FrontSail AI

Navigate Business Complexity with Intelligence

High-Converting Intake Script (Generic)

Business-hours intake to turn callers into booked jobs - fast, clear, and not salesy.

Goals	Keep in mind
• Make the caller feel heard • Capture essentials for the job • Set one clear next step	• Stay calm and structured • Give 2 options to book • Repeat back the plan

Script

1. **Open + set structure**
   Say: ***Thanks for calling - how can I help today?***
   If needed: 'I'll ask a couple quick questions so we can help you faster.'

2. **Headline problem**
   Ask: ***What's the main issue you're dealing with?***

3. **Urgency + safety**
   Ask: ***Is anything leaking, sparking, flooding, or unsafe right now?***

4. **Location + contact**
   Ask: ***What's the address/postal code, and what's the best name/number to reach you?***

5. **Next step (booking unlock)**
   Ask: ***Earliest available, or a specific day/time? (If callback first: what time window works?)***

6. **Prevent surprises (pick one)**
   Ask: ***House/condo/commercial? Any access notes (parking, buzzer, pets, gate)?***

7. **Confirm + close**
   Say: **Got it: {headline} at {address}. Next step: {booking/callback}. We'll confirm shortly.**

Tip: Add one business-specific question (e.g., equipment model, symptoms, or preferred tech) after you lock the next step.