MOBILECOMM

AI Customer Service Agent GoHighLevel Implementation Action Plan

Manager handoff guide | Centralized inbox + AI front-line sales/service rep

PROJECT OBJECTIVE

Implement an AI customer service and sales agent inside GoHighLevel (GHL) that serves as Mobilecomm's first-line responder. The goal is not just to answer questions - it is to convert inquiries into **store visits, repair jobs, phone sales, or qualified human handoffs**.

Definition of Done

A customer can contact Mobilecomm through a connected channel and the system can: **respond immediately -> understand the need -> answer from approved information -> collect required details -> recommend the right store/action -> capture the lead -> follow up -> escalate when needed.**

PHASE 1 - Centralize Communication

Connect channels

- Facebook Messenger
- Instagram DMs
- SMS/text messaging
- Website chat
- Email
- Missed-call text-back
- Facebook/Instagram lead forms

Completion test

- Send a test message through every connected channel and confirm it appears correctly in GHL Conversations.

PHASE 2 - Build the Mobilecomm Knowledge Base

Store information

- Store name, address, phone, hours, days open, services available, and store-specific differences.

Repair pricing

- Import the current approved repair pricing matrix.
- Include model-specific screen, battery, common repair and promotional pricing.
- AI must NEVER invent a repair price. If uncertain, collect device information and escalate.

Current promotions

- Maintain active promotions with effective/expiration dates whenever possible.

Policies & services

- Repair warranties and turnaround expectations
- Deposits and payment methods
- Data responsibility
- Unlocking, password/virus removal and data transfers
- Activation, financing, returns/exchanges, trade-ins/device purchases
- Accessories

PHASE 3 - Build the Mobilecomm AI Rep

Agent personality

- Friendly, short, conversational, helpful and confident.
- Sales-oriented without being pushy.
- Avoid long paragraphs and robotic responses. It should feel like texting a store employee.

PHASE 4 - Identify Customer Intent

Primary categories

- Repair
- Phone purchase
- Sell/trade phone
- Technical support
- Store information
- Existing repair
- Complaint/problem
- Other / uncertain -> escalate

PHASE 5 - Repair Conversation Workflow

Required flow

- Identify exact device/model and repair needed.
- Retrieve only approved pricing.
- Ask which area/store is most convenient.
- Move the customer toward a visit: today or another day.
- Do not let a qualified conversation end with only a price quote.

PHASE 6 - Phone Sales Workflow

Collect

- Desired phone/model
- Carrier or unlocked preference
- Budget
- New/used preference when relevant
- Preferred Mobilecomm location

Inventory rule

- If real-time inventory is not connected, AI must never claim an item is in stock. Route to a human/store for inventory confirmation.

PHASE 7 - Human Handoff Rules

Escalate immediately

- Angry customers
- Refund requests

- Warranty disputes
- Existing repair status
- Unverified pricing
- Unusual repairs
- Business/commercial inquiries
- Legal threats or chargebacks
- Lost-data claims
- Anything the AI does not confidently know

Behavior

- Never argue. Acknowledge the concern and route the conversation to a team member.

PHASE 8 - CRM Pipeline

Create pipeline: Mobilecomm Customer Leads

- New Inquiry -> AI Engaged -> Qualified -> Store Selected -> Appointment / Expected Walk-In -> Completed / Sold OR Lost / No Response

PHASE 9 - Capture Customer Data

CRM fields

- Customer name
- Phone
- Email
- Inquiry type
- Device manufacturer/model
- Repair type
- Quoted repair price
- Desired phone
- Preferred store
- Lead source
- Promotion
- Expected visit date
- AI/human status

PHASE 10 - Missed Call Automation

Workflow

- When a call is missed, automatically text: *Hi, this is Mobilecomm. Sorry we missed your call. What can we help you with?*
- AI then qualifies the customer through SMS.

PHASE 11 - Facebook / Instagram Lead Follow-Up

Workflow

- Connect lead campaigns to GHL.
- Respond quickly with campaign-specific messaging.
- For repair leads, ask for the phone model and continue the repair qualification flow.

PHASE 12 - Follow-Up Automation

Follow-up

- Create a light follow-up for customers who stop responding.
- Create a separate follow-up for qualified customers who do not visit.
- Avoid excessive messaging.

PHASE 13 - Test Before Autopilot

Testing

- Start in AI suggestion/draft mode where available.
- Run approximately 100 real or simulated conversations.
- Test repair pricing, batteries, hours, locations, inventory, trade-ins, unlocking, password/virus services, warranties, repair status, refunds and unusual questions.
- Document every incorrect response and correct the knowledge base/instructions.

PHASE 14 - Limited Autopilot

Enable first

- Store hours and locations
- Basic repair inquiries
- Approved repair pricing
- Promotions
- General services
- Lead qualification

Keep human escalation

- Sensitive, disputed, uncertain or high-risk conversations.

PHASE 15 - Management Dashboard

Track

- Inbound conversations
- AI response rate
- Human handoffs
- Repair leads
- Phone sales leads
- Leads by source/location
- Expected store visits
- Completed sales/repairs
- Lost leads
- Average response time
- Conversion rate

Primary KPI

- The key question is not how many messages AI answered. It is: **How many customer inquiries became revenue?**

AI Non-Negotiable Rules

- Never invent repair prices.
- Never invent inventory.
- Never promise a repair is complete.
- Never guarantee repair times unless authorized.
- Never make unauthorized discounts.
- Never create company policies.
- Never argue with customers.
- Never handle serious complaints without escalation.
- Never claim warranty coverage unless clearly supported.
- Never share another customer's device or repair information.

WHEN UNCERTAIN

Ask a clarifying question or hand the conversation to a Mobilecomm employee.

Manager's Initial Deliverables

DONE	DELIVERABLE
[ ]	All communication channels connected and tested
[ ]	All Mobilecomm locations/hours loaded into the knowledge base
[ ]	Current repair pricing uploaded and verified
[ ]	Current promotions uploaded with dates where possible
[ ]	Mobilecomm policies/services uploaded
[ ]	AI instructions completed
[ ]	Human handoff rules completed
[ ]	CRM pipeline created
[ ]	CRM fields created
[ ]	Missed-call workflow tested
[ ]	Facebook/Instagram lead workflow tested
[ ]	At least 100 AI test conversations completed
[ ]	List of incorrect/questionable AI responses documented

DONE	DELIVERABLE
[ ]	Corrections made before Auto-Pilot activation

PROJECT SUCCESS CRITERIA

The system functions as a **24/7 digital front desk and sales representative** for Mobilecomm, while employees focus on conversations requiring human judgment.