FSD-1.A-CS-046 LSG (Let's Get Started) Process to HubSpot

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Document Overview

Feature Name	Migrate Customer Success LSG Process to HubSpot
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Linked Feature Ticket	[Migrate LSG Process to HubSpot]
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Business Objective & User Need

Problem Statement: Current process is inefficient, requiring multi-steps and usage of external applications. There are also no action logs, historical updates, nor insights tracking.

Business Goal: Increase operational efficiency from 3 hours to an improvement of 80% efficiency. Provide instant customer insights and increase customer satisfaction by 50%.

Target Users: Customer Success Leads, Customer Success Teams, Accredited Business (ABs)/Customers.

Functional Overview

High-Level Description: The system should extract customer benefits-related data from Blue and migrate the benefits engagement and follow-up process from both Blue and Monday.com into HubSpot. HubSpot will serve as the centralized platform for rep assignment, email automation, call tracking, scheduling, and reporting. All interactions—including pre- and post-accreditation workflows—will be handled in HubSpot, and updates will sync back to Blue in real time.

Key Features & Functional Components:

Feature	Description	Priority
Data Extraction	HubSpot, via Chrome extension or API-based middleware, scrapes or pulls from Blue SQL views every 24 hours to extract business and benefits-related data	High
Data Processing / Sync	HubSpot performs **bi-directional live sync** with Blue (if supported), ensuring changes in rep assignment, call outcomes, or accreditation status update both systems	High
User Logs	System captures timestamped logs for key actions (assignment, email sends, call activity, status changes); logs stored in both ISO 8601 and Unix formats	High
Rep Assignment Logic	System auto-assigns Benefits Reps using zip code mapping (default), round-robin logic, hybrid, region-based + round-robin, and custom (future enhancement settings)	High
Email Automation	HubSpot sends Emails 1–3 with proper triggers, personalization, and tracking; fallback email auto-sends after failed call attempts	High
Call Scheduling & Logging	HubSpot booking links are embedded in email and customer website; system tracks how calls were booked and logs all call attempts and outcomes	High
Queue Dashboard	Benefits Rep dashboard displays real-time business status, scheduled calls, follow-up actions, and call origin	Medium
Fallback Automation	After max call attempts, system sends fallback email and reoffers calendar link; tracked in CRM	High
Calendar Booking System	HubSpot calendar replaces Microsoft Bookings; supports time zone-aware invites and form prefill with company metadata	High
Breeze AI Email Drafts	Auto-generates contextual email content (follow-up, fallback, renewal) based on call notes and business metadata	High

System Workflow & UI/UX

- **Workflow Diagram:** Technical Documents & Resource Materials - Customer Success Process Flows
- **User Interaction Steps:**

Action	AS-IS	TO-BE
Rep Assignment	BD or Benefits Rep manually looks up caseload links on Monday.com based on region/zip code	Auto-assignment of Benefits/Caseload Rep using zip code logic; future option for round-robin
Trigger – Process Start	Application manually reviewed and approved	At BID creation and rep assignment is auto initiated and timestamped
Email 1: Accreditation Approved	Sent via Insights from BD Rep or fallback	Sent via HubSpot with tracking, same sender logic
Email 2: CEO Welcome Message	Sent via Insights upon payment	Sent via HubSpot using same trigger and tracked
Email 3: Benefits Are Waiting	Sent via Streampage 3 days after payment—even if calls are scheduled	Sent via HubSpot only if no call is scheduled or completed; form prefilled with business info
Calendar Booking	Microsoft Bookings used; minimal data collected	HubSpot Calendar Booking with time zone support, rep/business availability, and form prefilled with company metadata
Rep Queue Management	Manual Outlook comparisons and downloaded reports	Centralized dashboard showing real-time business status and call queue (Kanban-style)
Alternate Call Scheduling (Pre-Approval)	BD or Benefits Rep may schedule call before approval using Outlook	System supports pre-approval booking and logs business status at booking and at time of call
Call Scheduling Source Tracking	Not tracked	Booking origin logged (e.g., BD Rep, Benefits Rep, Email #3, Self-Service Portal) for every call scheduled
Call Logs	Not consistently stored; not used in decision-making	Disposition, rep, and timestamps stored for each call attempt and outcome
Post-Call Follow-Up	Reps manually draft notes, schedule next steps in Blue	AI-assisted notes, automated email follow-ups, and next call scheduling via HubSpot
Outbound Calling Platform	PowerDialer (standalone, disconnected from HubSpot)	AirCall fully integrated into HubSpot, with auto-logging, click-to-call, and VoIP support
Timestamps	Not standardized	Both ISO 8601 (for frontend) and Unix (backend) timestamps stored system-wide
System Automation	Fragmented across Blue, Monday, Insights, Streampage	Unified workflow within HubSpot + AirCall, fully automated with smart triggers and insights

Follow-Up Email Generation	Reps manually write follow-up, fallback, and renewal emails from scratch using copy/paste or templates	Breeze AI assists by generating contextual email drafts based on call logs and metadata, which reps can edit and send via HubSpot

Functional Requirements

FSD-001: Auto-Assign Benefits Rep Based on Zip Code or Round Robin

Functional Summary: Automatically assigns a Benefits Rep to a business (BID, approved, paid) using zip code mapping or a future round-robin configuration, ensuring equitable caseload distribution. The system continuously checks for unassigned records (CS = null) and auto-assigns via a watcher process.

Related User Story: US-001: As a CSM, I want to be auto-assigned to businesses to begin onboarding quickly and reduce manual assignment errors.

Priority: High

Trigger:

- **Primary Trigger:** `BID create date = today AND CS Rep = null`
- **Watcher Trigger:** CS Assignment Watcher runs continuously or on relevant BID/application update events to detect unassigned records

System Logic:

On BID creation or status update event:

- System checks if `CS_Rep_ID` is null
- If null, it proceeds with assignment logic
- Assignment logic is determined by the selected Assignment Mode, configured by the CS Admin.
- CS Assignment Watcher continues checking unassigned businesses to ensure no one is missed
- All assignments are timestamped and stored

Assignment Mode Logic:

- **Zip Code (default):**
  - Matches `Business_Zip_Code` to `Benefits_Rep_ID` mapping table
  - Assigns `Benefits_Rep_Name` and is only performed if rep is marked 'Available'.
  - Logs method as `Assignment_Mode = zip`
- **Round Robin Mode (future enhancement):**
  - System calculates current caseload per rep
  - Assigns to rep with the fewest assigned new BIDs. Tie-breaker: rep with earliest `last_assigned_timestamp`
  - Reps re-enter rotation if prior calls are completed efficiently
  - Logs method as `Assignment_Mode = round_robin`
- **Zip Code to Round Robin Fallback (future enhancement):**
  - Assigns by zip code first using `Business_Zip_Code` to `Benefits_Rep_ID` mapping table
  - If all reps mapped to their respective zip codes are at or above caseload threshold, fallback to round robin.
  - Logs method as `Assignment_Mode = zip_then_rr`
- **Region-Based + Shared Round Robin (future enhancement):**
  - Rep is assigned one or more primary regions (i.e., AK, HI) up to a defined caseload capacity. Remaining bandwidth qualifies them for participation in general round robin if enabled by CS Admin.
  - CS Admin can select whether region-based rep(s) should participate in round-robin.
  - Reps without regions assigned will be in round-robin method.
  - Logs method as `Assignment_Mode = region_rr`
- **Custom (future enhancement):**
  - Logic is based on one or more keyword tag matching

    - Logic is based on Sales Rep Alignment (BD-to-CS handoff)
    - Logic is based on CS to TOB or LOB specialty.
    - Rule builder defines thresholds, filters, and mappings.
    - Logs method as `Assignment_Mode= custom`
- **Manual (future enhancement):**
    - Admin manually selects a rep from the directory. Reason field and override flag are required.
    - Logs method as `Assignment_Mode= manual`

Configuration Flag:

- `Assignment_Mode= 'zip' | 'round_robin' | 'zip_then_rr' | 'region_rr' | 'custom' | 'manual'` stored per record
- UI auto-assignment toggle and configuration available for Admins (optional future enhancement)

Caseload Balancing Formula:

```
EligibleReps = All reps where Rep_Status= 'Available'

For each eligible rep:
 Caseload= COUNT(Business WHERE BID_ID IS NOT NULL AND CS_Assigned= 'rep_id')

Assignment:
 Assign rep with MIN(Caseload)
 TIE-BREAKER: Earliest 'Last_Assigned_Timestamp'
```

UI Option (Optional Future Enhancement):

- A configurable **Assignment Mode dropdown** may be added to the **admin or business settings UI**
    - Options: `Assignment_Mode= 'zip' | 'round_robin' | 'zip_then_rr' | 'region_rr' | 'custom' | 'manual'`
    - Visible to **authorized admins only**
- **Assignment dropdown selected = Zip Code**
    - A view/edit option of rep names to zip code mapping. Clicking or tapping the edit icon allows a pop-up editable table. A save trigger will save latest mapping and close the pop-up.
- **Assignment dropdown selected = Round Robin**
    - Option to enter a max threshold count for all. Numeric only field (NUM(30)).
    - View of current round-robin order with last assignment date and time.
- **Assignment dropdown selected = Zip Code then Round Robin**
    - Define max caseload per rep with ability to mass populate to all. Numeric only field (NUM(30)).
- **Assignment dropdown selected = Region and Round Robin Overflow**
    - Define primary region(s) per rep (multi-select)
    - Set regional caseload cap per rep. Numeric only field (NUM(30)).
    - Toggle: Enable shared round robin participation after region cap is reached (Yes/No)
- **Assignment dropdown selected = Custom**
    - Custom Rule Type: Manual | Keyword Tag | Sales Aligned | Fixed Pair
    - Rule builder: Select filters, tags, thresholds
    - Save custom rule set as template (toggle)
- **Assignment dropdown selected = Manual**
    - Rep lookup dropdown (filterable by region or name)
    - Required reason text field
    - Optional flag: Mark as override (Yes/No)

Edge Cases:

- If no match found in zip code logic (`Zip Mode`): `Assignment_Status= Manual_Review`, alert Admin
- If all reps are unavailable in round robin (`Round Robin Mode`): Hold in pending queue and notify Admin
- If region cap exceeded, rep is excluded from region auto-pool but can still receive round-robin assignments if shared capacity is enabled.

Data Stored:

- `Assigned_Rep_ID`
- `Assignment_Mode`
- `Assignment_Timestamp`(ISO 8601 + Unix)
- `Last_Assigned_Timestamp`(rep level)
- `Assignment_Status`

Assumptions:

- Assignment Mode is stored in system config and editable by CS Admin.
- The Zip Code and Region Mapping Tables are system-accessible and regularly updated
- Rep caseloads, availability status, and performance metrics are stored and refreshed daily
- CS Assignment Watcher runs on a timed loop or is triggered on record updates
- BID creation always follows traffic file status conversion.
- Only BIDs are included in caseload metrics (traffic files are excluded)
- The UI option is an enhancement and not required at initial rollout
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-002: Store Datetime and Timestamp

Functional Summary: Captures and stores ISO 8601 and Unix-formatted timestamps for major actions across the system, enabling reliable logging, sorting, and system syncing.

Related User Story: US-002: As a system admin, I want all events timestamped for audit and sync purposes.

Priority: High

Trigger:

- At each major system event (e.g., accreditation approval, rep assignment, email send, call log creation, calendar scheduling)

System Logic:

- Store timestamps in two formats:
  - **ISO 8601 format** for front-end presentation and UI logic (e.g., `2025-04-15T15:00:00Z`)
  - **Unix timestamp (in seconds)** for backend processing and scheduling logic (e.g., `1713193200`)

Use Cases:

- Enables accurate scheduling logic (e.g., trigger email 3 days post-payment)
- Supports time zone-aware UI rendering and internal reporting

> *(e.g., calendar bookings should display in **each end-user's local time zone**)*

Data Stored:

- Apply to all system-tracked actions: application status change, rep assignment, calendar booking, and email dispatch
- Store both timestamp formats in associated tables/objects

Assumptions:

- All systems consuming date/timestamp data are capable of handling both ISO 8601 and Unix formats
- Time zone offset logic is supported in the UI layer or middleware
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-003: Trigger and Send Accreditation Approval Email

Functional Summary: Triggers and sends the Accreditation Approved email from HubSpot immediately upon application approval.

Related User Story: US-003: As a CSM, I want the business to receive a confirmation email after approval.

Priority: High

Trigger:

When `Application_Status = Approved`

System Logic:

- System sends Email #1 using **HubSpot Email Service**.
- **Sender Logic**:
  - If a BD Rep is assigned, use their email.
  - If no BD Rep is assigned, use fallback: `account.management@thebbb.org`

Email Content:

- **Subject:** *Your BBB Accreditation is Approved*
- **From:** email of BD Rep assigned, if not, `account.management@thebbb.org`
- **Body:** Pre-approved HTML template with personalization fields (e.g., business name)
- **Tracking:** Enable open rate, click rate, and delivery status via HubSpot analytics

Data Stored:

- Log email send timestamp using **ISO 8601** and **Unix** format
- Log sender and recipient metadata
- Associate email activity with business record

Assumptions:

- HubSpot email templates are pre-approved and available in the system
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

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FSD-004: Trigger and Send CEO Welcome Email

Functional Summary: Sends a personalized welcome message from the CEO upon payment confirmation, enhancing engagement.

Related User Story: US-004: As a business, I want a welcome message to confirm my accreditation.

Priority: High

Trigger:

When `Application_Status = Approved` **AND** `Payment_Status = Paid`

System Logic:

- HubSpot sends Email #2 automatically from static sender `t.andrew@thebbb.org`

Email Content:

- **Subject:** *Welcome to BBB Accreditation – A Message from Our CEO*
- **From:** t.andrew@thebbb.org (Tyler Andrew, CEO)
- **Body:** Pre-approved CEO welcome message with personalization fields (e.g., first name, business name)
- **Tracking:** Open and click rates logged in HubSpot insights

Data Stored:

- Email sent timestamp (ISO 8601 and Unix)
- Associated business ID and recipient email

Assumptions:

- CEO email template is preloaded in HubSpot
- Suppression logic prevents duplicate sends
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

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FSD-005: Validate Call Activity Before Sending Benefits Schedule A Call Email

Functional Summary: Validates whether a call is scheduled or logged before sending the 'Benefits Are Waiting' email to prevent duplicate outreach.

Related User Story: US-005: As a CSM, I want to avoid sending call invites if a call is already scheduled.

Priority: High

Trigger:

3 days after `Payment_Date`

Validation Logic:

The system will check:

- `Scheduled_Call_Date` (i.e., calendar booking)
- `Call_Logs` (i.e., completed calls)

> ***Email should be sent only if BOTH of the following are true:***

  - `Scheduled_Call_Date IS NULL`
  - `Call_Logs DO NOT CONTAIN a completed call`

> ***Email should be suppressed if EITHER of the following is true:***

  - A scheduled call exists
  - A completed call has already taken place, where completed means benefits rep spoke to the business.

Clarification:

- Reps may call without scheduling — `Scheduled_Call_Date` may be `NULL`, but a call log may still exist.
- Therefore, both indicators must be empty for the email to be triggered.
- Reps may schedule or initiate calls prior to business accreditation.
- Therefore, booking or call completion at any status should suppress the email.

Email Action and Content:

If **no call is booked AND no completed call exists**, send Email #3:

- **Via:** HubSpot
- **Subject:** *Your BBB Benefits Are Waiting – Here's What to Do*
- **From:** Assigned Benefits Rep
- **Body:** Pre-approved benefits walkthrough guide: Schedule a call, book a webinar and create a log in account
- **Tracking:** Enable open rate, click rate, and delivery status via HubSpot analytics
- Include a link to book a webinar
- Include link to launch HubSpot Calendar Booking Form (see FSD-006)

Form Fields (from calendar link): system to pre-populate with as much information as possible

- Business contact name
- Business name
- Assigned Rep's name
- Accreditation Approval Date
- Company number of years in business

- Primary reason they got accredited,
- What value are they hoping to gain from BBB (open field)

Edge Case Handling:

- If data is inconsistent (e.g., no booking, but call log exists), suppress the email and flag for manual review
- Store a suppression reason (e.g., `Call_Already_Made`, `Call_Already_Booked`)

Data Stored:

- Timestamp of evaluation and email send
- Boolean flags:
  - `Call_Booked= True/False`
  - `Call_Completed= True/False`
- Suppression reason, if applicable

Assumptions:

- `Call_Logs` must have a defined status field to indicate completion (e.g., `Held`, `Completed`, `Connected`)
- `Scheduled_Call_Date` uses a valid datetime format and is null if unscheduled
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

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FSD-006: Migrate Calendar Booking System from Microsoft Bookings to HubSpot

Functional Summary: Migrates calendar booking from Microsoft Bookings to HubSpot, supporting time zone-aware booking with prefilled business details.

Related User Story:

US-006: As a business, I want to easily schedule calls with my rep using an embedded form.

US-013: As a business user or Benefits Rep, I want meeting times to appear in **my local timezone**, so I can be sure of when to attend the scheduled call.

Priority: High

Trigger:

When a business completes payment and reaches **+3 days post-payment**, they are sent **Email #3** prompting them to book a call with their Benefits Rep.

- Additionally, the assigned Benefits Rep will check their queue of **unbooked calls** for businesses older than 3 days since payment.
- BD Reps and Benefits Reps may also book calls with businesses prior to approval (Traffic or BID status).

System Logic:

- Replace Microsoft Bookings with **HubSpot Calendar Booking** functionality
- Calendar link is embedded in **Email #3** and also accessible via rep dashboard or internal Kanban-style queue
- When a business books an appointment:
  - Calendar invitation is automatically sent to both parties
  - Timezone is adjusted per user's local setting (Rep and Business may differ)
  - Rep and business availability is cross-checked to display mutual open times
  - Status at time of booking is logged (Traffic, BID, AB)
  - Rep role (BD or Benefits) is stored with each booking

Calendar Booking Form Requirements (Launched from Email #3): The form should collect and pre-fill where possible:

- Business contact name
- Business name
- Assigned Rep's name
- Accreditation Approval Date
- Company number of years in business
- Primary reason they got accredited
- What value are they hoping to gain from BBB? (open field)
- Preferred topics or concerns (optional)
- Auto-populate internal tags or categories for segmentation

UI/UX Notes: see UIUXD 1.A-AM-047 Account Management Workflow Board

- Each business should appear in the Rep's **daily queue** if:
  - It has been > 3 days since payment
  - It has not booked a call yet
- Businesses with **no rep assigned** fall into a separate **Backlog bucket**
- Visual design suggestion: **Kanban-style board** showing below columns with display-details-on-hover:
  - Incoming (Businesses not yet approved)

- Backlog (Approved No Rep)
- Queued to Call (3 days > payment date)
- Scheduled
- Called (Max no. of calls)
- Completed (Total no. of calls)

Time Zone Handling:

- Calendar displays **each user's local time zone**
- Time selected by business should **translate** to Rep's calendar in their local zone
- Stored date/timestamps use both ISO 8601 and Unix for standardization

Edge Cases:

- If a rep is unavailable (calendar blocked), the business cannot book with them
- If no reps are assigned to a business, booking link should be suppressed and business routed to backlog until rep is assigned
- If business is later rejected, notify rep and suppress related automation

Data Stored:

- Booking timestamp (ISO 8601 and Unix)
- Business status at time of booking
- Booking originator and role
- Rep ID, business ID
- All form fields collected from booking process
- Source of booking (Email link vs. direct queue)
- Form field data

Assumptions:

- HubSpot calendar functionality supports mutual availability matching
- HubSpot calendar bookings can be customized with prefilled fields and company metadata
- HubSpot calendar can support dual- or multi-role scheduling and form customization
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-007: Benefits Rep Queue for Post-Payment Follow-Up Calls (Standard + Alternate Flow Support)

Functional Summary: Displays queued businesses in a rep dashboard once payment is made and no call has been scheduled or completed, helping prioritize follow-up.

Related User Story: US-007: As a CSM, I want to see which businesses I need to call next in a clean dashboard.

Priority: High

Trigger (Standard Flow):

Daily, the system evaluates businesses with:

- `Payment_Date+ 3 days` elapsed
- `Scheduled_Call_Date IS NULL`
- `Call_Successful= False`

These businesses are shown in the **Benefits Rep Queue** for follow-up.

Trigger (Alternate Flow):

A **BD Rep** or **Benefits Rep** schedules a call with a business **before accreditation approval**, while the business is still a:

- Traffic File
- **BID** (Business ID)

System Logic:

Standard Flow:

- Assigned Benefits Rep views queued businesses for follow-up
- Business appears in **"Ready to Call"** if:
  - Payment made ≥ 3 days ago
  - No call completed or scheduled
- If a calendar booking exists, rep calls on scheduled time
- If not, rep attempts outreach until `Max_Call_Attempts` reached, then sends fallback benefits email (see FSD-009)

Alternate Flow (Pre-Approval Scheduling):

- BD Rep or Benefits Rep schedules a call before the business becomes an AB
- System must support three outcomes:
  - **Business becomes accredited before call** → Calendar call proceeds as scheduled
  - **Business still pending accreditation** → Rep repurposes call, attempts to schedule another call, system logs both calls. Calls made before approval can be flagged differently (i.e., "pre-call prior to approval", etc.).
  - **Business not approved** → Rep can optionally cancel, proceed and mark calls as. i.e., "how to get approved"

Enhancement Over Current State:

Instead of manual downloads and Outlook comparisons:

- The system will **display real-time business accreditation status** AND **scheduled call date** in the rep dashboard
- System allows filtering by:
  - Business status (`Traffic`, `BID`, `AB`)
  - Scheduled call date
  - Assigned rep
  - Last known status at the time of booking

UI/UX Requirements:

- Rep queue dashboard shows:
  - Business name
  - Current status (`Traffic`, `BID`, `AB`)
  - Scheduled call date/time
  - Booking source (Rep name, method, role)
- Alternate flow businesses are tagged (e.g., "Booked Pre-Approval")
- System supports role-based scheduling permissions (BD/Benefits Rep)

Edge Cases:

- If a business is **rejected** after a call is already scheduled → Rep is alerted and call is flagged for cancellation
- If rep role overlaps (BD & Benefits), system should indicate who created the appointment
- If a business is reassigned before call date, notify both old and new reps

Data Stored:

- Booking timestamp
- Accreditation status at time of booking AND time of call
- Assigned rep ID
- Call originator (BD or Benefits Rep)
- Call outcome (if completed)

Assumptions:

- BD and Benefits Reps can both create bookings
- Business status data is refreshed daily or in near real time
- Calendar and business status are displayed within the same queue dashboard
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-008: Post-Call Follow-Up Automation

Functional Summary: After a completed or failed call, this feature automates next steps such as follow-up emails, fallback messaging, and optional AI-generated call summaries to streamline post-call engagement.

Related User Story: US-008: As a CSM, I want to schedule follow-ups automatically after a call.

Priority: High

Trigger:

If the call is completed:

- System offers a **pre-generated AI summary** based on the call transcript (if supported by AirCall).
- Rep confirms or edits the summary and enters any additional notes.
- System prompts the rep to choose a follow-up action:
  - **Email only**
  - **Call + Email**
  - **No follow-up**
- If "Call + Email" is selected:
  - System checks **mutual calendar availability** between rep and business.
  - A follow-up calendar invite is **auto-generated** via HubSpot Calendar.
  - Confirmation with meeting details is sent to both parties.
  - Follow-up emails (e.g., reminders, recap, next steps) are also automatically scheduled.
- All actions are logged and attached to the business record.

If the call is not completed after maximum attempts:

- System automatically triggers a **fallback email** with:
  - Subject: "We Tried Reaching You – Here's How to Connect with Your Benefits Rep"
  - Body: Includes summary of attempted outreach and a calendar link to reschedule

AI-Enhanced Options:

- Auto-generate call summary from transcript (if AirCall integration supports it)
- Suggest follow-up actions and templates based on conversation
- Allow rep to edit/override AI summary

Automation Rules for Follow-Up Call Scheduling:

- Rep can choose from preset intervals: +3 days, +1 week, custom date
- System checks for mutual availability and inserts time
- Calendar link is attached to confirmation email sent to business
- Call is automatically logged with `Type = Follow-Up`

Data Stored:

- `Call_Note` (manual or AI-generated)
- `Follow-Up_Action_Chosen` (Email, Call + Email, None)
- `Follow-Up_Scheduled= True/False`
- Timestamp of each action (ISO 8601 + Unix)

Edge Cases:

- If fallback email is triggered but call was later successful, allow rep to manually suppress email

- Log both manual and AI-generated versions of notes (if applicable)

Assumptions :

- HubSpot integration handles follow-up email scheduling and sending
- Call summaries can be generated from AirCall or other VoIP transcripts (optional)
- Rep is logged into HubSpot and synced with HubSpot Calendar
- HubSpot allows API-generated calendar invites tied to contact records
- AirCall logs are synced to the same contact for historical continuity
- **The column names are representational ; their actual column names in the database may vary or do not exist and need to be created**

FSD-009: Scheduling and Call Logging System

Functional Summary: Logs call attempts, outcomes, and the origin of scheduling (e.g., BD Rep, Benefits Rep, Email, or Portal) for full visibility and analytics.

Related User Story: US-009: As a CSM, I want to track call logs and understand how each call was scheduled.

Priority: High

A) **Call Scheduling Source Tracking**

Trigger:

Any time a calendar appointment is created for a business call

System Logic:

- System stores `Call_Scheduling_Source` from:
  - BD Rep manual booking
  - Benefits Rep manual booking
  - Business booking via Email #3 link
  - Business booking via Self-Service Portal
- Optional: System captures scheduled timestamp and scheduled rep
- This data is tied to the business record and used for engagement analytics

Data Stored:

- `Call_Scheduling_Source`
- `Scheduled_Call_Timestamp`
- `Scheduled_By` (rep ID or 'Business')

Edge Cases:

- If source can't be auto-detected, system prompts for manual tagging

B) **Call Logging System**

Trigger:

Every time a rep attempts or completes a call

System Logic:

- System logs:
  - Call disposition (`Attempted`, `Completed`, `Voicemail`, etc.)
  - Auto-increment `Call_Attempt_Count`
  - Timestamp of attempt
  - Linked rep and business

Data Stored:

- `Call_Disposition`
- `Call_Attempt_Count`
- `Rep_ID`
- `Timestamp`

Edge Cases:

- Call logged without status prompts the user before moving on

- Distinction between pre- and post-accreditation call attempts should be stored

UI/UX Requirements :

- Rep must confirm/update call outcome after each attempt
- Call log history should be visible in contact view and rep dashboard
- Status filters in dashboard (0, 1, 2 attempts)
- Display booking origin
- Optional enhancement : Include icons or tags (i.e., icon for Email #3, icon for BD Rep) for scheduling source visibility

Assumptions :

- AirCall (or VoIP provider) integration supports webhook/API-based logging
- Booking source is passed via calendar metadata or manual entry
- **The column names are representational ; their actual column names in the database may vary or do not exist and need to be created**

FSD-010: Centralized Email Orchestration via HubSpot

Functional Summary: Migrates all outbound emails—including Accreditation Approval, CEO Welcome, Booking Requests, Fallback, and Follow-Up messages—from external systems (Insights, Streampage, Microsoft Bookings) into HubSpot. HubSpot becomes the centralized platform for sending, tracking, and scheduling customer-facing communications across various stages of the business lifecycle.

Related User Story: US-010: As a CSM, I want all emails to be sent and tracked via HubSpot so I can manage outreach **and gather customer engagement insights** in one place.

Priority: High

Trigger:

Replace legacy email services (Insights and Streampage) with HubSpot Email Service for all Customer Success communications

Email Types Migrated to HubSpot

- **Email #1 – Accreditation Approved**
  - Triggered upon `Application_Status = Approved`
- **Email #2 – CEO Welcome**
  - Triggered upon payment confirmation
- **Email #3 – Your Benefits Are Waiting**
  - Sent 3 days post-payment, **only if** no call is scheduled or logged (see FSD-005)
- **Fallback Email**
  - Triggered after max call attempts (e.g., 2) with no successful contact
  - Contains message re: missed attempts + calendar link to reschedule
- **Follow-Up Emails**
  - Scheduled based on rep input or system logic
  - Used for:
    - Follow-ups after **failed scheduled calls**
    - **Renewal engagement**
    - General **re-engagement or check-ins**
  - May be scheduled manually by rep or automatically post-call (FSD-008)

Current State:

- **Email #1 (Accreditation Approved):** Sent via *Insights*
- **Email #2 (CEO Welcome):** Sent via *Insights*
- **Email #3 (Benefits Reminder):** Sent via *Streampage* (currently being transitioned)

Target State:

- All three emails will be fully migrated and sent via **HubSpot Email Service**

System Logic:

- Replace existing triggers to point to HubSpot automation flows
- Ensure email content and personalization fields match current templates
- Confirm sender logic (rep-based or static) works as intended in HubSpot

Dependencies:

- HubSpot account must support transactional and marketing email types
- Templates for all 3 emails must be recreated and tested in HubSpot
- All necessary dynamic tags (e.g., `{rep_name}`, `{business_name}`) must be configured

Use Cases:

- Enables centralized management of customer emails
- Ensures consistent branding and formatting
- Unlocks tracking, testing, and engagement analytics

Assumptions:

- Email content for all 3 messages is pre-approved and does not require rework
- HubSpot is capable of handling the full required email volume and segmentation logic
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-011: Enable HubSpot Email Tracking, Tags, and Engagement Insights

Functional Summary: Adds HubSpot email tracking, tagging, and analytics to measure opens, clicks, and customer engagement across communications.

Related User Story: US-011: As a team lead, I want to measure email engagement for business follow-up.

Priority: High

Trigger:

Each email sent via HubSpot (e.g., Accreditation Approval, CEO Welcome, Benefits Reminder)

System Logic:

For every outbound email, enable and store engagement metrics using HubSpot's built-in tracking features.

Required Tracking Elements:

- **Email Open Tracking:** Log timestamp of first open, number of opens, and device type (if available)
- **Click Tracking:** Track clicks on embedded links (e.g., buttons, calendar links)
- **Calendar Interaction:** If calendar booking link is present, log calendar page opened status
- **Response Status:** Record whether recipient replied or engaged with any follow-up CTA (e.g., booked a call, submitted form)

Data Tags:

- Embed appropriate personalization and tracking tags (e.g., `{first_name}`, `{business_name}`, `{rep_name}`, `{calendar_link}`)
- Tags should be dynamic and stored per contact in HubSpot CRM

Data Stored:

- Email metadata: send timestamp, sender, subject
- Engagement metrics: opens, clicks, reply status
- Action triggers: calendar booking initiated, not initiated

Use Cases:

- Enables downstream actions (e.g., sending a follow-up if no reply)
- Provides visibility for reps into customer engagement
- Supports future reporting and insight dashboards for CS and BD teams

Assumptions:

- HubSpot account is configured with tracking settings enabled
- Email templates include trackable links where needed (e.g., calendar booking CTA)
- CRM and analytics dashboards are configured to surface this data to internal users
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-012: Replace PowerDialer with AirCall for Outbound Calls

Functional Summary: Replaces PowerDialer with AirCall for outbound calling, enabling full call tracking and integration with HubSpot timelines.

Related User Story: US-012: As a CSM, I want to call businesses directly from HubSpot and track the outcome.

Priority: High

Trigger:

All outbound calls made by Benefits Reps (and optionally BD Reps) that were previously initiated through PowerDialer will now be routed through AirCall.

System Logic:

- Decommission PowerDialer as the outbound dialing platform for Customer Success Team
- Enable AirCall as the default call tool for outbound calls initiated via HubSpot
- AirCall should auto-log call events, durations, outcomes, and voicemails into the HubSpot contact record
- AirCall must support integration hooks with HubSpot's call logging and activity feed

UI/UX Requirements:

- Call buttons within HubSpot should trigger AirCall's dialer interface or auto-dial when clicked
- Reps should not need to leave the HubSpot environment to place or log a call
- Call recordings and outcomes should be accessible from the HubSpot contact timeline

Edge Cases:

- If AirCall is temporarily unavailable, allow for fallback to manual dialing and ensure notes can still be logged manually
- Ensure only assigned or licensed users can trigger AirCall calls

Data Stored:

- Call timestamp (ISO 8601 + Unix)
- Call duration and outcome
- Linked business/contact ID in HubSpot
- Call recording URL (if enabled)

Assumptions:

- AirCall is pre-integrated with HubSpot and licensed for all relevant users
- All outbound dialing activity should be visible and reportable in HubSpot and synced to Blue (see BRD)
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

FSD-013: Use of Breeze AI for Email Content Generation

Functional Summary: Integrates Breeze AI into the email generation workflow to assist Benefits Reps in creating personalized, high-quality follow-up emails, fallback messages, and renewal communication. This feature supports AI-generated drafts that reps can edit, approve, and send through HubSpot, ensuring consistency while saving time.

Related User Story: US-013: As a CSM, I want AI-generated email drafts to save time and improve consistency in follow-up outreach.

Priority: High

Trigger:

- Triggered after a call is logged, follow-up is scheduled, or fallback conditions are met.
- Activated when a Benefits Rep begins composing an email using HubSpot or connected middleware.

System Logic:

1. When an eligible email type is triggered (post-call follow-up, fallback email, renewal outreach):

- System calls Breeze AI to generate a personalized draft based on:
- Call notes (manual or AI-generated)
- Rep and business metadata (e.g., name, rep, call outcome)
- Email type and context

2. Generated draft is inserted into the HubSpot email editor or connected interface.

3. Rep can edit, approve, or regenerate the draft before sending.

4. Final version is logged and attached to the business record.

Data Stored:

- AI-generated draft version (optional)
- Final approved message content
- Timestamp of generation and send
- Type of email (Follow-Up, Fallback, Renewal)

Edge Cases:

- If Breeze AI fails to generate a draft, the system should allow manual input.
- If rep edits the message, both versions (AI + final) may be stored for reference.
- AI service latency or API failure should be caught and handled with fallback text suggestion.

Assumptions:

- HubSpot supports external AI-generated content insertion via custom integrations or workflows.
- Breeze AI has API access and permissions to receive metadata and return generated content.
- Rep always has final editorial control.
- **The column names are representational; their actual column names in the database may vary or do not exist and need to be created**

Non-Functional Requirements

Category	Requirement
Performance	System should process up to **100,000 business records in under 1 hour** (e.g., during migration or batch updates)
Security	All API access and integrations (HubSpot, AirCall, calendar, etc.) must be **encrypted via HTTPS/TLS 1.2 or higher**
Scalability	System must support **simultaneous rep activity** (e.g., bookings, call logs, email sends) without degradation
Reliability	System should maintain **99.9% uptime** for HubSpot workflow automations and integrations, with retry handling
Usability	Dashboards, calendar booking forms, and email templates must be **clear and usable by internal teams with minimal training**
Portability	System and workflows should be designed to allow future migration or enhancement (e.g., to another CRM or calendar system)
Maintainability	Logic should be **modular and documented** to allow workflow edits without impacting historical data
Accessibility	All user-facing interfaces (e.g., email forms, dashboards) must meet **WCAG 2.1 Level AA** accessibility standards
Localization	System must **display time zone-aware calendar invites and timestamps** correctly for both reps and businesses

Acceptance Criteria

Scenario	Expected Outcome
Business is approved and payment processed	Emails 1–3 are sent from HubSpot, triggered at appropriate stages and tracked for engagement
Business books a call	Booking metadata is stored (who booked, how it was booked, time zone adjusted, etc.)
Call is completed	Rep logs notes (manual or AI-assisted); follow-up flow is scheduled based on input
Call is not completed after 2 attempts	Fallback email is automatically sent with a calendar link to reconnect
Call disposition and source are logged	Each attempt or scheduled call includes timestamp, outcome, and booking source
Business and rep calendars sync	Booked meetings reflect both users' time zones and availability accurately
Reps view dashboard	Reps can access real-time queue with current business statuses, sorted by next action