



FLOWPILOT

AI AUTOMATION FOR SMALL SERVICE BUSINESSES

AI Business Growth System

Flagship client implementation SOP · \$799/month

A practical, client-facing operating guide for preparing, configuring, testing, and maintaining your FlowPilot service.

Use this guide with your FlowPilot implementation lead. It separates the access and approvals your team provides from the configuration FlowPilot completes.

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1. Purpose and scope

The AI Business Growth System connects FlowPilot's voice, lead conversion, booking, reminder, missed-call response, review-request, CRM, and reporting workflows into one operating system for a small service business. This SOP establishes the client-ready path from discovery through phased launch, team training, and monthly optimization. Each automation remains governed by the client's approved policies and a named human owner.

In scope: AI voice assistant, lead capture and qualification, booking, missed-call text-back, reminders, invoice reminders, review requests, CRM setup, reporting, alerting, and optimization review.

Out of scope unless separately approved: unreviewed outbound campaigns, payment collection, legal/medical/financial advice, emergency dispatch decisions, custom software development, and changes to telephone-carrier accounts.

2. Prerequisites and access checklist

- ☐ Name an executive sponsor, implementation owner, CRM owner, calendar owner, phone-system owner, and response-team lead.
- ☐ Provide authorized access to phone routing, CRM, website forms/chat, lead sources, calendar, approved messaging channels, and reporting source systems.
- ☐ Provide business identity, locations, services, service area, hours, holiday closures, team roles, escalation contacts, and approved public FAQs.
- ☐ Approve lead stages, required fields, qualification policy, appointment rules, cancellation/reschedule policy, response targets, and manual-review thresholds.
- ☐ Provide approved message templates, sender identity, consent/opt-out process, review-request policy, recording/transcription policy, and privacy requirements.
- ☐ Confirm monthly report recipients, definitions, decision cadence, and the client approver for production changes.

3. Dependency map

Foundation: approved business information, named owners, access, privacy/consent decisions, and source-of-truth CRM fields.

Capture: phone routing, forms/chat, and missed-call events feed lead creation and source labels.

Decision: qualification rules and business hours determine whether the lead routes to booking, a human queue, an escalation contact, or an approved not-a-fit response.

Action: the calendar, task queue, reminder rules, and approved messaging channels drive booking, follow-up, notifications, and reschedules.

Measurement: CRM stage data, booking outcomes, messages, and call outcomes feed the monthly report. Changes upstream require a re-test of every dependent workflow.



4. Phased rollout and implementation steps

Phase 0 - Design and access

1. Hold a workflow workshop to document customer journeys, staff ownership, service exceptions, privacy/consent decisions, and rollback contacts.
2. Confirm the CRM field dictionary, stage map, source map, calendar policy, and approved copy before any production automation is enabled.
3. Create a change log and test register so the client can approve configuration and launch decisions.

Phase 1 - Capture and qualify

1. Configure the AI Voice Assistant for approved greeting, business information, lead capture, intent handling, and human escalation.
2. Connect enabled forms, chat, and missed-call triggers to the CRM with duplicate handling and source labels.
3. Configure qualification rules for qualified, manual-review, urgent, existing-customer, and not-a-fit outcomes.

Phase 2 - Book and keep informed

1. Connect the approved calendar, appointment types, durations, buffers, staff assignments, and availability rules.
2. Configure booking, confirmation, reminder, reschedule, cancellation, and no-show paths with named human owners.
3. Enable approved missed-call text-back or reminders only after sender, consent, content, opt-out, and stop conditions pass QA.

Phase 3 - Follow up and protect reputation

1. Configure invoice-reminder, post-service follow-up, and review-request timing only for client-approved audiences and templates.
2. Route negative feedback, sensitive replies, and disputed service issues to a named human review queue; do not automate public responses without approval.

Phase 4 - Report and optimize

1. Publish the agreed operational view: source, response time where available, stage movement, bookings, exceptions, and follow-up status.
2. Review the first live period with the client sponsor, prioritize one or two improvements, and test each change before release.

5. Configuration checklist

- ☐ All access is authorized and each integration has a named client owner.
 - ☐ Phone routing, hours, holiday handling, escalation contacts, and rollback route are documented.
 - ☐ CRM field map, duplicate rules, source labels, stages, task owners, and manual-review queue are confirmed.
 - ☐ Qualification rules and service-area/eligibility boundaries match current client policy.
 - ☐ Calendar appointment types, availability, buffers, capacity, staff assignments, and exception rules are tested.
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- ☐ Every enabled message has approved sender identity, copy, consent, opt-out, timing, and stop conditions.
- ☐ Invoice-reminder and review-request eligibility, timing, stop rules, and sensitive-feedback route are approved.
- ☐ Dashboard metrics, reporting definitions, and monthly review owners are confirmed.

6. QA and testing scripts

Record the tester, date/time, expected result, actual result, linked CRM record, and owner for every exception.

Voice lead: Call with a new qualified enquiry. Confirm correct greeting, lead capture, CRM source, task/booking path, and human handoff.

Missed call: Trigger the approved missed-call event. Confirm the right text-back behavior, sender, consent controls, CRM update, and human fallback.

Qualification matrix: Test qualified, manual-review, urgent, existing-customer, and out-of-area requests. Confirm each produces the documented action.

Booking lifecycle: Book, reschedule, cancel, test an unavailable time, and test a staff absence. Confirm calendar and CRM data, tasks, and notifications stay aligned.

Reminder and opt-out: Trigger an approved reminder then opt out. Confirm content, timing, sender, suppression, and no subsequent sequence.

Review request: Use a completed-service test record. Confirm eligibility, timing, message content, stop rule, and escalation of a sensitive reply.

Invoice reminder: Use a non-production invoice record. Confirm recipient, approved timing, suppression after payment or manual close, and human escalation for disputes.

Reporting: Compare selected test records against the report to confirm source, stage, booking, and exception data are accurate.

7. Go-live plan

1. Client sponsor signs off on Phase 0 deliverables and all critical QA scenarios.
2. Launch Phase 1 to a controlled number, source, or after-hours route while both teams monitor outcomes.
3. Add Phase 2 only after lead capture, ownership, and booking QA pass in live conditions.
4. Add Phase 3 after messaging and review-request controls pass; add Phase 4 once source data is stable enough to report.
5. Hold a daily check-in during the agreed launch window. Material privacy, safety, messaging, routing, or booking errors require pausing the affected automation and using the documented manual/rollback path.

8. Handoff and training



FlowPilot delivers a role-based training session for the implementation owner, response-team lead, calendar owner, and CRM owner. Training covers queues, call and lead summaries, booking corrections, opt-outs, sensitive feedback, reporting, rollback, and change requests. The client team completes scenario practice for an urgent lead, missed call, booking exception, opt-out, and negative feedback route. FlowPilot provides the configuration summary, dependency map, approved assets, test register, and support process.

9. Ongoing maintenance

FlowPilot runs the agreed monthly review of call outcomes, lead sources, pipeline movement, booking results, automation exceptions, message suppression, review workflow, and reporting. The client maintains access, staff availability, calendar rules, service information, policy approvals, consent records, and response ownership. Any material change to phone routing, forms, CRM fields, calendar, services, staff, areas, or messaging must be assessed against the dependency map and retested before launch.

10. Responsibilities

FlowPilot: configure approved workflows, document dependencies, conduct QA, monitor agreed implementation metrics, recommend improvements, and support incident diagnosis.

Client sponsor: approve scope, policy, budget, launch, and major changes.

Client operations team: maintain current business information and systems access, respond to leads/escalations, own customer decisions, and approve operational content.

11. Acceptance criteria

- ☐ Phase 0 access, owners, approvals, dependency map, and rollback route are complete.
- ☐ Voice, capture, qualification, CRM, booking, and alerting tests pass for every enabled workflow.
- ☐ Messaging, opt-out, review-request, and sensitive-feedback paths pass for every enabled channel.
- ☐ Reporting matches documented test records and has an assigned monthly owner.
- ☐ Client team completes training and sponsor approves phased production activation.

12. Support and escalation

For any issue, report the affected workflow, time, contact/call/lead reference, expected result, actual result, business impact, and relevant screenshots or transcript. For privacy, safety, inappropriate messaging, material routing, or widespread booking errors, the client may pause the impacted automation and use the documented manual route immediately. FlowPilot investigates automation and integration configuration; the client retains ownership of carrier access, business policy, customer decisions, and source-system permissions.

