**FLOWPILOT**
AI AUTOMATION FOR SMALL SERVICE BUSINESSES

# Lead Conversion & Booking Automation

**Client implementation SOP · $399/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 governs the workflow that captures leads, qualifies them using client-approved rules, routes them to the correct owner, offers booking, sends approved reminders, and reports pipeline activity. The objective is a reliable and visible handoff from enquiry to booked appointment or human follow-up. Automation supports the team; it does not make unsupported eligibility, pricing, or service decisions.

In scope: lead-source mapping, CRM fields and stages, intake, qualification, booking, reminders, follow-up stop rules, alerts, and reporting.

Out of scope unless separately approved: paid advertising changes, unapproved outreach campaigns, payment processing, custom CRM migrations, regulated advice, and staff performance management.

# 2. Prerequisites and access checklist

- [ ] Name a client implementation owner, CRM owner, calendar owner, and response-team lead.
- [ ] Provide authorized access to enabled forms, inboxes, website chat, CRM, calendar, and approved messaging channels.
- [ ] Approve the lead stages, field definitions, service area, operating hours, response targets, and exception routes.
- [ ] Provide appointment types, duration, buffers, capacity, staff assignment, lead-time, cancellation, and rescheduling rules.
- [ ] Provide approved qualification rules, exclusions, pricing guidance, message templates, consent records, sender identity, and opt-out process.
- [ ] Identify urgent, high-value, existing-customer, and manual-review scenarios with named human owners.

# 3. Implementation steps

### Step 1 - Map intake and ownership

1. Inventory every enabled lead source and document the source label, required fields, source owner, destination, and duplicate behavior.
2. Define the minimum useful fields: name, preferred contact method, requested service, location, timing, source, and notes.
3. Map each CRM stage to one accountable owner. An automation may create a task, but a person owns the outcome.

### Step 2 - Configure qualification and routing

1. Translate the client's qualification rules into plain-language conditions: service area, service type, timing, availability, exclusions, and escalation flags.
2. Route uncertain, sensitive, high-value, or exception cases to manual review rather than automatically rejecting or promising service.

3. Configure duplicate detection and merge behavior so a returning lead keeps a coherent history.

### Step 3 - Configure booking and follow-up

1. Connect the approved calendar and appointment types; apply availability, duration, buffers, capacity, and staff rules.
2. Decide whether qualified leads receive a booking link, offered times, or a task for a team member.
3. Build concise follow-up paths for incomplete intake, no response, booking confirmation, reschedule, cancellation, and no-show. Stop all follow-up on booking, opt-out, manual close, or disqualifying status.

### Step 4 - Configure reporting

1. Track source, stage movement, response time where available, booking result, follow-up status, and exception reason.
2. Validate every report against a small set of known test records before using it for operational decisions.

## 4. Configuration checklist

- [ ] Every enabled source creates or updates the correct CRM record with a visible source label.
- [ ] Required fields, validation messages, duplicate handling, pipeline stages, and task owners are confirmed.
- [ ] Qualification paths cover qualified, manual review, not a fit, urgent, and existing-customer cases.
- [ ] Booking rules match the client calendar, staff availability, buffers, capacity, and cancellation policy.
- [ ] Message sender, consent, templates, timing, opt-out, and stop conditions are approved for every enabled channel.
- [ ] Alerts for urgent, stalled, high-value, and failed-booking leads reach named people.
- [ ] Reporting definitions and the monthly review owner are documented.

## 5. QA and testing scripts

Run each case with test contact details and document the expected and actual record, owner, task, and message outcome.

New web lead: Submit a qualified enquiry. Confirm source, required fields, CRM record, pipeline stage, owner, and booking path.

Incomplete lead: Omit a required field. Confirm the lead is not silently lost and that the approved completion path appears.

Out-of-area or not-a-fit: Submit an excluded request. Confirm the approved response or manual-review queue without a false booking promise.

Urgent lead: Submit the approved urgent test phrase. Confirm the escalation task/alert and a named human recipient.

Booking lifecycle: Book, reschedule, cancel, and create an unavailable-slot attempt. Confirm calendar accuracy, CRM updates, notifications, and stop conditions.

Messaging and opt-out: Trigger an approved reminder, then opt out. Confirm sender identity, content, recorded consent, opt-out handling, and suppression of later automation.

## 6. Go-live plan

1. Client owner approves the final stage map, qualification rules, booking policy, and message templates.
2. Launch with one source or a limited segment for the agreed observation window.
3. Client response-team lead monitors new tasks and escalations while FlowPilot checks source mapping, duplicate behavior, message delivery, and booking exceptions.
4. Review live test records and first production outcomes before enabling the remaining sources or follow-up paths.
5. Pause the affected automation and use the manual queue if messages, booking, consent, or routing behave outside the approved policy.

## 7. Handoff and training

FlowPilot trains the implementation owner and response-team lead on CRM stage ownership, task queues, manual review, booking corrections, opt-outs, reporting, and change requests. The client team completes a guided practice for a qualified lead, an urgent exception, a reschedule, and an opt-out. FlowPilot provides the approved field map, stage map, automation summary, and support route.

## 8. Ongoing maintenance

FlowPilot reviews source health, stage movement, automation exceptions, booking outcomes, and agreed reporting monthly. The client maintains calendar availability, staff ownership, service areas, qualification policy, consent records, sender approval, and timely responses to queues. New lead sources, CRM changes, campaigns, or policy changes require review and testing before activation.

## 9. Responsibilities

FlowPilot: configure approved integrations and logic, document settings, test paths, identify workflow issues, and maintain the agreed reporting review.

Client: own source systems, CRM data, calendar rules, consent and messaging approvals, response targets, business decisions, and human review outcomes.

## 10. Acceptance criteria

- [ ] All enabled sources create the expected CRM record without unintended duplicates.
- [ ] Qualification, manual-review, urgent, and not-a-fit paths produce the approved action.
- [ ] Booking, reminders, cancellations, and stop conditions pass the documented tests where enabled.

- [ ] Client team completes handoff training and can operate tasks, queues, and exceptions.
- [ ] Client owner approves the live workflow and ongoing change process.

## 11. Support and escalation

Report the source, time, contact reference, expected stage, actual stage, screenshots, and affected automation. For inappropriate messaging, consent concerns, or widespread booking/routing errors, pause the relevant workflow, preserve the records, and notify FlowPilot. FlowPilot investigates configuration and connector mapping; the client owns source-side access, business eligibility decisions, and customer communication.