

SHOEB LODHI - GROWTH SYSTEMS ARCHITECT

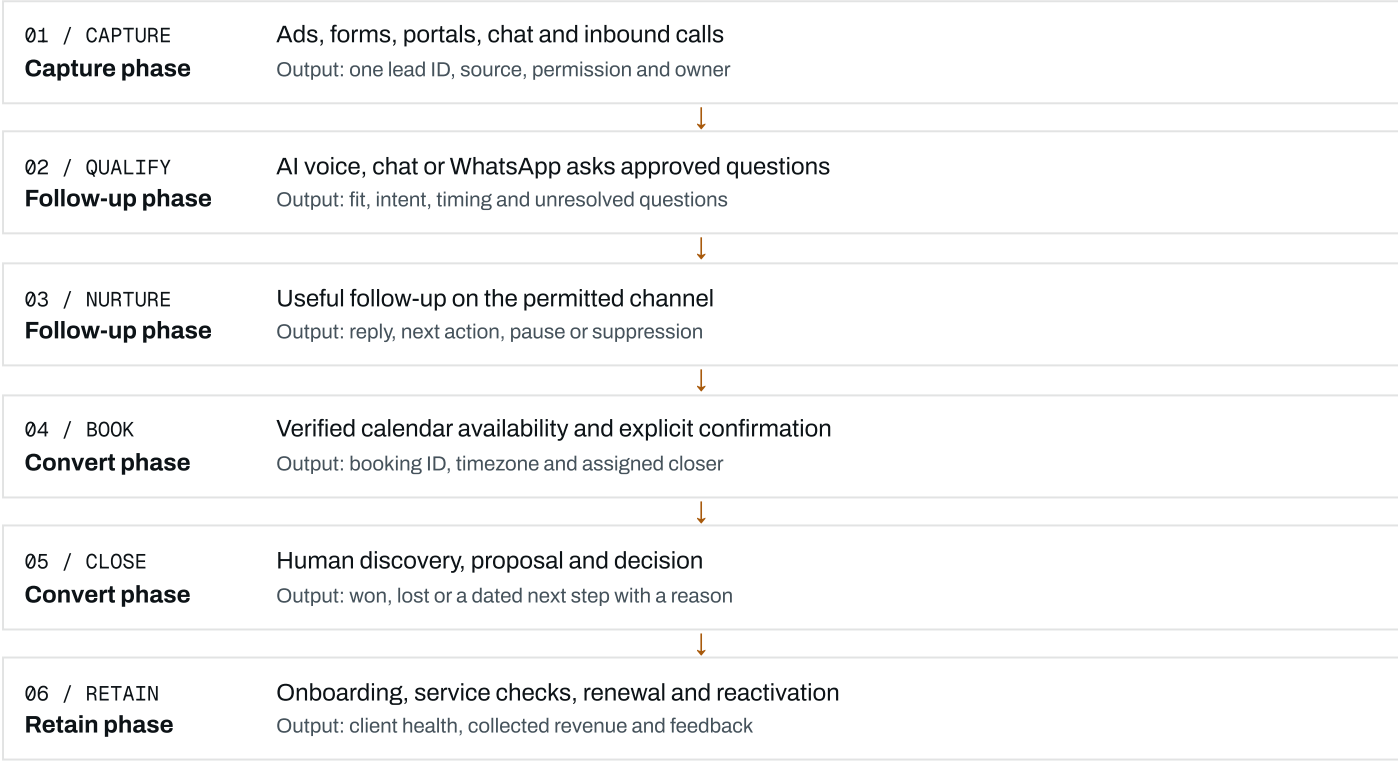
AI Revenue Architecture Blueprint

Map one connected system from first inquiry to retained client.

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I start with the handoffs, then choose the tools. This blueprint expands the four phases at shoeblodhi.com/frameworks/ai-revenue-system into six buildable layers.

READ TOP TO BOTTOM. EACH ARROW IS A RECORDED STATE CHANGE.



Shared spine: one CRM, an event history, approved knowledge, permission checks and a human exception queue. Reporting feeds source quality and service feedback back into capture.

Business / system owner

First journey to build

Create one reliable entry point.

Every inquiry needs an identity, a source and an accountable owner before it enters a sequence.

Components

- Forms, landing pages, ad lead forms and portal connectors.
- Inbound phone, web chat and WhatsApp entry points.
- CRM contact plus inquiry record, source mapping and duplicate review.
- Failed-delivery queue with an owner and replay action.

Minimum lead contract

- Lead ID and received timestamp with timezone.
- Name, usable contact method, language and service interest.
- Source, campaign and original inquiry context.
- Permission evidence, channel preference and assigned queue.

Data flow

Receive inquiry → validate fields → check existing contact → create or attach an inquiry → assign owner → record lead . accepted → start the permitted response. Preserve the original source as well as the latest touch.

Use a source event ID to stop retries creating duplicate inquiries. If a connector fails, keep the payload in a restricted retry queue. Reconcile source submissions against accepted CRM records each day.

AI roles and human handoff

Channel	Agent can do	Human takes over when
Voice	Disclose AI identity; capture callback details and request.	Caller asks for a person or identity is uncertain.
Chat	Ask one missing field at a time; preserve the conversation.	Account issue, sensitive data or an unsupported request.
WhatsApp	Acknowledge an inquiry through an approved flow.	Permission is unclear, number mismatch or delivery failure.

Metrics and acceptance test

- Capture coverage:** accepted unique inquiries / valid source submissions. Also track duplicate rate, unassigned inquiries and oldest connector failure. Choose a measurement window before comparing sources.
- ☐ A repeated source event attaches once and never restarts follow-up.
 - ☐ A missing owner enters a visible queue rather than disappearing.
 - ☐ A suppressed contact receives no automated outreach.

System of record

Reconciliation owner / daily time

● [03 / QUALIFY]

Turn a conversation into context.

Collect enough information to choose the next step. Keep eligibility, clinical decisions and commercial exceptions with qualified people.

Components

An approved question bank, answer schema, service knowledge, fit rules, language preference and an exception queue. Start with one service and a small set of questions.

Inputs and outputs

Input: inquiry, permission and known facts. Output: goal, budget range if relevant, timing, preferred next step, unanswered questions and a source-linked summary.

Data flow

1. Read existing answers and the permission record before contacting the lead.
2. Identify the business and AI assistant. Confirm this is a suitable time.
3. Ask only the missing questions. Allow “prefer not to say” and corrections.
4. Write facts separately from model suggestions. Keep unknown values unknown.
5. Set one outcome: ready to book, nurture, human review, unreachable or opted out.

Assign the channel deliberately

Agent role	Best use in this layer	Boundary
Voice	Short conversational qualification and a warm transfer.	Confirm ambiguous numbers and names aloud.
Chat	Structured questions with visible answer choices.	No hidden assumptions from browsing behavior.
WhatsApp	Asynchronous replies, language choice and resume later.	Do not repeat questions already answered elsewhere.

Human handoff

Escalate when someone asks for a person, disputes a recorded answer, needs advice beyond the knowledge base, or cannot be understood after a clarification. Send the goal, confirmed facts, uncertainty, permission, transcript reference and requested next action. Assign a named owner and a due time.

Metrics and acceptance test

Qualification completion: leads with all required answers / leads that engaged. Track abandonment by question, human corrections to summaries and review-queue age. Sample both qualified and rejected outcomes.

- ☐ “I do not know” remains unknown and routes for review when necessary.
- ☐ A person can correct a field without repeating the entire conversation.
- ☐ The agent never promises approval, treatment suitability or investment returns.

Required questions and the person who approves them

● [04 / NURTURE]

Make the next touch useful.

Nurture exists to resolve a question or support a decision. A sequence should stop when its reason to run disappears.

Components

A reason-based audience, approved message library, channel permissions, contact-hours settings, frequency limit, reply detection and a shared suppression list.

State before cadence

Store why the lead is waiting: timing, unanswered question, unavailable slot or no response. Save a review date and a specific next action for each reason.

Data flow

Qualification outcome → select relevant track → verify channel permission and quiet hours → send one useful message → record delivery and reply → book, update timing, hand off or stop. Every queued send rechecks the current state.

Example planning cadence for a requested consultation - adapt and approve before use.

Trigger	Useful action	Exit rule
Inquiry acknowledged	Answer the original question; offer a suitable next step.	Reply transfers control to the conversation owner.
Next permitted day	Ask whether one unanswered detail would help.	Pause if the lead requests a later date.
Example: day 3	Share one relevant, approved explanation.	Stop this track if booked or no longer relevant.
Example: day 7	Offer to close the loop or agree a future check-in.	No reply: stop active chasing and record the reason.

AI roles and human handoff

Voice: an agreed callback or recovery of an unanswered booking request. **Chat:** resume a user-initiated conversation with saved context. **WhatsApp:** send a relevant, permitted follow-up and route replies. Do not run competing sequences across all three.

A pricing objection, complaint, advice request or repeated confusion goes to a person. An opt-out stops outbound contact immediately across linked workflows, subject to necessary service communication handled under an approved policy.

Metrics and acceptance test

Reply rate: unique leads replying / unique leads with a delivered nurture message in the same cohort. Also track appointments after reply, delivery failures and opt-outs. Do not treat message volume as revenue.

- ☐ A booking, reply, ownership change or opt-out cancels stale queued sends.
- ☐ Returning leads keep their preferences and prior context.

Track reason / maximum touches / approving owner

● [05 / BOOK]

Book against real availability.

A proposed time is not a booking. Confirm only after the scheduling system accepts the appointment.

Components

Calendar availability, service duration, buffers, location or meeting link, timezone handling, owner assignment, confirmation and reschedule flows.

Booking record

Lead ID, service, appointment ID, start and end with timezone, host, location, status, confirmation timestamp and the source conversation.

Data flow and failure behavior

1. Check fit and the right service calendar. Ask for the lead's timezone.
2. Read current availability and offer two specific options.
3. Repeat the chosen date, local time, timezone, location and appointment purpose.
4. Create the booking with a request ID. A retry checks for an existing booking first.
5. After a successful calendar write, save the appointment ID in the CRM and confirm.
6. If the calendar fails or the slot disappears, explain the problem and offer a fresh option or a human callback. Never claim success.

AI roles and handoffs

Role	Action	Escalation
Voice	Offer slots, read back details and ask for explicit confirmation.	Caller needs an exception or cannot confirm the timezone.
Chat	Present exact slots and a booking reference after creation.	Calendar unavailable or conflicting existing appointment.
WhatsApp	Send approved confirmations and reschedule instructions.	Lead asks to change service, host or special requirements.

Metrics and acceptance test

Booking rate: unique qualified leads with a confirmed booking / unique qualified leads offered a next step. **Show rate:** held appointments / appointments due, using a stated cancellation policy. Count reschedules as one journey, not new demand.

- ☐ Two leads cannot confirm the same capacity-limited slot.
- ☐ A timeout and retry produce one appointment and one confirmation.
- ☐ Cancellation stops reminders and updates the closer's queue.

Calendar owner / fallback person

Service duration / buffers / timezone

Give the closer the full context.

AI supports preparation and administration. A human owns discovery, advice, negotiation and the decision to make a commitment.

Components

Closer queue, concise briefing, discovery checklist, approved offer information, proposal workflow, decision reasons and a service handoff checklist.

Human acceptance

The closer acknowledges ownership, reads unresolved questions and confirms the next action. An unaccepted handoff stays visible to the duty manager.

Data flow

Confirmed meeting → closer accepts brief → meeting outcome recorded → proposal or dated next step → verified won or lost outcome → onboarding or permitted nurture. Separate signed agreement, payment status and collected revenue.

Handoff packet - copy these fields into your CRM view.

Field	What the closer should see
Goal and fit	Lead's own objective, required criteria and any uncertainty.
History	Source, key replies, materials shared and previous appointment attempts.
Expectations	What was said about price, scope and timing, with a conversation reference.
Action	Appointment, host, next step, due time and agreed channel.
Guardrails	Do-not-contact flags, consent state and questions requiring specialist review.

AI roles and human boundaries

Voice: appointment reminders and a requested transfer. **Chat:** approved FAQs before the meeting. **WhatsApp:** agreed logistics and follow-up. Internal AI can draft a summary or task, but a person checks factual accuracy and approves proposals or nonstandard terms.

If the closer is unavailable, give a realistic callback commitment and route to a backup. Never imply a transfer succeeded until a person has accepted it.

Metrics and acceptance test

Close rate: won opportunities / qualified held meetings in a defined cohort. Also track median days to decision, overdue next actions, loss reasons and collected revenue by original source. Allow enough time for the cohort to mature.

- ☐ A missed meeting cannot be marked held by a reminder workflow.
- ☐ Won requires the business's documented evidence, not an optimistic AI summary.
- ☐ A lost reason triggers review before any reactivation track is allowed.

Closer / backup / handoff acknowledgement deadline

● [07 / RETAIN]

Connect the sale to delivery.

Retention starts when the client understands what happens next and someone owns delivery.

Components

Onboarding checklist, service owner, milestone reminders, support queue, client-health review, renewal dates and a permission-aware reactivation list.

Minimum account record

Service purchased, start date, promises made, next milestone, responsible person, open concerns, renewal or review date and communication preference.

Data flow

1. A verified won outcome creates an onboarding task and a service-owner assignment.
2. Send an approved welcome with the next action and the contact person.
3. Record delivery milestones from the source system. Do not infer completion from a sent email.
4. Route dissatisfaction to a human before offering more services.
5. Review future needs at an agreed milestone. Reactivate only when relevant and permitted.
6. Feed delivery issues and loss reasons back into qualification and marketing claims.

AI roles and human handoffs

Channel	Appropriate role	Human owns
Voice	Requested check-in, reminder or transfer to support.	Complaints, vulnerable callers and disputed commitments.
Chat	Approved onboarding answers and task-status lookup.	Account changes, access problems and specialist advice.
WhatsApp	Agreed service reminders and feedback requests.	Sensitive issues and nonstandard service requests.

Metrics and acceptance test

Onboarding completion: clients completing the agreed checklist / clients due to complete it. **Renewal rate:** renewed accounts / accounts eligible for renewal in the period. For one-time services, use agreed follow-up completion instead of forcing a subscription metric.

Report time to first service milestone, unresolved support age and reactivation outcomes separately from new acquisition. Use actual collected revenue and a documented allocation rule.

- ☐ A client with an open complaint does not enter an upsell sequence.
- ☐ Changing the service owner updates open tasks and future reminders.
- ☐ Deleted or suppressed data is not silently restored by a later sync.

Service owner / first milestone / review date

● [08 / READINESS]

Score the operating system.

Score evidence you can show today. This is a planning rubric, not a benchmark or a prediction of revenue.

Score each row: 0 = absent or unknown; 1 = partly documented or untested; 2 = documented, owned and tested end to end.
Maximum: 20.

Capability	Evidence to inspect	0 / 1 / 2
1. Source capture	Reconciliation from every active source to the CRM.	
2. Identity and duplicates	Retry and merge tests preserve inquiry history.	
3. Permission and suppression	Evidence, channel settings and a tested stop path.	
4. Ownership	Every queue has a primary person and backup.	
5. Qualification	Approved questions, unknown handling and sample reviews.	
6. Knowledge boundaries	Named approver, current sources and a human fallback.	
7. Booking integrity	Timezone, conflict, cancellation and retry tests.	
8. Handoff and delivery	Acknowledged briefs and verified service milestones.	
9. Reporting	Agreed event definitions and source reconciliation.	
10. Operations	Monitoring, restricted access, rollback and incident owner.	
Total	Assessment date / reviewer:	/ 20

Choose the next scope

0-7: repair capture and ownership first.

8-14: pilot one service, source and channel.

15-20: consider expansion after observing the pilot.

These bands are suggested planning choices.

Release gates override score

A zero in permission, ownership, knowledge boundaries or booking integrity blocks the affected automation. A high total never cancels a failed safety or reliability test.

Turn the lowest scores into work

Gap / evidence missing	Fix owner	Due date / proof of completion

● [09 / 90-DAY BUILD]

Build in dependency order.

This is an example 90-day plan for a focused rollout. Adjust scope to capacity, approval needs and the quality of your existing data.

Window	Deliverable and owner	Gate before moving on
Days 1-15	Map and baseline. System owner inventories sources, permissions, stages, offers and handoffs. Record current response times and missing data.	One journey selected. Owners, data contract and event definitions approved.
Days 16-30	Capture and routing. Operations connects one source, duplicate checks, assignment, suppression and retry monitoring.	Test leads reconcile to one inquiry each. Failed events reach a person.
Days 31-45	Qualification pilot. Service owner approves question bank, AI disclosure, knowledge and fallback. Test one channel internally.	Critical scenarios pass. Unknown answers and human requests route correctly.
Days 46-60	Booking and handoff. Sales owner validates calendars, confirmations, closer briefs and cancellation handling.	No false confirmations or duplicate bookings in pilot tests. Human acceptance works.
Days 61-75	Nurture and delivery. Journey owner adds reason-based follow-up, onboarding and relevant service reminders.	Reply, opt-out, won and complaint states cancel incompatible sequences.
Days 76-90	Review and expand. System owner audits conversations, source attribution, revenue evidence and queue workload.	Agree the next source or channel using observed evidence and staffed capacity.

Weekly operating rhythm

1. **Inspect:** source reconciliation, unresolved failures, unowned leads and overdue handoffs.
2. **Listen:** review a mixed sample of successful, abandoned and escalated conversations.
3. **Change:** approve one clear improvement with an owner and a rollback path.
4. **Compare:** use the same cohort definitions before and after the change. Record sample size and limitations.

Capacity and dependencies

Sponsor / decision maker

Builder / available hours per week

Sales and service reviewers

First pilot start / review date

Largest dependency and the smallest version we can release

Make launch reversible.

I release one journey with a named operator. Expansion waits until the team can explain what happened to each test lead.

End-to-end release checklist

- ☐ Source, campaign, permission and owner arrive correctly in the CRM.
- ☐ A duplicate event and a retry create no extra lead, send or booking.
- ☐ The agent discloses its AI role and follows the approved knowledge.
- ☐ A reply, opt-out, complaint and human request each take the intended route.
- ☐ A calendar failure produces a truthful fallback and a tracked task.
- ☐ The closer receives the brief and acknowledges ownership.
- ☐ Won, lost and retained outcomes link to evidence and the original inquiry.
- ☐ The duty operator can pause outbound actions without losing inbound capture.

Agree the first dashboard

View	Definition to agree before launch
Response	Received-to-first-attempt and received-to-first-two-way-contact, reported separately. Include unanswered leads.
Funnel	Unique inquiries, engaged, qualified, booked, held and won in the same acquisition cohort.
Reliability	Unassigned records, failed events, duplicate bookings, stale queues and opt-outs not applied.
Value	Collected revenue, source allocation and period. Keep modeled pipeline value separate.
Record the reporting timezone, deduplication rule, exclusions and data window on the dashboard. Compare like-for-like cohorts rather than mixing today's leads with last month's wins.	
Pilot scope / release owner	Pause switch / backup owner
Success criteria / review date	Failure threshold / recovery action

Want help implementing this?

Bring the completed system map, your three lowest readiness scores and one real handoff problem. We can use those to define a practical first build.

shoebloodhi.com/contact