

Revenue · Lead intake and booking

The Intake & Follow-Up Agent

From a social post to a paid, booked call, without the owner chasing a single lead by hand.

Best fit

Businesses that run on bookings: clinics, coaches, consultants, wellness and professional services

Business constraint

Demand constrained

Turns more interest into paying clients

Connects to

CRM · Payments · Scheduling

The problem

Interest is not the problem. Follow-through is.

Leads come in through a form or a phone call and then sit. The owner, or someone on the team, chases people manually between everything else they do. Many of these businesses do not want to hire a marketing team or a full front desk, so the gap between a filled form and a paying client stays open.

The hidden costs

01	**Leads that go cold**	Every day without a reply lowers the chance the person ever books.
02	**The owner as front desk**	Hours that should go to clients go to texts, emails and reminders.
03	**Content that stalls**	Without steady posts, the top of the funnel dries up too.

Before and after

Today

- × Posting when there is time, which is rarely
- × Form submissions waiting in an inbox
- × Payment, paperwork and booking chased one by one
- × No-shows and unsigned forms discovered late

With the agent

- → Weekly posts written in the owner's own voice
- → Every new lead logged and contacted at once
- → Payment, intake, waivers and booking in sequence
- → Reminders that stop the moment a step is done

How the agent works

Six steps. People stay in the loop.



01	**Create demand**	Part one writes social posts for several platforms every week, in the owner's voice, for the owner to approve.
02	**Capture the lead**	When someone fills out the interest form from a post, they go straight into the CRM.
03	**Ask for payment**	The lead receives a text and an email with a payment link, right away.
04	**Collect the paperwork**	Once they pay, the intake form and waivers go out, with reminders until they are signed.
05	**Book the call**	They get a booking link, a Zoom confirmation and follow-up reminders before the call.
06	**Hand to a human**	The owner shows up to a paid, prepared call. Anything off-script goes to a person.

Connects to

Social platforms · Interest form · CRM · Text and email · Payment link · E-signature · Scheduling · Zoom

Built-in controls

Owner's voice, owner's approval

Posts follow a voice profile the owner signs off, and nothing publishes unseen.

Map, then automate

The flow from first contact to booked call is mapped on one page; steps that need a human stay human.

Stops when done

Reminders end the moment a person pays, signs or books.

The business case

The revenue math

ILLUSTRATIVE MODEL

40	10	30
form fills a month	paid	leads a month
people who raised their hand	under manual follow-up	the system goes after

A few extra paying clients a month from those 30 can cover the full cost of the build. Use your own form and payment numbers from last month.

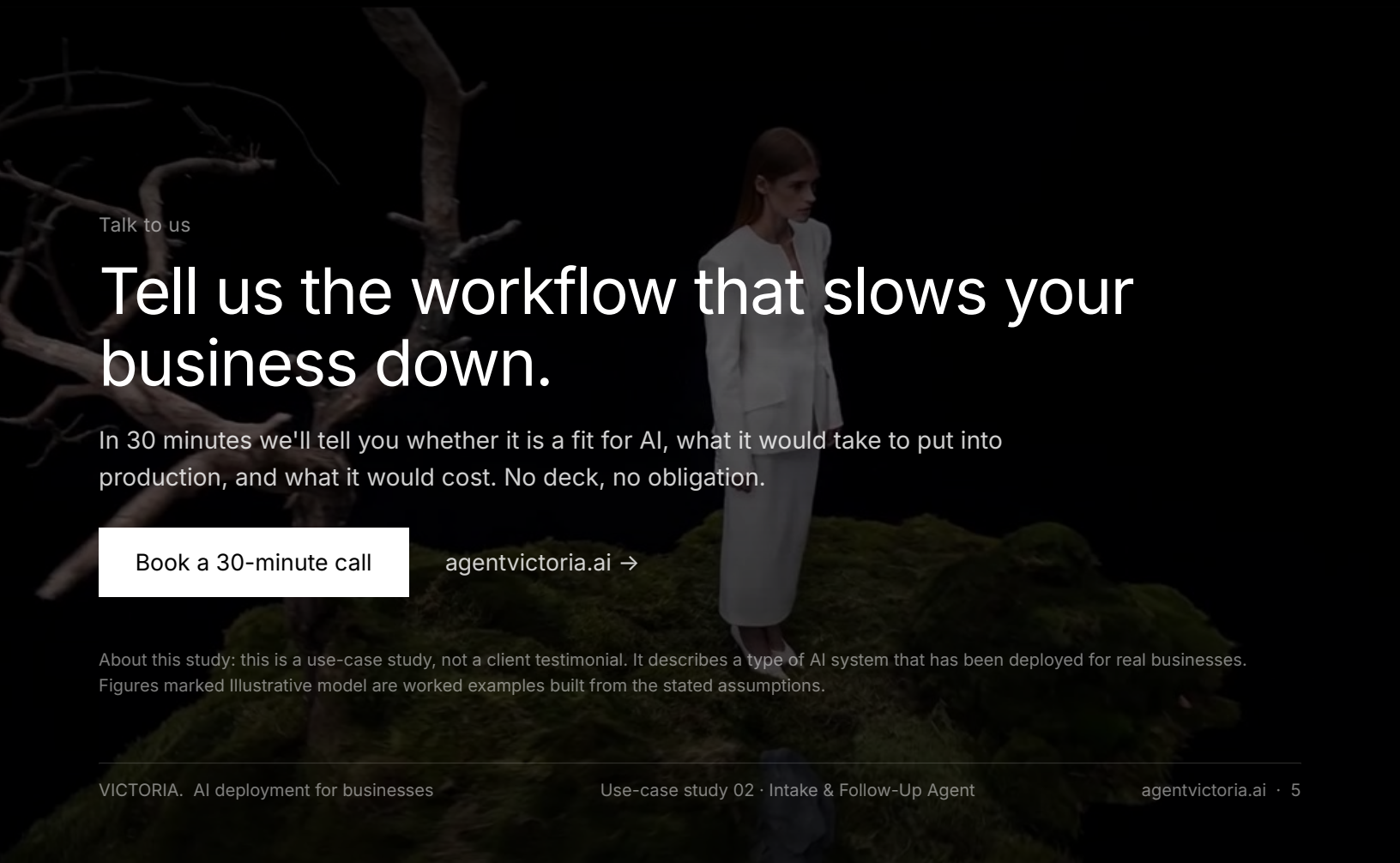
The question that starts the conversation

“How many people filled out a form last month, and how many actually paid?”

How Victoria delivers it

Five phases. Testing is one of them.

01	**Scope & data readiness**	One funnel, one owner, one number to move: form-to-paid conversion.
02	**Build against your systems**	Built into your CRM, payment, signature and calendar tools, not around them.
03	**Test on your real cases**	Tested on real past leads and edge cases before a single live message goes out.
04	**Deploy with controls**	Approval on content, send limits and a kill switch from day one.
05	**Run & improve**	Conversion measured monthly and improved, one step of the funnel at a time.



Talk to us

Tell us the workflow that slows your business down.

In 30 minutes we'll tell you whether it is a fit for AI, what it would take to put into production, and what it would cost. No deck, no obligation.

Book a 30-minute call

agentvictoria.ai →

About this study: this is a use-case study, not a client testimonial. It describes a type of AI system that has been deployed for real businesses. Figures marked Illustrative model are worked examples built from the stated assumptions.