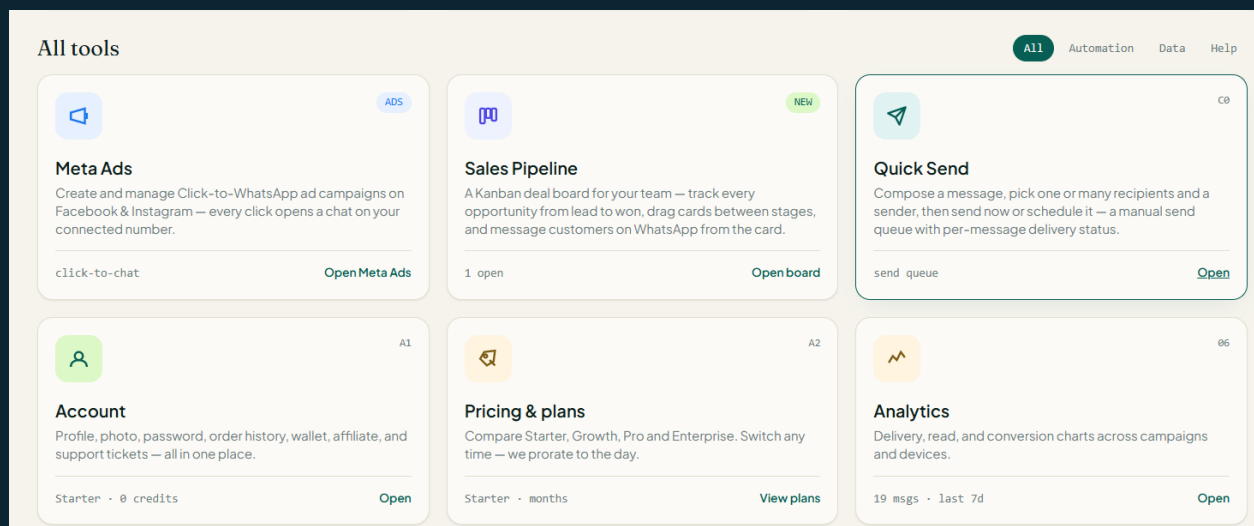


FLOWPILOT

Business Automation & Customer Growth Platform

Turn marketing enquiries into conversations, conversations into qualified opportunities, and opportunities into customers — with automation, AI, sales management and analytics in one workspace.



A sales-oriented guide to what FlowPilot can do for a growing business

ATTRACT • CAPTURE • ENGAGE • QUALIFY • CONVERT • RETAIN • MEASURE

Why businesses choose FlowPilot

Growing businesses often use separate tools for advertising, customer messaging, lead tracking, follow-ups, AI, team management and reporting. FlowPilot brings these activities into one connected workflow.

Capture leads faster

Connect advertising, website chat and direct messaging so enquiries can move into your sales process quickly.

Respond 24/7

Use automated replies, AI assistants and trained knowledge to answer common questions and start conversations immediately.

Never lose follow-ups

Use scheduled messages, campaigns and sales stages to keep opportunities moving.

Give sales teams visibility

Use the pipeline, contacts, activity history and team permissions to make ownership clear.

Measure what creates results

Review delivery, reads, engagement, conversion and campaign activity so marketing can be improved.

Scale without adding complexity

Connect supported integrations and webhooks to extend automation into existing business systems.

The goal is simple: less manual work, faster response, better follow-up and more visibility across the customer journey.

The FlowPilot growth engine

The strongest way to use FlowPilot is to connect features into a customer journey instead of using each feature in isolation.

01	ATTRACT Meta Ads • Website • WhatsApp Links Bring qualified prospects into a direct conversation.
02	CAPTURE Contacts • Attributes • Integrations Store customer information so every enquiry has a place in your system.
03	ENGAGE Auto Reply • Templates • Broadcasts • Quick Send Reply quickly and send relevant information at the right time.
04	QUALIFY AI Training • Chatbot • AI Call Assistant • Flows Ask questions, understand intent and route serious prospects.
05	CONVERT Sales Pipeline • Team Members • Follow-ups Give salespeople ownership and move opportunities through stages.
06	RETAIN Scheduled Messages • Campaigns • Customer Communication Stay connected after the first sale and create repeat opportunities.
07	MEASURE Analytics • Message History • Call Logs • Activity Log See what is working and improve the next campaign.

The objective: less manual work, faster response, stronger follow-up and more visibility.

Marketing & Lead Generation

Use these features as building blocks. The business result comes from connecting them into a repeatable workflow.

Meta Ads

Create and manage Click-to-WhatsApp advertising campaigns for Facebook and Instagram.

Business use: Promote products, services, offers, events, consultations and demos.

WhatsApp Link Generator

Create direct chat links with trackable short links, custom slugs and QR-code friendly destinations.

Business use: Put a chat link on websites, landing pages, social profiles, business cards and campaigns.

Chatbot Widget

Add a chat experience to your website so visitors can ask questions and start an enquiry.

Business use: Turn website traffic into conversations and route visitors to the right team.

Contacts

Keep leads and customers together with search, import, tags and segmentation.

Business use: Create audiences such as new leads, VIPs, follow-up required or product-specific prospects.

Attributes

Store customer variables such as first name, order ID and custom values for personalized communication.

Business use: Personalize messages and keep useful business information attached to each contact.

Sales Pipeline

Use a visual Kanban-style board to track opportunities from lead to won/lost.

Business use: Create stages such as New Lead → Qualified → Demo → Proposal → Negotiation → Won.

Messaging & Automation

Use these features as building blocks. The business result comes from connecting them into a repeatable workflow.

Quick Send

Compose a message, choose recipients and a sender, then send now or schedule it.

Business use: Handle individual follow-ups, reminders and important customer communication.

Auto Reply

Trigger replies based on keywords, business hours or availability rules.

Business use: Give prospects an immediate first response and answer common questions.

Message History

Search and review inbound and outbound communication and export history where available.

Business use: Give your team context when a customer returns.

Broadcasts

Send template-based campaigns to selected contacts with delivery, read, failure and queue tracking.

Business use: Announce offers, events, updates and re-engagement campaigns to relevant audiences.

Scheduled Messages

Queue messages for a future time based on timing, segments or triggers.

Business use: Create consistent follow-up sequences for leads, appointments, renewals and reminders.

Notifications

Route important alerts to supported channels such as email, Slack or in-app notifications.

Business use: Notify the right person when a lead or operational event needs attention.

AI, Calls & Customer Experience

Use these features as building blocks. The business result comes from connecting them into a repeatable workflow.

AI Training

Train assistants with your own URLs, text, Q&A; and business knowledge.

Business use: Create an AI that understands your products, services, FAQs, policies and business information.

AI Call Assistant

Use configured AI voice workflows for customer calls and lead follow-up.

Business use: Qualify leads, confirm appointments, handle initial enquiries and pass outcomes to your team.

Call Logs

Review call history and, where configured, transcripts, recordings and tool-call timelines.

Business use: Understand what happened on calls and identify leads that need human follow-up.

Guidebook

Use step-by-step playbooks and operational articles to standardize how teams use the platform.

Business use: Train new staff and reduce dependence on one person knowing the entire process.

Support

Access support resources and assistance for setup, known issues and service questions.

Business use: Keep operations moving when a team member needs help.

Connections, Operations & Control

Use these features as building blocks. The business result comes from connecting them into a repeatable workflow.

Devices

Connect and monitor supported messaging numbers/devices and review connection health.

Business use: Keep communication channels organized and visible to the team.

Integrations

Connect supported systems such as Shopify, HubSpot, Zapier and other available services.

Business use: Move customer or order information between systems and reduce duplicate data entry.

Webhooks

Send delivery, read and reply events to external HTTP endpoints in real time.

Business use: Connect FlowPilot to custom software, websites or internal systems.

Google Account

Connect supported Google services for calendar and meeting-related workflows.

Business use: Move qualified prospects from enquiry to scheduled meeting.

Team Members

Invite users and assign roles such as owner, admin and member.

Business use: Create clear responsibilities for sales, support and management.

Activity Log

Review important sign-ins, workspace actions and administrative changes.

Business use: Improve operational visibility and accountability.

Analytics

Review delivery, read and conversion-related charts across campaigns and devices.

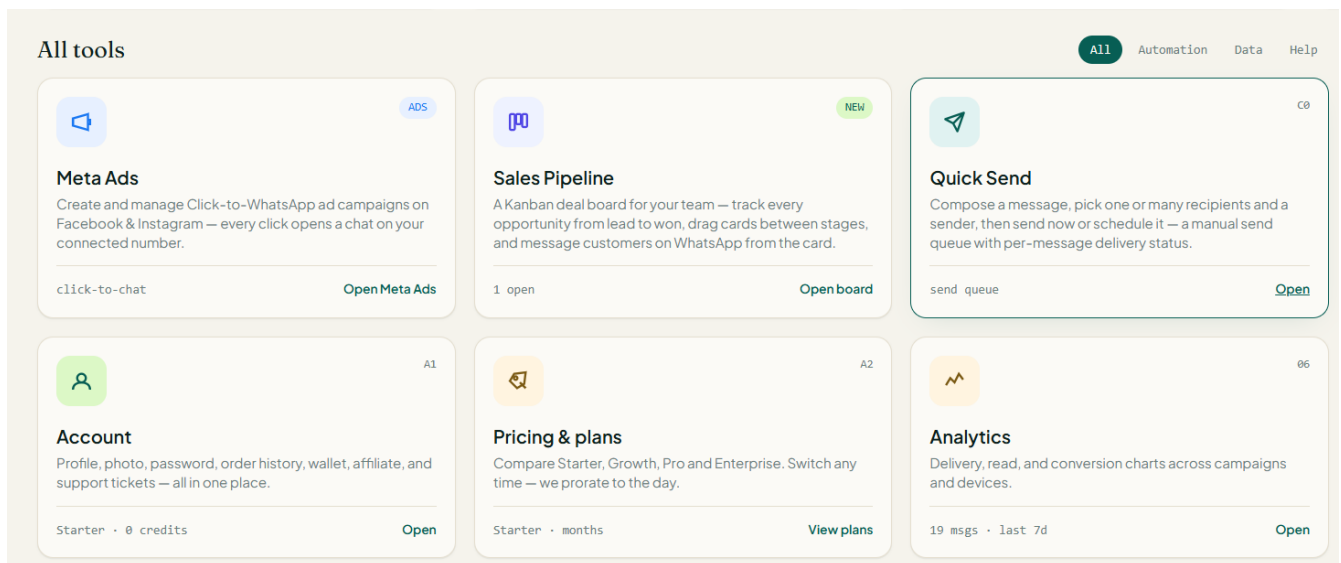
Business use: Identify which campaigns and communication activities deserve more investment.

Account & Plans

Manage profile, password, order history, wallet, support and plan information.

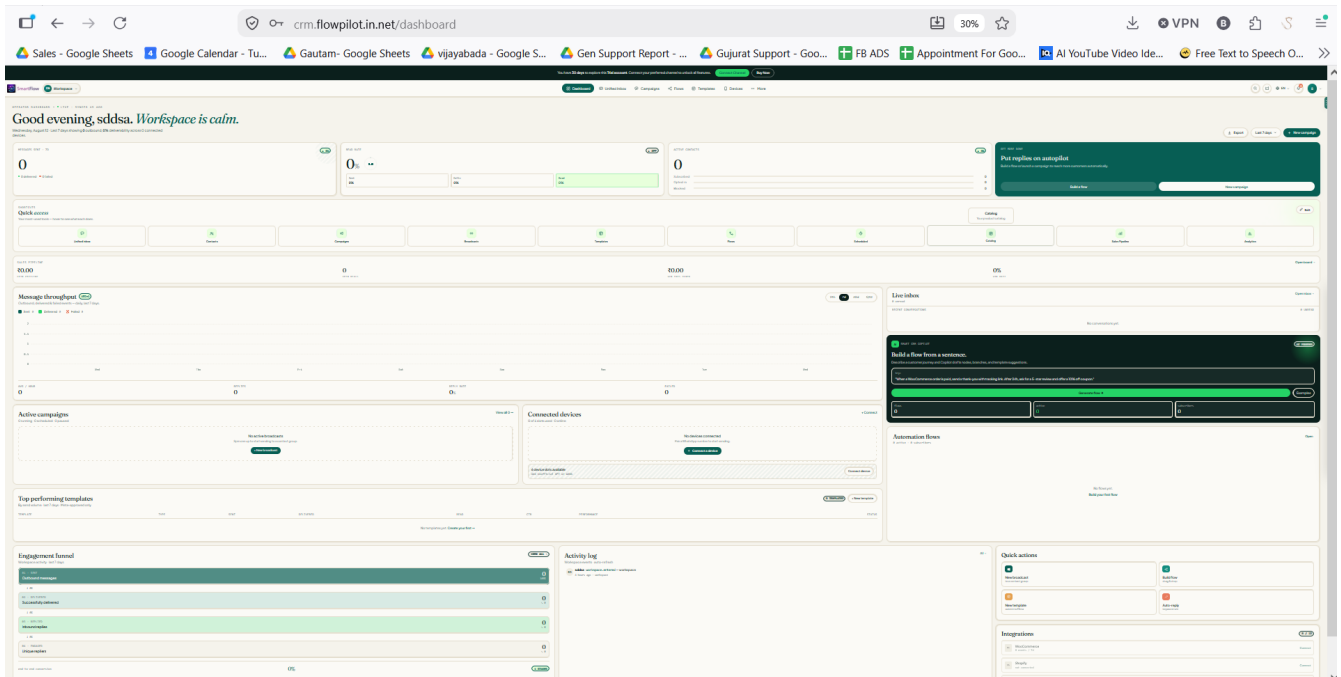
Business use: Keep account administration centralized for the business owner.

See the platform at a glance



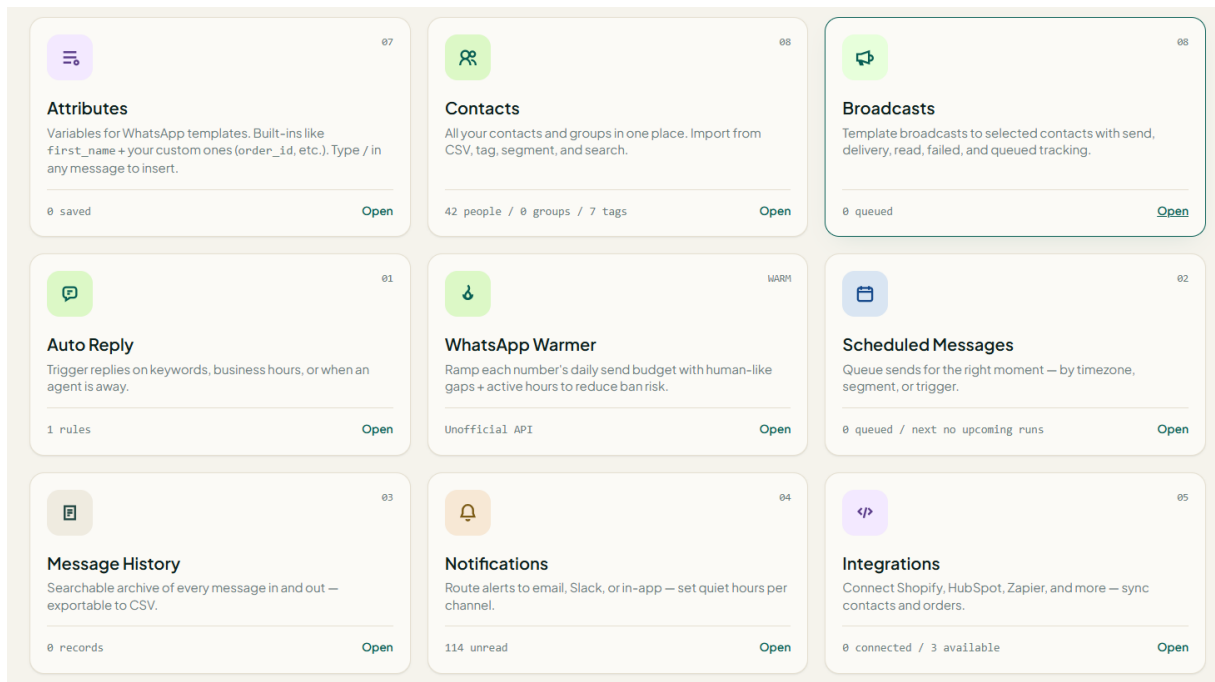
Marketing, sales, messaging, AI, analytics and business tools are organized in one workspace.

Manage the customer journey



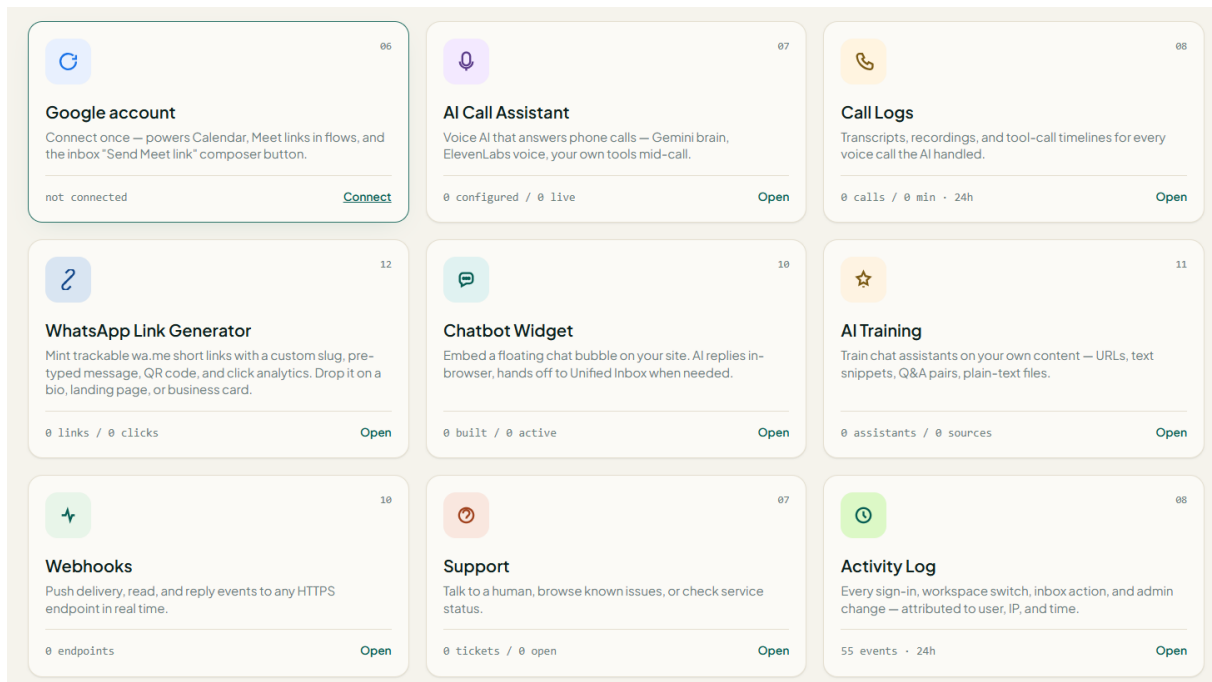
The dashboard gives a central view of activity, campaigns, connected devices, templates and operational performance.

Automate everyday communication



Contacts, broadcasts, auto replies, scheduled messages, history, notifications and integrations support repeatable customer communication.

Add AI to the customer experience



AI training, chatbot, AI calling, Google workflows and webhooks extend the platform beyond basic messaging.

How different businesses can use FlowPilot

Real Estate	Meta Ad → Chat → AI qualification → Contact → Sales Pipeline → Site Visit follow-up	More qualified property enquiries and better follow-up.
Coaching / Education	Ad → Chatbot → Course questions → Counselling → Pipeline → Reminder → Admission	Convert more enquiries into counselling calls and admissions.
Clinics / Local Services	Ad / Website → Auto Reply → Appointment details → Scheduled reminder → Team follow-up	Respond quickly and reduce missed appointments.
Agencies	Lead campaign → Qualification → Pipeline → Proposal → Follow-up → Won	Standardize lead handling and improve sales visibility.
E-commerce	Store / Campaign → Contact → Personalized communication → Follow-up → Analytics	Improve customer engagement and repeat opportunities.

A simple 30-day rollout plan

Week 1 — Foundation

Connect supported communication channels, import contacts, define tags/segments, set user roles and prepare core templates.

Week 2 — Lead Response

Set up auto replies, chatbot knowledge, lead qualification questions and sales pipeline stages.

Week 3 — Follow-up

Create scheduled follow-ups, broadcasts for relevant segments and notifications for leads that need attention.

Week 4 — Optimize

Review analytics, message history, campaign outcomes and pipeline performance. Improve the weakest step in the journey.

The management rule

Do not automate everything on day one. Start with one high-value customer journey, measure it, improve it, and then expand the same framework to other products, campaigns or teams.

Ready to turn enquiries into a repeatable sales process?

FlowPilot is designed to help a business connect marketing, customer conversations, AI, follow-up, sales management and analytics in one operating system.

BOOK A FLOWPILOT DEMO

See how your own lead-to-customer workflow can be built inside the platform.

FlowPilot

Business Automation • AI • Customer Communication • Sales • Analytics