AI SMS follow-up flow

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

1 0:00

Customer submits contact form

Lead fills out a web form or sends a Google Business Profile message. Form data includes name, phone, and problem description.

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2 0:05

AI reads and classifies the submission

System parses the form fields, extracts urgency signals from the problem description, and scores priority. "Water heater leaking" scores higher than "interested in a quote for repiping."

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3 0:30

AI sends first SMS to customer

A contextual message that uses the customer's name, references their specific problem, and asks a useful follow-up question. Not a canned autoresponder.

> *"Hi David, this is Comfort Air. We got your message about the AC. With kids in the house I want to make sure we get this handled fast. Have you checked whether the outdoor unit is running?"*

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4 ~1:00

Customer replies

Customer sends a natural-language response. The system reads the reply and extracts relevant details (symptoms, availability, address if needed).

> *"The fan outside isn't spinning. Thermostat says 81 but it's set to 72. Tomorrow morning works if you can get someone here early."*

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5 ~1:15

AI qualifies and routes

Based on urgency score and customer response, the system decides the next action. Emergency jobs get dispatched immediately. Routine requests get scheduled for the next available slot.

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6a **Schedule check**

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

6b **CRM update**

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

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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