

SeppFlow — Marketing & Sales Blueprint

Internal operating playbook. Not a brochure — this is the thing you execute, Monday by Monday. Built 24 Jun 2026.

How to read this doc. Section 0 below is the **locked source of truth** — the names, prices and numbers you quote from. Sections 1–4 are the detailed reasoning, scripts and tactics behind it. Where any range or variant in the detail sections differs from Section 0, **Section 0 wins**.

0. Locked operating decisions (quote from here)

0.1 The pipeline — one schema, in Zoho Deals

Six stages. That's it (a solo operator closing ~2/month does not need an 11-stage enterprise pipeline):

1. **New / Contacted** — lead exists, first touch sent
2. **Audit Booked** — Missed-Call Audit / call on the calendar
3. **Audit Done (Qualified)** — ran the audit, they're a fit, money math delivered
4. **Proposal Sent** — one-pager out with the recommended tier
5. **Won** → then **Onboarding** → **Active** (→ **Upsell**)
6. **Lost** — always set Zoho's existing **Reason For Loss** field (picklist already in the CRM: *Price* · *Competition* · *Lack of response* · *Missed Follow Ups* · *Unqualified Customer* · *Expectation Mismatch* · *Future Interest* · *Wrong Target* · *Other*). "Nurture" is a status, not a stage.

0.2 The price card — locked (no improvising on calls)

Tier	Setup	Monthly	Who it's for
Missed-Call Rescue	\$750	\$300/mo	Solo / 1–2 trucks. Just stop losing calls + after-hours cover.
Booked-Job Engine ★ <i>(default sell)</i>	\$1,500	\$500/mo	2–8 crews. Answer + qualify + book the job + follow-up.
Done-for-You Growth	\$2,500	\$900/mo	Bigger shops. Full automation + review engine + dormant-lead reactivation.

Lead magnet / front door: the **Missed-Call Audit** — **always free**. One clean front door; no paid "tripwire" (drop it — it just confuses the offer). Month-to-month, no lock-in.

0.3 The 90-day target — math that actually reconciles

- **Goal: 8–10 paying clients · ~\$4–5k MRR by Day 90.** Default ARPU = **\$500/mo** (the Booked-Job Engine tier).
- $8 \times \$500 = \text{\$4,000 MRR}$ · $10 \times \$500 = \text{\$5,000 MRR}$. Plus **~\$1,500 setup cash up front** per client.
- This comes from **warm + LinkedIn + Fiverr + referrals** — **NOT cold email**.

0.4 Daily time budget: ~3 focused hours/day

Every activity target in the sections below assumes ~3h/day. If you only get 90 minutes: do **warm touches + booked audits first**, then LinkedIn DMs; drop content that day.

0.5 The AI voice agent — what you actually build it on *(the #1 thing that was missing)*

- **Start no-code for speed-to-demo: Retell AI or Synthflow** (live phone agent in a day; ~\$0.07–0.10/min + ~\$30–80/mo platform). Alternatives: Bland.ai, Vapi.
- **Graduate to Vapi** when you want deeper control / custom logic (it's API-first — fits the way you already run Claude Code).
- **Each client gets a local number in THEIR area code** (Twilio number via the platform) → a Dallas mover's callers see a Dallas number, never Israel. Call-forward their existing line to it.
- **Build ONE demo agent on your own number first.** That *is* your best sales tool — "call this number right now and talk to mine for 30 seconds."

0.6 The overseas-trust answer (you're in Tel Aviv, buyer's in Dallas/Manchester/Sydney)

This is a real Monday objection — here's the standing answer:

- **The agent calls from a local number** in their area code. They never experience "overseas."
- **Payments:** Stripe / PayPal / Wise (all international, all normal for them).
- **De-risk hard:** first month money-back, month-to-month, and *you are the one person they text directly* — more accountable than a local agency's account manager, not less.
- **Lead with proof:** 300+ 5★ reviews over 8 years. Calendar (Google appointment scheduling) **auto-shows the prospect's own timezone** — verify once from a logged-out US browser.

0.7 Warm reactivation — the honest version

- The ~50 "Follow Up" leads in Zoho are **mostly old Fiverr buyers with no phone/company** (e.g. "James UNKNOWN") — that is **not** a pipeline.
- Reality: a **handful** are real, reachable, on-niche movers (e.g. **Safeway Moving, MoveltPro**). Work those first for quick wins — but **LinkedIn is the real engine**. Don't stake Phase 1 on the warm list.

0.8 Cold email = PARKED (deliberately not in these 90 days)

Stays off until warm + Fiverr are producing paying clients **and** you can do it right: burner **.com** domain, 2–4 week warmup, Smartlead/Instantly as the sender, Hunter to find+verify — **never** from **seppflow.com**. The 4 Day-0/3/7/12 templates are written and waiting. **Phase 3 = scale what already works, not "launch cold."**

0.9 Proof numbers — use only these (verified)

8 years freelancing · 300+ 5★ reviews · ~1M YouTube views · ~1.5k subscribers. Do not invent project counts or per-platform follower numbers in any bio, post or script.

*The detail below: **\$1 Foundation** (positioning, personas, offer, the Voicemail-Tax math) · **\$2 Marketing & demand-gen** (warm → LinkedIn → Fiverr → referrals) · **\$3 Sales blueprint** (pipeline, discovery/audit script, objections, close) · **\$4 Execution** (90-day plan, KPIs, budget).*

FOUNDATION

SeppFlow marketing plan — internal operating playbook. This is the bedrock the channels, cadences and scripts sit on. Everything downstream (LinkedIn, cold email, Fiverr, the site)

inherits its ICP, wedge, offer and proof from this section.

1. Positioning statement + the category we own

Positioning statement (one paragraph):

SeppFlow is a done-for-you AI front office for home-service businesses — movers, contractors, HVAC, roofers, plumbers — that answers every call 24/7, books the job into the calendar, and runs the follow-up that owners never get to. Unlike software vendors who hand you an app and a login, or agencies who bill a markup and disappear, SeppFlow is run by one accountable founder (Joe Pusser) who builds it, runs it, and stays on the hook for the result. We don't sell tools — we sell **booked jobs that would otherwise have gone to voicemail and then to the next guy on Google.**

Category we own: the **AI front office for the trades**. Not "AI agency," not "chatbot company," not "CRM consultant." We deliberately avoid the crowded "AI automation agency" label (every solo operator on LinkedIn now claims it). Our category cue is operational and outcome-named: *the front office that never sleeps*. The owner already understands what a front office does — answers the phone, books the job, chases the paperwork. We just say: yours now runs itself.

Category-defining line (use everywhere): *"Never miss a call. Never miss a job."* Supported by the north star *"Run your business. We'll handle the rest."*

Why this wins for a solo operator: a single name with a single accountable face beats a fake-agency "we/our team" voice for this buyer. The human IS the product. The category is small enough to dominate (trades, not "SMBs in general") and concrete enough that a roofer gets it in five seconds on a cold call.

2. ICP — detailed, with named personas

Firmographic ICP (qualify IN):

- Owner/founder of a home-service / trade business: **movers, general contractors, HVAC, roofing, plumbing** (primary five).
- **US / UK / AU**, English-speaking, phone-driven sales.

- **1–20 employees** — owner-operator up to small crew. Sweet spot: 2–8 trucks/crews, ~\$300k–\$3M revenue.
- Books jobs **by phone**; loses leads when nobody picks up or follow-up is slow.
- Not a tech buyer. Buys "more booked jobs," not "AI."

Persona A — "Mike," 6-truck moving company, Dallas TX

- **Profile:** 44, owns a residential mover, 6 trucks, 9 crew, ~\$1.4M/yr. Started as a mover, bought his first truck at 29. Answers his own phone between loads.
- **His day:** On a job by 7am. Phone rings while he's carrying a sofa down three flights — goes to voicemail. He sees "Missed call (1)" at the next break, calls back 90 minutes later; half the time it rings out because that person already booked someone else. Evenings he's typing job details into a spreadsheet at the kitchen table at 9pm.
- **Exact pain triggers:** missed calls during jobs and after 6pm; weekend inquiries he can't man; quote requests that go cold because he didn't follow up Tuesday; the recurring dread of *"how many \$3,000 jobs did I lose this week and never even know?"*
- **Where he hangs out:** Facebook groups for movers, /r/movingcompany, industry FB pages, local BNI; on LinkedIn but doesn't post much; watches YouTube for business/ops tips (this is Joe's lane).
- **What he already tried:** a part-time answering service (read from a script, didn't qualify, annoyed callers); a "set it and forget it" CRM he never logged into; his nephew "doing the social media."
- **Buying trigger:** peak moving season (May–Sept) when call volume spikes and he physically cannot answer; or one specific lost job he can put a dollar figure on.
- **Disqualifier:** if he insists on answering every call himself and "doesn't trust a robot" with zero willingness to test — park him; don't push.

Persona B — "Dave," roofing + exterior contractor, Manchester UK

- **Profile:** 38, roofing & exteriors, himself + 4, ~£600k. Storm-and-referral driven — demand is spiky.
- **His day:** On scaffolding or driving. Phone in the van. After a storm he gets 20 calls in a day and can answer maybe 6; the other 14 ring out and go to whoever calls back first. He quotes by phone, then forgets to chase, and the homeowner books the firm that followed up.
- **Exact pain triggers:** storm-surge call spikes he can't staff; no after-hours cover; quotes that die from no follow-up; review requests he never sends (so his Google rank stalls).

- **Where he hangs out:** Checkatrade / trade forums, roofing FB groups, LinkedIn for B2B/commercial work, WhatsApp with his crew.
- **What he already tried:** girlfriend/spouse taking calls (burned out), a cheap chatbot on the website that only handled typed chat (his leads phone, they don't type), Checkatrade leads he paid for and couldn't answer fast enough.
- **Buying trigger:** a storm event; or losing a big commercial quote to a competitor who "just picked up."
- **Disqualifier:** purely commercial/tender business with a real office manager already covering phones — less acute pain; lower fit.

Persona C — "Linda," HVAC company office manager / co-owner, Phoenix AZ

- **Profile:** 51, co-owns an HVAC business with her husband (he runs the techs, she runs the office), 12 employees, ~\$2.2M. She's the buyer and the gatekeeper.
- **Her day:** Phones ring all summer (AZ HVAC peak = 110°F days, emergency calls). She's juggling dispatch, invoicing, payroll and the phone. After-hours emergency calls go to voicemail and the customer calls the next 24/7 HVAC company. She's drowning in busywork and knows follow-up and review requests are slipping.
- **Exact pain triggers:** after-hours emergency calls lost to voicemail (highest-value calls in HVAC); overflow during heatwaves; no time for follow-up sequences or review requests; double-data-entry between phone notes and the CRM.
- **Where she hangs out:** HVAC owner FB groups, ACCA / trade associations, LinkedIn (active — she's the office/admin brain), software review sites.
- **What she already tried:** ServiceTitan-class software (powerful but expensive and still needs a human to answer); a national answering service (generic, didn't know HVAC, fumbled emergencies).
- **Buying trigger:** summer peak; an emergency call lost at 2am that she can quantify; or wanting to scale without hiring a \$40k/yr receptionist.
- **Disqualifier:** already running a full ServiceTitan + dedicated dispatch desk and happy — lower urgency (still a fit for follow-up/reactivation, not the voice agent).

Hard DISqualifiers (don't sell to, regardless of fit)

- **Not phone-driven** (pure e-commerce, online-booking-only, app-based) — no Voicemail Tax to fix.
- **Big enough to already staff a 24/7 call center** (>20–30 staff with a real front desk) — we're not replacing a department.

- **Price-shoppers who want a \$50 chatbot** — wrong category; Fiverr-floor buyers, not retainer clients.
 - **"Just give me the software, I'll run it myself"** tinkerers — we're done-for-you; self-serve isn't our model.
 - **Industries outside the trades** (restaurants, agencies, SaaS) — dilutes the category; refer out.
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3. Core value proposition + the "Voicemail Tax" wedge (money lost)

Core value prop:

Every call answered, every job booked, every lead followed up — automatically, 24/7 — so you stop bleeding revenue to missed calls and stop doing your office work at 9pm. Built and run by one person who's accountable for the result. **You run the business. We handle the rest.**

The wedge — the "Voicemail Tax": every call that rings out is a job that just called the next firm on Google. You never get a receipt for the work you never knew you missed. That invisible leak is the Voicemail Tax, and it's the single sharpest entry point because (a) it's money, (b) it's quantifiable, and (c) the owner already feels it.

Illustrative money model (use this exact math in the audit and on calls)

Mover example (Persona A — "Mike"):

Input	Value
Inbound calls / week	50
Missed (rings out / after-hours / on-a-job)	30% = 15/week
Of missed, would've booked if answered	25% = **3.75 jobs/week**
Average booked job value (local move)	\$1,200
Lost revenue / week	~\$4,500
Lost revenue / month	~\$18,000
Lost revenue / year	~\$216,000

Even at a conservative half of that — *missing 15% of calls, only 15% would-have-booked* — Mike is leaking **~\$65k/year**. The SeppFlow voice agent at a few hundred dollars a month recovers a fraction of that and pays for itself on **one** saved job a month.

The framing line (verbatim): *"You don't have a marketing problem — you have a 'nobody's minding the store' problem. The leads are already calling. You're just not there to catch them. Fix the leak before you pour in more water."*

Trade-tuned defaults for the audit math (so the number is credible, not generic):

- **Movers:** avg job \$800–\$1,500 · ~30% missed in season.
- **Roofing:** avg job \$4,000–\$12,000 · storm-spike missed-call rate 40%+ → *one* recovered roof = a year of retainer.
- **HVAC:** avg job \$300 (service) to \$8,000 (install) · after-hours emergency calls are the highest-intent, most-missed → lead with the 2am call.
- **Plumbing:** avg emergency job \$400–\$2,500 · "burst pipe at midnight" caller will dial down the list until someone answers.

The premium "morning recap" is the visible proof of the recovered tax: *"3 calls answered overnight, 2 quotes booked into Tuesday, 1 tire-kicker handled. Nothing's waiting on you."*

4. The offer — productized into 3 tiers + lead magnet

Pricing logic: the Fiverr \$180/\$450/\$900 are *one-off CRM-setup* prices for an inbound, price-sensitive marketplace. Direct clients buy a **running service**, not a setup — so the model is **setup fee (one-time, covers the build) + monthly retainer (covers running it, accountability, the recovered Voicemail Tax)**. The retainer is the real business; the setup fee filters tire-kickers and funds the build. Anchor against the alternative they'd otherwise pay: a **\$35k–\$45k/yr receptionist** or a **\$1.50–\$3.00/call generic answering service that fumbles the qualification**. At every tier, one or two recovered jobs/month covers the cost — that's the close.

Tier 1 — "Missed-Call Rescue" (entry / land)

- **Who:** Mike or Dave who just wants to stop the bleeding — fastest yes.
- **Included:** AI voice agent that answers 24/7, captures caller name/number/job details, books into the calendar (or texts the owner instantly to call back), missed-call → instant SMS text-back, the daily morning recap.
- **Pricing:** Setup \$750–\$1,000 (one-time) + \$300–\$400/month.
- **Logic:** priced so a single saved job/month pays for it. The land tier — get the agent live, prove the recap, earn the upsell.

Tier 2 — "Booked-Job Engine" (core / the default sell)

- **Who:** owner who wants calls answered AND the follow-up that actually converts them — the recommended package.
- **Included:** everything in Rescue, plus CRM setup (Zoho/HubSpot), **instant lead response** across phone + web form, **follow-up sequences** (Day 0/3/7/12 to no-shows and unbooked quotes), **review-request automation** after each completed job, basic reporting.
- **Pricing:** Setup \$1,500–\$2,500 + \$600–\$900/month.
- **Logic:** this is where the margin and the stickiness live; "the engine that books jobs while you work." Map directly onto the existing \$450 Fiverr "CRM + Automation" package, repriced for a running retainer.

Tier 3 — "Done-for-You Growth System" (premium / expand)

- **Who:** Linda's HVAC or a multi-crew operator who wants the whole front office run for them.
- **Included:** everything in Engine, plus **dormant-lead reactivation** (mine the old/missed-lead list — exactly the Zoho warm movers — and rebook them), multi-channel (voice + SMS +

web chat), advanced pipeline + reporting, monthly strategy call with Joe, priority support, and Joe personally tuning the system.

- **Pricing: Setup \$3,000–\$5,000 + \$1,200–\$1,800/month.**
- **Logic:** mirrors the \$900 Fiverr "Done-for-You CRM System," elevated to a retainer with a named owner and a reactivation engine that generates net-new revenue from leads they already paid for.

Lead magnet — "The Missed-Call Audit" (free / cheap front door)

- **What:** a free 15-minute audit. Joe calls the business's own number after hours / during the day and shows them what a caller actually experiences (ringtone → voicemail → silence). Then runs the \$3 money math live on THEIR numbers: *"You're missing roughly X calls a week, that's about \$Y a month walking to your competitor."*
 - **Why it works:** it's not a "demo," it's a **diagnosis with a dollar figure**. It weaponizes the Voicemail Tax — the prospect hears their own dead phone line.
 - **CTA everywhere:** the universal Google Calendar booking link (`calendar.app.google/...`). Every channel — LinkedIn DM ("message me CALLS"), cold email Day 0–12, Fiverr, site, trade landing pages — funnels to **Book your free Missed-Call Audit**.
 - **Optional paid tripwire:** a **\$97–\$197 "Done-for-You Audit + 7-day voice-agent trial"** to filter serious buyers when volume is high — but free is the default while warm-first and proof-building.
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5. Messaging pillars + proof/credibility assets

Messaging pillars (every asset ladders to one of these)

1. **Never miss a call, never miss a job.** The Voicemail Tax is real money walking to your competitor; we plug the leak. (*Lead with this where money + urgency live — sales pages, cold scripts.*)
2. **Run your business — we handle the rest.** Outcome over tech: you get your evenings back; the busywork is off your plate, not added to your screen. (*Lead with this on the hero / About / brand-level.*)
3. **One accountable craftsman, not a faceless agency.** Joe builds it, runs it, answers the phone. 800 years of smiths — *"my name means 'smith'; now I forge AI agents."* No markup, no account-manager runaround.

4. **Proof over hype — receipts, not buzzwords.** 8 years, 300+ five-star reviews, a real founder you can call. We ban "revolutionary / cutting-edge / next-gen." We show the morning recap, not a feature list.

Voice guardrails (apply to all copy): lead with the outcome not the tech (AI is *how*, never the headline); plain words, short sentences, kitchen-table real; specifics + proof, never hype; speak in "we've got it" relief, never hand the owner homework. Keep Joe visible.

Proof / credibility assets to deploy

1. **8 years on Fiverr · 300+ five-star reviews** — the headline trust stack. Use in every bio, cold opener, site, and the LinkedIn About. (*Only verified numbers — don't invent project/follower counts.*)
2. **The live CRM gig with 25 reviews** (`josephpusser`, \$180/\$450/\$900) — direct, clickable third-party social proof; link trade landing pages to it.
3. **The "morning recap" artifact** — *"3 calls answered overnight, 2 quotes booked, 1 tire-kicker handled."* The #1 visible-relief proof; screenshot it, put it on the hero, send it in DMs. Relief made visible for a buyer who trusts what he can see.
4. **The Missed-Call Audit result itself** — the prospect's own dead phone line + their own dollar figure. The most persuasive proof is the one they generate.
5. **~1M YouTube views / ~1,500 subscribers** — existing audience repurposed to voice-agent/automation content; authority + a warm inbound funnel, not building from zero.
6. **The smith heritage story (Puusepp = "smith," 800 years of makers)** — authentic, memorable origin that earns the craftsman's-pride positioning and separates SeppFlow from the faceless "AI agency" crowd. Distinctive, not decorative.
7. **B2B closer background** — years closing six-figure deals before going independent; *he speaks the owner's language and sells, not just builds.* The edge that makes the qualification on the voice agent actually convert.
8. **The named warm base (build into case studies)** — on-niche movers already in Zoho (e.g. Safeway Moving Inc, MoveItPro) in "Follow Up." As these convert via the warm-first reactivation play, each becomes a trade-specific, named proof asset ("how a 6-truck Texas mover stopped losing weekend calls") that feeds the \$2 personas and the site case studies.

Asset-building priority: the foundation already has assets 1–7 in hand today; the marketing motion's first job is to convert the warm Zoho movers (free, LinkedIn/phone) into asset 8 — real named trade results — which then powers the cold channels.

Marketing Channels & Demand-Gen

Operating principle: **warm before cold, free before paid**. Joe has money sitting in the Zoho CRM (warm movers already in "Follow Up") and a 1M-view audience on LinkedIn. Those two channels cost \$0 and should produce the first booked calls before a single dollar goes to cold email or ads. Everything below is sized for **one solo operator, ~2 focused hours/day**, starting Monday. Universal CTA everywhere = the Google Calendar booking link (calendar.app.google/CAAdYqQXepkJhxiWj7).

Channel priority (the order Joe actually works them)

#	Channel	Cost	Temperature	Why this rank
1	Zoho warm reactivation	Free	Hot	Money already in the CRM — on-niche movers (Safeway Moving, MoveItPro) in "Follow Up". Fastest path to a booked call.
2	LinkedIn	Free	Warm→cold	Main engine. Profile-as-landing + ~20-30 connects/day + content off the ~1M-view YouTube library.
3	Fiverr	Free	Inbound	Already converting (CRM gig, 25 reviews). Optimize + add AI-voice/chatbot/Claude-Code gigs to ride the existing review trust.
4	Cold email	~\$80/mo	Cold	Built and ready, deliberately PARKED. Switch on only after #1-2 prove the offer and there's cash to do warmup right.
5	Referrals / partnerships (+ light paid)	Free→low	Warm	300+ happy Fiverr clients + niche-adjacent partners. Paid only after the funnel converts.

1) Zoho Warm Reactivation — the fastest money

Goal: Convert the existing "Follow Up" movers in Zoho into 2-3 booked calls in the first 2 weeks, with **zero email** (no main-domain deliverability risk — reach them via LinkedIn DM + phone).

Weekly targets

- Pull & segment the full "Follow Up" list (one-time, Week 1) — Claude reads Zoho; Joe approves any write.
- **10 warm reactivations/week:** 5 via LinkedIn (find the owner, connect, DM), 5 via phone.
- Every touch logged back to Zoho with a next-step date (Claude drafts, Joe confirms the write).

The play

1. **Segment first.** Filter **Leads** / **Contacts** where **Lead_Status = Follow Up** AND niche = mover/home-service. Rank by: on-niche (movers top) → had a real prior conversation → US/UK/AU timezone reachable.
2. **Match the channel to the contact.** Phone number on file → call. No phone but a findable owner → LinkedIn DM. Never resurrect them by cold email from **joseph@seppflow.com**.
3. **Lead with the new offer, not "checking in."** These people knew Joe as the CRM/cold-call guy — reframe around the AI voice agent (a real, new reason to talk).
4. **Move the stage.** On reply/booked call → push Zoho stage **Follow Up → Contacted → Qualified → Demo Booked**. On a hard no → **Lost** with a reason so the list stays clean.

Example copy

LinkedIn DM to a warm "Follow Up" mover (knew Joe before):

"Hey [First] — we talked a while back about [CRM / your leads]. I've since built something that's a better fit for a moving company: an AI voice agent that answers every call 24/7 and books the job straight into your calendar — so after-hours and on-the-truck calls stop going to a competitor. Worth a quick 15 min to show you how many calls you're losing? Here's my calendar: [link]"

Phone opener (warm):

"Hi [First], it's Joe — we spoke a while back about your leads. Quick one: when you're on a job and the phone rings, who picks up? ... Right. I now build an AI agent that answers every one of those and books the move. Can I show you on a 15-minute screen-share this week?"

2) LinkedIn — the main free channel

Goal: Turn Joe's existing audience + profile into a steady inbound + outbound engine: profile-as-landing-page, daily connections, a value-first DM sequence, and content that mines the ~1M-view YouTube library. Target: **3-5 booked calls/week by week 4.**

Profile-as-landing (do this Monday, before any outreach) The profile IS the landing page every connection clicks. The ready-to-paste **Headline** and **About** are already written (in `outreach-linkedin-plan.md`) — paste them. The About ends with the lead magnet hook: *"Message me 'CALLS' and I'll show you how many jobs you're losing to voicemail."* Featured section → link the calendar + the seppflow.com mover landing page. Still outstanding: replace the old "PD" logo + banner with the steel-S brand assets.

Weekly targets (manual — Joe clicks, Claude drafts; do NOT automate, LinkedIn blocks)

- **20-30 connection requests/day** to ICP (Owner/Founder + moving/HVAC/roofing/plumbing/contractor + US/UK/AU). ~100-150/week, under the spam cap.
- 2-3 days of **warming** (like/comment a target's posts) before the value DM.
- **3 posts/week** (content cadence below).
- DM sequence run on everyone who accepts.

Connection note (short, no pitch):

"Hey [First] — I work with moving/home-service owners on the missed-call problem (the jobs that quietly go to whoever picks up first). Always glad to connect with people in the trade."

The value-first DM sequence (after they accept — never pitch on message 1):

- **DM 1 (day of accept) — pure value, a question:** "Thanks for connecting, [First]. Quick one I ask every owner: when you're on a job and the phone rings, does it go to voicemail — or to a competitor? Curious how you handle it."
- **DM 2 (on reply / +3 days) — name the enemy, soft proof:** "That's the 'Voicemail Tax' — a missed call after hours is usually a booked job that just went to whoever answered. I build an AI voice agent that answers 24/7 and books the job into your calendar. Want me to send a 60-sec example of it handling a real moving call?"
- **DM 3 (+3 days) — the ask:** "If it's useful, easiest is a 15-min screen-share — I'll show you live, no slides. Here's my calendar: [link]. If now's not the time, all good."
- **DM 4 (+5 days) — break-up:** "No worries [First], I'll leave it — if missed calls ever start costing you bookings, my door's open. Wishing you a busy season."

Content cadence — repurpose the ~1M-view YouTube material Joe's edge is an existing audience and a video back-catalog. **3 posts/week**, mixed: 1 short native video clip (cut from YouTube), 1 text/story post, 1 proof/offer post. Voice = honest, no-hype, craftsman's pride.

5 concrete post angles built on the Voicemail Tax:

1. **"The Voicemail Tax" definition post** — "Every missed call isn't zero. It's a booked job that just went to your competitor. I call it the Voicemail Tax. Here's the math: [X calls/wk missed × Y avg job value]..." Establishes the enemy in his words.
2. **"I called 10 moving companies after 6pm. Here's what happened."** — a field experiment: how many went to voicemail, how many never called back. Concrete, screenshot-able, screams the problem without selling.
3. **The smith story** — Puusepp = "smith," 800 years of makers, Estonia→Tel Aviv. "My family forged metal. I forge the flow of calls and jobs." Brand differentiation + memorability; pin it.
4. **60-second demo clip** — native video of the AI voice agent answering a mock moving call and booking it into the calendar. Caption: "This is the receptionist that never sleeps, never takes lunch, and never lets a job ring out." Show, don't tell.
5. **Anti-agency truth-bomb** — "Why I don't run an agency: you don't get a faceless team and a markup. You get one person who builds it and runs it — and answers when you call. That's it." Hits the "one accountable person, no agency markup" wedge.

Posting rule: every post ends with a soft CTA, not a hard sell — comment-bait ("How many calls do you think you miss a week?") or the "CALLS" lead-magnet line. Hard calendar link only on the demo + offer posts.

3) Fiverr — inbound, ride the existing trust

Goal: Keep the warm inbound flowing and expand the gig surface into the new positioning, leveraging the 300+ reviews / 25 on the CRM gig as social proof the new gigs inherit by association.

Weekly targets

- Respond to all inbound within a couple hours (Fiverr ranks responsiveness).
- Ship the gig fixes below in week 1; publish 1 new gig/week.

The play

1. **Fix the live CRM gig** (`provide-tech-support-via-zoom`) — rewrite the Description (still has old **Kommo** text — remove it; Joe doesn't work with Kommo). Keep pricing \$180/\$450/\$900, premium framing, no cheap chat-consult package. Fill the open 5th tag.
 2. **Pause off-theme gigs** to free slots: `present-and-produce-your-elearning-course`, `be-your-affiliate-marketing-coach-via-skype`, (decide on `create-a-logo`).
 3. **Publish 4 new gigs** mapped to the offer:
 - **AI voice agent receptionist** (answers + books 24/7) — the flagship, mirrors the website.
 - **AI chatbot lead capture.**
 - **Website / app build.**
 - **Claude Code / Claude CoWork implementation consulting** — timely, premium, real expertise (Joe runs Claude Code daily). ⚠ Low search on Fiverr — pair the title/tags with broad terms ("AI automation," "AI agent setup," "business workflow automation") so it's findable.
 4. **Cross-pollinate:** Fiverr buyers → invite to connect on LinkedIn (feeds channel #2 and the referral engine).
-

4) Cold Email — the parked-but-ready engine

Status: BUILT, deliberately OFF. Joe decided to do cold properly (with warmup) when there's budget — not a cheap broken test that lands in spam and gives a false negative. **Hard rule: never cold-email from the main** `joseph@seppflow.com` **domain.**

The do-it-right stack (switch on when #1-2 prove the offer + cash exists):

- **Burner** `.com` **domain(s)** (~\$8-12/yr, e.g. `tryseppflow.com`) → 301-redirect to seppflow.com. Never the main domain.
- **Cheap dedicated mailboxes** (Zoho Mail Lite ~\$1/mo, or Outlook/Maildoso for deliverability) + SPF/DKIM/DMARC.
- **Smartlead or Instantly (~\$37-39/mo)** as the sender — includes warmup, inbox rotation, reply detection. **2-4 week warmup is mandatory** before the first real send.
- **Hunter.io** (key at `D:\hunter_key.txt`, Free: 50 finds/100 verifies/mo) for find + verify only — its own sender is too weak for cold.

The sequence (already written — Day 0 / 3 / 7 / 12): Zoho merge syntax, CTA = calendar link.

Subjects: `[First]`, a call you missed last week → `re: never miss a call` → `what your mornings could look like` → `should I close your file?` Full bodies are drafted and ready to paste into whichever sender Joe picks.

Switch-on trigger: flip cold email ON once the warm channels have produced **at least 3-5 booked calls** and the demo→close motion is proven. Don't pay for cold to validate an unproven pitch.

5) Referrals / Partnerships (+ light paid later)

Goal: Mine the 300+ happy Fiverr relationships and niche-adjacent partners for warm intros — the cheapest high-trust leads there are.

Weekly targets

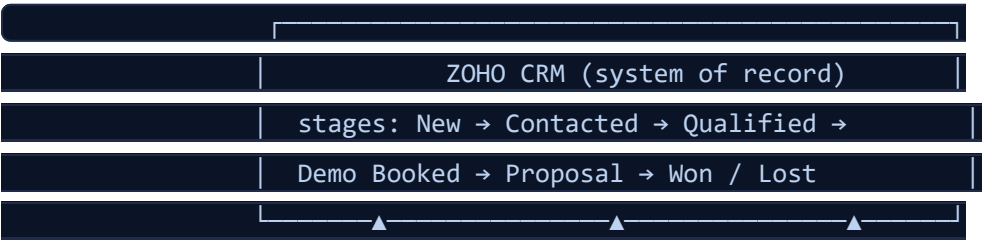
- **5 referral asks/week** to past 5★ Fiverr clients (those who'd plausibly know a home-service owner).
- 1 partnership conversation/week (see below).

The play

- **Past-client referral ask:** "Hey [First] — thanks again for the 5★. I've gone all-in on AI phone agents for home-service businesses (movers, contractors). If you know any owner losing jobs to missed calls, a quick intro would mean a lot — happy to pay a referral fee / return the favor."
 - **Niche-adjacent partners** (sell to the same owner, don't compete): moving-software vendors, junk-removal / packing-supply companies, local-SEO and web-design freelancers, bookkeepers serving trades. Offer a reciprocal referral or rev-share. One partner with a book of mover clients can outproduce weeks of cold outreach.
 - **Light PAID — only after the funnel converts:** small geo-targeted LinkedIn/Meta tests or Google Search on high-intent terms ("answering service for movers"). Cap the first test at a low monthly number; scale only on a proven booked-call cost.
-

Lead-Gen Engine — how Hunter + Zoho + LinkedIn feed the pipeline

The three free assets form one loop; every new lead lands in **Zoho** as the single source of truth.



(A) WARM REACTIVATION	(B) LINKEDIN	(C) HUNTER → COLD
existing "Follow Up"	connects +	find+verify owner
movers, LI/phone	DMs + inbound	emails → (parked)
		Smartlead sequence

- **(A) Warm:** the "Follow Up" movers already in Zoho → reactivated by LinkedIn/phone (channel 1). No tooling needed, highest hit-rate.
- **(B) LinkedIn:** outbound connects + the "CALLS" inbound lead magnet → each interested owner logged to Zoho as **New** / **Contacted**. This is the primary *new*-lead source.
- **(C) Hunter:** when building a cold list, Hunter finds + verifies the owner's email; rows go into Zoho, then (once switched on) feed the Smartlead/Instantly Day 0/3/7/12 sequence. Until then Hunter is used sparingly within its 50/100 free monthly cap.
- **Glue:** Zoho is the one board. Claude reads it freely and drafts every touch + stage move; **Joe approves any write/update/delete**. No lead lives in a DM thread or a spreadsheet.

Funnel — stages & conversion assumptions

Rough planning math for a solo operator (deliberately conservative; refine with real numbers after 30 days):

Stage	Definition	Assumed conversion → next	Example (to land ~2 closes)
Awareness	Saw a post / got a connect or call	—	~600 touches/mo (LI connects + posts + reactivations)
Lead	Replied / asked / opted in ("CALLS")	~8-12% of awareness	~60 leads
Booked call	On the calendar	~25% of leads	~15 calls
Proposal/quote	Saw the demo, got a scope+price	~55% of calls	~8 proposals
Close (Won)	Signed / paid	~25-30% of proposals	~2 clients
Retain	Monthly run/manage (recurring)	target ~80%+ retention	grows MRR each month

Read: the lever is the **top** (more warm reactivations + connects) and the **booked-call → proposal** step (a tight live demo of the agent answering a real moving call). At ~2 closes/mo and recurring management fees, MRR compounds — retention is where a solo agency actually wins, so over-deliver on the "I build AND run it" promise.

Content Calendar — simple weekly rhythm (solo, ~2 hrs/day)

Day	LinkedIn post	Outreach block	Pipeline / admin
Mon	Voicemail Tax / value post (angle 1 or 2)	25 connects + 5 warm Zoho reactivations	Plan the week; pull any new Hunter rows
Tue	—	25 connects + run DM sequence on accepts	5 referral asks to past Fiverr clients
Wed	Smith-story or anti-agency post (angle 3 or 5)	25 connects + 5 warm reactivations	Fiverr: ship a gig fix / new gig
Thu	—	25 connects + DM sequence	1 partnership conversation
Fri	60-sec demo clip (angle 4)	25 connects + follow-ups on open threads	Log everything to Zoho; review booked calls

Repurposing rule: one piece of YouTube footage → 1 native LinkedIn clip + 1 text post pulled from its transcript + 1 demo cut. Three posts from one source. Batch-record/cut on the weekend so weekdays are outreach, not production.

First-30-days focus: channels **1 and 2 only** (Zoho warm + LinkedIn) + the Fiverr fixes. Don't touch cold email or paid until the warm engine has put real booked calls on the calendar and the demo→close motion is proven.

SeppFlow Sales System & Blueprint

This is Joe's internal operating playbook. It runs inside the **existing Zoho CRM** (org **RecoverPrivacy**, Free edition, USD, Asia/Jerusalem). One operator, warm-first, executable starting Monday. The universal CTA everywhere is the Google Calendar booking link:

<https://calendar.app.google/CAdYqQXepkJhxiWj7>.

The one job of this whole system: turn the Voicemail Tax into a number the prospect can feel, then sell the relief. Lead with "you stop missing calls," never "AI agents."

Reality check baked in: Zoho Free has **no email send / no templates** in the connector, and the existing warm base is ~50+ "Follow Up" leads that are mostly **old Fiverr buyers with no phone/company** (e.g. James UNKNOWN, Doris Q.) plus a handful of real reachable ones with phone numbers (MaryAnne Wiseman +44, Bazaar Royale, Axl Lopez, Andrew Stromotich, Orna Gilead Hammer). So warm reactivation = **LinkedIn + phone**, Claude drafts / Joe sends. Cold email stays parked.

1. Pipeline Stages (Zoho Deals)

Zoho's Deals module currently has the **default** stages: `Qualification`, `Needs Analysis`, `Value Proposition`, `Identify Decision Makers`, `Proposal/Price Quote`, `Negotiation/Review`, `Closed Won`, `Closed Lost`, `Closed Lost to Competition`. **Rename/replace them** with the SeppFlow set below (Setup → Modules → Deals → Stage picklist; map Closed Won→Won, Closed Lost→Lost). Keep the probability % so the forecast is real.

Leads live in the **Leads** module (status field) until they book an audit call; on booking, **convert the Lead to a Deal** so the deal pipeline only ever holds real opportunities. Pre-call nurture happens with the `Lead_Status` field; post-booking selling happens with the `Stage` field.

Lead-stage statuses (Leads module — before a call is booked)

Lead_Status value	Goal	Action	Script / message	Exit criteria	Cade
New Lead	Make first contact within 24h	New inbound (Fiverr msg, LinkedIn DM reply, site form). Tag source.	LinkedIn first-reply: <i>"Appreciate the connect, [Name]. Quick one — when you're on a job and the phone rings out, where do those calls go right now? That's the exact leak I plug for [movers/contractors]."</i>	Got a reply / booked audit → Engaging or Audit Booked	Same then 0/3/7
Engaging	Get the audit call booked	Run 2-touch value DM/phone. Offer the free Missed-Call Audit, not a "demo."	<i>"Worth 15 min? I'll show you roughly how many jobs a month you're losing to voicemail and what it'd take to catch them. No pitch if the math's small."</i> Drop calendar link.	Calendar slot booked → Audit Booked	Touc every days, touch
Audit Booked	Hold the call; convert to Deal	Calendar event auto-created. Send confirm + 1h reminder. Convert Lead → Deal at this point.	Confirm: <i>"Locked in for [day/time]. I'll have your area's missed-call math ready. Anything specific killing you right now — after-hours, or calls during jobs?"</i>	Call happens → Deal at "Audit / Discovery"; or no-show → No-Show cadence	24h + reminder
Nurture (warm)	Reactivate the existing Zoho warm base	The Fiverr/referral "Follow Up" crowd. Reconnect personally, no hard sell.	<i>"Hey [Name] — it's Joe from the [Fiverr CRM] work a while back. I've narrowed down to one thing now: making sure home-service businesses never miss a call. Are you still in [their space]?"</i>	Replies / interested → Engaging	1 touch 3 weeks then

Lead_Status value	Goal	Action	Script / message	Exit criteria	Code
			<i>Might be a fit, might not."</i>		
Disqualified / Lost	Keep pipeline clean	Wrong fit (not phone-driven, no budget, agency). Tag reason.	—	—	Re-try 90 days only if

Deal-stage pipeline (Deals module — after audit is booked)

Stage (prob.)	Goal	Action	Script / template	Exit criteria
1. Audit / Discovery (20%)	Run the Missed-Call Audit call; make the pain a number	Deliver the §2 question flow. Compute lost-revenue math live.	See §2 framework. End with: <i>"So that's roughly \$X/month walking to your competitor. Want me to show you how I'd plug it?"</i>	Pain quantified + budget/authority confirmed → Qualified
2. Qualified (35%)	Confirm it's a real deal; agree on tier	Recap the number in writing, confirm decision-maker + rough budget.	Recap DM/email: <i>"Quick recap: ~ [X] missed calls/mo × [close rate] × \$[job value] = ~\$[Y]/mo. I'd run [tier]. Sending the one-pager — want it by [day]?"</i>	Prospect wants the proposal → Proposal Sent
3. Proposal Sent (50%)	Get the proposal in front + a decision date	Send §3 one-pager. Book the decision call ON the same call you send it.	<i>"Sent. Let's grab 10 min [day] to walk it and answer anything — I don't want you reading it cold."</i>	Proposal opened + decision call set → Verbal Yes / or objection → handle
4. Negotiation / Decision (70%)	Handle objections, lock terms	Work §4 objections. Offer the risk-reversal. Hold price; flex scope.	<i>"Totally fair to think — what's the one thing between you and a yes?"</i> Then the matched §4 response.	Agreed terms → Verbal Yes
5. Verbal Yes (85%)	Convert words to	Send simple agreement + first invoice. Make saying	<i>"Great call. Sending a one-</i>	Signed + deposit paid →

Stage (prob.)	Goal	Action	Script / template	Exit criteria
	signature + deposit	yes frictionless.	<i>page agreement + the first invoice now. Once that's in I block your build week and we're live in [X] days."</i>	Won
6. Won (100%)	Kick off onboarding	Trigger \$6 onboarding checklist. Set Active.	<i>"Welcome aboard. Here's exactly what I need from you (5 min) and what happens next."</i>	Onboarding form returned → Onboarding
Onboarding	Build + go live in ≤7 days	Build voice agent + automations. Weekly status.	<i>"Day 1: build started. Day 3: you test it. Day 5: live. I'll text you each step."</i>	Agent live + first call answered → Active
Active	Deliver the "morning recap" relief; retain	Monthly value report (\$7). Watch usage.	Monthly: <i>"Last 30 days: [N] calls answered, [M] jobs booked, [hrs] saved."</i>	30 days clean → eligible for Upsell/Referral
Upsell	Expand to next tier / add automation	Trigger \$7 ladder when a trigger hits (volume, new service line).	<i>"You're booking enough now that [add-on] would pay for itself — want me to switch it on?"</i>	New scope agreed → new Deal
Lost	Learn + recycle	Tag exact reason (price/timing/competitor/no-budget).	<i>"No problem — can I check back in [90 days]? I'll keep your missed-call number on file."</i>	—

2. Discovery Call — the "Missed-Call Audit"

Frame the call as a **free audit**, never a demo or sales call. 15–20 min. Goal: make the leak a dollar figure *they say out loud*, qualify, then transition.

Open (10 sec, lower the guard): *"Thanks for the 15 minutes. This isn't a pitch — I'm going to ask you a few numbers about your calls, and by the end you'll have a rough figure for what missed calls are costing you. If it's small, I'll tell you and we're done. Fair?"*

A. Make the pain real (the audit questions, in order):

1. *"When you're on a job and the phone rings — where does that call go right now?"*
(voicemail / nobody / spouse)
2. *"Roughly how many calls a day come in?"* → **calls/day**
3. *"Honest guess — how many ring out or hit voicemail on a busy day?"* → **missed/day**
4. *"When someone gets your voicemail, what do you reckon they do?"* (let them say "call the next guy" — that's the wound)
5. *"After-hours and weekends — is anyone catching those?"*
6. *"When a new lead does come in, how fast do you call them back? Minutes? Next day?"*
7. *"What's an average job worth to you?"* → **job value**
8. *"Of the people who actually reach you and you quote — what share book?"* → **close rate**

B. Do the math live (this is the whole call):

missed/day × 22 working days = missed/month **missed/month × close rate × job value = \$lost/month**

Example (mover): 4 missed/day × 22 = 88/mo × 25% close × \$1,200 job = **~\$26,400/mo**

"Voicemail Tax." Say the number, then go quiet. Let it land.

C. Qualify (plain SPICED/BANT — don't make it a checklist out loud):

- **Situation / pain** — covered by A. (the number)
- **Impact** — *"If that number's even half right, what would catching those jobs mean for you?"*
- **Authority** — *"Are you the one who'd make the call on something like this, or is there a partner?"*
- **Money** — *"If I could catch even a third of that for a few hundred a month, is that a no-brainer or do you need to see it first?"* (price anchored against the loss)
- **Timing** — *"Is this a 'this month' fix or a 'someday' thing?"*

D. Transition to offer: *"So you're losing roughly **\$[Y] a month** to calls nobody's catching. Here's the good news — this is the exact thing I build. An AI voice agent that answers every call 24/7, sounds normal, qualifies them, and books the job straight into your calendar. You'd wake up to a text: '3 calls answered, 2 booked.' Want me to put together exactly what that'd look like for you — one page, with your numbers on it?"* → move Deal to **Qualified**.

3. Proposal (one page)

Send within 2h of the call, while the number is hot. One page, his honest voice, no agency deck.

Structure:

- 1. **Title:** *"Catching the calls you're losing — for [Company]"*
- 2. **The number (their math, restated):** *"Right now ~[X] calls/month go unanswered ~ **\$[Y]/month** in jobs going to competitors."*
- 3. **What I'll build (done-for-you, one accountable person — me):**
 - AI voice agent: answers 24/7, qualifies, books into your calendar
 - Instant lead-response + follow-up automation
 - Morning recap text ("3 calls answered, 2 booked")
- 4. **Tier recommendation (recommend ONE, anchor with three):**

Tier	Setup	Monthly	For
Starter	\$750	\$300/mo	Voice agent answers + books. Solo operator.
★ Growth (recommend)	\$1,500	\$500/mo	Agent + instant follow-up + review requests + CRM. Most movers/contractors.
Pro	\$2,500	\$900/mo	Everything + dormant-lead reactivation + multi-line/team routing.

*(Pricing ladders off the proven Fiverr \$180/\$450/\$900 anchors, repriced for done-for-you + monthly run.) Always tie to the loss: "Growth pays for itself if it saves you **one** job a month."*

5. **Risk reversal / guarantee:** *"30-day catch-it-or-it's-free: if the agent doesn't answer and book real calls in the first 30 days, you don't pay the setup. I build it, I run it, you can call me directly — no faceless agency."*
 6. **One CTA:** *"Reply 'go' or grab 10 min here: [calendar link]."*
-
-

4. Objection Handling (honest voice)

1. **"Too expensive."** — *"Compared to what, though? You told me you're losing ~\$[Y] a month to missed calls. Growth is \$500. If it catches one job, it's paid for. The expensive option is the one you're on now — you just don't get a receipt for it."*
2. **"We already have someone / an answering service."** — *"How fast do they answer at 9pm on a Sunday? And do they actually book the job into your calendar, or just take a message you call back later — by which point the customer already booked someone else? Mine answers in one ring, every time, and books it. Happy to run them side by side."*
3. **"AI sounds robotic / impersonal."** — *"Fair — most do. Call this number and talk to mine for 30 seconds before you decide. If it sounds like a robot, I've failed and we're done. Your customers care about one thing: somebody picked up and booked them. A robot that books beats a human voicemail that doesn't."*
4. **"We're too small for this."** — *"Small is exactly who this is for. A big company has a front desk; you've got a phone in your pocket while you're carrying a couch. You're the one who can't afford to miss a \$1,200 job. Big companies miss a call and shrug — you feel it."*
5. **"Just send me info."** — *"I'll send the one-pager, but it's built off your numbers, so let's spend 10 minutes so it's actually yours and not a brochure. What's a good time tomorrow?"* (always pair "send info" with a booked slot, or it dies)
6. **"Let me think about it."** — *"Of course. Just so I send the right thing — what's the part you want to think about? The price, whether the AI's good enough, or the timing?"* (surfaces the real objection; then answer that one)
7. **"Does it really work?"** — *"Honest answer: it works when calls are your bottleneck — which, from your numbers, they are. It won't magic up demand you don't have. But you've already got people calling; you're just not catching them. That part it nails. And the 30-day guarantee means you find out on my dime, not yours."*
8. **"I need to ask my partner."** — *"Smart — get them on a 10-min call with me. Easier for me to answer their questions live than for you to relay the missed-call math secondhand. When are you both around?"*

5. Follow-up Cadence (no-shows & stalls)

Reuse the **Day 0/3/7/12** structure (already written, Zoho merge syntax). For warm/LinkedIn use the same beats by DM/phone instead of email.

- **No-show:** Within 15 min — *"Caught you at a bad time? No stress — your missed-call number's still sitting here. Grab a slot that works: [link]."* Then Day 3 / Day 7 / Day 12.
 - **Day 0** — `{{First_Name}}, a call you missed last week` → the audit hook.
 - **Day 3** — `re: never miss a call` → soft re-raise + the lost-revenue number.
 - **Day 7** — `what your mornings could look like` → the morning-recap relief story.
 - **Day 12** — `should I close your file?` → the takeaway close: *"Last one from me — want me to keep your file open or close it out? Either's fine, just don't want to chase you."*
 - **Stalled in Proposal/Negotiation:** every 2–3 days, max 2 weeks, then move to Lost (90-day re-touch). Never more than 4 unanswered touches — silence past Day 12 = Lost, not "still working it."
-

6. Close + Onboarding Checklist

On Verbal Yes → Won:

- ☐ Send one-page agreement + first invoice (setup + month 1).
- ☐ Deposit/first payment received → flip Deal to **Won**, set **Onboarding**.

Onboarding (target: live in ≤7 days):

- ☐ Send 5-min intake: business hours, services, pricing/quote logic, service area, FAQs, calendar to book into, phone number to forward.
- ☐ Get call-forwarding set up (their carrier → agent number).
- ☐ Build voice agent (greeting in their name, qualify questions, booking flow).
- ☐ Connect calendar + CRM + follow-up/review automations.
- ☐ **Joe test-calls it** + client test-calls it.
- ☐ Go live; confirm first real call answered.
- ☐ Turn on the morning recap text. Flip to **Active**.

7. Retention / Upsell / Referral

Monthly value report (the retention engine — the "relief made visible"): every 30 days, one message: *"[Company] — last 30 days: [N] calls answered, [M] jobs booked, ~\$[Z] in work caught, [hrs] of your time saved. Anything you want tweaked?"* This is the #1 churn-killer because it shows the number they'd lose by cancelling.

Upsell ladder (trigger-based, not pushy):

- Starter → Growth when call volume climbs or they ask for follow-up.
- Growth → Pro when they add a service line, a second phone line, or a crew.
- Bolt-ons: dormant-lead reactivation campaign (one-time revenue spike, great upsell), review-generation, seasonal blast.
- Trigger line: *"Your numbers crossed the point where [add-on] pays for itself — want it on?"*

Referral ask (after first strong monthly report): *"Glad it's working. Quick favor — you probably know other [movers/contractors] losing calls the same way. Intro me to one and I'll knock \$[X] off your next month (and take great care of them)."* Tag referral source in Zoho

`Lead_Source = External Referral` (the base already has these — they convert best).

8. Daily + Weekly Routine (solo KPIs)

Daily (≈90 min sales block, mornings = US/UK overlap):

- 20 new LinkedIn connects to ICP (owners, movers/contractors/HVAC/roofers/plumbers, US/UK/AU).
- 5–10 value DMs to accepted connections.
- Reactivate 5 warm Zoho "Follow Up" leads (LinkedIn/phone) — **prioritize the ones with phone numbers/companies** (MaryAnne Wiseman, Bazaar Royale, Axl Lopez, Andrew Stromotich, Orna) before the no-data Fiverr names.
- Clear all Zoho tasks/follow-ups due today (no lead older than its cadence step).
- Run any booked audit calls; write the recap note same day.

Daily activity targets: 20 connects · 5–10 DMs · 5 warm touches · 0 overdue follow-ups · book ≥3 audit calls/week.

Weekly:

- Mon: pipeline review — every Deal has a next action + date; kill anything past Day 12 silence.
- Wed: post 1 piece of content (repurpose YouTube → Voicemail Tax angle) for inbound.
- Fri: numbers review — connects, replies, calls booked, proposals out, closes. Send monthly value reports due this week.

Funnel math to hit ~2 clients/mo: ~3 audits/wk → ~12/mo → ~50% qualified (6) → ~33% close (2). Tune the top (connects/DMs) if audits booked drops below 3/wk.

9. Zoho Automation Setup (run it hands-off on Free edition)

Free edition is light on workflow, so lean on **Tasks + Workflow Rules (Free allows a small number) + the connector for reads/updates**. Keep it minimal and reliable.

- **Workflow Rule — "New Lead → first-touch task"**: on Lead create, auto-create a Task "First contact" due same day, assigned to Joe.
- **Workflow Rule — "Audit Booked → confirm + reminder tasks"**: on `Lead_Status = Audit Booked`, create Tasks at 24h and 1h before the slot ("Send confirm", "Send reminder").
- **Cadence on stage change**: when a Deal hits **Proposal Sent**, auto-create follow-up Tasks at Day 2 / Day 5 / Day 9. When it hits **Verbal Yes**, daily task to chase signature (max 3).
- **Stalled-deal sweep**: a saved Custom View "No activity 7+ days" that Joe checks every Monday → anything stale gets a touch or moves to Lost.
- **Active-client monthly task**: recurring Task per Active deal on the 1st: "Send monthly value report."
- **The Claude assist layer (this is the real automation for a solo op)**: because the Zoho connector can read records, search, run COQL, and update fields — **Claude drafts every message** (first-touch, recap, proposal, follow-up, monthly report) on demand using the live record data, and **updates stage/status/tags after Joe confirms**. Joe sends from LinkedIn/phone/his mailbox; Claude keeps the CRM honest. Hard rule: Claude reads freely, **confirms before any write/update/delete**, and **never** sends email from the main `seppflow.com` domain.
- **What NOT to automate**: no auto-emails from Zoho (no warmup, main-domain risk, and the Free connector can't send anyway). Cold email stays parked until the proper Smartlead/Instantly + burner-domain + warmup stack is in place.

Relevant files

- Brand voice / taglines / cold-call opener: `C:\Users\Mike\.claude\projects\C--Users-Mike-Claude-Projects-Joseph-Pusser\memory\brand-platform.md`
- Channels, Day 0/3/7/12 templates, Zoho/Hunter status, warm-base notes: `C:\Users\Mike\.claude\projects\C--Users-Mike-Claude-Projects-Joseph-Pusser\memory\outreach-linkedin-plan.md`
- Live Zoho Deals field metadata (default stages to replace): `C:\Users\Mike\.claude\projects\C--Users-Mike-Claude-Projects-Joseph-Pusser\8da31103-fd75-445c-aaae-912a426ee672\tool-results\toolu_01DJE5gNDKefao7YkEwJAQ97.txt`

EXECUTION — 90-Day Rollout, Metrics & Budget

Internal operating playbook for Joe. Warm-first, free-before-paid, executable by one person starting Monday. Everything below assumes ~3 focused hours/day on SeppFlow alongside Fiverr inbound.

The one-sentence operating thesis

We already have the leads (warm movers sitting in Zoho on "Follow Up") and the audience (LinkedIn + 1M YouTube views). The first 60 days cost almost nothing — we mine what we own. We only pay for cold email in Phase 3, once the offer is proven and a case study exists to point at.

1. The 90-Day Plan

Pipeline stages (use these exact names in Zoho — one source of truth)

`New → Contacted → Engaged (replied) → Call Booked → Proposal Sent → Won / Lost / Nurture`

Every activity below moves a record between these stages. If it's not in Zoho, it didn't happen.

PHASE 1 — Days 1–30: Warm reactivation + LinkedIn + first closes

Goal of the phase: turn the existing warm Zoho base + LinkedIn into the first 1–2 paying clients, with zero ad/tool spend.

Week 1 — Set the trap before hunting

- Paste the ready LinkedIn Headline + About (already written, still un-pasted), fix the company-page logo/banner (steel "S", generate locally — RTX 3060 pipeline is free).
- Pull every Zoho lead in "Follow Up" into a single segmented list; tag the on-niche movers (Safeway Moving Inc, MoveltPro, etc.) **warm-mover**. Target: a clean list of 30–50 warm, on-ICP records.
- Confirm the Google Calendar booking link works and shows real slots. This is the universal CTA — test it from a logged-out browser.
- **DoD:** profile live, company page fixed, ~40 warm leads tagged and stage-set to **Contacted** queue, calendar link verified.

Week 2 — Reactivate the warm base (LinkedIn + phone, never main-domain email)

- Contact 8–10 warm movers/day via LinkedIn DM or phone (Claude drafts, Joe sends). Soft, value-first: "you had us pencilled in to fix missed-call follow-up — still bleeding calls after hours?"
- Start LinkedIn connecting: 20–30 new ICP owners/day with a personal note. Like/comment 2 days before the soft DM.
- **DoD:** all ~40 warm leads touched at least once; 100+ new ICP connection requests sent; first replies logged as **Engaged**.

Week 3 — Book the calls

- Follow up every warm lead a 2nd time (different angle: a number — "movers lose ~\$X/missed call"). Push every **Engaged** reply toward the calendar link.
- Keep the LinkedIn connect engine running (20–30/day). Begin replying inside DMs with the "message me CALLS" hook.
- **DoD:** 3–5 booked discovery calls on the calendar; pipeline shows movement into **Call Booked**.

Week 4 — First closes + first proof

- Run the discovery calls. Offer the productized starter: **AI voice agent + instant lead-response automation, done-for-you**. Price it to close fast (anchor off the Fiverr Premium \$900 as the floor for setup; monthly run/management on top).
- Send simple 1-page proposals (scope + price + "I build and run it personally"). Close 1–2.

- **DoD:** 1–2 signed clients, first cash in, one client who agrees to be the future case study. Phase 1 done when MRR > \$0 and there's a logo to point at.
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PHASE 2 — Days 31–60: Systematize + Fiverr + content

Goal of the phase: stop doing everything by hand. Turn the first win into a repeatable build, a case study, a content engine, and Fiverr inbound — so lead flow no longer depends on Joe manually DMing.

Week 5 — Productize the build

- Document the voice-agent + automation build as a fixed checklist/template (so client #3 takes hours, not days). Lock the menu: **Voice Agent (setup + monthly), Automation pack, Lead-reactivation sprint.**
- Write the first case study from the Phase-1 client (real numbers: calls answered, jobs booked). Put it on the relevant trade landing page (movers).
- **DoD:** repeatable build doc exists; 1 published case study live on seppflow.com.

Week 6 — Fiverr as inbound

- Fix the CRM gig description (remove old Kommo text), then publish the new **AI voice agent receptionist** gig + **AI chatbot lead capture** gig. Pause the 3 off-theme gigs to free slots.
- Point Fiverr buyers at the same productized offer; Fiverr's 25 reviews do the trust work cold outreach can't.
- **DoD:** 3 on-theme gigs live and optimized; first AI-gig inbound message or order.

Week 7 — Content engine (Joe's real edge)

- Repurpose YouTube into 3 LinkedIn posts/week on the Voicemail Tax theme ("the call you missed at 6pm went to your competitor"). Each post ends in the CALLS hook.
- Keep warm/LinkedIn outreach running but now content does top-of-funnel work passively.
- **DoD:** 9+ LinkedIn posts shipped in the phase; inbound DMs starting from content (not just outbound).

Week 8 — Tighten the funnel

- Review conversion at each stage (where are calls not booking, where are proposals stalling?). Fix the weakest step — usually proposal→close, so add a same-call close or a 48h follow-up.

- **DoD:** 3–4 total clients live, MRR climbing toward ~\$2–3k, a written funnel with known conversion rates. Phase 2 done when one new client can be onboarded without inventing the process.
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PHASE 3 — Days 61–90: Turn on cold email properly + scale

Goal of the phase: add a paid, scalable channel on top of the proven warm/inbound base — done RIGHT, never cheap-and-broken.

Week 9 — Build the cold infrastructure (warmup starts NOW)

- Buy 1–2 burner **.com** domains (NOT seppflow.com — e.g. tryseppflow.com), redirect to seppflow.com. Set up cheap mailboxes (Zoho Mail Lite / Outlook), SPF/DKIM/DMARC.
- Connect Smartlead or Instantly and **start the 2–4 week warmup immediately** — this clock runs in the background while we keep selling warm.
- **DoD:** domains live + redirecting, mailboxes authenticated, warmup running.

Week 10 — Build the cold list

- Use Hunter (Free: 50 finds/100 verifies/mo) to find + verify ICP mover/contractor owner emails. Respect the cap — this is a quality list, not a blast.
- Load the 4 already-written cold templates (Day 0/3/7/12, calendar CTA) into the sender, with the case study now baked into the value line.
- **DoD:** first verified cold list (~50–100 contacts) loaded; sequence built and reviewed; warmup still completing.

Week 11 — Cold goes live (small)

- Launch cold sends only after warmup is healthy. Start small (20–40/day/mailbox) to protect deliverability. Monitor reply/bounce.
- **DoD:** cold sequence sending, first cold replies booking calls, bounce rate under control.

Week 12 — Scale what works

- Three channels now run in parallel: warm/LinkedIn, Fiverr inbound, cold email. Double down on whichever is producing the cheapest booked calls.
- Decide what to hand off next (VA for list-building, or a second mailbox) using the unit economics below.
- **DoD:** \$5k MRR target in reach or hit; a clear, written answer to "what do I do more of in Q2." Phase 3 done when there's a repeatable, multi-channel pipeline that doesn't depend on Joe

touching every step.

2. KPI / Metrics Dashboard (track weekly — the funnel)

One page, reviewed every Friday. These are the only numbers that matter.

Metric	What it means	Wk-4 (Phase 1)	Wk-8 (Phase 2)	Wk-12 (Phase 3)
Outreach touches/wk	warm DMs + new LinkedIn connects + (later) cold sends	~150	~200	~300+
New conversations (Engaged)	leads that replied	8–12	15–20	25–35
Booked discovery calls	on the calendar	3–5	5–7	8–10
Calls held	actually showed	3–4	4–6	6–8
Proposals sent	scoped + priced	2–3	3–4	5–6
New clients won	signed	1–2	1–2	2–3
MRR (running total)	recurring monthly	~\$0.5–1k	~\$2–3k	~\$5k

Conversion benchmarks a solo operator can hit: Engaged→Call ~35–40%, Call→Proposal ~60%, Proposal→Won ~40–50%. If Proposal→Won is below 30%, the problem is pricing or proof, not volume.

Leading vs lagging: outreach touches and booked calls are *leading* (controllable daily). MRR is *lagging* — never optimize MRR directly, optimize calls booked and the conversion rate.

Cumulative 90-day target: ~~6–8 paying clients~~, ****\$5k MRR**** by Day 90 (stretch \$6–7k if cold lands early), with a credible line of sight to \$10k in the following 60 days.

3. Tool Stack & Monthly Budget

Tool	Role	Phase 1–2 (warm)	Phase 3 (cold on)
Zoho CRM (Free)	single pipeline source of truth	\$0	\$0
LinkedIn (free tier)	main warm channel	\$0	\$0
Google Calendar	universal booking CTA	\$0	\$0
Google Workspace	main inbound mailbox (joseph@seppflow.com)	~\$7	~\$7
Fiverr	inbound, 25 reviews	\$0 (% on sales)	\$0
Hunter.io (Free)	find + verify cold emails	\$0	\$0 (Free cap)
Voice-agent platform	the actual product (per-minute/usage)	bill to client	bill to client
Burner .com domain(s)	cold sending, redirect to seppflow	—	~\$1–2
Cold mailboxes (Zoho Mail Lite ×1–2)	cold sender accounts	—	~\$2
Smartlead or Instantly	cold sender + warmup + reply detect	—	~\$37–39
Total SeppFlow spend/mo		~\$7	~\$50

Key budget principle: the voice-agent platform's usage cost is a client-billable cost-of-goods, not Joe's overhead — price it into the monthly fee, don't eat it. Joe's own fixed burn stays ~\$7/mo until cold turns on, then ~\$50/mo. No agency markup, no wasted SaaS.

4. Unit Economics (the math to \$5k and \$10k MRR)

Deal shape (productized, done-for-you, Joe builds + runs it):

- **Setup fee:** ~\$900–1,500 one-time (anchored off the Fiverr Premium \$900 floor) — this funds the build.
- **Monthly retainer:** ~\$300–600/mo to run + manage the voice agent + automation.
- **Working assumption for the model:** ~\$400 MRR per client average.

CAC (customer acquisition cost):

- *Warm/LinkedIn (Phase 1–2):* ~\$0 cash, cost is Joe's time. Effective CAC near zero — this is why warm-first.
- *Cold (Phase 3):* ~\$50/mo tooling spread across ~1–2 clients/mo from cold ≈ **\$25–50 CAC**.
- The **setup fee alone (~\$900+) covers CAC many times over on day one**. Payback is effectively immediate — Joe is cash-positive on a client before the first retainer even bills.

Path to \$5k MRR: ~12–13 clients at ~\$400/mo. Realistically by Day 90 we hit ~\$5k with a mix of slightly higher retainers (fewer, better clients) — e.g. 8–10 clients averaging \$500–600. Setup fees (\$900+ each) provide a healthy cash cushion alongside the recurring base.

Path to \$10k MRR (the next 60 days): double the base to ~20 clients at \$400–500, OR move upmarket — fewer clients at \$600–900/mo (larger movers/contractors who lose more per missed call). The second path is better for a solo operator: **20 clients is a service-delivery wall for one person; 12–15 higher-value clients is not**. Plan to raise prices and/or add a VA for list-building/onboarding before delivery becomes the bottleneck.

Capacity reality check: at ~\$400–600 MRR/client and solo delivery, the natural ceiling before hiring is roughly 15–20 active clients. \$10k MRR is reachable solo only by pushing average deal size up — so start raising prices the moment there are 2+ live case studies.

5. Top Risks + Mitigations

Risk	Why it bites a solo founder	Mitigation
Cold email burns the main domain / lands in spam	one bad blast can poison seppflow.com reputation permanently	Hard rule: never cold from seppflow.com. Burner .com only, mandatory 2–4wk warmup, start at 20–40/day. Cold stays PARKED until Phase 3.
Warm base gets burned by over-contact	only ~40 warm leads — spam them and they're gone	Max 2–3 touches, different angle each, value-first, LinkedIn/phone not email. Treat the warm list as scarce inventory.
Delivery bottleneck — Joe is build + sell + run	selling stops when delivering, lumpy revenue	Productize the build (Phase 2 checklist) so client #3 is hours not days; raise prices to cap client count; line up a VA before ~15 clients.
Discovery → won leaks (proof gap)	no case study early = "trust me" doesn't close cold prospects	Ship the first case study in Phase 2; lead with the Fiverr 25 reviews + "I personally build and run it" as proof until then.
Indecision / channel-hopping	Joe's known pattern — jumping channels before any one is proven	The phase gates ARE the guardrail: don't touch cold (Phase 3) until warm+Fiverr (Phase 1–2) produce paying clients. One channel proven before the next turns on.
Voice-agent usage cost eats margin	per-minute platform fees on a flat retainer	Price usage as client-billable COGS into the monthly fee; cap included minutes, overage billed. Never absorb it.
Time split with Fiverr / other projects	~3hrs/day is the real constraint, not money	Protect the daily outreach block (leading metric). Fiverr is inbound — let it run; don't let it consume the outbound hours.

Definition of "90 days well spent"

Not vanity reach — a **working machine**: a clean Zoho pipeline with known conversion rates, 6–8 paying clients, ~\$5k MRR, at least one published mover case study, three live channels (warm/LinkedIn, Fiverr, cold), and a productized build that lets the next client be onboarded without reinventing anything. That's the platform from which \$10k is an execution problem, not a strategy problem.