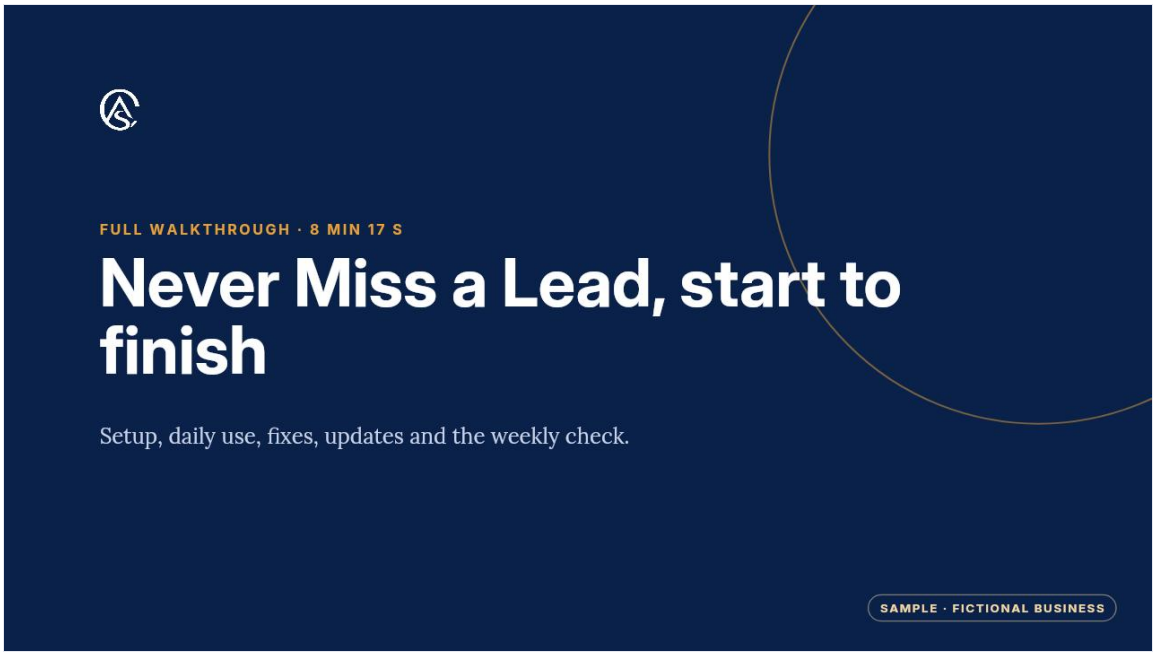
NEVER MISS A LEAD · FULL WALKTHROUGH

Never Miss a Lead: the full walkthrough

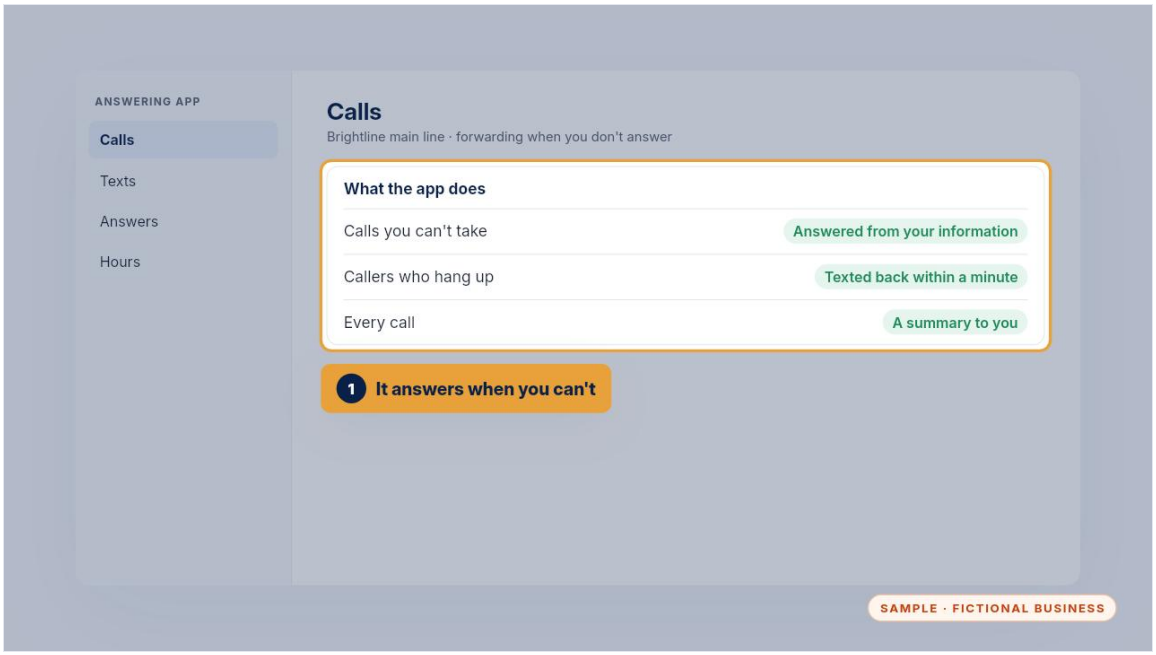
Setup with the Kit or the Install, daily use, fixing a wrong answer, updates, edge cases, privacy and the weekly check.

Watch the narrated video: https://openarmsolutions.com/guides/never-miss-a-lead/never-miss-a-lead-full-walkthrough

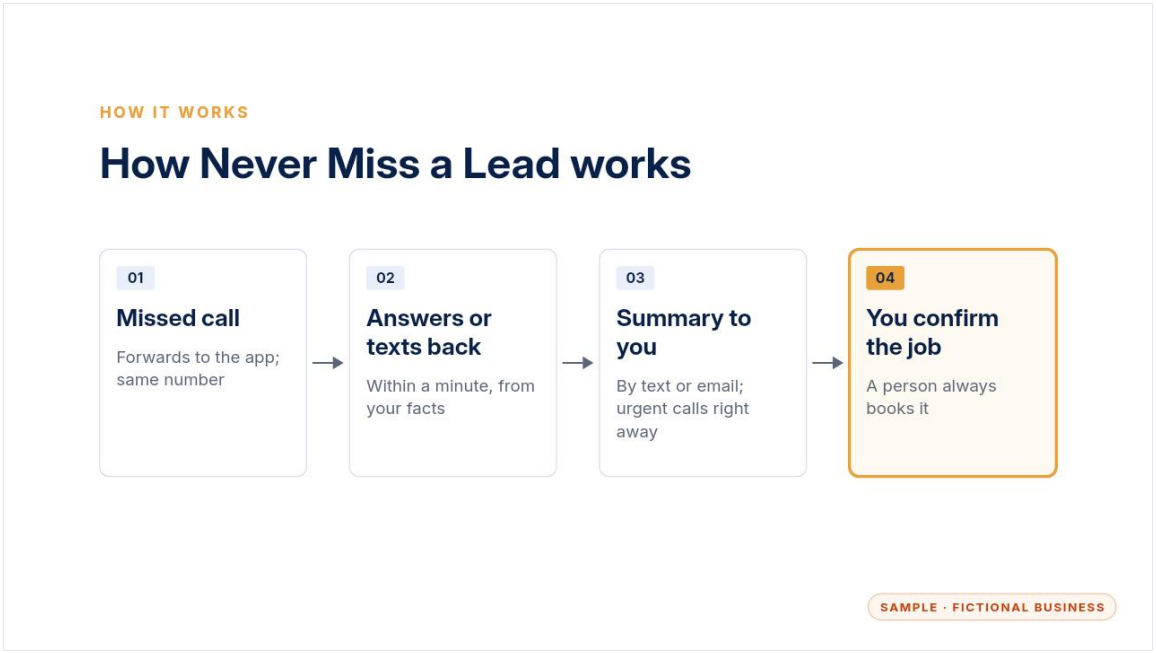


1 This is the full walkthrough of Never Miss a Lead, shown on our fictional sample business, Brightline Heating and Air. It covers setup, daily use, fixing a wrong answer, updates, edge cases, privacy and the weekly check. Use the chapters to jump to the part you need.

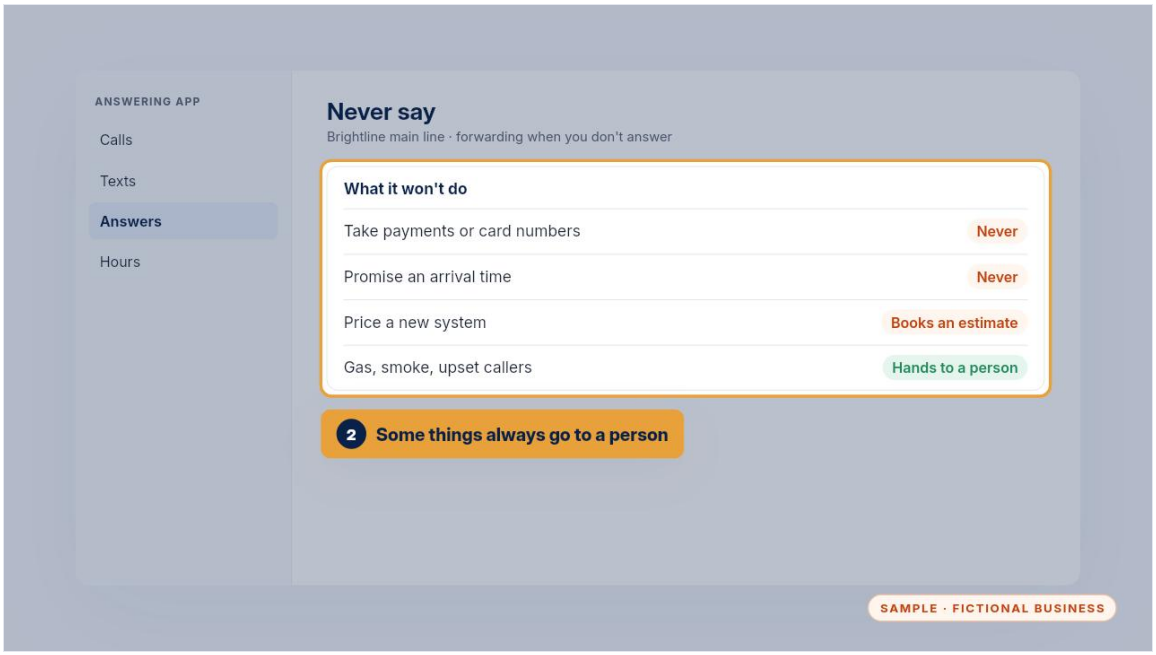
What it does and what it won't do



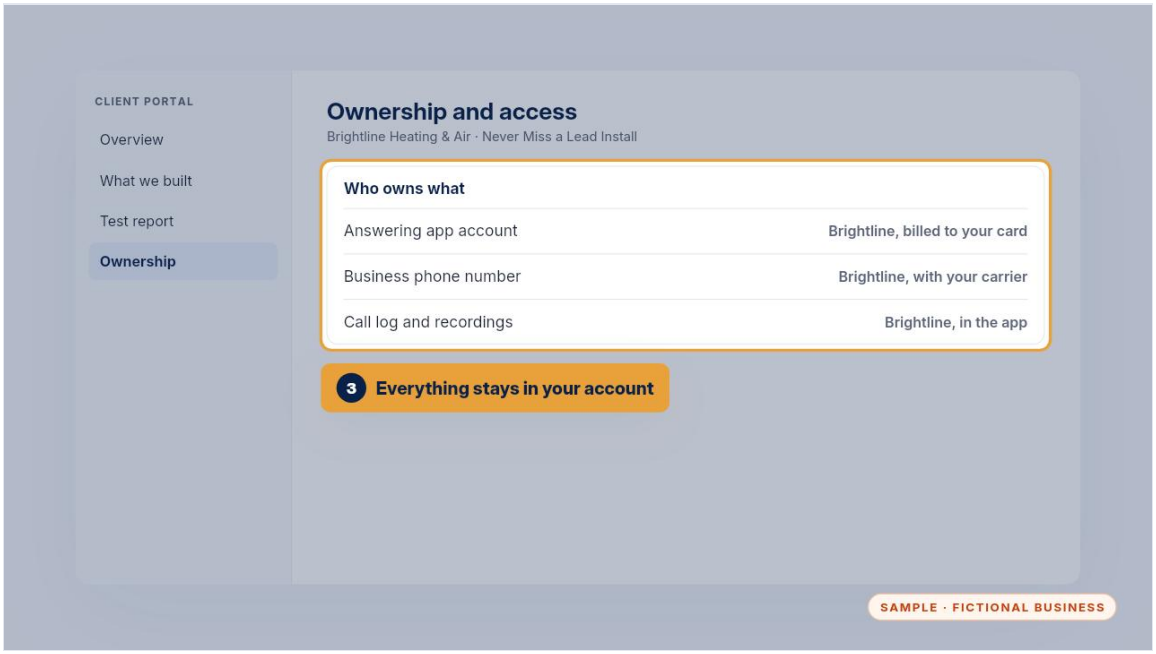
2 When you can't pick up, your answering app answers for you. It uses your own information, takes the caller's details, and texts back anyone who hangs up before it answers.



3 Here's the whole flow. A call you miss forwards to the app. The app answers, or texts back within a minute. You get a summary by text or email, and then you confirm the job.

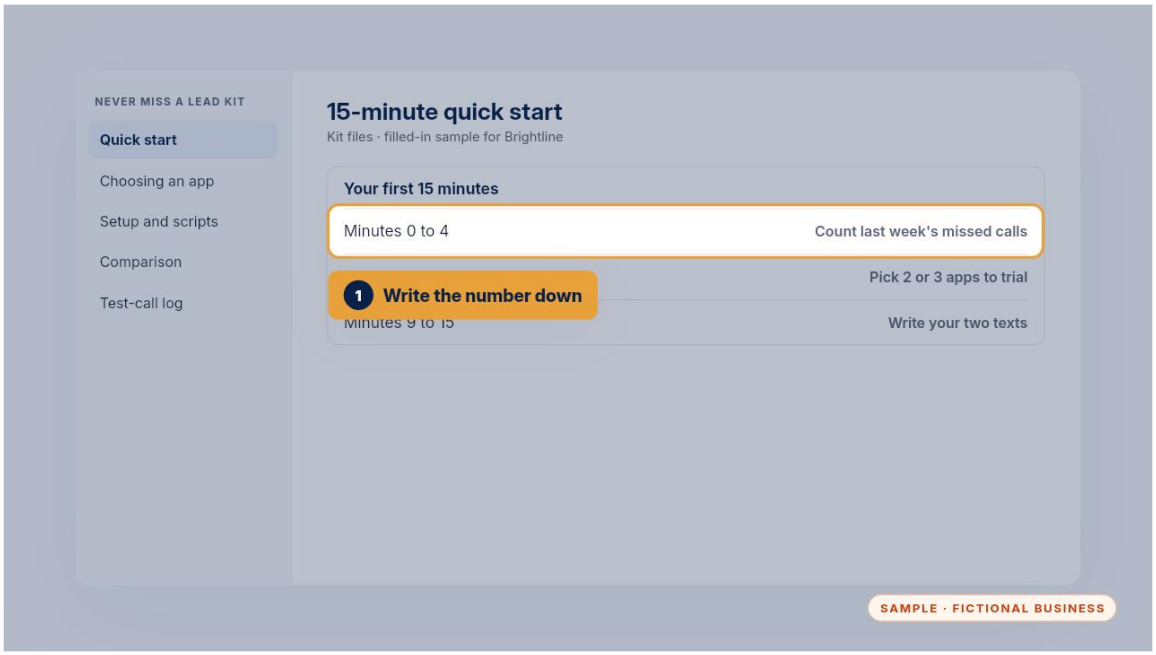


4 It never takes card numbers, never promises an arrival time and never prices a new system. A caller who asks for a person, sounds upset or mentions gas goes to a person.

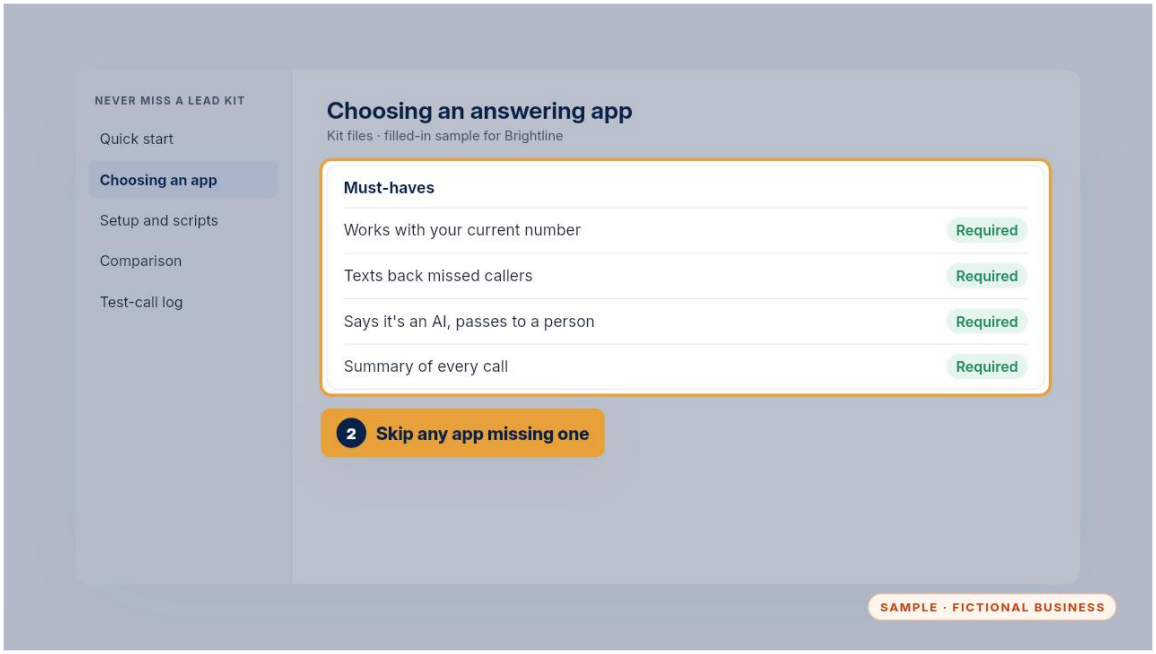


5 The app, your number and your call records stay in your own account. You pay the app directly, usually twenty-nine to one hundred ninety-nine dollars a month, by app and call volume.

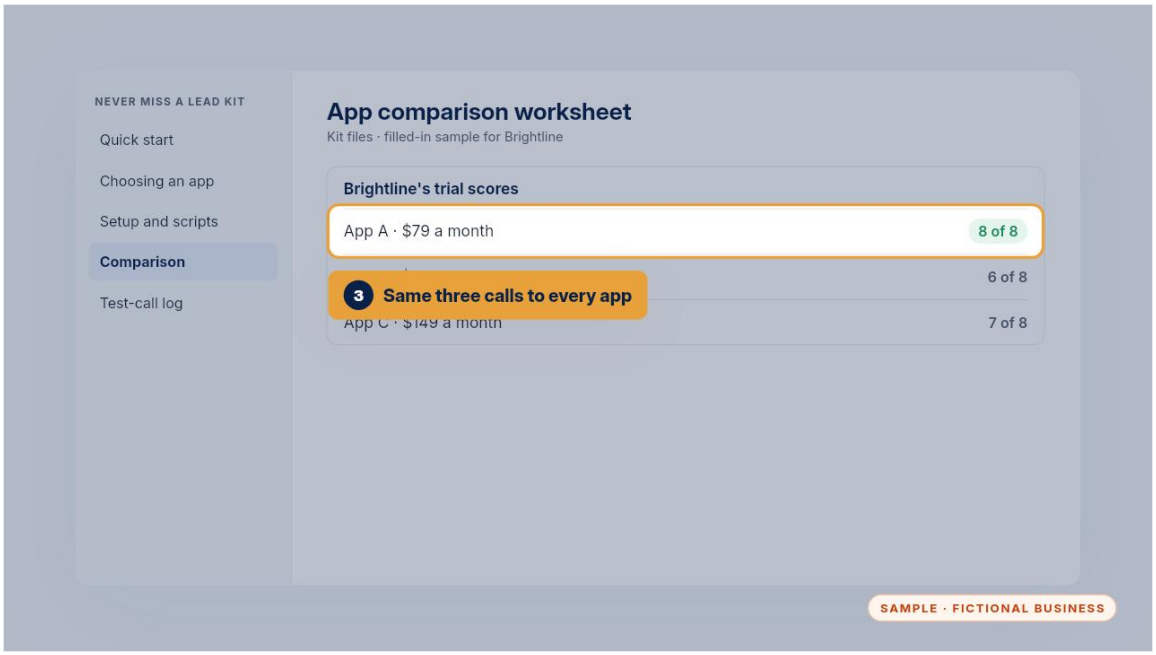
Setup, step by step



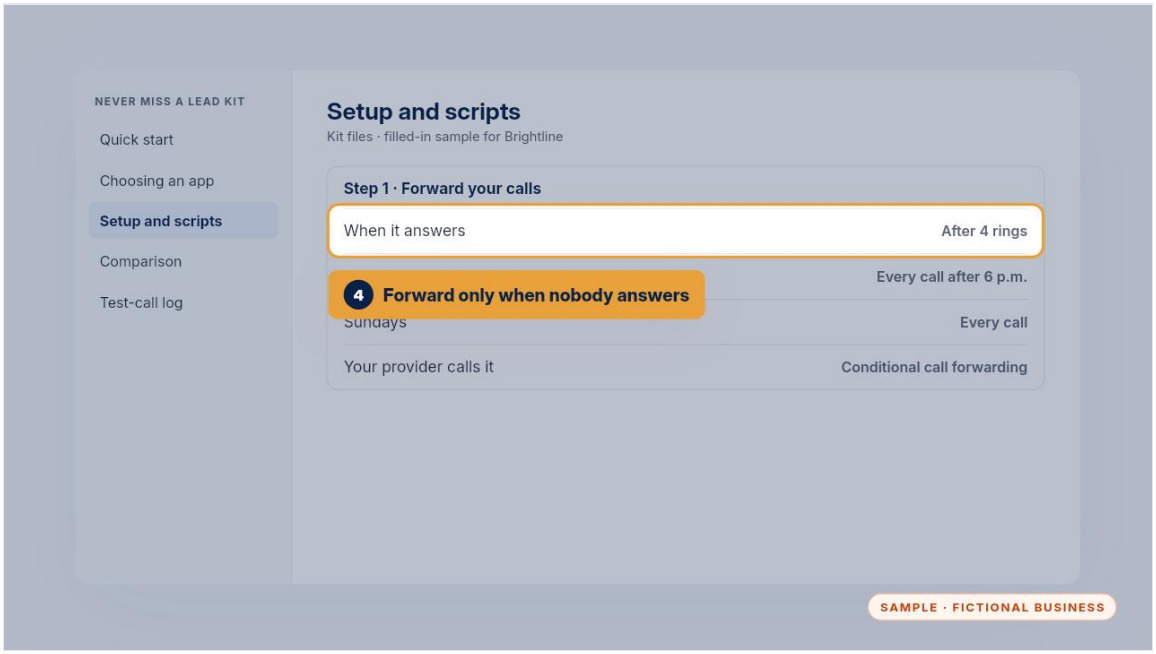
6 With the Kit, start with the fifteen-minute quick start. Count last week's missed calls in your call log and write the number down. You'll compare it again after thirty days.



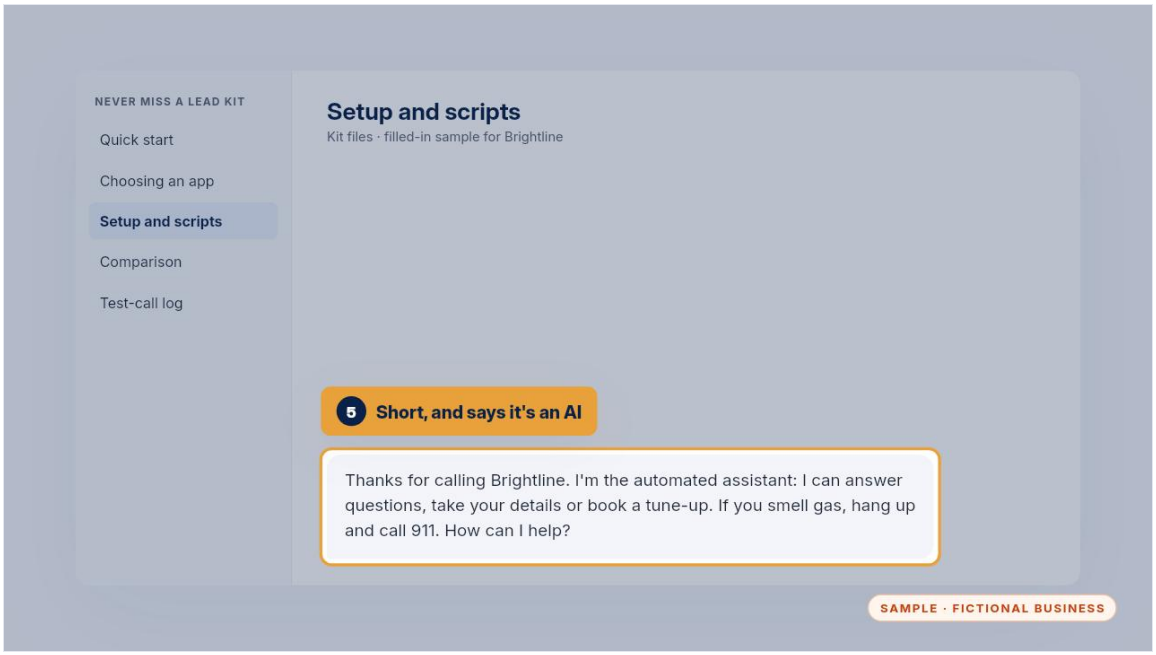
7 Then read the must-haves in Choosing an answering app. Skip any app that can't use your number, text back, answer from your information, say it's an AI, pass callers on and send summaries.



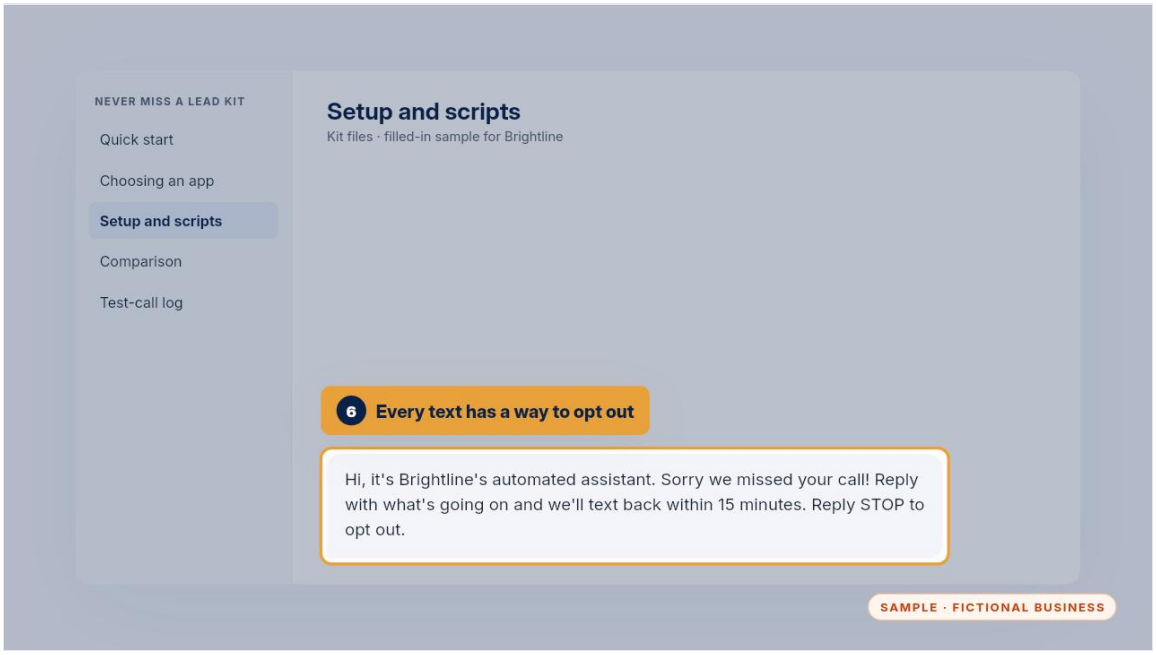
8 Start two or three free trials, make the same three test calls to each, and score them on the worksheet. Brightline chose the app that scored eight of eight, at seventy-nine dollars a month.



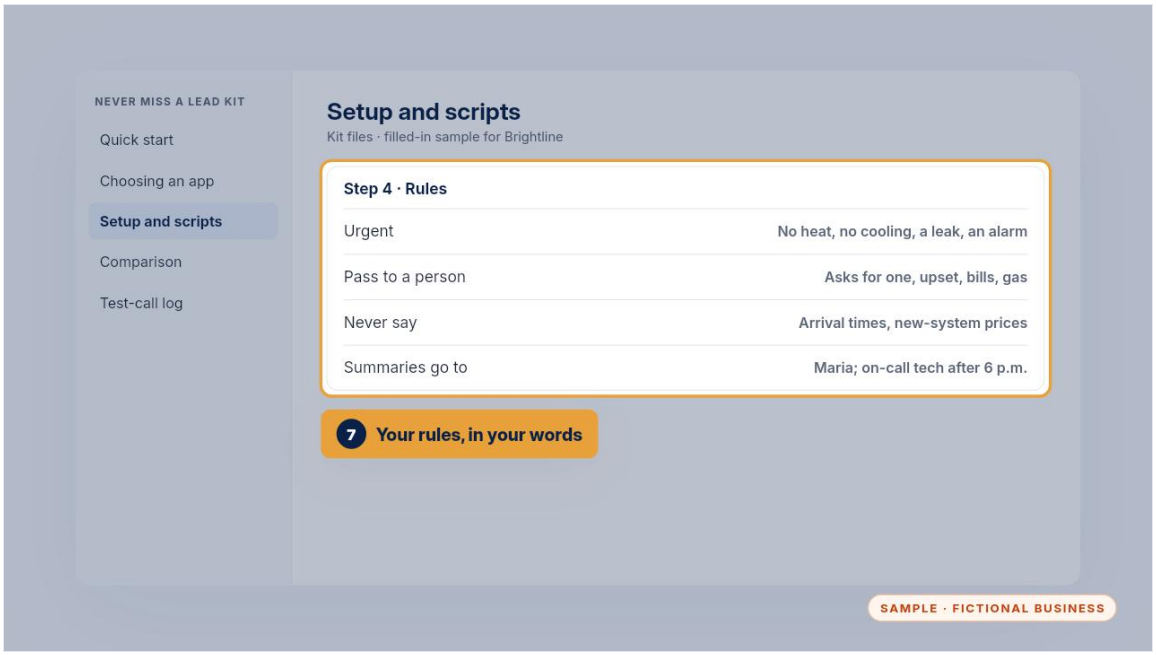
9 Next, forwarding. Most businesses forward only when nobody answers. Brightline's calls go to the app after four rings, and all calls after six in the evening and on Sundays.



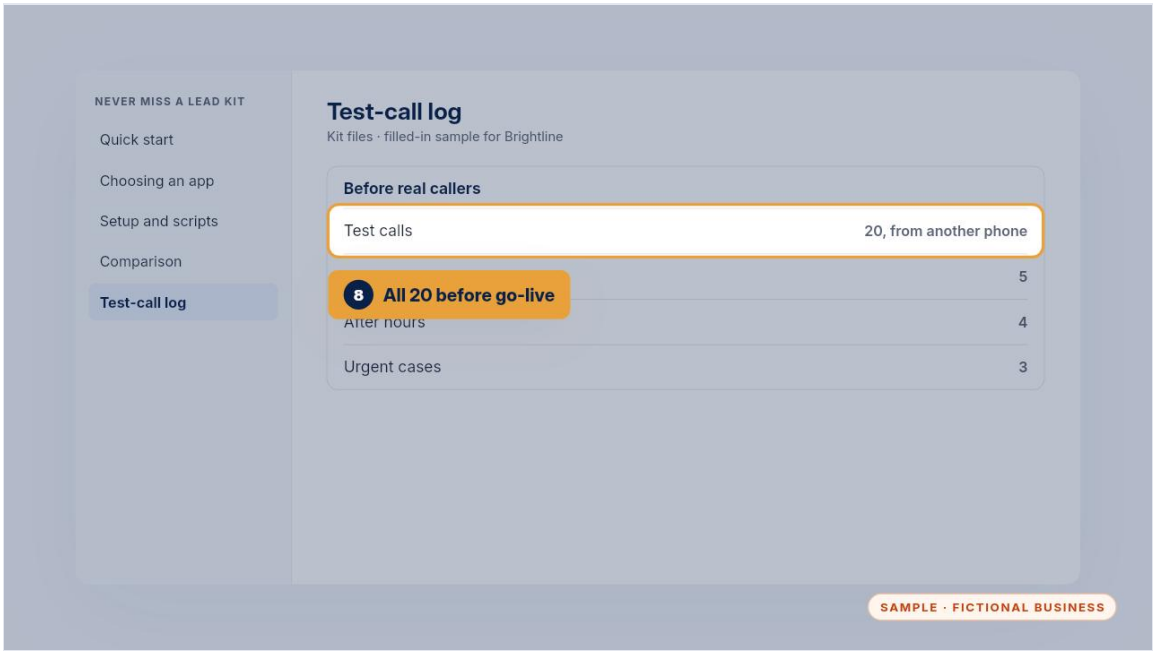
10 Write a short greeting that says it's an automated assistant and what it can do. If you record calls, the greeting says so, and you check your state's rules.



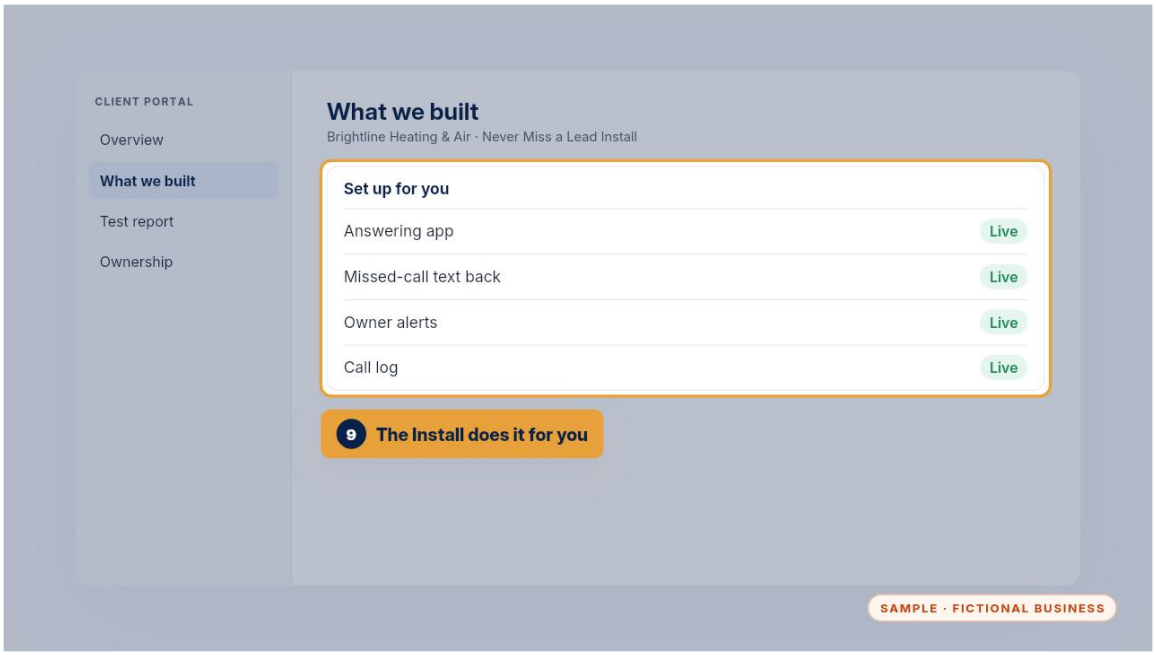
11 Then the missed-call and after-hours texts. Each says it's from your automated assistant and ends with reply STOP to opt out. Carriers require texting registration, so ask how your app handles it.



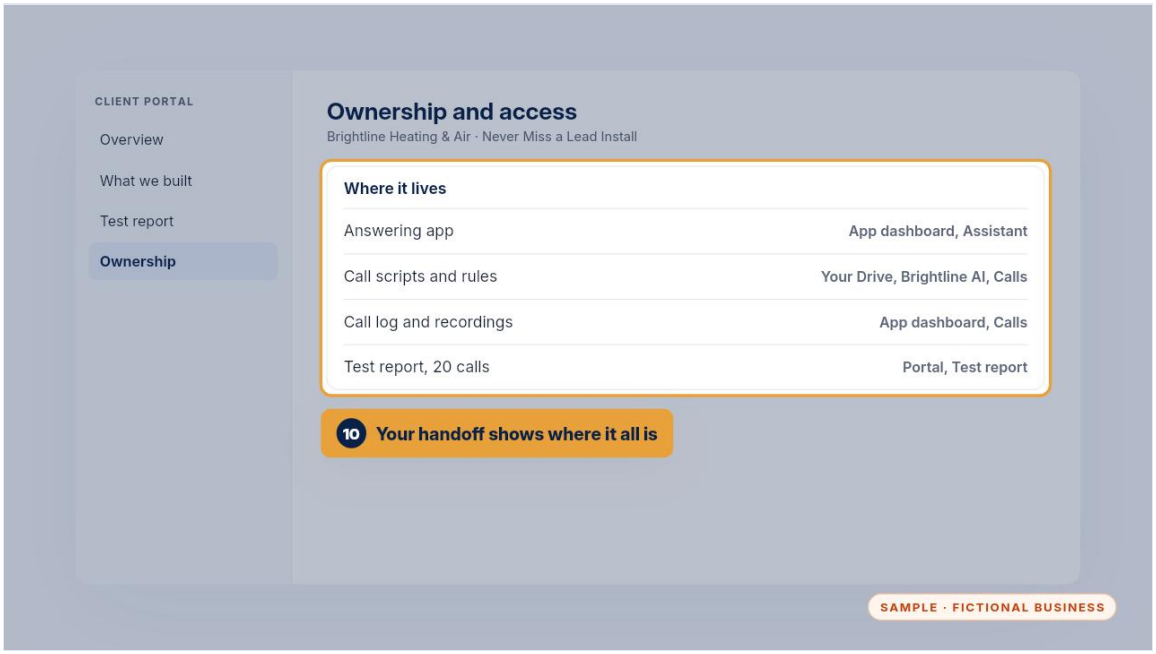
12 Fill in what's urgent, when to pass a call on, what it must never say, and where summaries go. With a Business Brain, paste in sections one to four.



13 Last, make all twenty calls on the test-call log, from a phone that isn't yours, before real callers reach the app.

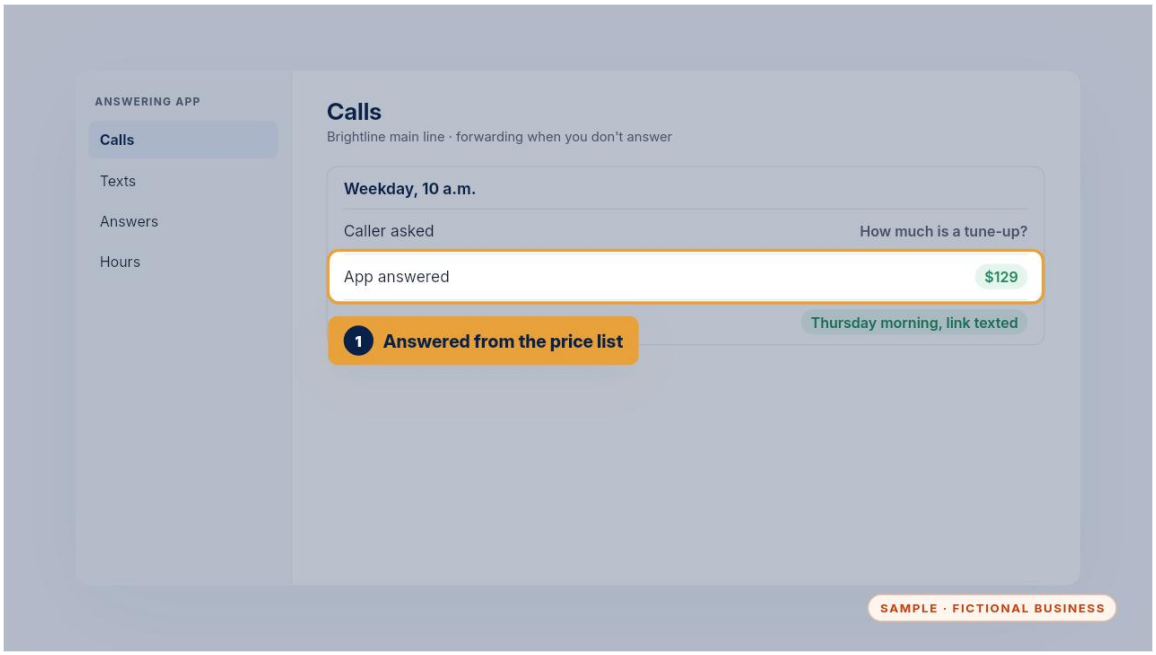


14 With the Install, we do all of this for you in one to two weeks. We open the app in your account, load your services, hours, top questions and booking rules, and run the test calls with you.

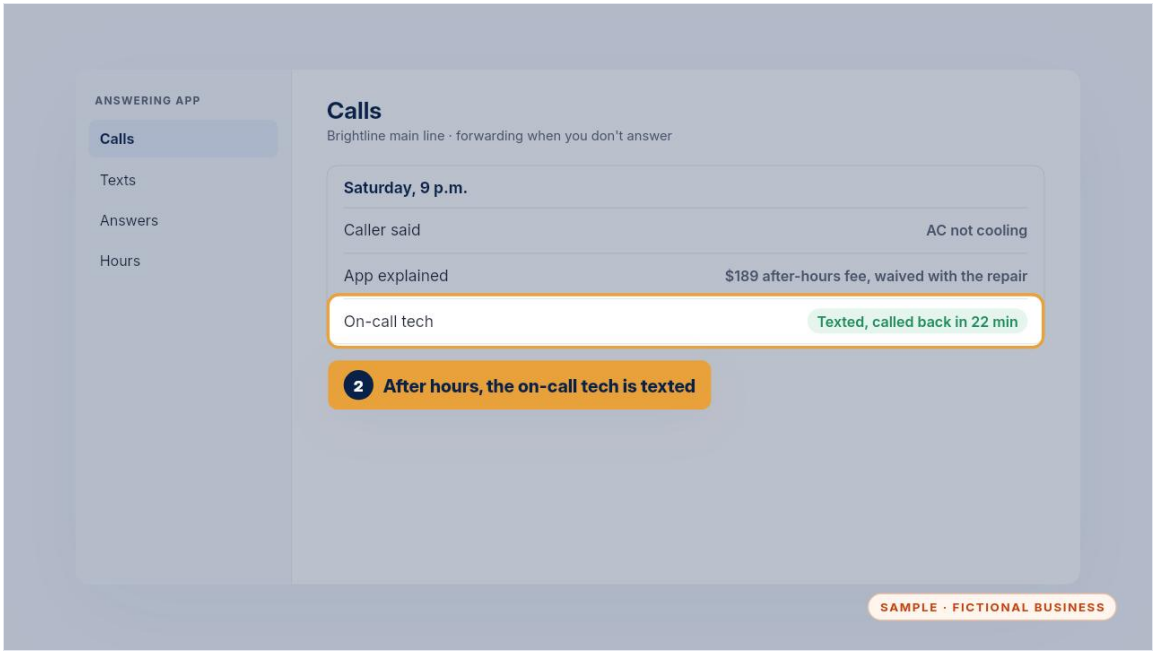


15 Your handoff pack shows where everything lives. Scripts and rules are in your own Drive, call logs stay in the app, and the twenty-call test report is in your portal.

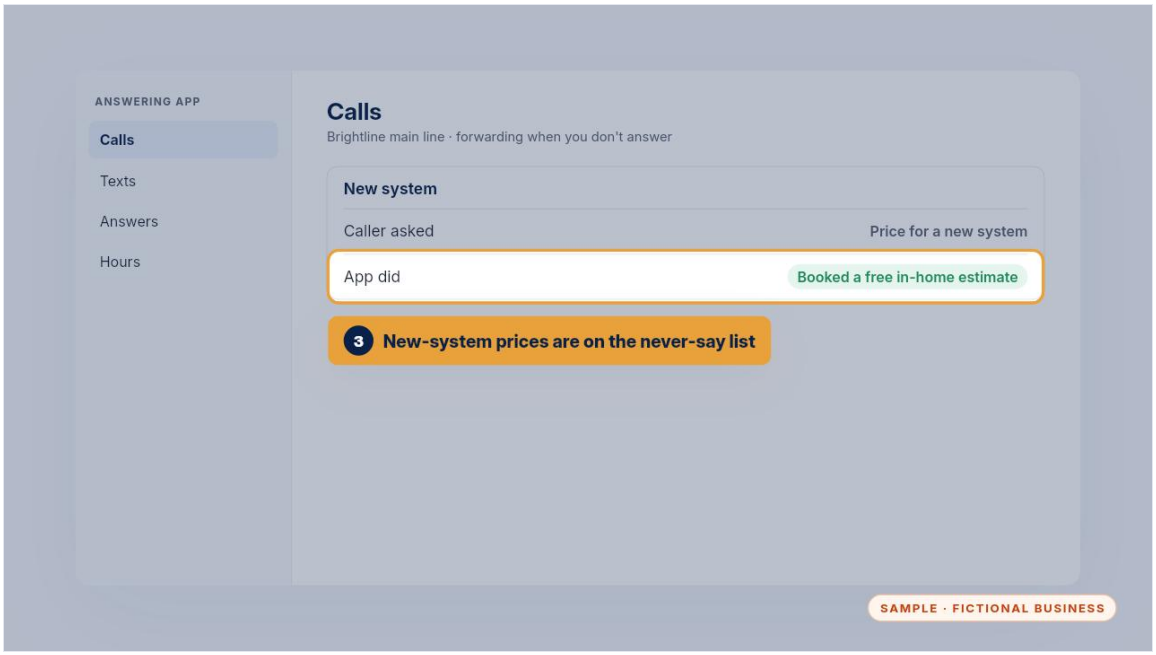
Daily use



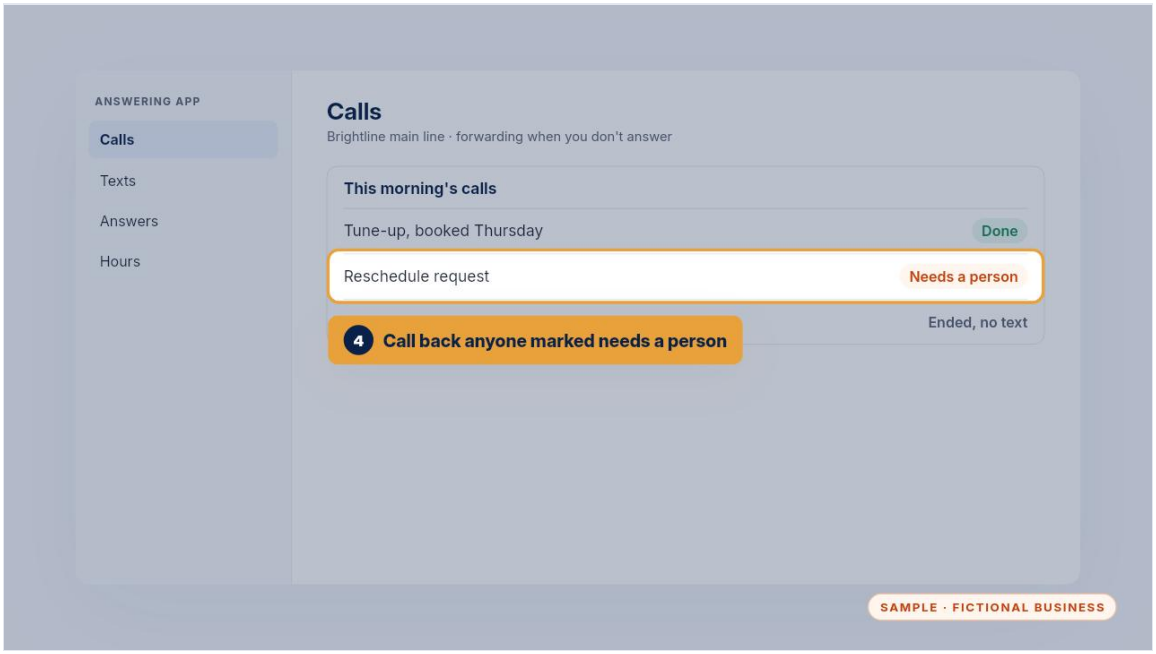
16 A weekday at ten. A caller asks what a tune-up costs. The app answers one hundred twenty-nine dollars, offers Thursday morning and texts the booking link.



17 Saturday at nine at night, an AC isn't cooling. The app explains the one hundred eighty-nine dollar after-hours fee, waived with the repair, and texts the on-call tech, who called back in twenty-two minutes.

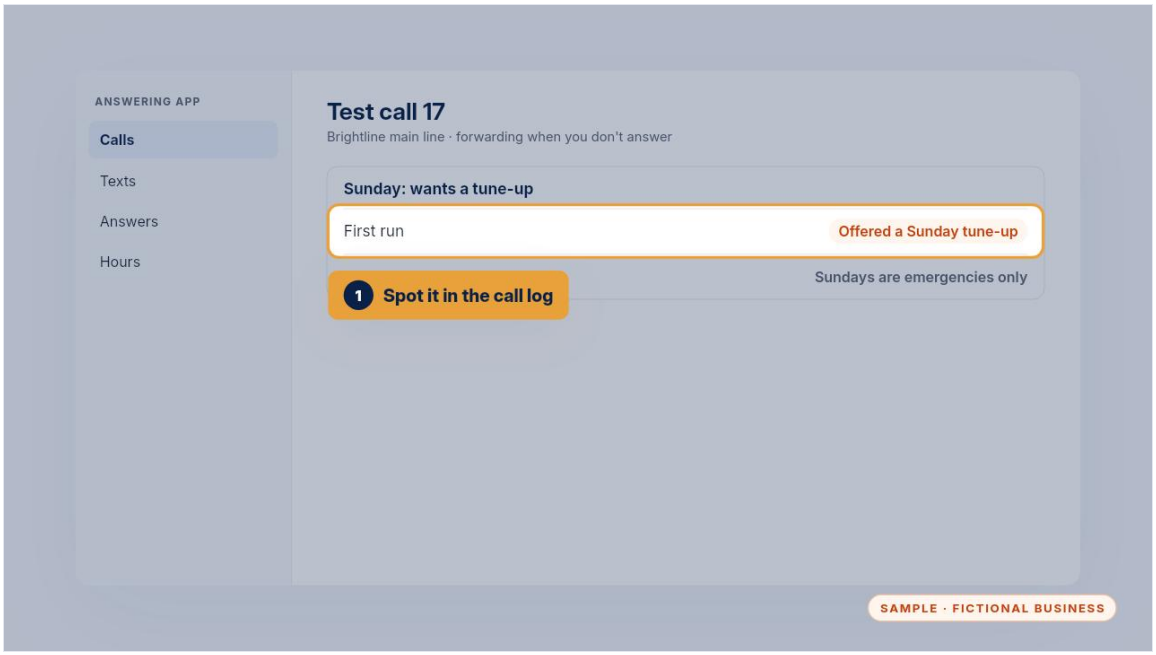


18 A caller wants a price for a new system. That's on the never-say list, so the app books a free in-home estimate instead.

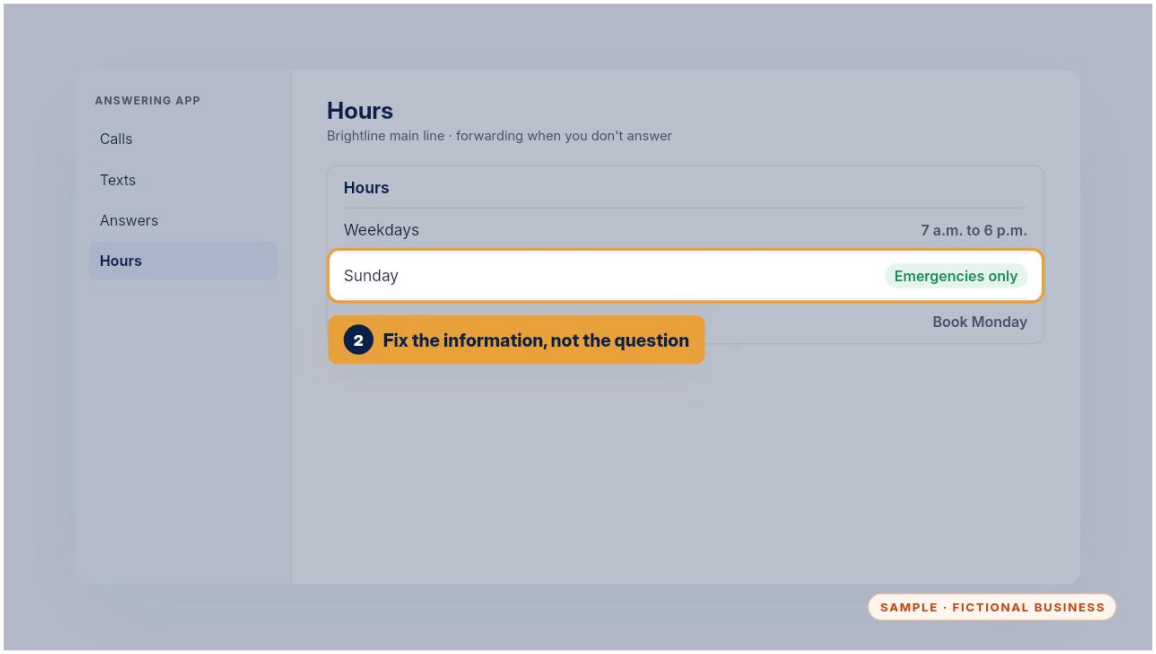


19 Each morning, open the Calls page. Every call has a summary and the caller's details. Call back anyone marked needs a person, like this customer who wants to reschedule.

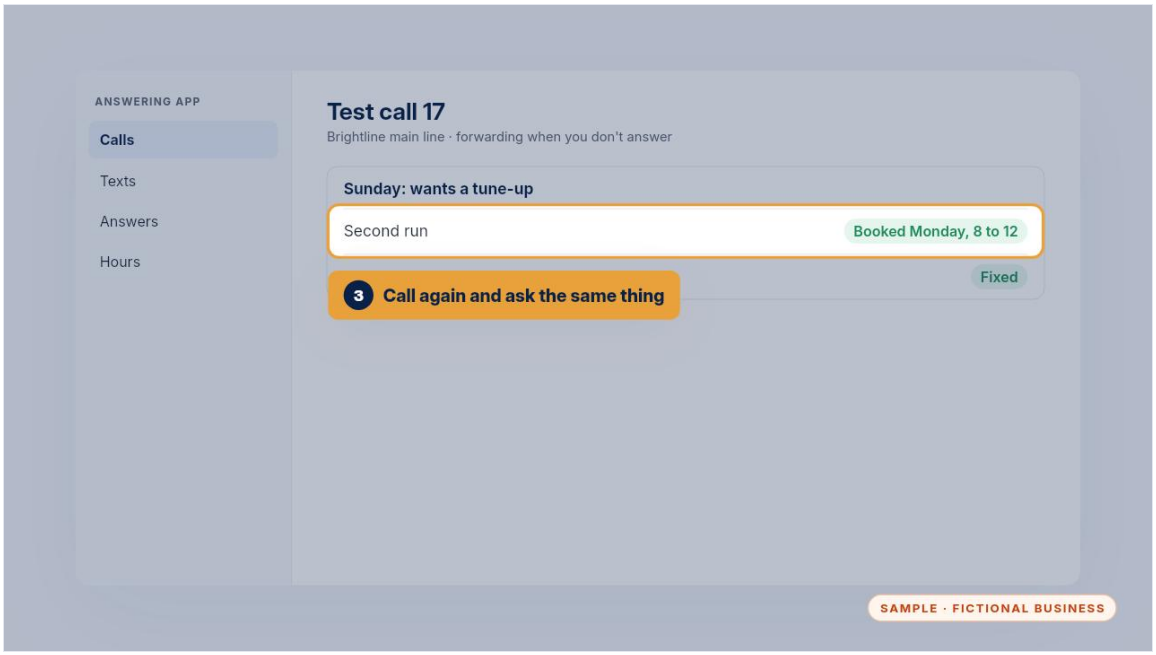
When it gets something wrong



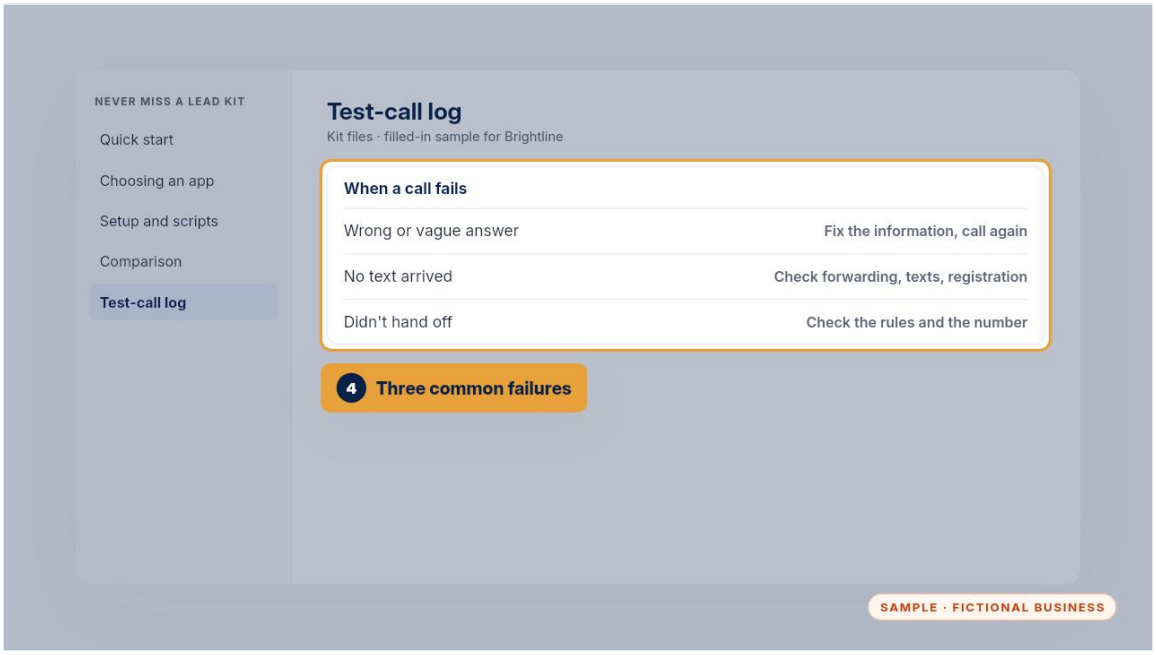
20 During testing, the app offered a tune-up on a Sunday. Brightline only takes emergencies on Sundays, so that answer was wrong.



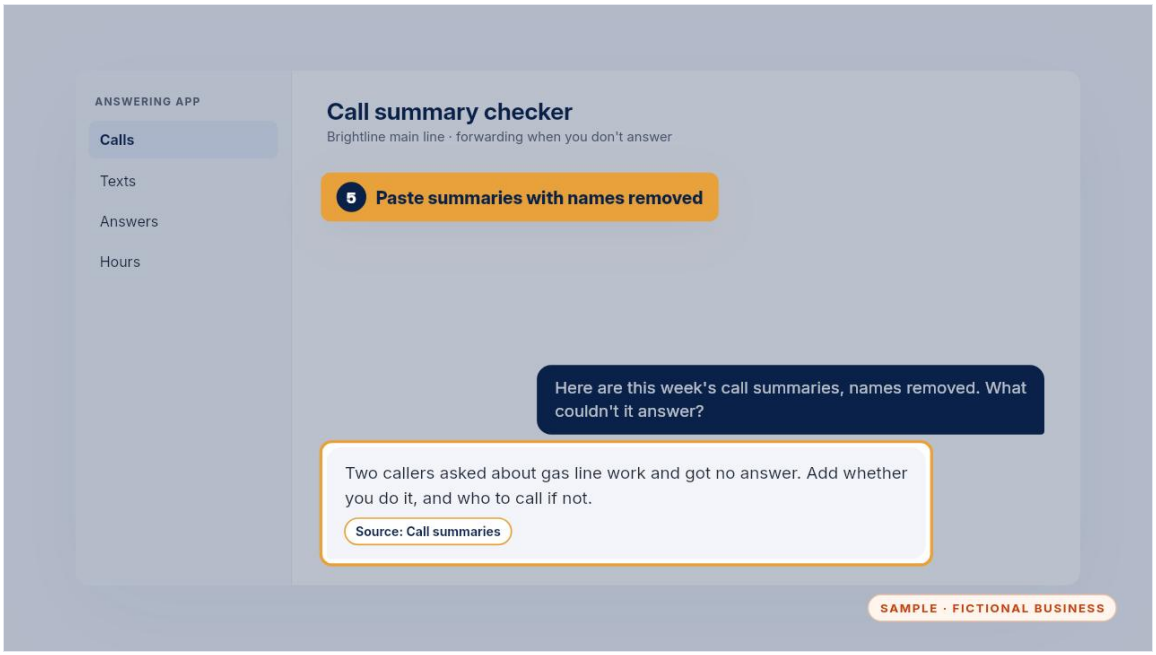
21 Fix the information you gave the app, not the question. Here the hours were changed to say Sunday is emergencies only, and routine visits book on Monday.



22 Then call again and ask the same thing. This time it booked Monday between eight and noon, so the call is marked fixed.

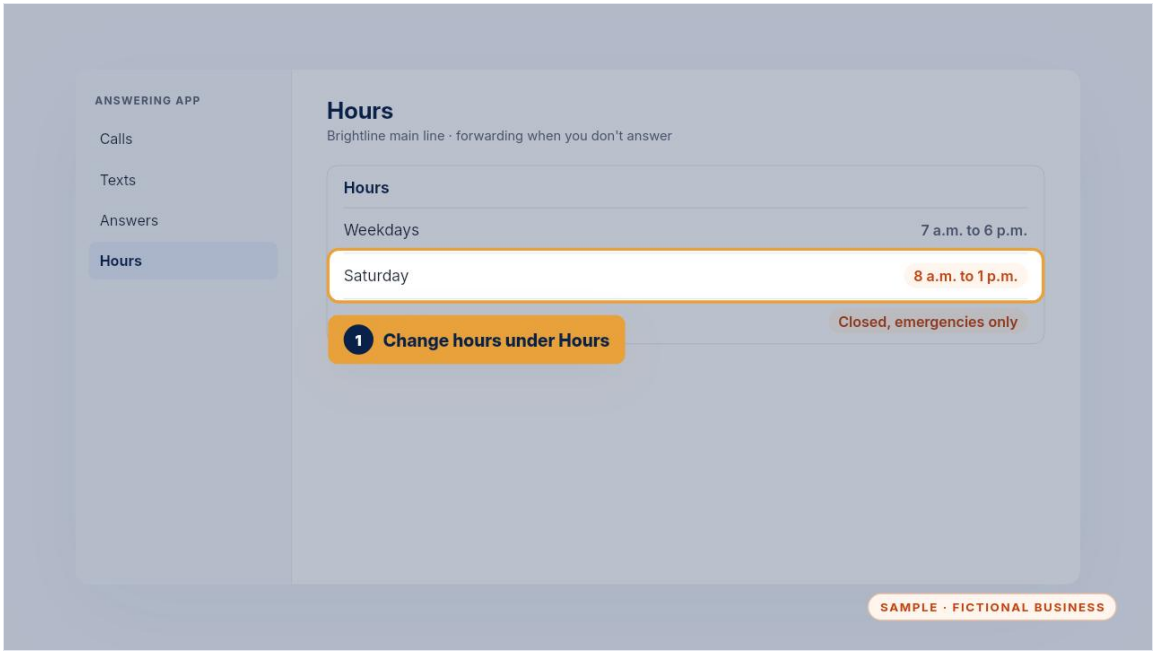


23 If no text arrives, check forwarding, the text setting and your texting registration. If it didn't hand off, check your rules and the number calls go to.

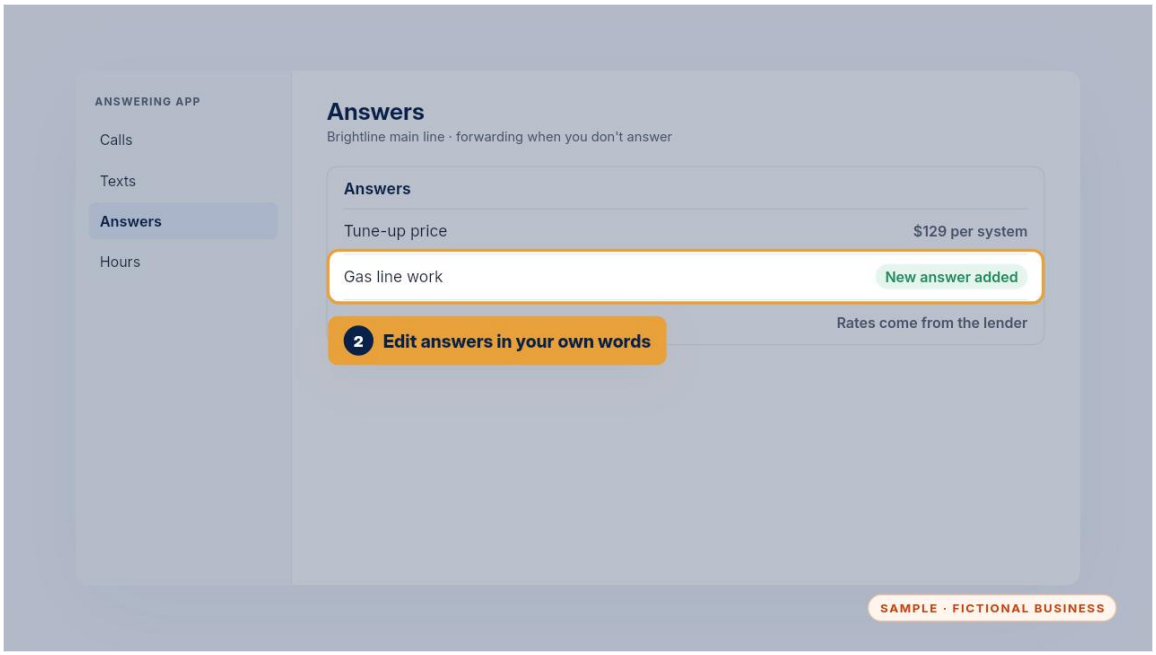


24 To catch problems early, paste a week of call summaries, with names removed, into the summary checker prompt. It lists questions the app couldn't answer and facts to add.

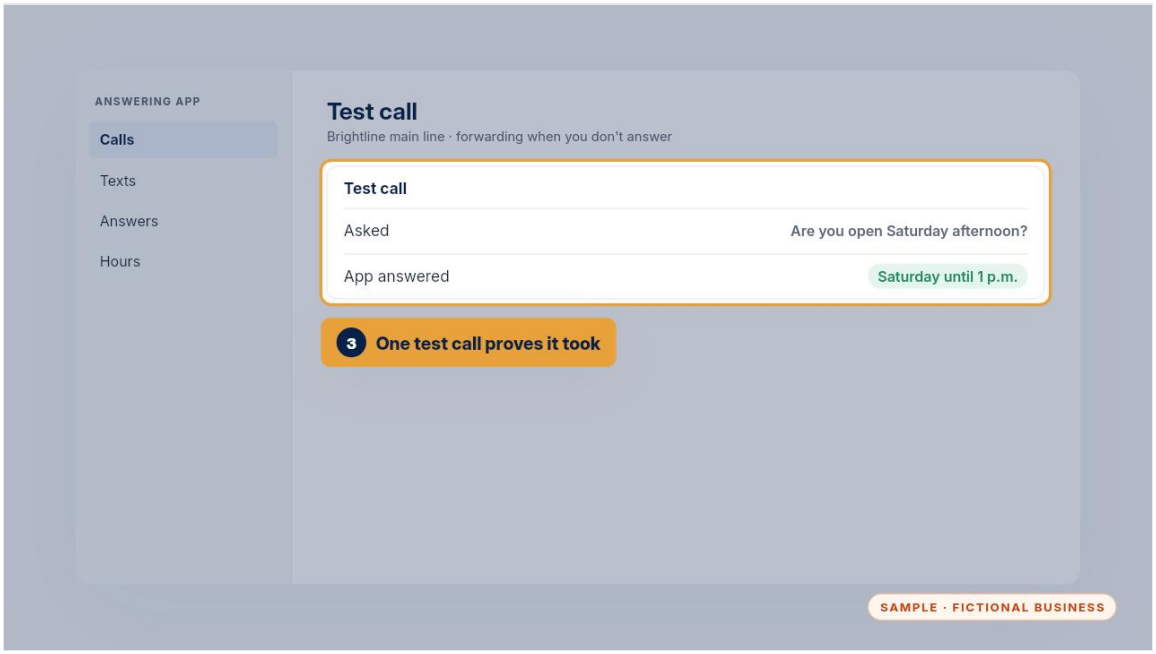
Updating prices, hours and services



25 When your hours change, change them under Hours. Before a holiday, add the day, and say whether emergencies still go to your on-call tech, so urgent callers aren't left waiting until you're back.

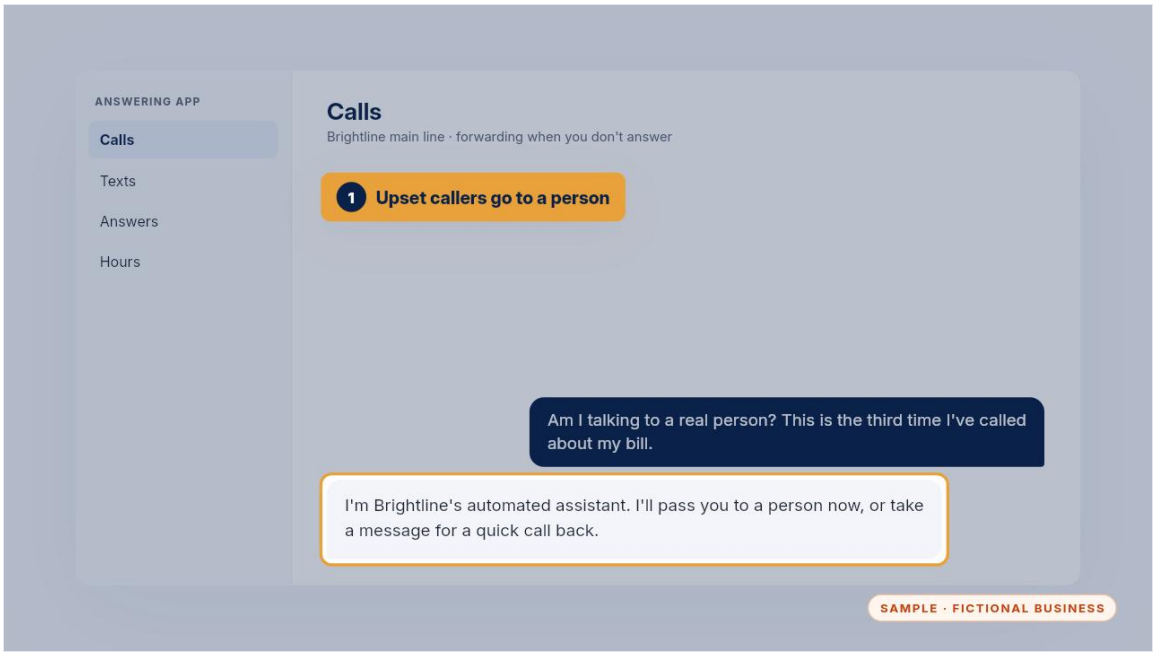


26 For a new price or service, edit it under Answers. Use the same wording as your Business Brain, so the phone, your website and your team all say the same thing.

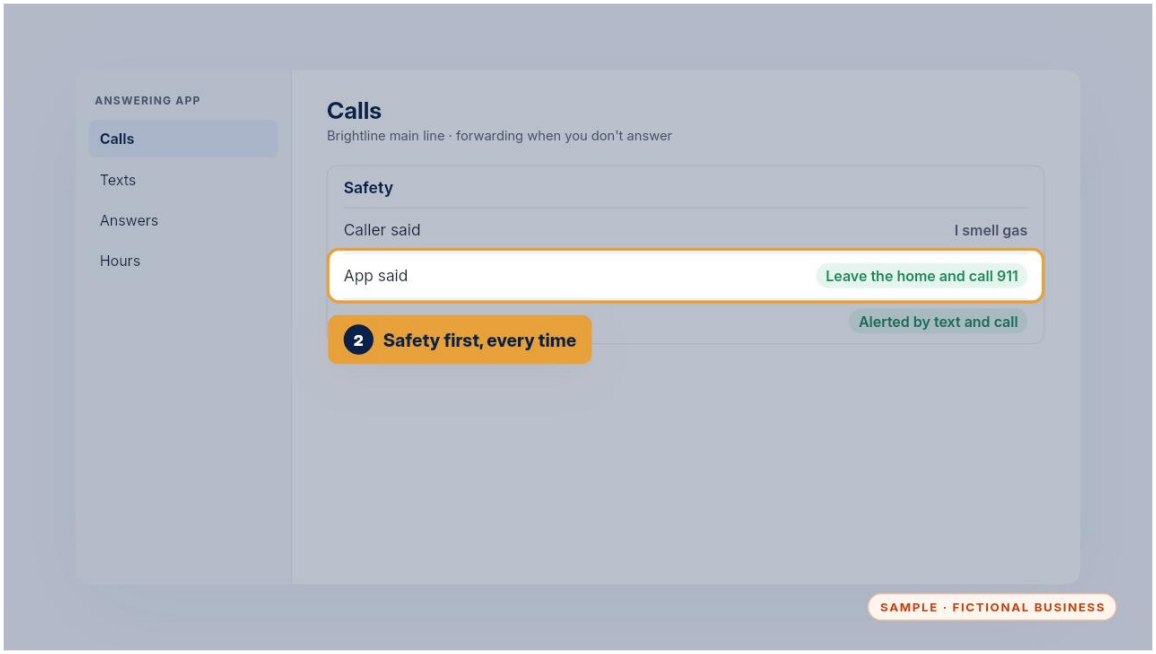


27 Then make one test call about what you changed. When the answer is right, the change took. With the Install, you can text us the change instead, and on Keep It Running we test it too.

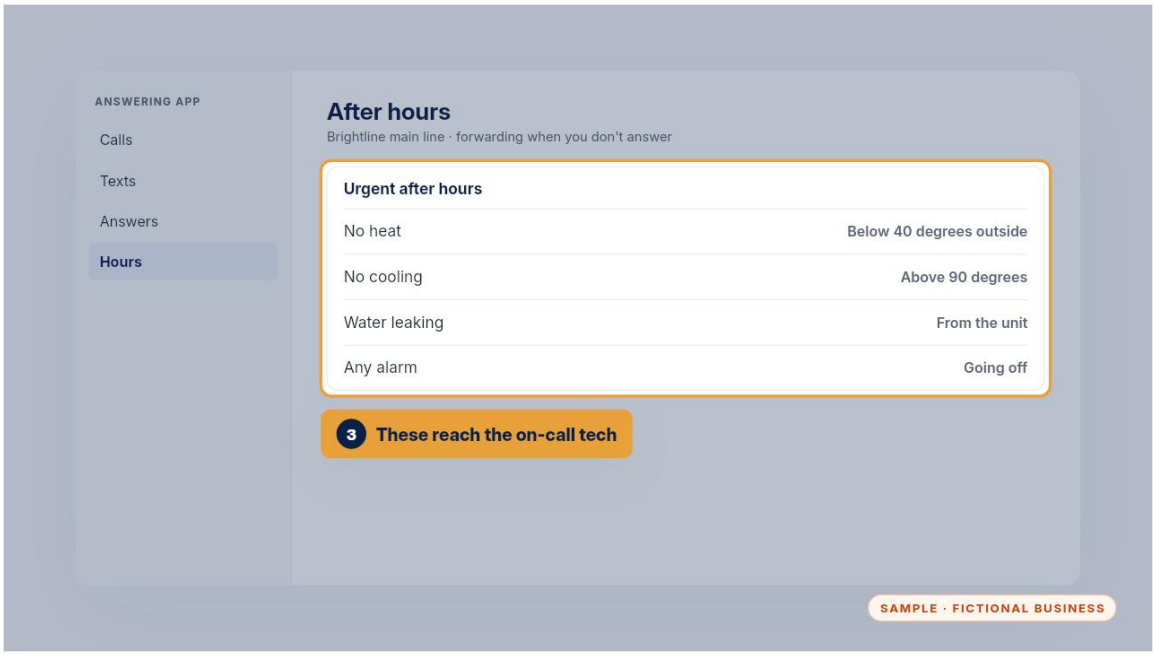
Edge cases



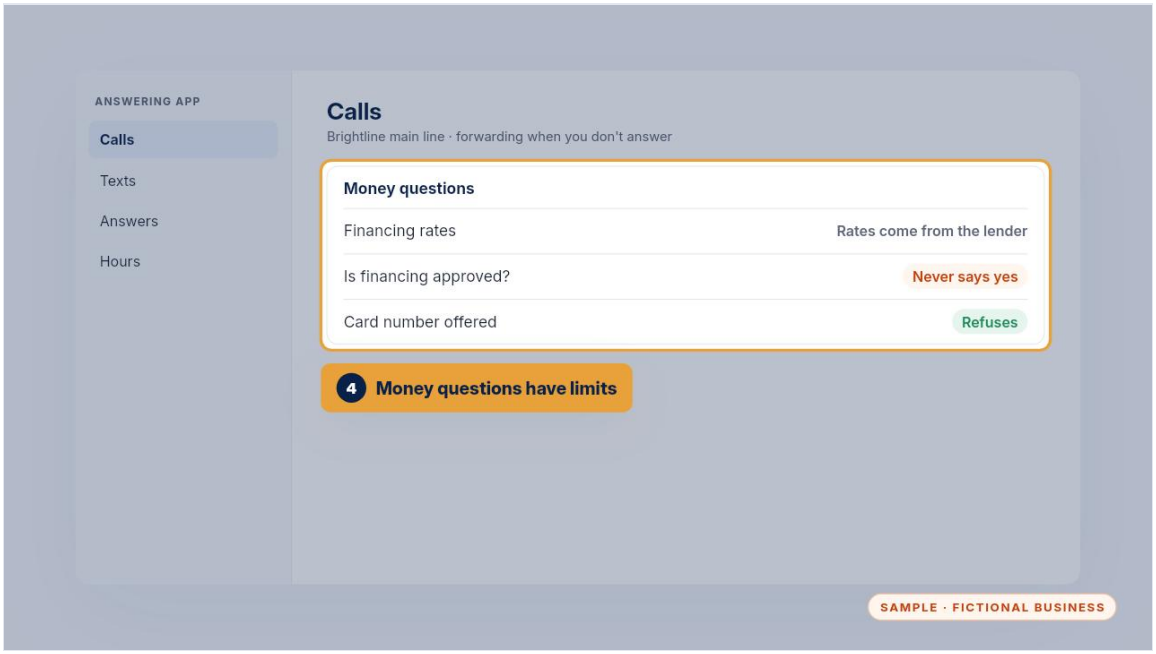
28 Asked if it's a real person, the app says it's an automated assistant. When a caller is upset or mentions a bill or a warranty claim, it passes them on or takes a message for a call back.



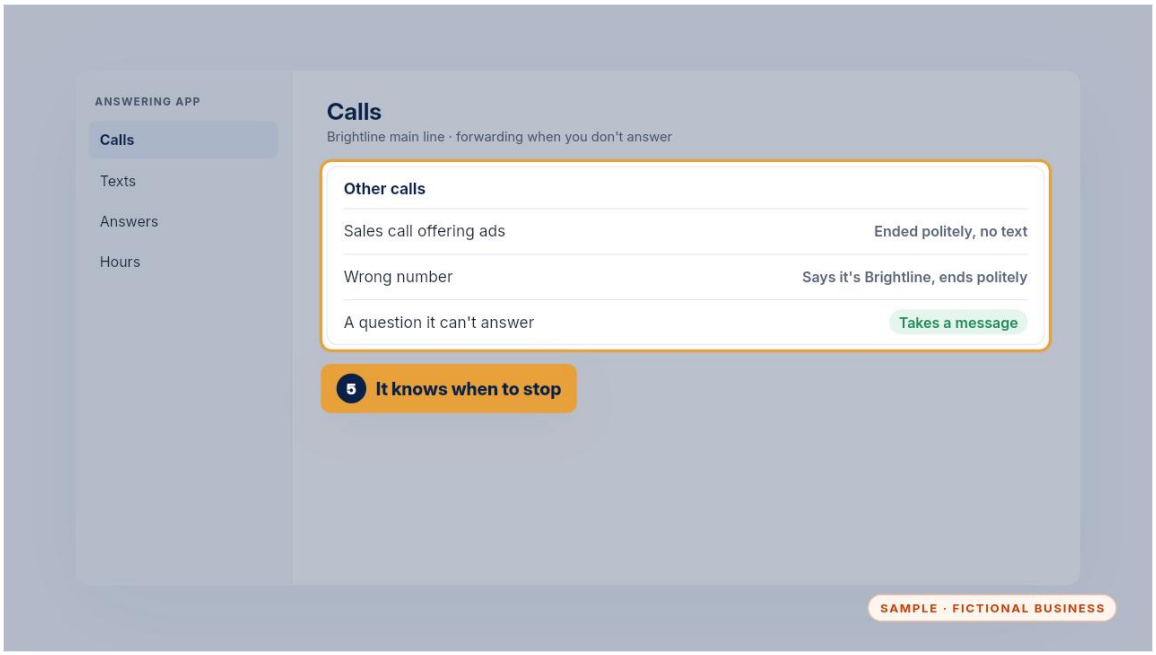
29 Safety comes first. A caller who smells gas or sees smoke is told to leave the home and call nine one one, and the owner is alerted by text and call.



30 After hours, urgent means no heat below forty degrees, no cooling above ninety, water leaking from the unit, or an alarm going off. Those reach the on-call tech at once.

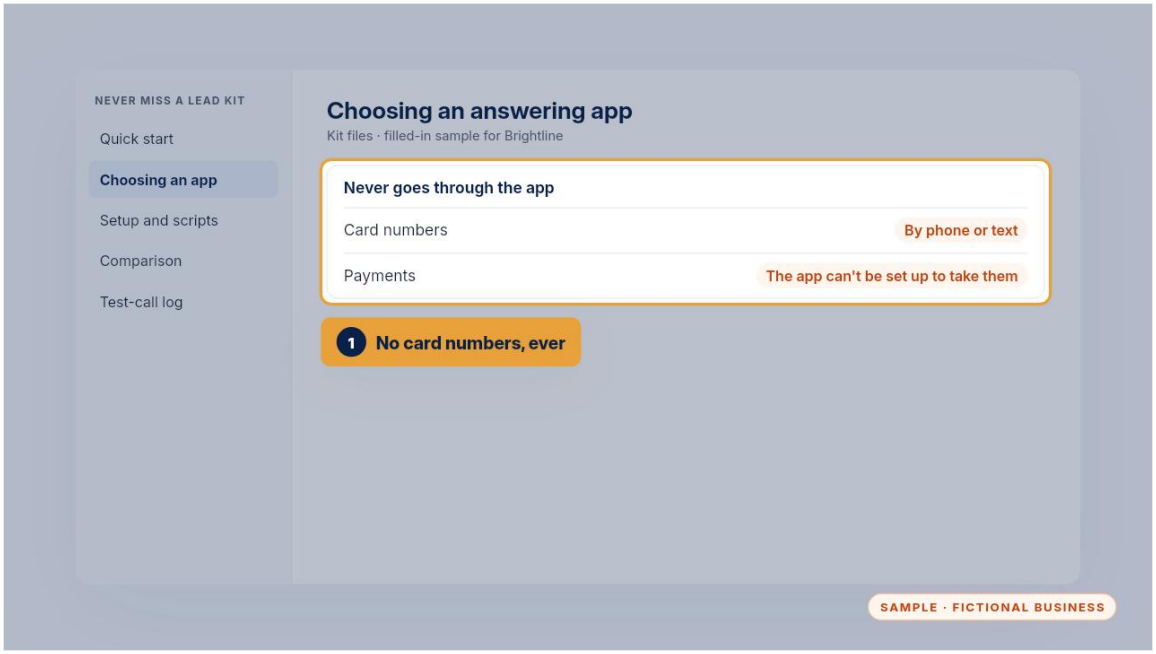


31 Asked about financing, it says rates come from the lender and offers the free estimate, and it never says financing is approved. Offered a card number, it refuses.

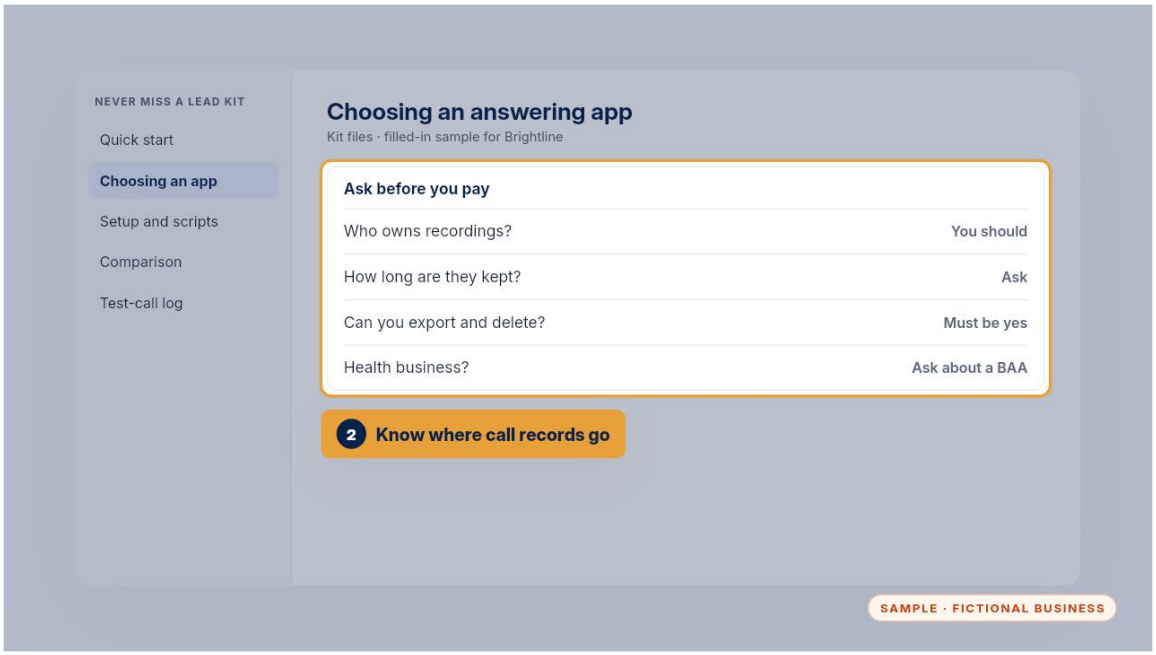


32 Sales calls and wrong numbers get a polite goodbye and no text. A question it can't answer becomes a message, so you can call back.

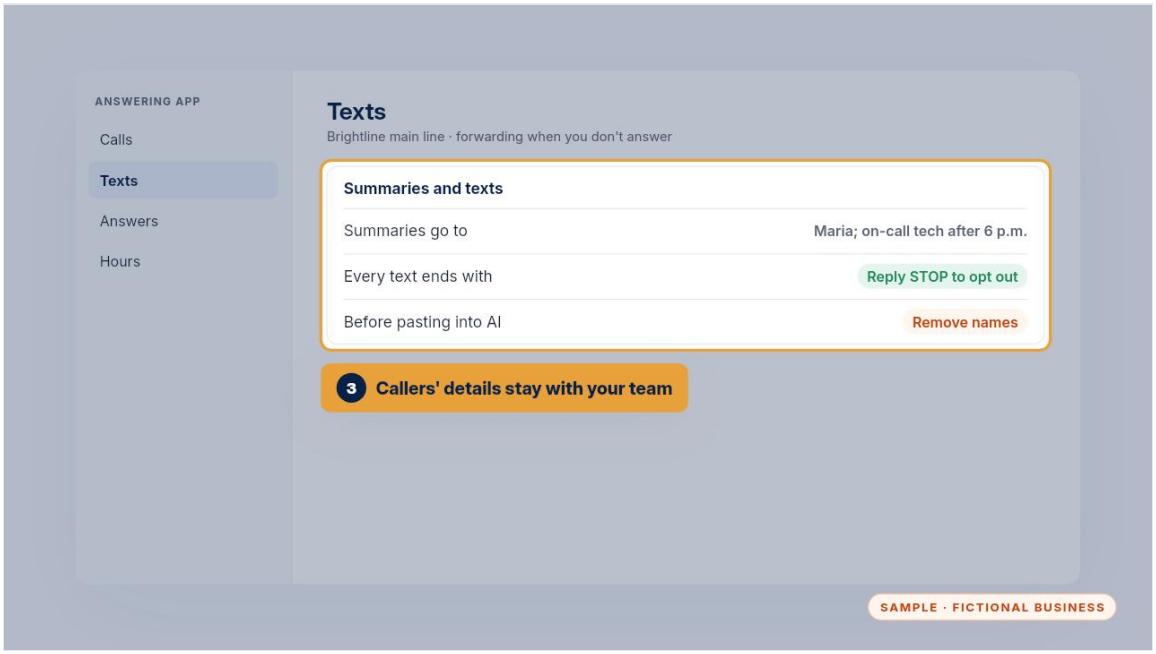
Privacy rules



33 Card numbers never go through the app, by phone or by text. Check before you sign up that it can't be set up to take payments.

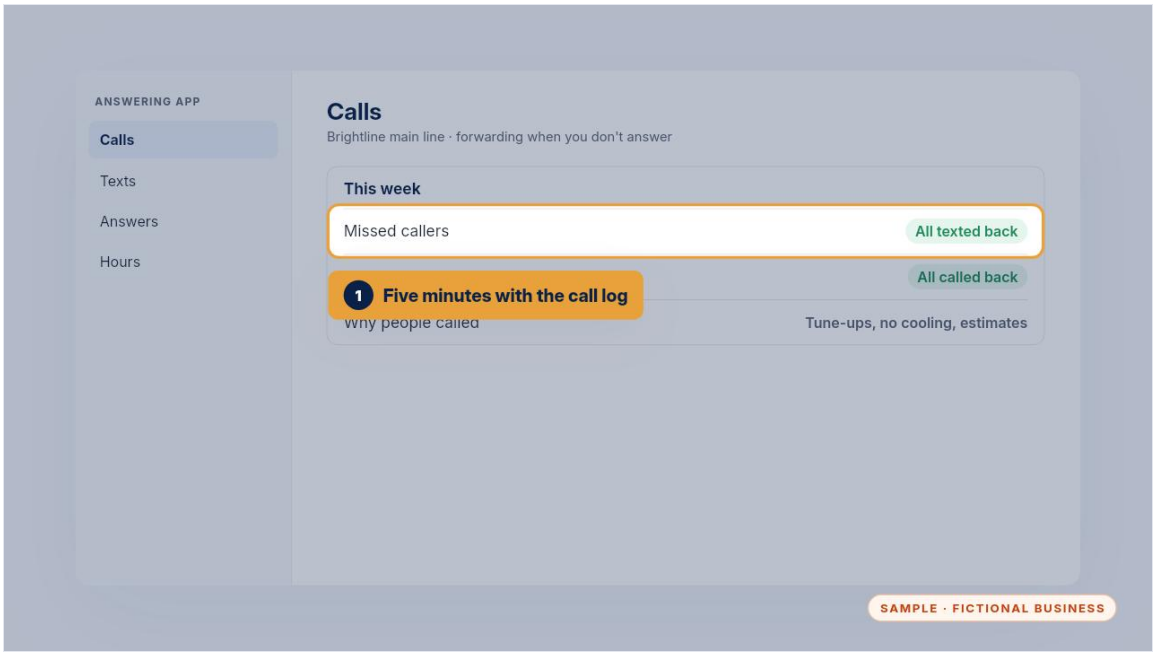


34 Ask who owns recordings and transcripts, how long they're kept, and how to export or delete them. Health businesses should also ask whether the app will sign a Business Associate Agreement.

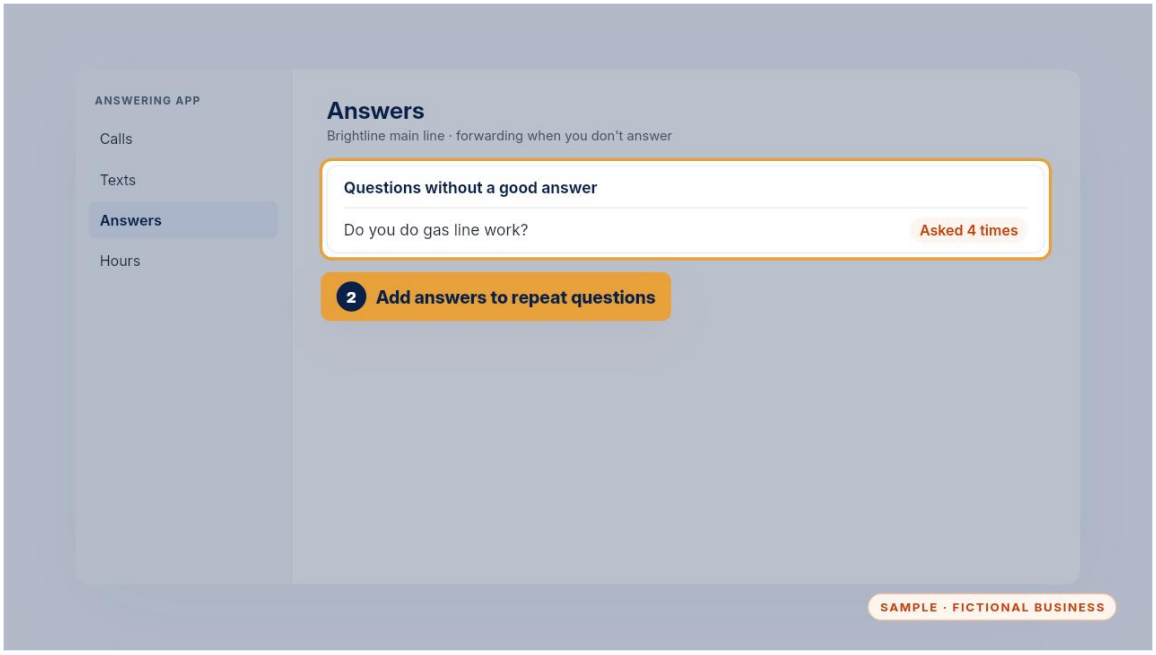


35 Summaries hold callers' names and numbers, so send them only to the people who call back. Remove names before you paste summaries into any AI tool, and keep the STOP line on every text.

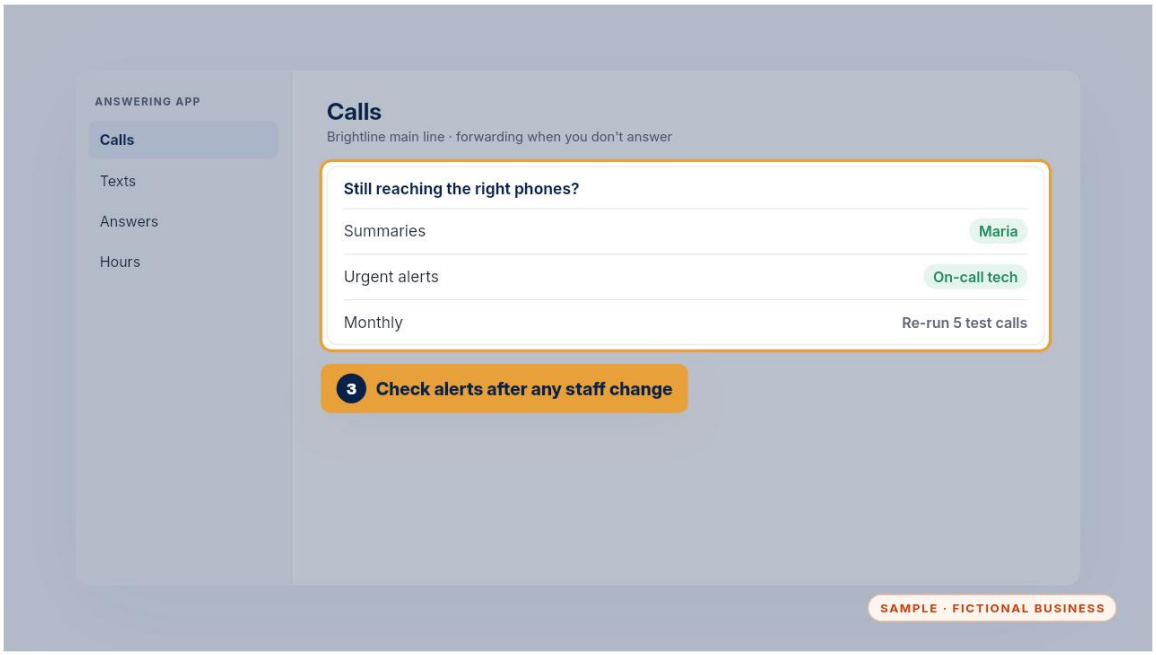
The weekly 5-minute check



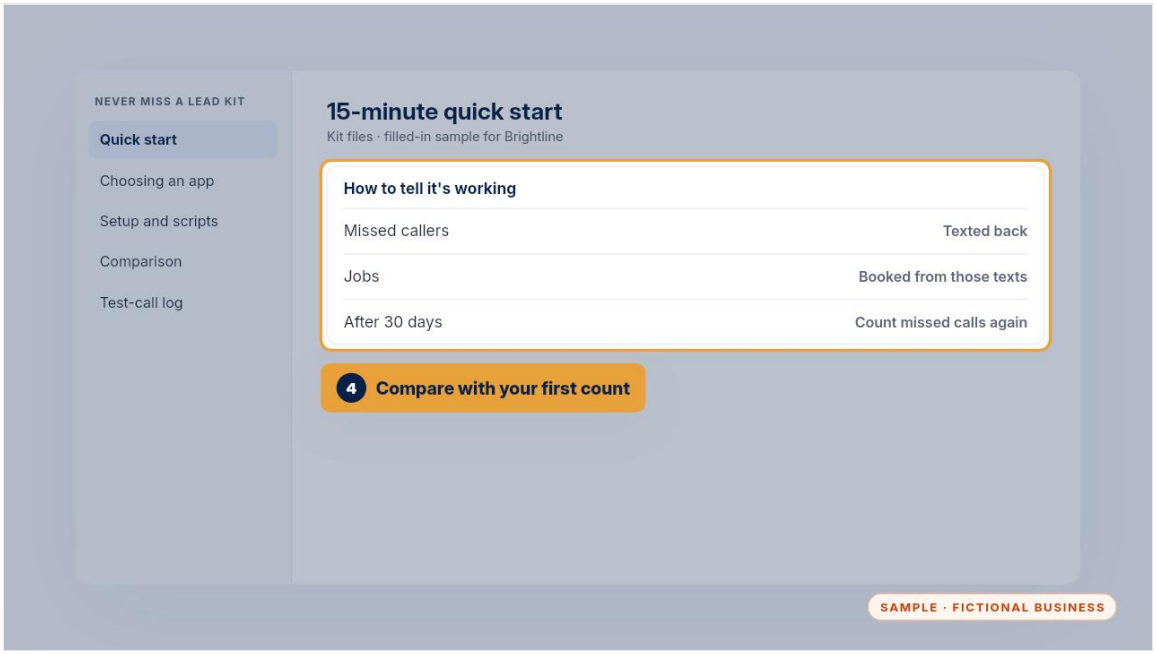
36 Once a week, take five minutes with the call log. Check every missed caller got a text, and everyone marked needs a person got a call back.



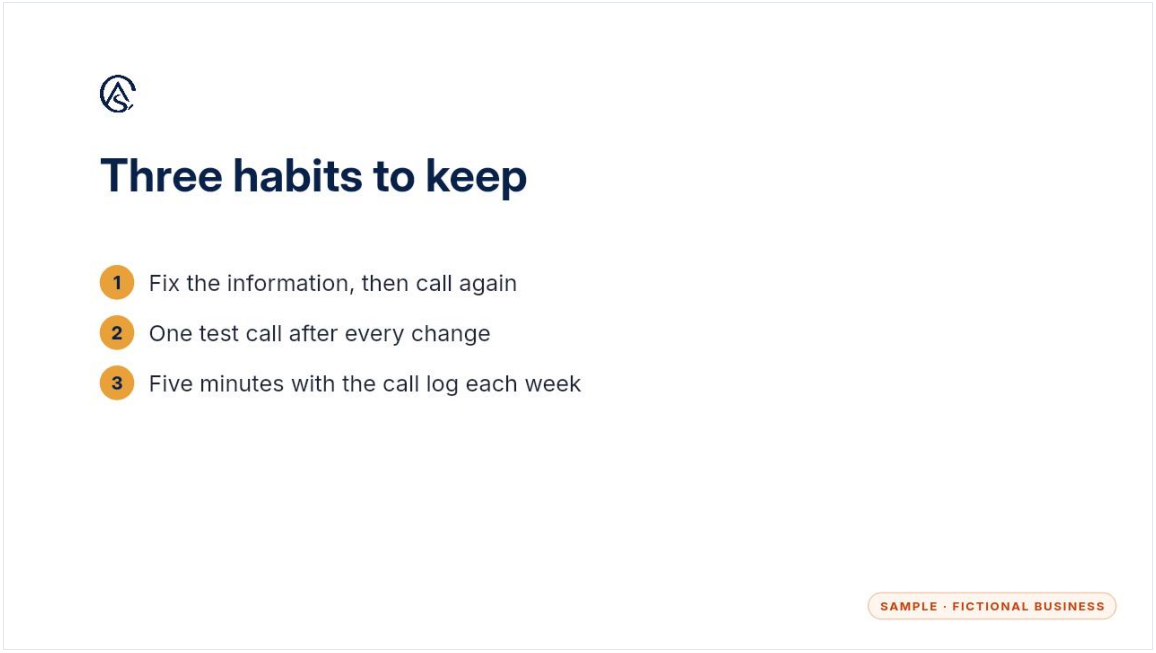
37 Look at why people called. When one question keeps coming up without a good answer, add it. In the sample, callers asked about gas line work four times in a month, so that answer went in.



38 Check that summaries and urgent alerts still reach the right phones, especially after a staff change. Once a month, and after any change, re-run five of the test calls.



39 It's working when missed callers get texted back and jobs get booked from those texts. After thirty days, count your missed calls again and compare with the number you wrote down at the start.



40 Fix the information, test after every change, and give the call log five minutes a week.