

# DONNA

## Product Overview

### Operational Intelligence Infrastructure for SMBs

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#### Overview

DONNA is an AI operational infrastructure layer that sits across a business and coordinates communication, workflows, and execution.

Rather than replacing existing tools, DONNA operates above them—unifying how work gets done so nothing falls through.

It enables businesses to:

- Respond instantly across channels
- Execute follow-ups and workflows consistently
- Maintain full operational context across interactions

Over time, DONNA learns how a business operates and improves execution, while contributing to the broader DONNA Intelligence Network.

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#### How DONNA Works

DONNA operates across three core layers:

##### 1. Communications Layer

DONNA centralizes and manages inbound and outbound communication across channels.

Current capabilities:

- Email (automated response and follow-up)
- Website chat (auto-response and escalation)
- Inbound voice calls (answering and triage)
- Outbound voice calls (scheduling-focused)

DONNA maintains shared context across all channels, ensuring that conversations are not siloed.

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##### 2. Execution Layer

DONNA converts communication into structured action and ensures follow-through.

Core functions:

- Responds to inbound messages and inquiries
- Escalates conversations when needed
- Schedules appointments via outbound calling
- Coordinates follow-ups automatically
- Routes tasks and interactions internally

The system ensures that:

- Leads are not missed
  - Follow-ups are consistent
  - Workflows execute without manual tracking
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### 3. Intelligence Layer

DONNA continuously learns how a business operates.

This includes:

- Communication patterns
- Workflow structures
- Operational preferences

Memory is **persistent and effectively unlimited**, allowing DONNA to maintain long-term context across customers, interactions, and workflows.

This enables:

- Increasingly accurate responses
  - Better workflow execution over time
  - Reduced need for manual input
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## Autonomy & Control

DONNA operates across a spectrum of autonomy:

- **Draft Mode:** DONNA prepares responses for human review
- **Autopilot Mode:** DONNA automatically responds to email and chatbot interactions
- **Hybrid Execution:** DONNA handles routine tasks while escalating exceptions

In autopilot:

- DONNA can respond to email independently
- Chat interactions are automatically handled and escalated when necessary

Humans remain in control through:

- Approval workflows (when configured)
  - Escalation triggers
  - Configurable autonomy settings
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## Onboarding & System Setup

DONNA is designed for rapid deployment with minimal manual configuration.

### Onboarding Process:

1. User initiates onboarding via settings
2. A guided wizard prompts for:
  - Google Drive folders
  - Documents (PDFs, SOPs, internal materials)
  - Website URLs for scraping
3. Optional API integrations are connected
4. DONNA processes and structures the data
5. System generates operational settings and workflows
6. User reviews and confirms

This creates:

- A fully configured operational profile

- Immediate usability without manual system building
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## Integrations & System Architecture

DONNA is positioned as a **layer above the existing software stack**.

### Current integrations:

- Google Workspace (email, calendar, docs)
- Stripe
- QuickBooks
- Supabase
- General API connectivity

DONNA can:

- Ingest data from existing systems
- Operate across multiple tools simultaneously
- Serve as the coordination layer between them

This approach:

- Avoids requiring system replacement
  - Increases ROI of existing tools
  - Reduces fragmentation
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## Voice Capabilities

DONNA currently supports:

- **Inbound calls:** answering and triaging requests
- **Outbound calls:** scheduling and coordination

Planned near-term expansion:

- Full outbound calling workflows
  - SMS/text-based interaction
  - Control of DONNA via phone or text interfaces
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## Memory & Learning

DONNA maintains **persistent, long-term memory** across:

- Customer interactions
- Internal workflows
- Business context

Unlike session-based systems, DONNA:

- Retains historical knowledge
- Continuously improves performance
- Reduces repetitive input over time

This enables compounding operational intelligence within each deployment.

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## Security & Guardrails

DONNA includes a configurable security and control layer.

Key principles:

- Users define the level of operational autonomy
- Guardrails can be adjusted based on risk tolerance
- Sensitive actions can require approval or escalation

Features include:

- Controlled response behavior
- Escalation for complex or sensitive scenarios
- Configurable operational boundaries

Advanced security capabilities are expanded in **Pro and Enterprise tiers**, supporting higher compliance and governance requirements.

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## DONNA Intelligence Network (DIN)

Each DONNA instance contributes to a broader network of operational intelligence.

### How it works:

- Businesses can submit requests (e.g., vendors, partners, services)
- Matching DONNAs identify qualified counterparts
- Introductions are made with user approval
- No private data is shared without consent

### What propagates across the network:

- Operational patterns
- Workflow optimizations
- Performance insights

### What does NOT propagate:

- Customer data
- Financial data
- Proprietary company information

This creates:

- A compounding intelligence system
  - Network-driven value expansion
  - Increasing utility with scale
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## Key Differentiation

DONNA is structurally different from existing solutions.

### Not a CRM

- Does not function as a static database
- Acts as an execution layer, not a record system

### Not automation software

- Does not require manual workflow building
- Learns and adapts dynamically

### **Not a chatbot**

- Operates across full business workflows
  - Executes actions, not just responses
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## **Summary**

DONNA transforms how SMBs operate by introducing a unified system layer across communication and execution.

It enables:

- Consistent follow-through
- Reduced operational friction
- Improved responsiveness
- Scalable coordination

As adoption grows, DONNA evolves from a single-business system into a **networked operational intelligence platform**, where each deployment increases the value of the entire system.

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**DONNA is not another tool.**

**It is the system that ensures the business runs.**