

PRODUCT PROFILE

Every Lead.
Every Channel.
One Intelligent
Flow.



STREAMLINEFLOW

The AI-powered growth platform that helps service businesses attract, engage, book and retain more customers—without managing a disconnected stack of tools.

StreamlineFlow unifies CRM, lead capture, communications, scheduling, marketing, automation, reputation and analytics around an industry-trained AI assistant that works 24/7.

THE CONTENT

The Growth Problem	03	Marketing & Reputation	12
The Solution	04	Industry-Trained Assistants	13
Complete Platform	05	Service Business Use Cases	14
Your AI Team	06	Implementation	15
Instant Lead Response	07	Business Impact	16
Automated Follow-Up	08	Pricing	17
Scheduling	09	Why StreamlineFlow	18
Brand Voice & Guardrails	10	Get Started	19
Omnichannel Engagement	11	Contact	20

02 | THE GROWTH PROBLEM

YOUR LEADS ARE MOVING FAST. YOUR TOOLS ARE NOT.

Modern service businesses often lose revenue in the gaps between an inquiry, a reply, a follow-up and a booked appointment.

Leads arrive from websites, ads, calls, texts and social channels.

After-hours inquiries wait while faster competitors respond.

Follow-up stops after the first unanswered message.

Customer context is scattered across separate tools and inboxes.

Manual scheduling creates delays, clashes and preventable no-shows.

Marketing activity is difficult to connect with booked revenue.

Generic chatbots weaken trust instead of reflecting the brand.

Owners pay for overlapping software that teams do not fully use.

THE RESULT

More administrative work—and fewer opportunities reaching the calendar.

03 | THE SOLUTION

ONE PLATFORM FROM FIRST TOUCH TO BOOKED JOB.

StreamlineFlow connects the complete customer journey so every lead has context, ownership and a next action.

01

Capture

Bring inquiries from websites, forms, calls, ads and messaging channels into one CRM.

02

Respond

Engage prospects instantly through AI-supported chat, SMS, email, WhatsApp and voice.

03

Qualify

Collect service needs, timing, location and buying intent.

04

Nurture

Run personalized follow-up sequences until the prospect responds or exits.

05

Schedule

Book, confirm and reschedule appointments against live calendar availability.

06

Convert & Grow

Track pipelines, reviews, campaigns and revenue-driving outcomes.

OUTCOME A booked job at the end of every complete flow.

04 | COMPLETE PLATFORM

TEN DISCONNECTED TOOLS, REPLACED BY ONE FLOW.

Every capability shares the same customer record, conversation history and automation logic.



AI-Powered CRM

Score, segment and organize leads while surfacing the next best action.



Lead Capture & Nurture

Capture every inquiry and activate timely, personalized sequences.



Marketing Automation

Trigger email and SMS campaigns from real customer behavior.



Appointment Scheduling

Book in real time with confirmations, reminders and rescheduling.



Multi-Channel Inbox

Bring calls, SMS, email, web chat and social conversations together.



Websites & Funnels

Launch connected digital experiences designed to convert.



Workflow Automation

Route, assign, notify and follow up through no-code processes.



Reputation Management

Request, monitor and respond to reviews consistently.



Reporting & Analytics

See pipeline, activity and ROI in owner-friendly dashboards.

05 | YOUR AI TEAM

FOUR COORDINATED CAPABILITIES CARRY EVERY LEAD FORWARD.

StreamlineFlow combines instant engagement, persistent follow-up, brand-aligned communication and real-time scheduling.

01

Instant Response

Reply the moment a lead raises a hand—across supported channels, day or night.

02

Smart Follow-Up

Continue personalized outreach when the first message receives no reply.

03

Brand Voice

Use approved tone, style, services and offers so automation sounds like the business.

04

Appointment Booking

Offer live availability, book the meeting and send confirmations automatically.

ALWAYS WORKING

The AI handles speed and repetition; the team handles expertise, judgment and high-value conversations.

06 | INSTANT LEAD RESPONSE

NEVER LET A HOT LEAD GO COLD.

The best lead is often the one your business answers first.

Always-On Coverage

Support inquiries outside normal office hours and during busy periods.

Multi-Channel Reply

Engage through web chat, SMS, email, WhatsApp and connected workflows.

Consistent Qualification

Ask approved questions and capture the details needed for the next step.

Intelligent Routing

Send urgent, complex or high-value conversations to the right person.

CRM Capture

Write customer details and conversation outcomes into the correct record.

Immediate Next Action

Book, assign, notify or start follow-up without waiting for manual entry.

LIVE CONVERSATION

Do you cover emergency repairs tonight?

Web chat · 21:48

Yes—we have a technician available. What's the issue and your postcode?

AI assistant · 21:48

Burst pipe under the sink. SW6.

BOOKED

Emergency call-out · Tonight 22:30

Assigned · Confirmation sent · CRM updated

07 | AUTOMATED FOLLOW-UP

TURN SILENCE INTO BOOKED REVENUE.

Most prospects do not convert after one message. StreamlineFlow keeps the conversation alive without forcing the team to remember every touch.

Reply Hand to team	No Reply Continue cadence	Booked Exit sequence	Opt-Out Suppress contact
Personalized Sequences Tailor outreach using service, source, behavior and customer context.		Smart Timing Use delays, reminders and event-based actions instead of random messages.	
Channel Coordination Combine SMS, email, calls and messaging workflows appropriately.		Stop Conditions End or redirect automation when the lead responds, books or opts out.	
Reactivation Reconnect with older opportunities using approved campaigns.		Visible Activity Keep every automated and human touch inside the shared customer history.	

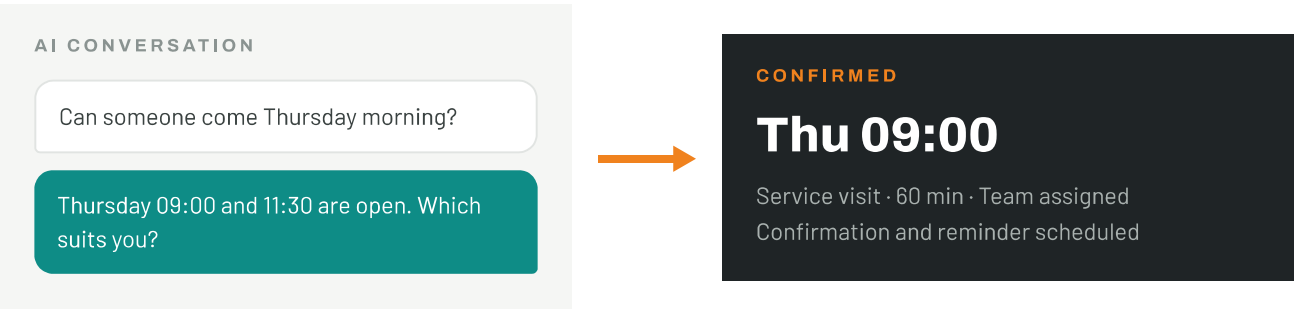
FOLLOW-UP PRINCIPLE

Persistent does not mean careless—cadence, consent, quiet hours and opt-outs must be configured responsibly.

08 | SCHEDULING

FILL THE CALENDAR WHILE THE OFFICE IS CLOSED.

Your AI assistant can convert interest into a confirmed appointment without back-and-forth delays.



Live Availability Offer only the dates and times available on the connected calendar.	Booking Rules Apply duration, service, team and scheduling constraints.	Confirmations Send appointment details immediately after booking.
Reminders Reduce avoidable no-shows with approved pre-appointment outreach.	Rescheduling Give customers a controlled path to choose another available time.	Team Visibility Keep calendars, contact records and pipeline stages synchronized.

CUSTOMER EXPERIENCE The lead moves from “interested” to “booked” in the same conversation.

09 | BRAND VOICE & GUARDRAILS

AUTOMATION THAT SOUNDS LIKE YOU—AND KNOWS ITS LIMITS.

StreamlineFlow is configured around approved knowledge, rules and handoff points before the AI assistant goes live.

GUARDRAILS · CONFIGURATION

Approved Knowledge

Control which services, FAQs, policies and offers the AI may use.

Conversation Rules

Define how the assistant responds, qualifies and guides prospects.

Brand Tone

Match the business personality: professional, warm, concise or consultative.

Escalation Triggers

Route sensitive, urgent, unusual or high-value conversations to people.

CRM Field Mapping

Capture details in the correct records and fields.

Pre-Launch Testing

Test realistic scenarios, edge cases and handoff moments before launch.

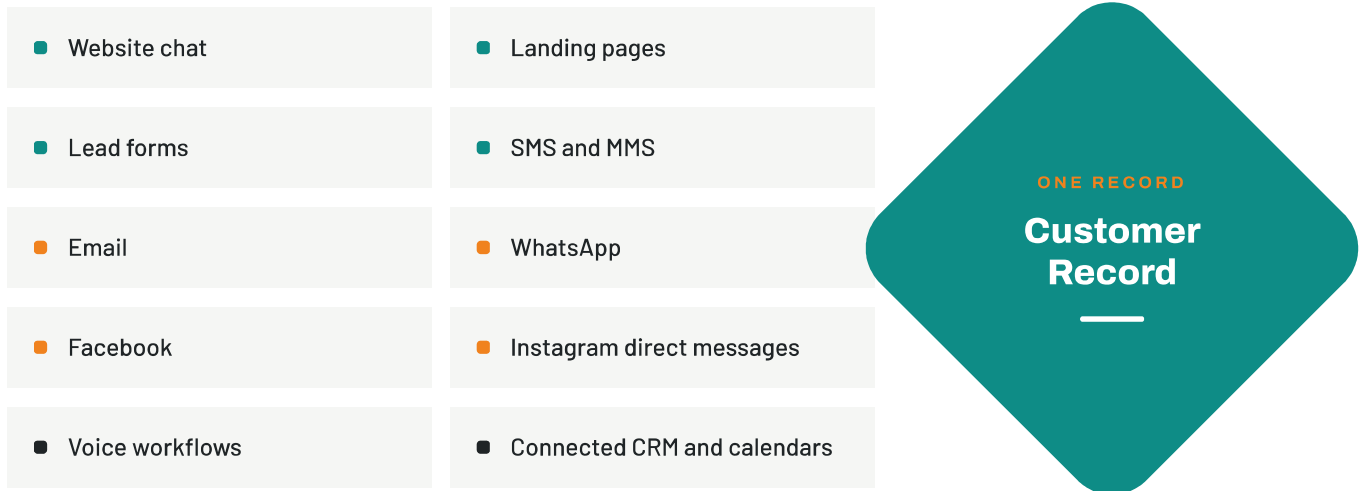
CONTROL & ACCURACY

AI should operate inside documented business guardrails—not make uncontrolled commitments.

10 | OMNICHANNEL ENGAGEMENT

MEET LEADS WHEREVER THEY START THE CONVERSATION.

Create one consistent customer experience across the channels people already use.



ONE CUSTOMER STORY

Every interaction should update the same customer record instead of creating another disconnected thread.

11 | MARKETING & REPUTATION

STAY VISIBLE, RELEVANT AND TRUSTED—AUTOMATICALLY.

StreamlineFlow connects customer acquisition with ongoing engagement and reputation building.



Automated Campaigns

Send behavior-based email and SMS journeys for nurture and reactivation.

Social Media Automation

Schedule content, monitor engagement and support approved responses.

WhatsApp Hub

Use automated conversations for inquiries, updates and follow-up.

Websites & Funnels

Create lead-generating pages connected directly to CRM workflows.

Review Requests

Invite satisfied customers to share feedback at the right moment.

Reputation Monitoring

Track and respond to reviews with consistent brand standards.



12 | INDUSTRY-TRAINED ASSISTANTS

A DEDICATED AI ASSISTANT TRAINED FOR YOUR TRADE.

StreamlineFlow adapts the assistant’s knowledge, qualification questions, scheduling rules and tone to the way each service business operates.



Home Services

Cleaning, plumbing, electrical, HVAC, landscaping, pest control, roofing and handyman services.

“Boiler not heating—can you come today?”



Health & Wellness

Spa, massage, fitness, beauty, gym and sports coaching.

“Any 60-minute massage slots this weekend?”



Pet Services

Grooming, walking, sitting and veterinary practices.

“Grooming for a large dog on Friday?”



Automotive & Repair

Auto repair, appliance repair and other appointment-led service operations.

“Brake noise—what’s the earliest booking?”

CONFIGURATION MATTERS

Each implementation should reflect actual services, coverage area, availability, pricing rules and escalation needs.

13 | SERVICE BUSINESS USE CASES

BUILT AROUND THE MOMENTS THAT CREATE OR LOSE REVENUE.

The platform can support common workflows across acquisition, customer service and retention.

After-Hours Lead

Reply, qualify and book while the team is unavailable.

INQUIRY → AI REPLY → BOOKED

Missed Call Recovery

Trigger an immediate text or follow-up workflow after a missed call.

MISSED CALL → SMS → CALLBACK

Quote Request

Capture requirements, route the opportunity and schedule an estimate.

FORM → ROUTING → ESTIMATE

No-Response Nurture

Continue approved outreach until the lead replies or exits.

SILENCE → CADENCE → REPLY

Appointment Reminder

Confirm attendance and offer controlled rescheduling.

BOOKING → REMINDER → ATTENDED

Review & Referral

Request feedback after service and support referral campaigns.

JOB DONE → REQUEST → REVIEW

14 | IMPLEMENTATION

LIVE IN DAYS—CONFIGURED AROUND THE BUSINESS.

A successful AI assistant begins with workflow discovery, accurate knowledge and controlled testing.

- **1. Discover**
Map lead sources, services, channels, calendars, qualification and handoffs.
- **2. Connect**
Link the CRM, website, messaging, phone and calendar environment.
- **3. Train**
Configure knowledge, brand tone, questions, rules and escalation triggers.
- **4. Automate**
Build the response, follow-up, scheduling and notification workflows.
- **5. Test**
Run real scenarios, exceptions and consent or opt-out paths.
- **6. Launch & Optimize**
Go live, monitor conversations and improve using performance data.

■ GO LIVE

LOW-FRICTION START

The website positions setup as no-engineer-required and designed to go live in days rather than months.

15 | BUSINESS IMPACT

LESS SOFTWARE. FASTER RESPONSE. MORE BOOKED JOBS.

StreamlineFlow is designed to improve the operating conditions that influence conversion and scalable growth.

Speed-to-Lead

Reduce the time between inquiry and meaningful response.

Follow-Up Coverage

Ensure opportunities receive the intended nurture activity.

Calendar Utilization

Convert more qualified conversations into appointments.

Team Productivity

Reduce repetitive admin and switching between disconnected tools.

Customer Experience

Deliver faster, more consistent and better-contextualized communication.

Management Visibility

Track sources, conversations, pipeline movement and revenue outcomes.

MEASURE WHAT MATTERS

Response time • Contact rate • Booking rate • No-show rate • Pipeline conversion • Cost per booked job

16 | PRICING

ONE COMPLETE PLATFORM. TWO SIMPLE WAYS TO PAY.

Start with the core platform, up to five users and a seven-day free trial.

\$75 / Month

Monthly subscription with up to five users included.

Additional Users

Monthly plan: \$10 per user.

20% DISCOUNT

\$720 / Year

Annual subscription promoted with a 20% discount.

Additional Users

Annual plan: \$8 per user per month.

Core Platform

Contacts, pipelines, calendars, sites, workflows, campaigns, reporting and more.

AI & Communication

AI, calls, messaging and provider usage may be metered or subject to account-specific rates.

7-Day Trial

Test the platform and validate the operating fit before continuing.

CONFIRM BEFORE PUBLICATION

The annual page also displays "\$79/month," which conflicts with \$720/year; final checkout terms should be reconciled.

17 | WHY STREAMLINEFLOW

ONE AI BRAIN BEHIND THE ENTIRE CUSTOMER JOURNEY.

The differentiator is not simply having AI—it is connecting intelligence, customer context and workflows across the business.

01 Service-Business Focus

Built around inquiries, quotes, appointments, jobs and repeat customers.

03 Shared Customer Context

Every channel contributes to the same contact and opportunity history.

05 Human Handoffs

Escalate conversations when expertise or judgment is required.

02 AI + Complete Platform

Combine AI assistants with CRM, communications, marketing and scheduling.

04 Industry Configuration

Train knowledge, questions and rules around the selected trade.

06 Consolidated Operations

Replace overlapping point tools with one connected environment.

18 | GET STARTED

PUT YOUR AI ASSISTANT TO WORK TODAY.

Successful service businesses should not be limited by manual processes, missed inquiries or disconnected software.

Start the Free Trial or Plan Your AI Agent

Choose one representative lead journey—from first inquiry to booked appointment—and configure StreamlineFlow around the channels, rules and handoffs your business already uses.

NEXT STEP

www.streamlineflow.io

TRIAL

Start free for 7 days

Platform capabilities, integrations, AI usage, communication rates and commercial terms should be confirmed for the selected account and implementation scope.

THANK YOU



Lets Embark on the Ship of Success Together and
Land on the island of Achievements.

WE + YOU = SUCCESS



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