT VOICEMAIL

"You've reached [Sales]. Please leave your name, number, and a brief message. Our AI assistant will transcribe this and either email you a response or call you back within 2 hours."

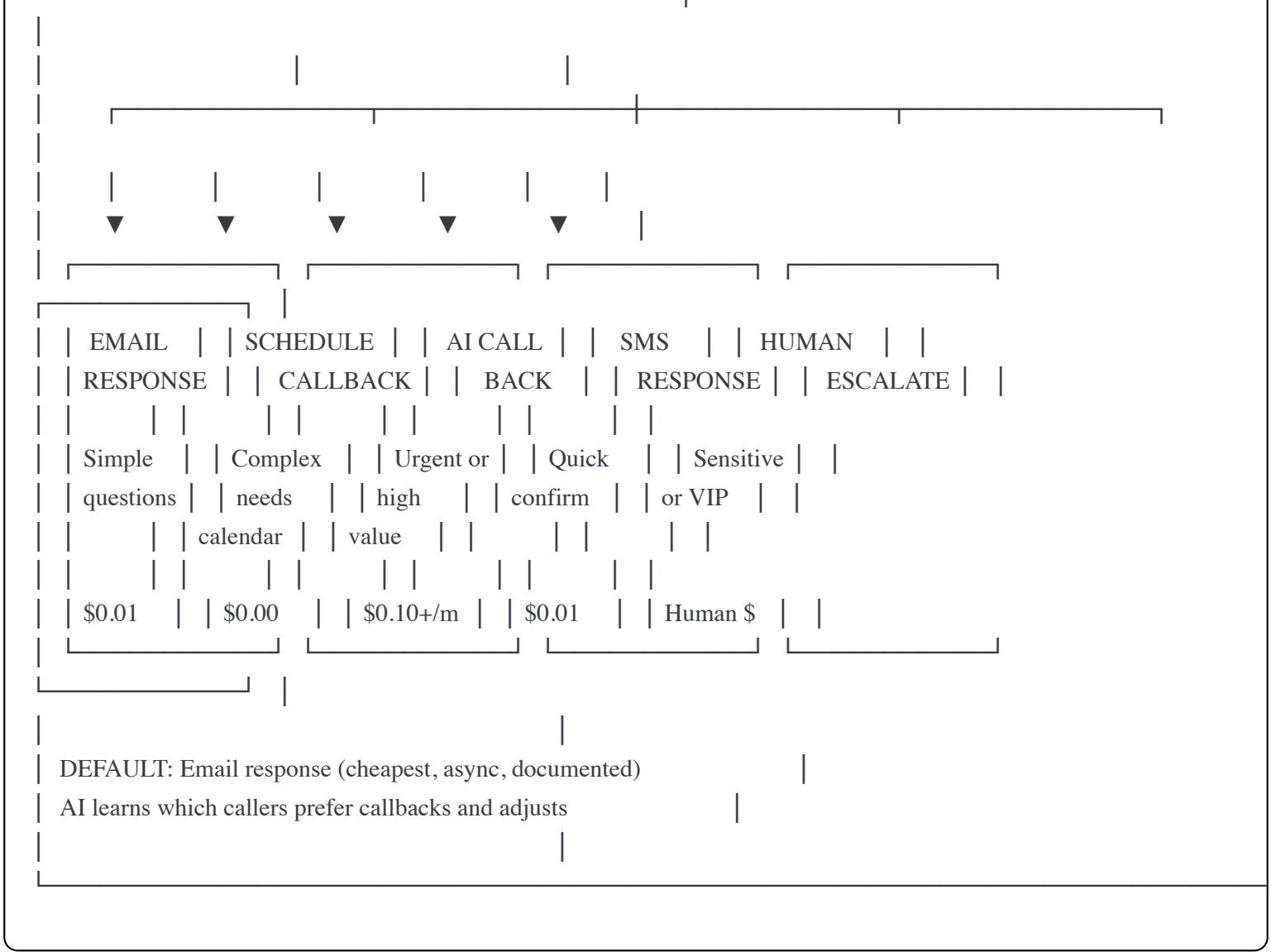
[BEEP - Recording starts]

COST: ~\$0.02/min Twilio recording

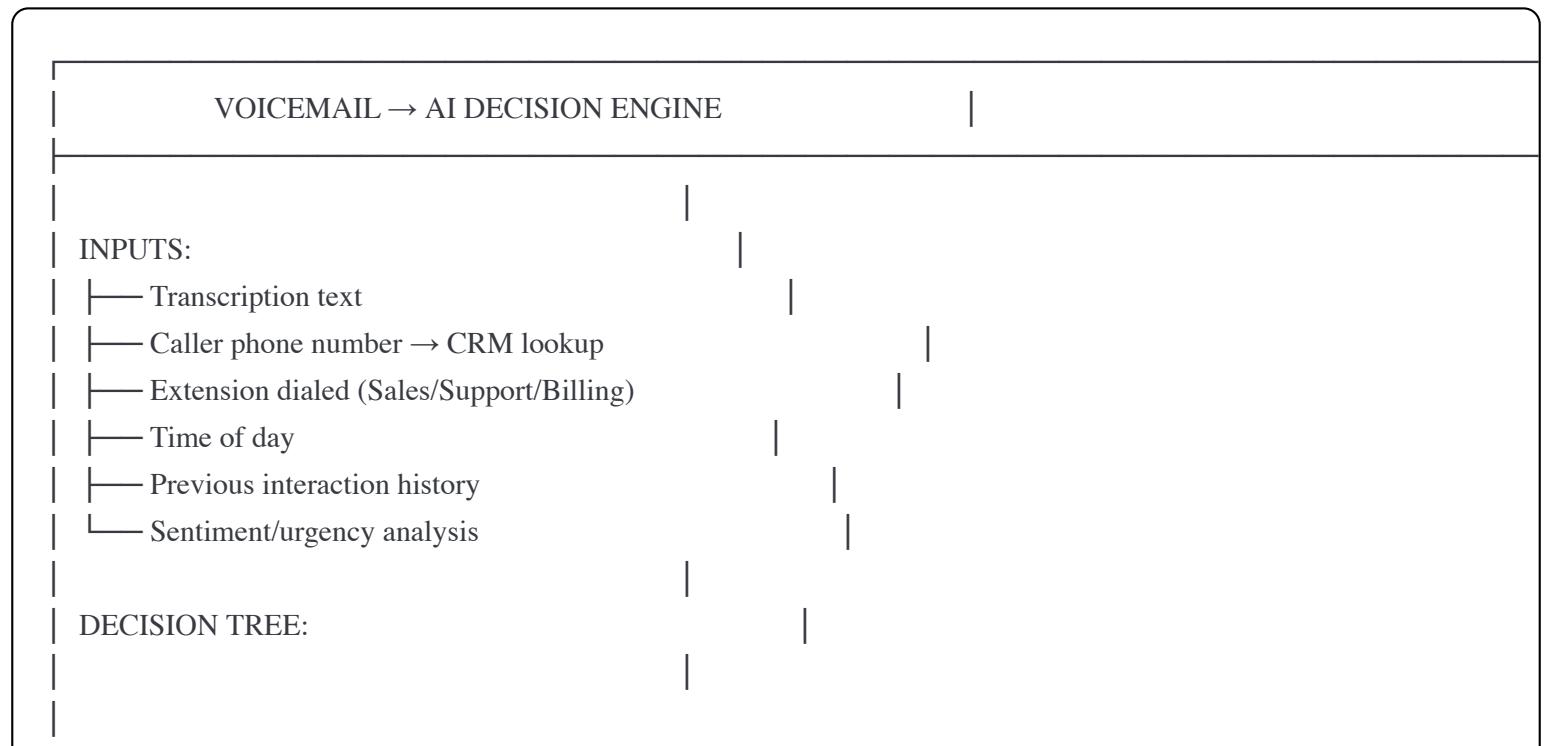
### VOICEMAIL PROCESSING PIPELINE

- |  |              |
|--|--------------|
| 1. Recording saved to S3                   | ~\$0.00      |
| 2. Whisper transcription                   | ~\$0.006/min |
| 3. AI analyzes: intent, urgency, sentiment | ~\$0.01      |
| 4. CRM lookup: known contact?              | ~\$0.00      |
| 5. AI decides response action              | ~\$0.01      |

TOTAL COST: ~\$0.03-0.05 per voicemail



## Voicemail Processing Logic



IS THIS URGENT?

(Keywords: "emergency", "cancel", "refund", "angry", etc.)

YES → Is contact a paying customer?

YES → Schedule AI callback within 30 minutes

NO → Send email, offer to schedule call

NO → Continue...



CAN AI ANSWER VIA EMAIL?

(Simple question, info request, status check)

YES → Generate email response

Include: "Reply to this email or call back for more help"

Include: Link to schedule call if they want voice

NO → Continue...



DOES THIS NEED A CONVERSATION?

(Complex issue, consultation, demo, negotiation)

YES → Send email with:

"I'd love to discuss this with you. Here are available times:"

[Calendar booking link]

"Or reply with your preferred time and I'll call you."

AI schedules callback, budgeted cost

RESULT: 80%+ of voicemails handled via email (\$0.01)

15% scheduled for callback (predictable cost)

5% immediate callback (emergency, budgeted)

## OUTBOUND CAMPAIGN ARCHITECTURE

### Manifest Destiny: 60 Emails in 90 Days

MANIFEST DESTINY CAMPAIGN ENGINE

CAMPAIGN STRUCTURE:

60 Campaigns over 90 days = ~1 email every 1.5 days

— 15 EDU (Educational) → Learning Center presentations

— 15 HOOK (Action-oriented) → Claim listing, post event, etc.

— 30 HOWTO (Tutorials) → Step-by-step guides

EACH EMAIL:

Subject: [Compelling subject from campaign]

Body:

- Personalized greeting

- Value proposition (2-3 sentences)

- Primary CTA → Learning Center presentation

- Secondary CTA → Meet your AI Account Manager

Unsubscribe link

- Unsubscribe link

Tracking:  
- Open (pixel)  
- Click (which link)  
- Learning Center engagement (slides viewed, time)  
- Conversion (signup, schedule, contact)

#### ADAPTIVE SENDING:

##### ENGAGEMENT LEVEL

HIGH (opens, clicks, visits) | → Continue sequence  
| → May trigger phone call  
| → Priority for human follow-up

MEDIUM (opens, some clicks) | → Continue sequence  
| → Standard cadence

LOW (opens only) | → Continue but reduce frequency  
| → Try different content types

NONE (no opens) | → Re-engagement attempt  
| → Different subject lines  
| → Eventually sunset

#### Strategic Phone Calls (1-2 per 90 days)

##### STRATEGIC OUTBOUND CALLS

PURPOSE: Community publication notification

"Hi [Name], this is Sarah from Fibonacci. We just published an article about [their community/industry] and featured some local businesses. I wanted to let you know personally - check your email for the link!"

#### TRIGGER CONDITIONS (pick contacts who):

- Have opened 3+ emails (engaged)
- Visited Learning Center at least once
- Are in the community being published
- Have NOT yet converted (still opportunity)
- Are reachable (valid phone, reasonable hours)

#### CALL STRATEGY:

##### Option A: HUMAN CALL (if you have staff)

- More personal
- Can handle objections naturally
- Cost: Staff time

##### Option B: AI CALL (VAPI/Retell)

- Scalable
- Consistent message
- Cost: \$0.10-0.20/min
- Keep SHORT: 30-60 seconds max

##### Option C: RINGLESS VOICEMAIL

- Drops voicemail without ringing
- No live conversation needed
- Cost: ~\$0.03/drop
- Check TCPA compliance

VOLUME: 50-100 calls per publication announcement

BUDGET: If AI at \$0.15/min × 1 min × 100 calls = \$15

Much cheaper than expected!

# COST PROJECTIONS

## Monthly Cost Model (1000 prospects in funnel)

### MONTHLY COST PROJECTION

#### ASSUMPTIONS:

- 1,000 prospects in 90-day Manifest Destiny campaign
- 60 emails per prospect over 90 days = 20 emails/month/prospect
- 25% email open rate
- 5% click to Learning Center
- 1% schedule call with AI Account Manager
- 0.5% "Call Now" (immediate AI call)
- 50 strategic outbound calls/month (publication announcements)
- 20 inbound voicemails/month

#### COST BREAKDOWN:

##### EMAIL (SendGrid)

20,000 emails × \$0.001 = \$20/month

##### LEARNING CENTER

1,000 views × \$0 = \$0/month (hosting negligible)

##### AI TEXT RESPONSES (email replies, chat)

200 interactions × \$0.01 = \$2/month

##### SCHEDULED AI CALLS ("Schedule Call" conversions)

10 calls × 5 min avg × \$0.15/min = \$7.50/month

##### IMMEDIATE AI CALLS ("Call Now" conversions)

5 calls × 5 min avg × \$0.15/min = \$3.75/month

##### STRATEGIC OUTBOUND AI CALLS

50 calls × 1 min avg × \$0.15/min = \$7.50/month

##### INBOUND VOICEMAIL PROCESSING

20 voicemails × \$0.05 = \$1/month

CORPORATE PHONE NUMBER (Twilio)

1 number × \$1/month = \$1/month

TOTAL: ~\$43/month for 1,000 prospects

Cost per prospect: \$0.043/month

Cost per 90-day journey: ~\$0.13/prospect

#### SCALING:

10,000 prospects = ~\$430/month

100,000 prospects = ~\$4,300/month

The model scales linearly with prospects, NOT with engagement

(Learning Center views are free, most responses are email)

## SIMPLIFIED DATA MODELS

CORE DATA MODELS (Simplified)

CAMPAIGN\_ENROLLMENT

  | id

  | contact\_id → CRM contact

  | campaign\_type: 'manifest\_destiny'

  | started\_at

  | current\_email\_index: 1-60

  | status: active | paused | completed | converted

  | engagement\_score: 0-100

  | last\_email\_sent\_at

```
    └── last_email_opened_at
    └── last_learning_center_visit_at
    └── calls_scheduled: int
        └── calls_completed: int
        └── converted_at
            └── EMAIL_SEND
                ├── id
                ├── enrollment_id
                ├── campaign_id: EDU-001, HOOK-003, etc.
                ├── sent_at
                ├── delivered_at
                ├── opened_at
                ├── clicked_at
                ├── click_target: learning_center | account_manager | other
                └── unsubscribed_at
                    └── VOICEMAIL
                        ├── id
                        ├── contact_id (nullable - may be unknown)
                        ├── phone_number
                        ├── extension_dialed
                        ├── recording_url
                        ├── transcription
                        ├── ai_summary
                        ├── intent_detected
                        ├── urgency: low | medium | high
                        ├── response_type: email | schedule | callback | escalate
                        ├── response_sent_at
                        ├── created_at
                        └── resolved_at
                            └── SCHEDED_CALL
                                ├── id
                                ├── contact_id
                                ├── scheduled_at
                                ├── purpose: consultation | demo | follow_up | publication_notify
                                ├── initiated_at
                                ├── connected_at
                                ├── duration_seconds
                                ├── outcome: completed | no_answer | rescheduled | cancelled
                                ├── recording_url
                                ├── transcription
                                ├── ai_summary
                                └── next_action
```

└── cost

## IMPLEMENTATION PRIORITY

### PHASE 1: MVP (Weeks 1-4)

#### MUST HAVE FOR LAUNCH:

##### Email sending engine (SendGrid)

- Campaign queue
- Personalization
- Open/click tracking
- Unsubscribe handling

##### Learning Center integration

- Track which campaign sent them
- Track engagement (slides, time)
- Update CRM with activity

##### Account Manager landing page

- Schedule call (calendar embed)
- Send message (form → email)
- Watch FAQ (Learning Center links)
- Call Now (Twilio click-to-call or VAPI)

##### Basic CRM updates

- Log all email activity
- Log Learning Center visits
- Log scheduled calls

#### CAN WAIT:

##### Voicemail system (add corporate number later)

##### AI voice calls (start with human or skip)

##### Inbound phone handling

##### Real-time chat

## PHASE 2: PHONE (Weeks 5-8)

- Corporate phone number (Twilio)
- IVR menu (recorded, simple)
- Voicemail recording
- Whisper transcription
- AI voicemail analysis
- Auto-response (email)
- Scheduled callback system

## PHASE 3: AI VOICE (Weeks 9-12)

- VAPI/Retell integration
- AI scheduled calls (Account Manager)
- AI outbound (publication notifications)
- Call recording + transcription
- Post-call CRM updates

## KEY DESIGN PRINCIPLES

### COST-OPTIMIZATION PRINCIPLES

#### 1. EMAIL FIRST, ALWAYS

Every communication defaults to email unless there's a reason not to.

Email is 100x cheaper than voice.

#### 2. RECORDED > LIVE

Learning Center presentations are free after creation.

Use recorded content for education, demos, FAQs.

Save live AI for high-intent moments.

### 3. SCHEDULED > IMMEDIATE

Scheduled calls are predictable costs.

"Call Now" is available but not the primary CTA.

Budget for X scheduled calls/day.

### 4. VOICEMAIL-FIRST INBOUND

Don't answer live initially.

Voicemail + AI transcription + email response = cheap.

Live AI answering = expensive.

### 5. SHORT CALLS WIN

Outbound AI calls: 30-60 seconds max.

"Just wanted to let you know..." done.

Long conversations = high cost.

### 6. LEARN WHAT WORKS, THEN SCALE

Start with 1,000 prospects.

Measure: What converts? What's worth the cost?

Then scale what works.

## NEXT STEPS

1. **Confirm this architecture matches your vision**
2. **Prioritize: Email engine first? Or phone system?**
3. **Choose email provider** (SendGrid recommended for deliverability)
4. **Choose calendar tool** (Calendly, Cal.com, or custom?)
5. **Design Account Manager landing page** (I can create mockup)
6. **Map the 60 campaigns to email templates** (we have the content!)

The beautiful thing: **Your 60 campaigns are already built.** Now we just need the engine to send them.