

Robert Potter - Content Direction + Next Steps

What I want you to do now so we can finalize the brand build

Roberto

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Robert,

I went through the brand playbook and the direction is right.

The main thing I want you to understand is this: **your content should not make you look like an AI tutorial guy.** That pulls in the wrong audience. We are not trying to attract people who want to learn ManyChat, n8n, or how to sell automations.

We are trying to attract business owners who look at you and think:

This guy has standards. He understands business. He can walk into my company and see what is broken.

That is the brand.

Agency MIOSA is the business behind it. Your personal brand is the trust engine that makes people want to take the Solutions Call.

The Direction

Your brand should sit on five lanes:

1. **Business standards** - how serious operators think, decide, and execute.
2. **Agency MIOSA / Builder in Public** - what we are building, what we are seeing in real businesses, and what results we are producing.
3. **Health and discipline** - your food, training, recovery, and physical standards.
4. **Faith and family** - wife, fatherhood, values, and what you are building for.
5. **Athlete mindset** - what sports taught you about standards, feedback, pressure, and execution.

That is the mix.

The business content gets people to trust your competence.

The standards / health / family content gets people to trust your judgment.

Together, they make you more than another marketing account.

What We Are Actually Building

I want you to understand the full operating picture, not just the content plan.

We are not only making posts. We are building the Agency MIOSA operating system: who owns what, what the company sells, how leads come in, how we follow up, what tools we use, what gets tracked, and how we keep everyone moving without waiting on one person for every answer.

That is why I am putting this in writing.

The goal is to map out:

- our company pillars,
- our roles and responsibilities,
- our content and sales motion,
- our website and funnel structure,
- our ads and lead flow,
- our email and follow-up system,
- our tool stack,
- our client delivery process,
- and the weekly calendar / agenda for what we are actually doing.

Once this is clear, you should not feel like you are guessing what Agency MIOSA is or waiting on a vague call to understand the next move.

The Company Pillars

Agency MIOSA should be organized around clear operating pillars.

Pillar 1 - Brand + Content

Purpose: build trust in the market and make the right buyers pay attention.

Owner: Robert leads this lane. Roberto supports strategy and positioning.

Includes: Robert's personal brand, Agency MIOSA content, case study content, founder videos, reels, stories, buyer-facing education, proof posts, and content that drives Solutions Calls.

Rule: content should attract business owners, not tool learners.

Pillar 2 - Ads + Funnel

Purpose: turn attention into booked conversations.

Owner: Robert owns the front-end sales/marketing direction. Roberto helps with strategy and system architecture. The team supports execution.

Includes: website / landing page, Solutions Call CTA, Meta ads, retargeting, ManyChat / DM triggers, lead forms, calendar booking, follow-up sequences, and tracking booked-call quality.

Rule: no random traffic. Every campaign needs a clear offer, landing path, follow-up path, and owner.

Pillar 3 - Sales + Client Intake

Purpose: convert qualified leads into the right offer.

Owner: Robert owns the sales lane. Len and the girls can support outreach, follow-up, appointment setting, and keeping the front-end motion alive.

Includes: lead qualification, Solutions Calls, follow-up, proposal handoff, client questions, and keeping prospects warm.

Rule: Robert does not need to wait on Roberto for every small growth action, but any deeper systems/AI/client-scope promise gets aligned before it is sold.

Pillar 4 - Systems + AI Delivery

Purpose: fix the actual business backend once a client needs more than marketing.

Owner: Roberto / MIOSA owns this lane.

Includes: CRM architecture, funnel architecture, AI chat, knowledge base, automations, tracking and attribution, lead routing, workflow design, backend operations, and complex platform work.

Rule: if the client has a real systems problem, it comes into the MIOSA systems lane.

Pillar 5 - Operations + Reporting

Purpose: keep the company from becoming a mess internally.

Owner: shared, but someone must be assigned for each operating area.

Includes: weekly priorities, client status, task ownership, content calendar, ad spend and CPL, booked calls, follow-up status, emails, tool access, documents, proposals, and what is waiting on whom.

Rule: if nobody owns it, it does not exist.

What Robert Needs Visibility Into

You should be able to see what is happening across the business without asking me ten times.

The things we need to track are:

- who owns the website,
- what is live on the website,
- what offer the website is pushing,
- what ads are running,
- what funnels are live,
- what emails are going out,
- what leads came in,
- what calls were booked,
- what follow-up is pending,
- what client proof we can use,
- what deliverables are being built,
- what tools we are using,
- and what is blocked.

That is the agenda/calendar I am talking about.

It is not just a personal calendar. It is the operating map for Agency MIOSA.

What The Operating Document Should Contain

The document I am putting together should give you a clear view of the company, not just a list of content ideas.

It should include these sections:

1. **Company structure** - what Agency MIOSA is, what it sells, what lanes exist inside it, and where you fit.
2. **Roles and responsibilities** - what I own, what you own, what Len/the girls can support, and what needs a named owner.
3. **Company pillars** - brand/content, ads/funnel, sales/intake, systems/AI delivery, and operations/reporting.

4. **Current client proof** - what we can say about BetterStem, what we should avoid saying yet, and what case-study language is safe.
5. **Website status** - what the website needs to communicate, what offer it points to, and what link people should click.
6. **Ads and funnel status** - what campaigns are live or planned, what the offer is, what funnel each campaign sends people into, and how we judge lead quality.
7. **Email and follow-up** - what inboxes, reminders, no-show flows, proposal follow-ups, and client follow-ups need to exist.
8. **Tool stack** - what tools we are using, who owns access, what each tool is for, and what is live vs still being built.
9. **Weekly agenda/calendar** - what happens each week so we are not randomly reacting every day.
10. **Open decisions** - the exact things we need to decide together before you start pushing hard.

The point is simple:

You should know what you are responsible for, what I am responsible for, what the company is selling, what systems are live, what is still being built, and what you can confidently say in public.

That is what lets you move without feeling rushed, confused, or dependent on me for every small decision.

Website, Ads, Funnels, Email

These are the pieces that need owners.

Website

The website should answer:

- what Agency MIOSA does,
- who it is for,
- what proof we have,
- what the offer is,
- and how to book a Solutions Call.

The website should not be a vague AI agency page.

It should say:

We fix broken growth systems for high-ticket service businesses.

Owner: to be assigned. Robert owns the market-facing message. Roberto owns the systems/positioning accuracy. Execution support can be delegated.

Ads

Ads should push one clean idea:

Most businesses do not need more leads. They need to fix what happens after the lead comes in.

Owner: Robert owns direction and review. The execution owner must be clearly assigned.

Track: spend, CPL, booked calls, lead quality, creative winners, and what offer each ad is pushing.

Funnels

The funnel should be simple:

Content / ad -> landing page or DM trigger -> audit checklist /
booking CTA -> Solutions Call -> Phase 1 offer

Owner: Robert owns the front-end path. Roberto owns the backend system logic when the funnel touches CRM, automations, AI, or client delivery.

Email + Follow-Up

We need to know what emails exist and what they are doing.

Track: lead nurture, booked-call reminders, no-show follow-up, proposal follow-up, client onboarding, internal status emails, and who is responsible for checking replies.

Owner: to be assigned. Until assigned, it will be messy.

Rule: no lead should sit because nobody knows whose inbox it landed in.

Tool Stack

The tool stack needs to be written down so everyone knows what we are using.

For every tool, we need:

- tool name,
- owner,
- login/access owner,
- what it is used for,
- what workspace or client it belongs to,
- and whether it is live, draft, broken, or needs migration.

Categories we need to map:

- website / landing page,
- CRM,
- calendar booking,
- email inbox,
- email/SMS follow-up,
- ads manager,
- analytics / tracking,
- ManyChat or DM automation,
- document/proposal storage,
- internal task tracking,
- client communication,
- content planning,
- and reporting.

This matters because the details are where everything breaks.

Weekly Operating Calendar

We need a simple weekly rhythm.

Monday - Plan

- What are we selling this week?
- What content is going out?
- What ads are running?
- What offers need tightening?
- What calls are already booked?

Tuesday - Build / Follow Up

- Build or fix the funnel pieces.
- Follow up with warm leads.
- Check inboxes and DMs.
- Confirm calls.

Wednesday - Content + Sales Push

- Post the main business / Agency MIOSA content.
- Push buyer-facing CTA.
- Review ad performance.

Thursday - Delivery + Proof

- Pull client proof.

- Update case study language.
- Check what deliverables are done vs still refining.

Friday - Review

- What brought buyers?
- What brought learners?
- What booked calls?
- What got ignored?
- What should we kill?
- What should we double down on?

This is how we stop guessing.

What I Want You To Stop Doing

Stop making the content about tools.

Do not lead with:

- “Here is the workflow.”
- “Here is the automation.”
- “Here is how to build this in ManyChat.”
- “Here is how to build this in n8n.”
- “Comment and I will send you the template.”

That content gets views, but it brings the wrong people.

Those people want to become you. They do not want to hire us.

From now on, the content should be about:

- what was broken in the business,
- what the owner did not see,
- where the lead flow was leaking,
- what result came from fixing it,
- what standard most businesses are missing,
- and what we look for before we run more ads.

Same world. Different audience.

How To Talk About Agency MIOSA

Use this simple frame:

Most businesses do not have a lead problem. They have a system problem.

That is the core idea.

Agency MIOSA does two things:

1. **Phase 1: rebuild the system.** We fix the CRM, automations, tracking, funnels, lead flow, AI chat, email/SMS, and backend foundation.
2. **Phase 2: run growth.** After the foundation is fixed, we run ads, content, email/SMS, reporting, strategy, and optimization.

So your content should not sound like:

| We run ads.

It should sound like:

| We find where the business is leaking money, rebuild the system, then scale what is working.

That is the buyer-facing message.

The Agency Structure

I do not think the right move is to create a totally separate agency right now.

That would split the brand, confuse the offer, and make it harder for the market to understand what we do.

The cleaner move is:

| Agency MIOSA has two lanes.

Lane 1 - Growth / Marketing Execution

This is your lane.

You can run this with Len and the girls so you stay active, paid, and moving while I am building the deeper platform and client systems.

This lane includes:

- content direction,
- ads,
- appointment setting,
- lead follow-up,
- sales conversations,
- front-end client communication,
- offer positioning,
- basic growth execution,
- and keeping opportunities moving.

This is where you should be operating day to day.

Lane 2 - Systems / AI / Automation

This is my lane.

This is where MIOSA and I come in when the client has deeper problems:

- broken CRM,
- broken funnels,
- bad tracking,
- bad attribution,
- poor lead routing,
- no follow-up system,
- AI chatbot / knowledge base needs,
- automation and backend workflow problems,
- custom platform or infrastructure needs.

So the simple version is:

| You run the growth front end. I own the systems backend.

That lets you keep building and earning without us launching a random second brand.

If a client only needs marketing execution, your lane can handle it.

If a client needs the deeper system rebuilt, it comes into the MIOSA build side.

That is the whole advantage.

What To Do With Len And The Girls

Yes, I think you should use Len and the girls if they help you stay busy and keep the front end moving.

But it should sit under the Agency MIOSA structure, not as a disconnected agency.

Their job is not to invent a new brand. Their job is to support the growth lane:

- outreach,
- follow-up,
- booking calls,
- content support,
- basic campaign execution,
- client communication support,
- and keeping you from being the only person pushing everything forward.

If that lane brings in a client that needs AI, automation, CRM, funnels, or a deeper business rebuild, that client comes to the MIOSA systems side.

That gives everyone a clean role.

You can make money from the marketing/growth side.

MIOSA still captures the bigger system work.

The brand stays unified.

BetterStem Proof Language

Use BetterStem, but use it carefully.

Safe line:

We helped cut BetterStem's cost per lead from \$15.70 to \$7.80 while rebuilding the backend system that was leaking leads.

Do not say everything is perfect or fully done unless we have confirmed every piece. The better angle is:

The reason most agencies fail is they run more traffic into a broken system. We fix the system first.

That is true, strong, and defensible.

Your Week 1 Content Plan

Do not overcomplicate this.

For the first week, I want:

- 3 main feed reels,
- daily stories,
- 5-10 trial reels,
- one buyer-facing Agency MIOSA call-to-action,
- bio and link updated.

That is it.

Reel 1 - The Standard

Topic:

Taste vs flexing.

Angle:

| Most people think the expensive thing is the flex. It is not. The real flex is standards.

Purpose:

Show how you think. This is not an Agency MIOSA pitch. This builds the brand.

Reel 2 - Business / Agency MIOSA

Topic:

| Most businesses do not have a lead problem. They have a leak problem.

Angle:

| We walked into a clinic and found that ads were not the main issue. The issue was what happened after the lead came in.

Purpose:

This connects the brand to the business. This is the post that can create Solutions Call interest.

Reel 3 - Health / Discipline

Topic:

| Seed oils, recovery, energy, and standards.

Angle:

| I changed what I ate and the first thing that changed was how I felt and operated.

Purpose:

Show that your standards are not only business. They are how you live.

Trial Reel Hooks

Use these as quick tests:

Most business owners do not have a lead problem. They have a leak problem.

The ad is not broken. The system behind the ad is broken.

We cut a clinic's CPL in half, but the real win was fixing what happened after the lead came in.

If your CRM is messy, more ads just make the mess more expensive.

The fastest way to waste ad spend is to send leads into a broken follow-up system.

Most agencies sell traffic because they do not know how to fix the backend.

Comment AUDIT and I will send you the checklist we use to find where a business is leaking leads.

ManyChat / Comment Trigger Rule

Use comment triggers, but make them buyer-facing.

Do not use:

Comment WORKFLOW for the automation.

Use:

Comment AUDIT and I will send you the checklist we use to find where a business is leaking leads.

Good keywords:

- AUDIT
- LEAKS
- SYSTEM
- GROWTH
- CLINIC

Bad keywords:

- WORKFLOW
- N8N
- MANYCHAT
- AUTOMATION TEMPLATE

The point is to pull in owners, not students.

Bio Update

Use this direction:

Operator. Father soon.
Building @agencymiosa

Standards in business, health, faith, and family.
Miami.

The link should go to:

Agency MIOSA Solutions Call

If the final booking link is not ready, use the best interim link and we replace it once the shared inbox and booking flow are finalized.

What I Need You To Do Now

1. Update the bio.
2. Put the Agency MIOSA Solutions Call link in the bio.
3. Film the 3 Week 1 reels.
4. Post stories daily.
5. Test the trial hooks.
6. Stop tool/tutorial content.
7. Send me the drafts before posting anything that makes a hard client claim.

The only place I want you to slow down is BetterStem proof. Use it, but do not overclaim it.

What We Need To Finalize Together

When we meet, we need to lock:

1. The exact Solutions Call link.
2. The final bio.
3. The first Agency MIOSA CTA.
4. The BetterStem proof wording.
5. Whether we ask Greice for a testimonial now or after the close-out walkthrough.
6. Whether we start by targeting clinics or broader high-ticket service businesses.
7. Your public title: Co-Founder, Partner, or Head of Growth.

Once those are locked, you have the brand lane and the first week of execution.

That is the goal.