FOPOS

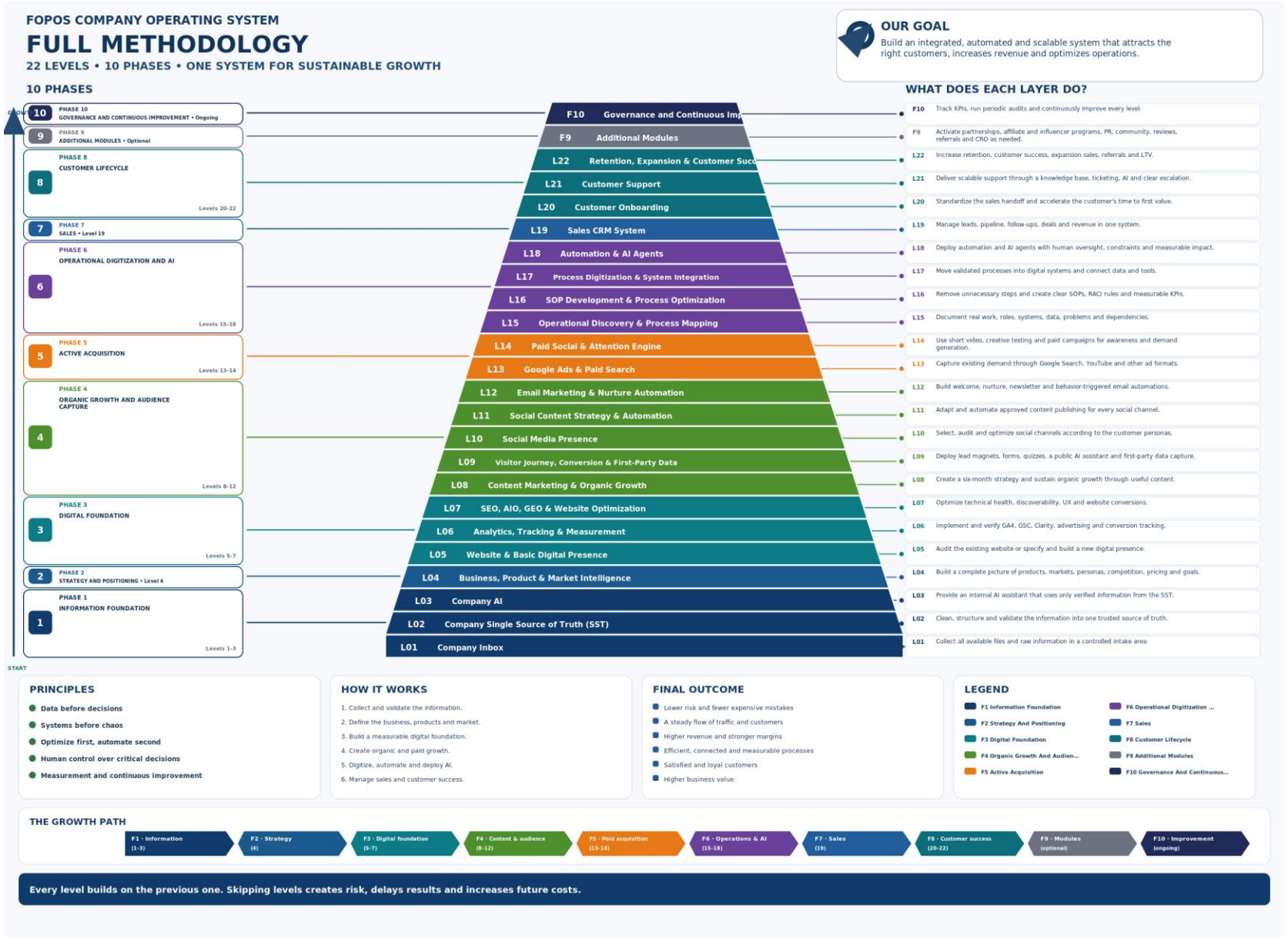
Company Operating System & Digital Growth

MASTER METHODOLOGY

A universal plan for the development of a company or project

Full raw version
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FOPOS Company Operating System — a complete pyramid scheme



Fopos Company Operating System & Digital Growth

Master Methodology — a universal plan for the development of a company or project

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1. Purpose of the methodology

This methodology builds on the original Fopos Digital Marketing Framework and turns it into a complete system for:

- management of company information;
- creation of a single source of truth;
- implementation of AI;
- definition of products, markets and audiences;
- construction of digital presence;
- organic and paid customer attraction;
- digitization and automation of operations;
- sales management;
- onboarding, customer service and retention;
- measuring revenue, efficiency, costs and quality.

The methodology is universal and can be used for a new project, a start-up company, a developing business or an established organization that needs restructuring, digitization and growth.

2. Basic logic of the methodology

The methodology follows a linear sequence:

> ***Raw data → verified knowledge → AI access → strategic clarity → digital presence → measurement → organic growth → audience capture → paid engagement → operational digitisation → sales → service and retention.***

Any level:

1. uses the results of the previous levels;
2. creates specific data, systems or assets;
3. undergoes human verification;
4. there are measurable criteria for completion;
5. submits the validated new information back to the Single Source of Truth;
6. prepares the ground for the next level.

The methodology is linear in construction, but contains constant feedback. Data and results from higher levels may indicate a need for adjustment in a lower level. Each such correction again goes through a process of verification and validation.

3. Critical Principle: Accumulating Information Risk

Missing, incorrect, out-of-date or unconfirmed information below level creates a risk that all subsequent decisions will be based on a false foundation.

This can lead to:

- incorrectly defined product;
- wrong user personas;
- choosing an inappropriate market;
- wrong pricing strategy;
- incorrect marketing messages;
- development of unnecessary software;
- advertising to an inappropriate audience;
- automation of inefficient processes;
- AI agents that execute wrong instructions;
- significant future rework costs.

The basic law of the methodology is:

> ***Errors do not remain in the levelwhere they occur. They are carried forward, multiplied and increased in value in each subsequent level.***

The later an error is discovered, the greater the cost of its elimination. Therefore, it does not move forward when critical information is missing.

4. Validation Gate between levels

At the end of each level, a mandatory control check is performed.

Evaluated:

- **Completeness** — is the required information available?
- **Authenticity** — has it been verified by a competent person?
- **Relevance** — is it currently valid?
- **Coherence** — are there contradictions?
- **Traceability** — is the source known?
- **Property** — is there a person in charge?
- **Applicability** — is the information sufficient for the following level?
- **Measurability** — is it defined how the result will be evaluated?

Each area gets a status:

- **Verified** — confirmed and usable;
- **Incomplete** — missing information;
- **Conflicting** — there are conflicting data;
- **Outdated** — the information is outdated;
- **Assumption** — an assumption is temporarily used;
- **Not Applicable** — not applicable to the project.

In the case of a non-critical failure, it can only be continued if:

- the pass is clearly marked;
- the risk is documented;
- there is a person in charge;
- there is a deadline for top-up;
- dependent results are marked as conditional.

PHASE I — INFORMATION BASE

Level 1 — Company Inbox

Raw Information Intake Layer

Target

Collection of all available information about the company or project, without requiring it to be prearranged, verified or up-to-date.

This is the constant entry point for any new information.

Incoming information

- contracts;
- offers;
- presentations;
- reports;
- tables;
- product descriptions;
- catalogs;
- price lists;
- procedures;
- instructions;
- employee files;
- photos;
- videos;
- audio recordings;
- emails;
- notes;
- archives;
- old and new versions of documents;
- information from external systems.

Principle

Level 1 is **untrusted information layer**.

The information in it can be:

- incomplete;
- duplicated;
- outdated;
- controversial;
- incorrectly named;
- no clear owner;
- no known source.

It cannot be used directly by Company AI as official company knowledge.

Intake / Curation AI

An additional AI agent may assist processing by:

- file recognition;

- text extraction;
- classification;
- generation of metadata;
- detection of duplicates;
- detection of different versions;
- suggesting a folder or category;
- marking of contradictions;
- creating tasks for human review.

This agent can suggest but cannot independently determine what the official truth is.

Main results

- centralized entrance area;
- register of available sources;
- primary categorization;
- list files without owner or context;
- list of potential duplicates;
- list of human review information.

Validation Gate

Levelit is ready for initial passage when:

- the known primary sources are collected;
- each organizational area is checked for available documents;
- missing sources are registered;
- there is a certain process for receiving new information.

Level 1 never "closes". It remains the active entry point throughout the life of the project.

Level 2 — Company Single Source of Truth

Structured and validated company knowledge

Target

Creating an official, structured, up-to-date and human-verified source of company information.

Single Source of Truth does not necessarily mean one database or one file. It means that for each type of information there are:

- official place;
- official version;
- owner;
- status;
- update rules.

Main activities

- classification of information;
- cleaning and deduplication;
- detection of the current version;
- connecting to a source;
- human review;

- confirmation;
- mapping of connections;
- archiving of outdated versions;
- access rights management;
- defining the life cycle of information.

Mandatory metadata

Each important element must contain:

- name;
- category;
- description;
- source;
- owner;
- date of creation;
- date of last inspection;
- version;
- status;
- access rights;
- links to other sites;
- recheck period.

Main statuses

- Draft;
- Pending Review;
- Verified;
- Superseded;
- Outdated;
- Archived;
- Restricted.

Folder and File Policy

Must be defined:

- folder structure;
- naming rules;
- version rules;
- allowed formats;
- space for the official document;
- space for working copies;
- archive policy;
- editing rights;
- approval rights;
- storage terms;
- deletion process.

Map of the information

For each core information area, it should be known:

- where the data comes from;
- who creates them;
- who checks them;

- who uses them;
- where they are stored;
- how they are updated;
- to which systems they feed.

Main results

- Company Knowledge Map;
- Folder and File Policy;
- Information Governance Policy;
- register of data owners;
- official structure of company knowledge;
- archive of invalid versions;
- a process for accepting new knowledge.

Validation Gate

Do not switch to Company AI until:

- there is no clear distinction between verified and unverified information;
- critical documents are not confirmed;
- there are no responsible parties;
- there are unresolved critical contradictions;
- no update rules.

Level 3 — Company AI

Universal internal company assistant

Target

Creating an AI assistant that allows employees to use all the validated knowledge of the company.

Critical architectural rule

> ***Company AI has access only to Level 2.***

It does not have direct access to the raw information from the Company Inbox.

This allows his answers to be based only on:

- official;
- validated;
- current;
- controlled information.

Basic functions

Company AI can:

- answers questions;
- finds documents;
- explains products and services;
- explains procedures;
- supports onboarding;

- creates drafts;
- compare versions;
- summarize information;
- supports the preparation of offers;
- directs employees to the right process;
- detects missing or contradictory information;
- indicates the sources of the answer.

Access rights

Answers should consider:

- department;
- role;
- specific employee;
- level of confidentiality;
- rights to specific documents.

Major restrictions

Company AI:

- does not create official truth by itself;
- does not change the SST without an approval process;
- does not use unverified data;
- does not display information to which the user does not have access;
- must indicate uncertainty;
- must cite or link the sources.

Main results

- internal AI interface;
- role-based access;
- system for traceable answers;
- feedback mechanism;
- register of unanswered questions;
- list of knowledge gaps.

Feedback

Unanswered questions and open gaps create tasks for:

- completion of Level 1;
- review in Level 2;
- update of official knowledge.

PHASE II — BUSINESS, PRODUCTS AND MARKET

Level 4 — Business, Product & Market Intelligence

Target

To establish the overall business picture:

- what the company offers;
- to whom;
- in which market;
- against which competitors;
- at what positioning;
- for what purpose;
- with what resources.

Level 2 summarizes what the company knows. Level 4 checks whether knowledge is sufficient to make correct decisions.

Main areas

Business

- business model;
- sources of income;
- basic expenses;
- resources;
- capacity;
- key partners;
- restrictions;
- objectives;
- priorities.

Products and Services

- name;
- definition;
- characteristics;
- benefits;
- solved problem;
- target users;
- options;
- packages;
- prices;
- cost price;
- margin;
- life cycle;
- competitive advantages;
- restrictions;
- guarantees;
- frequently asked questions.

Market

- size;

- trends;
- segments;
- geographical scope;
- regulatory restrictions;
- seasonality;
- barriers;
- opportunities.

Users

- persons;
- user issues;
- motivations;
- objections;
- decision-making process;
- information sources;
- customer journey;
- selection criteria;
- trust factors.

Competition

- direct competitors;
- indirect competitors;
- substitutes;
- product offers;
- prices;
- positioning;
- content;
- keywords;
- channels;
- strengths and weaknesses.

Brand and communication

- positioning;
- brand book;
- tone of communication;
- basic messages;
- value proposition;
- visual identity;
- evidence;
- promises;
- restrictions on communication.

Strategy and Resources

- business purposes;
- marketing objectives;
- time horizon;
- budgets;
- available team;
- external resources;
- KPI;
- desired future state.

Gap Analysis

For each area is determined:

- what information is available;
- what is missing;
- what is unconfirmed;
- what should be studied;
- what should be created;
- who should confirm it.

Basic questions

Levelit must provide an affirmative response to:

1. What do we have?
2. Where are we now?
3. Where do we want to go?
4. What is missing between the current state and the desired state?
5. What resources are needed?

Main results

- Business Overview;
- Product and Service Catalog;
- Market Research;
- Buyer Personas;
- Competitor Matrix;
- Pricing and Packaging Model;
- Brand and Messaging Framework;
- Strategic Goals;
- Resource and Budget Plan;
- Gap Analysis;
- Strategic Roadmap.

Feedback to SST

After human validation, all newly created materials are recorded in Level 2.

Company AI receives them only after they are included in SST.

PHASE III — DIGITAL BASIS

Level 5 — Website & Basic Digital Presence

Target

Create or evaluate the main digital representation of the company.

Option A — Existing Site

A three-pronged analysis is performed.

Technical analysis

- hosting;
- architecture;
- security;
- SSL;
- speed;
- mobile performance;
- Core Web Vitals;
- broken links;
- errors;
- indexing;
- CMS;
- integrations;
- backups;
- accessibility.

Marketing analysis

- clarity of the proposal;
- product presentation;
- compliance with persons;
- communication messages;
- CTA;
- trust elements;
- case studies;
- social proof;
- forms;
- conversion paths.

UX analysis

- navigation;
- information architecture;
- comprehensibility;
- accessibility;
- mobile experience;
- friction points;
- user paths;
- dropping out.

Option B — no site

A detailed task is created based on the previous levels.

The assignment includes:

- objectives;
- auditoriums;
- products;
- pages;
- information architecture;
- user paths;
- functionalities;
- content;
- design;
- brand requirements;
- forms;
- integrations;
- security;
- analytics;
- SEO/AIO/GEO requirements;
- opportunities for future development.

Basic principle

> *The site is not an independent graphic project. It is the digital reflection of the validated business, product and marketing foundation.*

Results

For an existing site:

- Website Audit;
- UX Audit;
- Technical Audit;
- Conversion Audit;
- Prioritized Improvement Plan.

For a new site:

- Website Requirements Specification;
- Sitemap;
- Wireframes;
- Content Map;
- Functional Specification;
- Design Requirements;
- Acceptance Criteria.

Level 6 — Analytics, Tracking & Measurement

Target

Creating a reliable system for measuring online behavior and business results.

Tools

According to the project, the following can be implemented:

- Google Analytics 4;
- Google Tag Manager;
- Google Search Console;
- Microsoft Clarity;
- Google Ads;
- Meta Pixel;
- LinkedIn Insight Tag;
- TikTok Pixel;
- consent management;
- server-side tracking;
- CRM tracking;
- call tracking;
- e-commerce tracking;
- dashboard system.

Conversion Map

For each important process are defined:

- micro conversions;
- macro conversions;
- events;
- source;
- user step;
- value;
- responsible system.

Examples:

- visiting a key page;
- starting a quiz;
- completing the quiz;
- download e-book;
- registration;
- sending a form;
- a call;
- request for an offer;
- purchase;
- repeat purchase.

KPI Baseline

Before optimization, the current state is saved:

- traffic;
- sources;
- CTR;
- engagement;
- conversion rate;
- cost per lead;
- income;
- organic visibility;
- page performance;

- retention.

Quality Assurance

It is not enough that the tools are installed. Checking:

- whether the data is received;
- whether there is no duplication;
- whether the events are correct;
- whether the consent mode works;
- whether the data can be linked to a business outcome.

Basic principle

> ***Without reliable measurement, there is no way to know if the actions taken are moving the company forward or backward.***

Level 7 — SEO, AIO, GEO & Website Optimization

Target

Improving the technical performance, discoverability, understanding and conversion efficiency of the site.

With an existing site

Executing the plan from Level 5:

- technical SEO;
- on-page SEO;
- internal linking;
- URL structure;
- metadata;
- schema markup;
- content optimization;
- PageSpeed;
- mobile optimization;
- accessibility;
- UX improvements;
- conversion improvements;
- indexing;
- canonicalization;
- sitemap;
- robots;
- structured data.

On a new site

Verification and certification is carried out:

- compliance with the task;
- technical serviceability;
- responsive design;
- performance;
- analytics;

- conversion tracking;
- SEO readiness;
- AIO/GEO readiness;
- structured data;
- content accuracy;
- security;
- accessibility;
- forms and integrations.

AIO and GEO

The content and structure must be understandable not only by traditional search engines, but also by AI systems.

This includes:

- clear definitions;
- structured answers;
- reliable author sources;
- entity consistency;
- schema;
- FAQ;
- expert content;
- evidence;
- relevance;
- quotable statements.

Results

- optimized or certified site;
- SEO/AIO/GEO checklist;
- resolved issues report;
- keyword and topic map;
- baseline ranking report;
- ongoing optimization backlog.

PHASE IV — ORGANIC GROWTH AND AUDIENCE CAPTURE

Level 8 — Content Marketing & Organic Growth Engine

Target

Turning the site into an ever-expanding base of useful content that drives traffic and builds authority.

Six Month Content Strategy

The strategy uses:

- products;
- markets;
- persons;
- customer journey;
- user questions;
- problems;
- objections;
- competition;
- keywords;
- SEO/AIO/GEO data;
- strategic goals.

It defines:

- content pillars;
- topic clusters;
- keywords;
- search intent;
- target person;
- stage of the funnel;
- content type;
- CTA;
- internal links;
- publishing schedule;
- KPI;
- six-month calendar.

Content Production Process

Topic → brief → research → creation → images → formatting → SEO/AIO/GEO check → fact check → approval → publish → measure → update

Article Generation Agent

Automatic mode

The agent:

- chooses a topic;
- creates content;
- uses the company context;
- generate images;
- format;
- adds metadata;

- makes internal connections;
- evaluates quality;
- publish;
- track results.

Hybrid mode

An agent prepares, for example, 3–5 materials per day, and a person:

- checks;
- edit;
- approves;
- rejects;
- allows publishing.

The hybrid model is the recommended entry standard.

Main indicators

- indexed pages;
- impressions;
- organic clicks;
- keyword visibility;
- engaged sessions;
- leads;
- assisted conversions;
- backlinks;
- AI mentions;
- content freshness.

Basic principle

> *Automation is not judged by the number of posts, but by quality traffic, trust, generated contacts and business results.*

Level 9 — Visitor Journey, Conversion & First-Party Data

Target

Converting the anonymous visitor into a recognizable user, contact, lead or customer.

Mechanisms

- lead magnets;
- e-books;
- manuals;
- templates;
- newsletter forms;
- quizzes;
- self-assessment tools;
- calculators;
- configurators;
- feedback forms;
- demo requests;

- booking;
- AI assistant;
- push notifications;
- registrations;
- user profiles;
- preference centers.

Public AI Assistant

This AI is different from Company AI.

It only uses information approved for public release.

You can:

- answers questions;
- recommends a product;
- explains services;
- qualifies the user;
- recommends content;
- collect contact after consent;
- book an appointment;
- refers to an employee.

First-Party Data

Data is collected such as:

- expressed interest;
- reviewed products;
- downloaded materials;
- quiz answers;
- questions asked;
- preferences;
- status in the funnel;
- communication consent.

Feedback

User data may reveal:

- new questions;
- new objections;
- incomplete product descriptions;
- problems on the site;
- missing topics;
- new segments.

After verification, this knowledge can be added to SST.

Level 10 — Social Media Presence

Target

Defining and building an adequate presence in social networks.

If there are no profiles

Based on the persons are determined:

- which networks are relevant;
- why are they used;
- what is the role of each network;
- what formats are suitable;
- what resources are needed;
- which networks will not be used.

If there are profiles

An analysis is performed:

- relevance;
- positioning;
- visual identity;
- description;
- links;
- audience quality;
- engagement;
- content quality;
- traffic;
- business result;
- need to preserve, restructure or close.

Results

- Social Channel Selection;
- Profile Audit;
- Profile Optimization Plan;
- Channel Roles;
- Brand Consistency Checklist.

Level 11 — Social Content Strategy & Automation

Target

Create a steady stream of social media content based on content already created and approved.

Content Repurposing

An article can be transformed into:

- LinkedIn post;
- Facebook post;
- Instagram carousel;
- short video;
- FAQ publication;
- quote;
- infographic;
- thread;
- newsletter section;
- video script;

- community discussion.

Automatic model

The agent:

- discovers a new article;
- extracts the main ideas;
- adapt the content;
- generate visions;
- creates scenarios;
- adds links;
- plans publications;
- publish;
- track results.

Hybrid model

A person checks:

- facts;
- tone;
- visual identity;
- context;
- sensitive statements;
- final publication.

Principle

Content is not mechanically copied across all networks. The same idea is adapted to the native format of the particular platform.

Level 12 — Email Marketing & Nurture Automation

Target

Building systematic follow-up communication with users and leads.

Basic automations

- welcome email;
- registration +1 day;
- +3 days;
- +5 days;
- +7 days;
- +10 days;
- lead magnet delivery;
- onboarding sequence;
- educational sequence;
- product education;
- follow-up;
- abandoned action;
- newsletter;
- reactivation;

- event-based communication.

Types of triggers

Temporal

- after registration;
- after a certain period;
- before an event;
- after expiration of service.

Behavioral

- open email;
- clicked link;
- visited page;
- downloaded material;
- completed quiz;
- registration started;
- inquiry sent.

Segmentation

- product;
- interest;
- persona;
- market;
- behavior;
- lifecycle stage;
- client or prospect;
- engagement level.

Indicators

- delivery rate;
- open rate;
- click rate;
- reply rate;
- unsubscribe rate;
- conversion rate;
- revenue per subscriber;
- lead progression.

CHECKPOINT — DIGITAL FOUNDATION COMPLETE

To date, the company has:

- confirmed company knowledge;
- Company AI;
- defined products and markets;
- persons;
- positioning;
- site;
- analytics;
- SEO/AIO/GEO basis;
- content engine;
- mechanisms for capturing visitors;
- social presence;
- automated organic content;
- email nurture system.

It is a sustainable digital foundation that can operate without a constant large advertising budget.

PHASE V — ACTIVE AUDIENCE ATTRACTION

Level 13 — Google Ads & Paid Search

Target

Quickly capture existing demand and reach users with clear intent.

Google Search

Suitable for people who already:

- aware of the problem;
- looking for a solution;
- compare suppliers;
- looking for a product;
- looking for a price;
- want to take action.

Search Ads typically work in the middle and bottom of the funnel, not as a pure awareness channel.

Other Google formats

- YouTube;
- Display;
- remarketing;
- video campaigns;
- Performance Max;
- Demand Gen.

They can also be used for:

- awareness;
- reach;
- reminder;
- validation;
- retargeting.

Prerequisites

No paid advertising is launched without:

- conversion tracking;
- a clear offer;
- landing page;
- form or other mechanism;
- CRM or lead tracking;
- follow-up process;
- budget;
- KPI;
- stop-loss rules.

Main effect

Google Ads can bring traffic almost immediately.

But:

When the advertising budget is stopped, the paid stream usually stops as well.

Additional value

The data may show:

- which keywords convert;
- which messages work;
- which offer is effective;
- what is the acquisition price;
- which landing pages work.

This information feeds back into SEO, content and product strategy.

Level 14 — Paid Social & Attention Engine

Target

Actively reach people who are not looking for the product and may not yet be aware of the problem.

Creative Bank

An initial bank of approximately 12–15 short videos of 30–60 seconds in length is created.

The videos cover different approaches:

- problem recognition;
- a common mistake;
- unexpected fact;
- myth;
- advice;
- demonstration;
- case study;
- before/after;
- objection;
- social proof;
- personal position;
- hook to longer content.

Constant test cycle

Create → launch → measure → pick winners → variations → replace out of stock

The same videos are not expected to run indefinitely. Creative fatigue is monitored.

User path

Short video → profile → longer content → site or landing page → lead magnet / quiz / AI assistant → contact → email nurture → sale

Authoritative content

The profile must contain:

- longer videos;
- expert publications;
- case studies;

- evidence;
- demonstrations;
- answers to objections;
- customer stories.

Basic principle

> *Paid advertising does not fix a weak foundation. It increases the speed at which money is made or lost through it.*

PHASE VI — OPERATIONAL DIGITALIZATION AND AI

Level 15 — Operational Discovery & Process Mapping

Target

A thorough understanding of how the company actually works.

The officially described process and the actually implemented process often differ. Therefore, the information is collected directly from the people doing the work.

Range

- departments;
- roles;
- responsibilities;
- repetitive activities;
- incoming data;
- output results;
- used systems;
- used files;
- communication channels;
- approvals;
- dependencies;
- exceptions;
- deadlines;
- problems;
- manual operations.

Methods

- interviews;
- monitoring;
- shadowing;
- analysis of systems;
- analysis of documents;
- workshops;
- process walkthrough;
- analysis of real cases;
- time tracking.

Each process is described

- name;
- purpose;
- trigger;
- entrance;
- steps;
- roles;
- systems;
- rules;
- exceptions;
- output;
- customer;

- term;
- KPI;
- risks;
- problems.

Results

- Process Inventory;
- As-Is Process Maps;
- Role and Responsibility Map;
- Systems Map;
- Data Flow Map;
- Pain Points Register;
- Automation Opportunity Register.

Validation Gate

Each process is confirmed by:

- contractor;
- process owner;
- supervisor when necessary.

Level 16 — SOP Development & Process Optimization

Target

Transform informal ways of working into clear, repeatable and manageable procedures.

Critical principle

> *Before digitizing or automating a process, we need to check if the process is necessary and properly organized.*

Otherwise, inefficiency is automated.

Analysis

For each step it is checked:

- does it have value;
- is it mandatory;
- can it be removed;
- does it duplicate other work;
- can it be merged;
- does it require approval;
- does it create a delay;
- does it create errors;
- can it be standardized.

SOP structure

Each procedure contains:

- purpose;

- scope;
- roles;
- prerequisites;
- input data;
- successive steps;
- decision points;
- exceptions;
- deadlines;
- control checks;
- output;
- KPI;
- risks;
- escalation path;
- versions;
- owner.

Results

- To-Be Process Maps;
- SOP Library;
- RACI Matrix;
- Approval Matrix;
- Exception Handling Rules;
- Process KPI Framework;
- Training Materials.

Feedback to SST

Approved procedures are included in Level 2 and made available to Company AI.

Level 17 — Process Digitization & System Integration

Target

Transfer of validated procedures from manual, oral, paper or offline forms to digital systems.

Main activities

- choice of systems;
- development of internal modules;
- digital forms;
- centralized registers;
- roles and rights;
- workflow systems;
- task management;
- document management;
- approvals;
- notifications;
- integrations;
- API connections;
- dashboards;
- audit logs.

Approach

For each process is determined:

- which part remains human;
- which part is digitized;
- which system is the source of record;
- what data is created;
- what data is used;
- how systems exchange information;
- what happens in the event of an error;
- who is responsible.

Results

- Digital Process Architecture;
- System Requirements;
- Integration Map;
- User Roles;
- Data Model;
- Digital Workflows;
- Acceptance Tests;
- Migration Plan;
- Training Plan.

Level 18 — Automation & AI Agents

Target

Automating the repeatable parts of the already optimized and digitized processes and deploying AI agents for specific activities.

Automation Assessment

Each activity is evaluated by:

- frequency;
- time;
- price;
- repeatability;
- complexity;
- risk;
- need for human judgement;
- quality of input data;
- possible financial effect.

Types of automation

Rule-Based Automation

Suitable for:

- moving data;
- notifications;
- task creation;

- approvals;
- statuses;
- reminders;
- documents;
- synchronization.

AI-Assisted Automation

AI prepares a result, and a human approves.

Suitable for:

- analysis;
- summary;
- classification;
- documents;
- suggestions;
- content;
- customer communication.

Autonomous AI Agents

The agent performs an entire process within clear rights and restrictions.

Only suitable when:

- the process is stable;
- the data is reliable;
- the risk is controlled;
- there is logging;
- there is human escalation;
- there are stop conditions;
- rollback is possible.

Sample AI Agents

- document intake agent;
- curation agent;
- content agent;
- social media agent;
- sales qualification agent;
- proposal generation agent;
- customer support agent;
- invoice processing agent;
- reporting agent;
- process monitoring agent;
- quality assurance agent;
- onboarding agent.

Human-in-the-Loop

For each automation is determined:

- what AI can do on its own;
- what requires approval;
- when it escalates;
- who reviews;
- how the decision is recorded;

- how to stop the system.

Measuring the effect

- time saved;
- reduced cost;
- fewer errors;
- shorter cycle time;
- higher capacity;
- better quality;
- higher incomes;
- better customer satisfaction.

Basic principle

> *AI should not be implemented as an end in itself. It must improve a specific measurable process.*

PHASE VII — SALES CRM AND REVENUE MANAGEMENT

Level 19 — Sales CRM System

Target

Create a centralized system for managing leads, opportunities, communication and sales.

Lead sources

- site;
- forms;
- AI assistant;
- email;
- social media;
- Google Ads;
- paid social;
- partners;
- recommendations;
- events;
- telephone calls;
- manual addition.

Lead Record

Each lead must have:

- name;
- company;
- contacts;
- source;
- product;
- need;
- interest;
- budget, when known;
- term;
- owner;
- history;
- status;
- score;
- consent;
- next action.

Pipeline

Example stages:

1. New Lead;
2. Contacted;
3. Qualified;
4. Discovery;
5. Proposal;

6. Negotiation;
7. Won;
8. Lost;
9. Nurture.

The stages are adapted according to the business.

Sales Process

They are determined:

- distribution rules;
- first reaction time;
- qualification criteria;
- follow-up cadence;
- mandatory fields;
- offer rules;
- discount approval;
- lost reason;
- handoff to onboarding.

AI in sales

AI can:

- qualify;
- summarizes the communication;
- suggests next action;
- prepares an offer;
- creates follow-up;
- analyze pipeline;
- signals delayed transactions;
- predicts probability;
- detects objections.

KPI

- response time;
- lead-to-qualified rate;
- qualified-to-proposal rate;
- proposal-to-win rate;
- sales cycle;
- average deal value;
- win rate;
- CAC;
- revenue by source;
- pipeline coverage;
- lost reasons.

Feedback

Sales data should enrich:

- the products;
- pricing;
- the persons;

- content strategy;
- the advertisement;
- customer onboarding;
- SST.

PHASE VIII — CUSTOMER LIFECYCLE

Level 20 — Customer Onboarding

Target

Smoothly transitioning the customer from sale to successful use of the product or service.

Handoff

When a sale is closed, the following are transferred to onboarding:

- agreed conditions;
- objectives;
- expectations;
- product;
- deadlines;
- contacts;
- specific requirements;
- risks;
- promises from the sales process.

Onboarding Process

It may include:

- welcome communication;
- collection of information;
- account setup;
- implementation;
- training;
- milestone plan;
- kickoff meeting;
- documentation;
- progress tracking;
- acceptance;
- go-live.

AI and Automation

- onboarding assistant;
- automatic instructions;
- task creation;
- reminders;
- personalized learning paths;
- progress monitoring;
- risk alerts.

KPI

- time to first value;
- onboarding completion;
- implementation time;
- number of blockers;
- customer effort;

- early satisfaction;
- early churn.

Level 21 — Customer Support

Target

Creating a reliable, measurable and scalable service system.

Channels

- help center;
- email;
- ticketing;
- chat;
- AI assistant;
- telephone;
- social media;
- in-product support.

Knowledge Base

The Support system must use:

- public product information;
- FAQ;
- troubleshooting;
- procedures;
- known issues;
- escalation rules.

Support AI

You can:

- answers frequently asked questions;
- classify requests;
- determines priority;
- offers a solution;
- gathers the necessary context;
- transfer to an employee;
- summarizes the case;
- creates a knowledge article.

KPI

- first response time;
- resolution time;
- first contact resolution;
- backlog;
- escalation rate;
- customer satisfaction;
- repeated issues;
- cost per ticket.

Feedback

Recurring issues refer to:

- product development;
- onboarding;
- procedures;
- website;
- content;
- sales promises;
- SST.

Level 22 — Retention, Expansion & Customer Success

Target

Increasing the duration and value of customer relationships.

Main activities

- customer health monitoring;
- usage tracking;
- satisfaction surveys;
- churn risk detection;
- renewal processes;
- reactivation;
- upsell;
- cross-sell;
- loyalty;
- customer education;
- success reviews;
- advocacy.

Customer Health Score

It may include:

- activity;
- use of key functions;
- support problems;
- payments;
- engagement;
- results;
- satisfaction;
- communication history.

Automations

- renewal reminders;
- inactive user flows;
- churn alerts;
- upsell triggers;
- customer milestone messages;
- satisfaction surveys;

- referral requests;
- review requests.

KPI

- retention rate;
- churn rate;
- repeat purchase rate;
- renewal rate;
- expansion revenue;
- LTV;
- NPS;
- customer satisfaction;
- referral rate.

ADDITIONAL MODULES

The following items can be activated according to the business, without necessarily being basic levels.

Affiliate, Partnership & Influencer Programs

- affiliate structure;
- reseller model;
- strategic partners;
- referral fees;
- influencer cooperation;
- tracking;
- attribution;
- partner onboarding;
- partner portal.

Public Relations & Authority

- press kit;
- press releases;
- media outreach;
- expert commentary;
- interviews;
- external publications;
- authority building;
- off-page SEO.

Community Building

- own group or platform;
- engagement rituals;
- events;
- discussions;
- user-generated content;
- ambassadors;
- referral challenges.

Reputation, Reviews & Referrals

- automatic feedback request;
- management of public profiles;
- responses to negative feedback;
- testimonials;
- case studies;
- referral program.

Conversion Rate Optimization

- A/B tests;
- landing pages;
- CTA;
- offers;
- forms;

- pricing presentation;
- funnel optimization.

Video Content Capability

Video content is seen as a common enterprise capability used by:

- blog;
- social media;
- advertising;
- sales;
- onboarding;
- support;
- community;
- PR.

TRANSVERSE MANAGEMENT LAYERS

The following items apply to all levels.

Data Governance

- property;
- quality;
- access;
- versions;
- lifecycle;
- privacy;
- security.

Human Review

Critical decisions, data and automations must have a clearly defined human responsibility.

Change Management

Implementation includes:

- communication;
- training;
- acceptance;
- support;
- feedback;
- adaptation of roles;
- usage measurement.

Security & Compliance

- role-based access;
- audit logs;
- data retention;
- backups;
- consent;
- privacy;
- incident response;
- vendor assessment.

Measurement

Each level must have:

- baseline;
- target;
- KPI;
- owner;
- reporting cadence;
- corrective actions.

Feedback Loops

A linear model does not mean a one-way system.

The results of the above levels may indicate a need for:

- updating a product;
- change of person;
- new procedure;
- new content;
- change of pricing;
- updating the SST;
- AI agent fix.

However, every change goes back through the review and validation process.

ULTIMATE METHODOLOGY ARCHITECTURE

Phase I — Information base

1. Company Inbox
2. Single Source of Truth
3. Company AI

Phase II — Business and strategic clarity

4. Business, Product & Market Intelligence

Phase III — Digital Foundation

5. Website & Basic Digital Presence
6. Analytics, Tracking & Measurement
7. SEO, AIO, GEO & Website Optimization

Phase IV — Organic Growth and Audience Capture

8. Content Marketing & Organic Growth
9. Visitor Journey, Conversion & First-Party Data
10. Social Media Presence
11. Social Content Strategy & Automation
12. Email Marketing & Nurture

Phase V — Active attraction

13. Google Ads & Paid Search
14. Paid Social & Attention Engine

Phase VI — Operating System

15. Operational Discovery & Process Mapping
16. SOP Development & Process Optimization
17. Process Digitization & System Integration
18. Automation & AI Agents

Phase VII — Sales

19. Sales CRM System

Phase VIII — Customer Lifecycle

20. Customer Onboarding
21. Customer Support
22. Retention, Expansion & Customer Success

BASIC FORMULA

We don't build a site before we understand the business.

We don't drive traffic until we can measure and convert it.

We don't automate a process before we understand and optimize it.

We don't deploy AI until we have reliable data, clear rules, and human oversight.

We don't scale sales until we have a system for successful customer service and retention.

NEXT STAGE OF DEVELOPMENT

The next version of the methodology should turn it into a practically executable framework in which for each level there are:

- specific checklist;
- templates;
- roles and responsibilities;
- recommended terms;
- maturity score;
- risk assessment;
- passing criteria;
- sample deliverables;
- KPI;
- automated tasks and agents in Fopos.