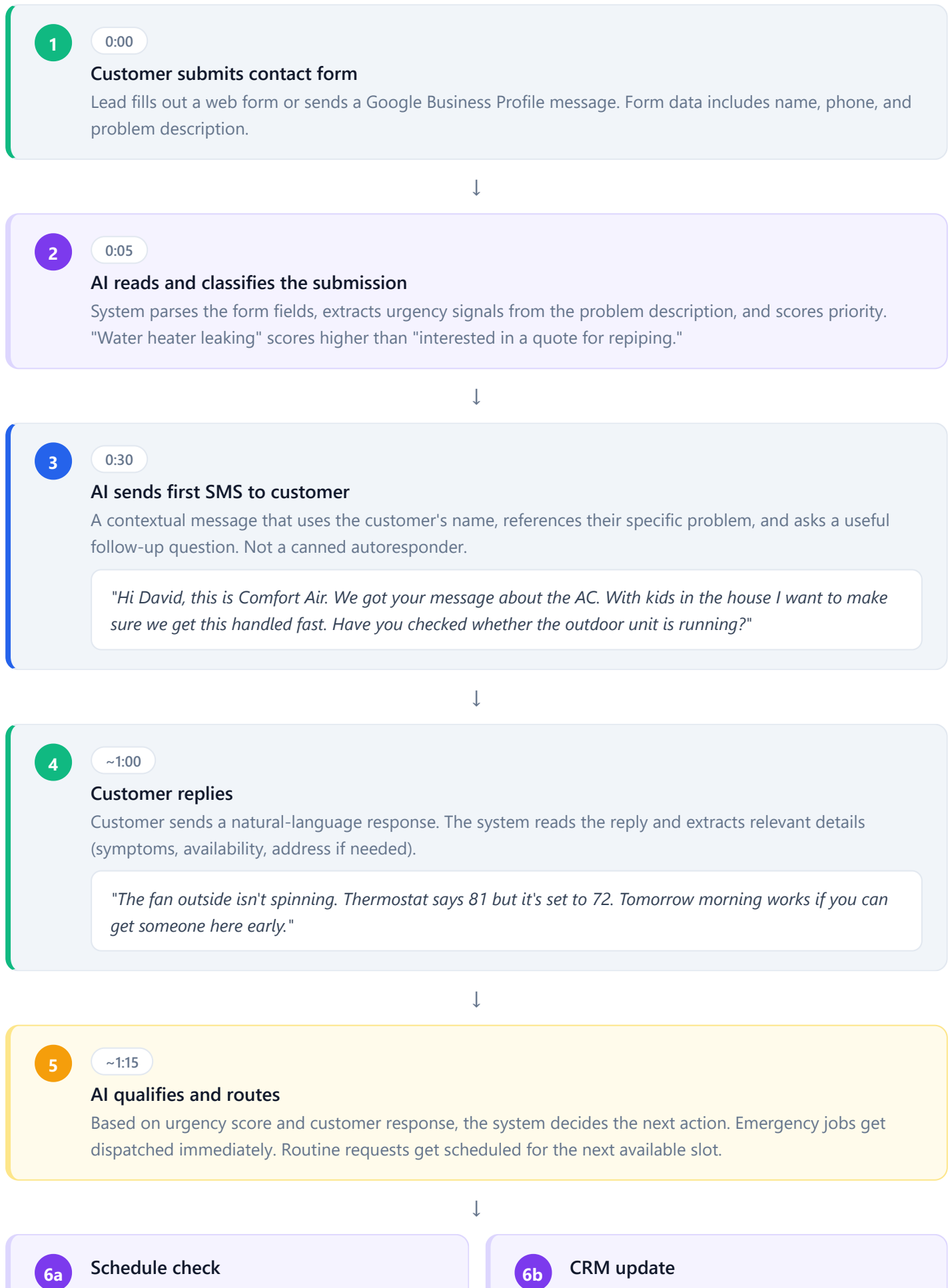


# AI SMS follow-up flow

How an AI-powered SMS system handles a lead from form submission to booked appointment



System checks the company calendar, finds the first available window matching the customer's preference, and reserves the slot.

Lead record created with full conversation transcript, urgency score, problem classification, and scheduled appointment details.



7

~2:00

### AI confirms appointment with customer

Customer receives confirmation with tech name, time window, and what to expect. This is the message that stops them from calling other companies.

*"Done. You're booked for 8 AM with James. He'll text you when he's on his way. If anything changes overnight, text this number."*



8

~2:15

### Tech notified

Assigned technician receives a text with customer name, address, problem summary, and appointment time. They confirm acceptance or it escalates to the next available tech.



9

Next morning

### Owner gets overnight summary

Single text or email summarizing all overnight activity: leads received, appointments booked, emergencies dispatched, and any leads that declined to schedule.

*"Last night: 3 leads. 1 booked for 8 AM (David, AC not cooling, James). 1 booked for 10 AM (drain clog). 1 asked for callback Wednesday."*

● AI action   ● Customer / outcome   ● Decision point   ● Background process

*Timestamps show elapsed time from form submission*