iFlowOps

5-MINUTE CUSTOMER GROWTH CHECKUP

Is your business missing new customers - or losing the ones it already earned?

This short assessment looks at two sides of customer growth so you can see where opportunities may be slipping through.

THIS CHECKUP COVERS TWO BUSINESS SYSTEMS

HEART

BRING CUSTOMERS BACK

Customer Loyalty & Retention System

Helps your business encourage repeat visits, follow up with inactive customers, request reviews, and stay connected through automated text messages.

Checks: loyalty • reviews • repeat customers

CALL

NEVER MISS THE NEXT ONE

Automated Business System

Uses a 24/7 AI voice receptionist to answer calls, respond to approved questions, collect lead information, book appointments, and notify the owner.

Checks: calls • leads • booking • follow-up

WHAT YOU'LL DO

Answer 7 questions about how your business handles calls, new leads, booking, follow-up, loyalty, reviews, and repeat customers.

BY THE END, YOU'LL KNOW

✓ Where customers may be slipping through

✓ Which iFlowOps system may fit your business

7 QUESTIONS | ABOUT 5 MINUTES | INSTANT GAP SCORE

Bring customers back. Never miss the next one.

STEP 1

Find the gaps

Answer based on how your business works today. Every YES identifies a possible gap.

1	2	3	4
Customer reaches out	**Business responds**	**Customer takes action**	**Relationship continues**
Call, form or QR	Answers or follows up	Books or purchases	Review or return visit

A gap at any stage can cost a lead, appointment, repeat visit, or review.

1 Missed Calls

Do customer calls sometimes go unanswered because you're busy, driving, helping another customer, or closed?

☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS A customer who is ready to buy may call another business instead of waiting.

2 Slow Lead Follow-Up

Do new inquiries sometimes wait hours before receiving a response?

☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS Interest is often highest at first contact. A long delay makes it easier to move on.

WHAT HAPPENS AFTER A MISSED CALL?

WITHOUT A SYSTEM

Missed call → Voicemail → No follow-up → Customer calls someone else

WITH A SYSTEM

Call answered → Need understood → Next step offered → Lead saved

STEP 2

Make it easy to take the next step

See what an AI voice agent actually does when a customer calls.

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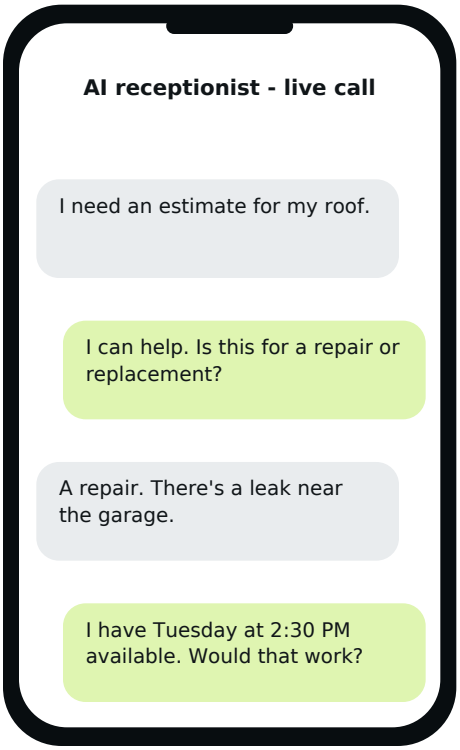
Hard-to-Book Appointments

Do customers have to call or message back and forth several times just to book an appointment?

☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS Every extra step makes booking less convenient and gives the customer time to leave.

A REALISTIC AI VOICE AGENT EXPERIENCE



1 **ANSWERS THE PHONE**
Speaks naturally and asks why the customer is calling.

2 **ANSWERS APPROVED QUESTIONS**
Uses the business's services, hours, service areas, and pricing guidelines.

3 **COLLECTS IMPORTANT DETAILS**
Captures name, phone, address, requested service, and urgency.

4 **BOOKS THE NEXT STEP**
Checks available times and schedules a consultation while the caller is engaged.

CONSULTATION BOOKED

TUE
22

Roof estimate
2:30 PM - 3:00 PM
Confirmed

SMS **OWNER NOTIFIED**
New roof consultation booked. Customer details and call summary are

The AI handles routine calls. Complicated or sensitive situations can be transferred or flagged for a person.

STEP 3

Don't forget the customers you already earned

Retention systems give customers a reason to remember you and return.

4

One-Time Customers

After a customer makes a purchase, do you have no consistent system encouraging them to come back?

☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS Even a happy customer may become a one-time customer without a reason or reminder to return.

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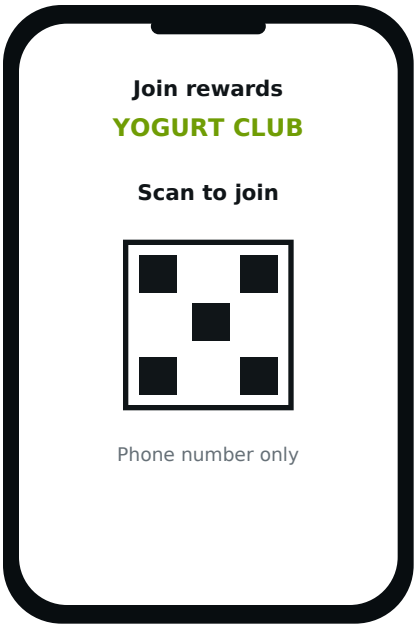
Forgotten Customers

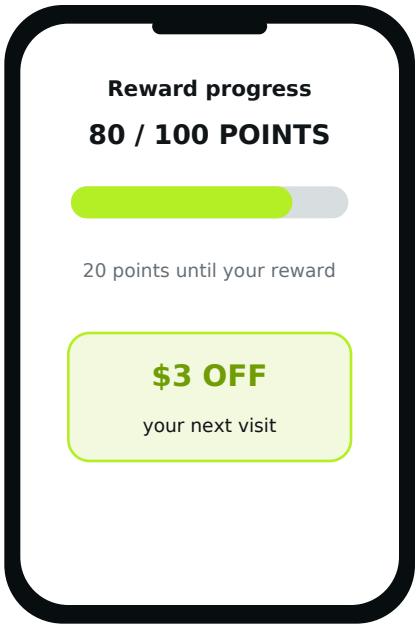
Do customers sometimes go 30, 60, or 90 days without hearing from your business?

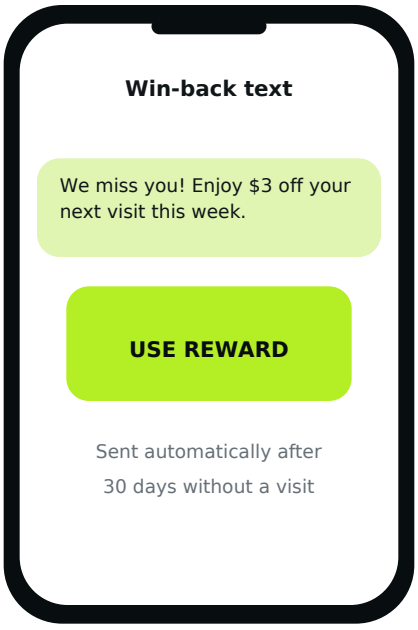
☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS Satisfied customers can still forget your business or develop a new habit elsewhere.

WHAT A CUSTOMER SEES







Purchase → Earn points → Timely reminder → Return visit

STEP 4

Build trust without adding another task

Reviews and consistent follow-up help more customers feel confident choosing your business.

6

No Review Follow-Up

Do happy customers usually leave without being asked for a Google review?

☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS Happy customers often intend to leave a review but forget without a simple reminder.

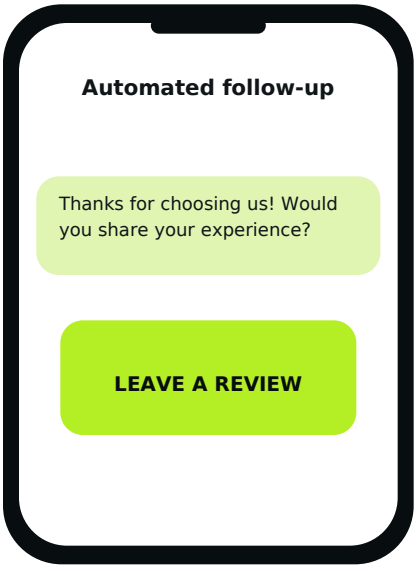
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Everything Depends on You

When you're busy or away, does customer follow-up slow down or stop?

☐ **YES - This happens** ☐ **NO - We have this covered**

WHY IT MATTERS When one person must remember every step, consistency gets harder as the business grows.



★★★★★

Fast response and excellent service

The team made the entire process easy. I received a quick response and knew exactly what to expect.

Google review • Posted today

WHY REVIEWS MATTER

TRUST

People compare reviews before calling.

VISIBILITY

A stronger profile can help you stand out online.

PROOF

Recent feedback shows customers what to expect.

YOUR CUSTOMER SYSTEM SCORE

Count each YES. Lower is better.

0-2	STRONG FOUNDATION	3-4	GROWTH OPPORTUNITIES	5-7	TIME TO SYSTEMIZE

SEE IT IN ACTION

How one purchase becomes more business

A retention system continues the relationship after the customer leaves.

1 PURCHASE

Sarah buys a $12 yogurt.

RECEIPT

2 JOIN

She scans a QR code and enters her phone number.

QR

3 EARN

Her digital reward card updates automatically.

80 PTS

4 RETURN

After 30 days, she receives a useful offer.

$3 OFF

5 REVIEW

After a positive visit, she receives a review request.

5 STAR

6 REPEAT + REFER

A return visit creates another chance for a great experience, a review, and a referral.

ONE CUSTOMER CAN CREATE MORE THAN ONE RESULT

Purchase → Reward → Return visit → Review → Referral

The goal is not to send more messages. It is to send the right message at the right time.

SEE IT IN ACTION

How a roofing call becomes a booked consultation

WITHOUT A SYSTEM

Missed call

↓

Voicemail Customer calls another roofer

WITH AN AI VOICE AGENT

Call answered

→ Need identified → Appointment offered

Lead captured while interest is high

1 CUSTOMER CALLS

I need an estimate for a roof leak.

2 AI ANSWERS

The receptionist responds immediately and asks approved questions.

3 DETAILS CAPTURED

Name, phone, address, service need, and urgency are saved.

4 CONSULTATION BOOKED

The customer chooses Tuesday at 2:30 PM.

5 OWNER NOTIFIED

The owner receives the appointment, customer details, and call summary.

SMS NEW CONSULTATION BOOKED

Roof repair • Tuesday at 2:30 PM • Customer details and call summary saved.

The owner did not have to stop working to answer, collect details, or schedule the call.

iFlowOps

YOUR RESULTS

Your gaps point to the right business system.

Use your YES answers to identify whether your business needs help bringing customers back, capturing new opportunities, or both.

HEART

MOSTLY RETENTION GAPS?

Customer Loyalty & Retention System

- ✓ Digital rewards and loyalty
- ✓ Win-back offers for inactive customers
- ✓ Automated review requests
- ✓ SMS reminders and follow-up

CALL

MOSTLY CALL + BOOKING GAPS?

Automated Business System

- ✓ 24/7 AI voice receptionist
- ✓ Answers approved customer questions
- ✓ Collects lead information
- ✓ Books appointments and alerts owner

GAPS ON BOTH SIDES?

If you found problems with both retention and missed opportunities, a combined customer growth system may be the best fit.

YOU FOUND THE GAPS. NOW LET'S CLOSE THEM.

See what a system could look like for your business.

BOOK A FREE 15-MINUTE REVIEW