FLOWPILOT

AI AUTOMATION FOR SMALL SERVICE BUSINESSES

AI Voice Assistant

Client implementation SOP · $299/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

This SOP defines how FlowPilot and the client prepare, configure, test, launch, and maintain the AI Voice Assistant. The service is designed to answer approved inbound calls, collect lead details, answer approved questions, offer approved appointment paths, and route exceptions to a person. It does not replace emergency handling, professional advice, or a client team member's responsibility to respond to escalated calls.

In scope: inbound call coverage, business profile, caller intents, approved FAQ responses, lead capture, booking or callback rules, alerts, reporting, and launch support.

Out of scope unless separately approved: outbound campaigns, payment collection, emergency dispatch decisions, legal/medical/financial advice, unsupported language coverage, and changes to the client's phone carrier account.

2. Prerequisites and access checklist

- [ ] Name one client implementation owner and one backup approver.
- [ ] Provide approved access to the call-routing or phone-system administrator, plus the number(s) and business hours in scope.
- [ ] Supply the public business name, service area, operating hours, holiday closures, locations, staff roles, and escalation phone numbers.
- [ ] Provide the current service list, approved pricing language if any, FAQs, policies, and examples of calls that should be escalated.
- [ ] Confirm the client-approved calendar, booking owner, appointment types, durations, buffers, and cancellation rules if booking is enabled.
- [ ] Confirm the CRM or lead destination, required fields, duplicate-handling policy, and the person who receives urgent call alerts.
- [ ] Approve the caller disclosure, recording/transcription policy, consent language, and privacy notice required for the business and location.

3. Implementation steps

Step 1 - Confirm the call path

1. Document each number, its current destination, the planned routing method, and the rollback destination.
2. Define business-hours, after-hours, holiday, and overflow behavior. Keep an owner available for every route that transfers to a person.
3. Confirm how urgent, safety-related, or emergency calls are handled. The assistant must immediately route these according to the client-approved policy and must never provide emergency instructions.

Step 2 - Build the business profile

1. Configure the approved business identity, greeting, locations, service area, hours, service descriptions, and voice/tone guidance.
2. Create a concise knowledge base from client-approved material only. Mark uncertain facts for human follow-up rather than guessing.
3. Set lead fields: caller name, callback number, requested service, location, timing, summary, urgency flag, and consent status where applicable.

Step 3 - Configure intents and routing

1. Map the expected intents: new enquiry, existing customer, scheduling, rescheduling, cancellation, status question, billing question, urgent request, and unknown request.
2. Define the answer, data to capture, destination, and stop condition for every intent.
3. Configure human transfer, callback task, voicemail fallback, and CRM handoff rules. Use a named queue or person, not an unowned destination.

Step 4 - Configure booking and notifications

1. Connect only the client-approved calendar and appointment types.
2. Apply duration, buffers, lead-time, service-area, staff-assignment, and availability rules.
3. Confirm who receives a booked-call notification, urgent alert, missed-transfer alert, and failed-booking task.

4. Configuration checklist

- [ ] Greeting identifies the business and explains the assistant's purpose in approved language.
- [ ] Hours, closures, locations, services, and service-area details match the client's current public information.
- [ ] Every caller intent has an approved answer and a human fallback.
- [ ] Urgent and sensitive requests route to a named person or queue.
- [ ] Lead fields, CRM mapping, duplicate behavior, and alert recipients are confirmed.
- [ ] Calendar availability, appointment types, buffers, and reschedule/cancel rules are confirmed where enabled.
- [ ] Call recordings/transcripts, consent, retention, and access controls follow the client's approved policy.
- [ ] Rollback routing and the owner authorized to use it are documented.

5. QA and testing scripts

Run these from a non-production test number where possible. Record the time, tester, expected result, actual result, and owner for any issue.

New lead: "Hi, I need help with [service] in [location] this week." Confirm a clear response, required lead details, correct CRM record, and the right follow-up owner.

Booking: "Can I book the next available [appointment type]?" Confirm available times respect rules, the appointment lands in the correct calendar, and notifications reach the named recipient.

Existing customer: "I need to change my appointment." Confirm identification, approved reschedule path, and no duplicate record.

Urgent or sensitive request: Use the client-approved test phrase. Confirm immediate escalation without an unsupported answer.

Unknown question and transfer failure: Ask an unapproved question, then make the transfer destination unavailable. Confirm the assistant offers the approved fallback and creates a follow-up task.

6. Go-live plan

1. FlowPilot completes a configuration review with the client owner and resolves all critical QA issues.
2. Launch first to a controlled route, after-hours path, or defined call percentage for the agreed observation period.
3. Client monitors escalations and booked appointments during the first business day; FlowPilot monitors call outcomes, failed routes, and knowledge gaps.
4. Expand to the agreed full route only after the client owner approves the observed results.
5. If a material routing, safety, privacy, or booking error occurs, use the documented rollback destination, preserve the call reference, and notify FlowPilot support.

7. Handoff and training

FlowPilot provides a walkthrough for the implementation owner and backup covering call summaries, alerts, CRM records, appointment exceptions, knowledge-base updates, and the rollback path. The client team practices handling an urgent escalation, a missed transfer, a booking correction, and a caller request outside approved scope. The client receives the approved configuration summary and named support route.

8. Ongoing maintenance

FlowPilot reviews sampled calls, failed intents, transfer outcomes, booking results, and agreed operational metrics each month. The client must notify FlowPilot before changing hours, services, locations, staff, phone routing, calendar rules, privacy language, or escalation contacts. Material changes are reviewed and tested before production activation.

9. Responsibilities

FlowPilot: configure the approved workflow, document settings, conduct QA, monitor implementation issues, and recommend improvements.

Client: provide accurate source information and authorized access; approve call language, routing, policies, and launch; maintain human coverage; and respond to escalations and change requests.

10. Acceptance criteria

- [ ] Required client access and business information are complete.

- [ ] Test calls demonstrate correct lead capture, routing, fallback, and booking behavior where enabled.
- [ ] Urgent/sensitive scenarios follow the approved escalation path.
- [ ] Client owner has completed training and received configuration and rollback documentation.
- [ ] Client owner approves the live workflow in writing or through the agreed project channel.

11. Support and escalation

For an incident, send FlowPilot the call time, caller number or reference, affected number, expected behavior, actual behavior, urgency, and screenshots or transcript where available. For safety, privacy, or material routing issues, the client may immediately use the rollback route and notify FlowPilot. FlowPilot investigates configuration and integration issues; the client owns phone-carrier access, business decisions, caller follow-up, and policy approvals.