

NexorLink

SOFIA FEATURE MASTERY

Sales Playbook, Volume II · Advanced Scenarios & the Complete Capability Set

Read after Volume I. Together they make you an expert.

Why This Volume Exists

Volume I made you fluent in the pitch, the plans, and the sales process. This volume makes you an expert on everything Sofia can do, and on the signature features that actually close deals. When a prospect asks “wait, can she also...?” you should already be nodding. Master this, and there is almost no capability question you can’t answer with confidence.

How to use it: Part A is your complete capability map. Part B is the deep dive on the seven signature scenarios and exactly how to sell each. Part C is a feature Q&A addendum. Part D tells you which features to show off in a demo to land the sale.

Part A • The Complete Sofia Capability Set

Everything Sofia does, grouped by what it accomplishes. Each line includes why it matters, so you can sell it, not just list it.

Answering & routing

- Answers 100% of inbound calls, 24/7, in English and Spanish. Why it matters: nothing goes to voicemail or a competitor.
- Switches languages within a call based on the caller. Why it matters: bilingual coverage with zero extra staff.
- Live transfer to on-duty staff when a human is needed. Why it matters: she knows her limits and hands off cleanly.
- Answers common questions, hours, location, services, insurance. Why it matters: frees the front desk from repetitive calls.
- Screens and filters spam and robocalls. Why it matters: the team is never interrupted by junk.

Scheduling

- Books, reschedules, and cancels appointments directly on the business calendar in real time. Why it matters: no double-entry, no missed bookings.
- Emergency one-button reschedule of a full day when a provider is out. Why it matters: turns a front-desk crisis into one action (see Part B).
- Waitlist slot-filling when someone cancels. Why it matters: cancellations become filled appointments.

Proactive outbound & follow-up

- Appointment confirmations plus 24-hour and 2-hour reminders. Why it matters: fewer no-shows without lifting a finger.
- No-show recovery calls to rebook customers who miss appointments. Why it matters: recovers revenue that would be lost.
- Lead capture for callers who aren't ready to book. Why it matters: no overflow or after-hours lead ever leaks.

Reputation & feedback

- Post-visit satisfaction survey with a rating after every visit. Why it matters: it measures how the visit actually went and decides what happens next.
- Smart reputation protection: customers who rate 9 or higher are invited to leave a Google review, while anyone who rates below 9 is routed to staff for internal review instead of a public one. Why it matters: public reviews stay strong and unhappy customers are caught privately before they post (see Part B).

Protection & visibility

- Every call recorded, logged, and summarized in the dashboard. Why it matters: full visibility, nothing disappears, easy quality review.
- Built-in compliance disclosures, recording and AI-identity notices, and BAA-backed data handling for healthcare. Why it matters: the client stays protected (see Volume I, Compliance).

Part B • Signature Scenarios & How to Sell Them

These are the features that turn a maybe into a yes. Know each one cold: what it is, how it works, why it sells, and what to say.

1. Emergency one-button reschedule

What it is: when a key staff member is out or the business has to close unexpectedly, one action reschedules the entire affected day, instead of your team making dozens of frantic calls.

How it works: a team member submits the emergency reschedule request, a quick form or a button in their tools, and Sofia automatically calls every affected customer that day, tells them, and reschedules or offers new times.

Why it sells: every business has lived the nightmare of a provider out sick and a full schedule. This erases that pain in one click.

“Picture a key person out sick or an unexpected closure, with a full day already booked. Instead of your team making dozens of stressful calls, you hit one button and Sofia calls every affected customer and reschedules them for you. That alone is worth the plan.”

2. After-hours, and when a caller wants a human

What it is: Sofia never leaves an after-hours caller at a dead-end voicemail, even when the office is closed and no one is available.

How it works: if an on-call team member is set up and available, she transfers the live call. If not, which is the usual after-hours case, she offers to book the next available appointment or takes a detailed message with the caller's name and callback number and logs it for the team to return first thing. In a medical setting, she directs true emergencies to 911 or the nearest ER.

Why it sells: prospects immediately worry “what happens at night when someone needs a person?” This answers it and removes the fear that AI will strand their customers.

“Even at 10 PM, if a caller wants a person, Sofia doesn't just dump them to voicemail. If someone's on call she connects them; if not, she books them into your next opening or takes a full message so your team follows up first thing. And a real emergency? She points them straight to 911. Nobody's ever left stranded.”

3. Waitlist slot-filling

What it is: Sofia fills last-minute cancellations from a waitlist automatically.

How it works: when a customer cancels, she calls customers on the waitlist to offer the newly open slot, and books the first one who accepts.

Why it sells: an empty chair is lost revenue. This keeps the schedule full without the front desk chasing anyone.

“When someone cancels, that slot doesn't just sit empty, Sofia calls your waitlist and fills it, so a cancellation turns into a kept appointment.”

4. Post-visit survey, reviews & reputation protection

What it is: after a visit, Sofia surveys the customer and then intelligently decides what to do based on how satisfied they are, growing the business's public reputation while protecting it.

How it works: she follows up after a completed visit, by call or text, and asks the customer to rate their experience. If they rate 9 or higher, she invites them to leave a Google review. If they rate below 9, she does not send them to Google, she thanks them, captures their feedback, and routes it to your staff for internal review and follow-up.

Why it sells: this is the part owners love. You only funnel happy customers to Google, so your public rating climbs, and you catch unhappy customers privately, so you can make it right before it ever becomes a one-star review. Reputation growth and reputation protection in one feature.

“After each visit Sofia asks your customer how it went. If they’re thrilled, she invites them to leave you a Google review. If they’re not, she doesn’t send them to Google, she flags it to your team so you can fix it privately. Your public reviews only get stronger, and you hear about problems before the internet does.”

5. No-show recovery

What it is: when a customer misses an appointment, Sofia proactively calls to rebook them.

How it works: she detects the no-show and places an outbound call to reschedule, recovering the visit.

Why it sells: a no-show is usually just forgotten money. Automatic recovery turns lost visits back into revenue.

6. Spam & robocall screening

What it is: Sofia filters out spam and robocalls so the team isn’t interrupted.

Why it sells: front desks waste real time on junk calls. This quietly protects their day.

7. Lead capture

What it is: callers who aren’t ready to book still get their information captured.

How it works: for overflow and after-hours callers especially, she captures name, number, and what they’re interested in, and logs it for follow-up.

Why it sells: a lead that isn’t written down is a lead that’s gone. This makes sure none slip through.

Part C • Feature Q&A Addendum

Feature-specific questions to add to your Q&A mastery. Keep them accurate; if something falls outside what you know, say you'll confirm and follow up.

Q: What happens after hours if a caller insists on a live person?

A: If someone's on call she transfers them. If not, she offers to book the next opening or takes a full message with their callback number for first-thing follow-up, and directs real medical emergencies to 911 or the ER. She never leaves them at a dead-end voicemail.

Q: Can Sofia reschedule a whole day if my provider is out?

A: Yes. Your team submits an emergency reschedule request and Sofia calls every affected customer that day to reschedule them, so you're not making dozens of calls by hand.

Q: Does she send every customer to Google for a review?

A: No, and this is the smart part. After the visit she surveys the customer. Only customers who rate 9 or higher are invited to leave a Google review. Anyone who rates below 9 is routed to your staff for internal review instead, so unhappy customers are handled privately and never pushed to post publicly.

Q: What happens to an unhappy customer's feedback?

A: It goes to your team for follow-up, with the rating and any comments, so you can reach out and make it right before it becomes a public complaint.

Q: How does she know who was a no-show and who showed up?

A: Your check-in tells her. Patients marked as checked in are treated as attended, so no-show callbacks only go to real no-shows and post-visit surveys only go to customers who actually came in.

Q: Will she keep contacting a customer who asked to stop?

A: No, if a customer opts out she honors it and stops calling and texting them, and outbound calls only run within permitted hours.

Q: What does she do when a customer cancels?

A: She can call customers on your waitlist to offer the open slot and book the first one who takes it, so cancellations get filled.

Q: Does she chase no-shows?

A: Yes, she calls customers who miss an appointment to rebook them.

Q: Will she stop spam and robocalls?

A: Yes, she screens and filters junk calls so your team isn't interrupted.

Q: What if the caller isn't ready to book?

A: She captures their name, number, and interest so nothing is lost, especially valuable for after-hours and overflow calls.

Q: Can we see what happened on each call?

A: Yes, every call is recorded, logged, and summarized in your dashboard.

Q: Can we choose what she does after hours?

A: Yes, after-hours behavior is configured to your preference, transfer to on-call, book the next slot, or take a message. We'll set the default that fits your business.

Part D • The Demo Moments That Close

When you demo, don't just show that she answers, show the features that make a prospect say "I need this." Pick the two or three that hit their biggest pain.

- Bilingual switch mid-call, land it live by switching to Spanish. Universal wow.
- Describe the emergency one-button reschedule, every business feels that pain instantly.
- Describe after-hours handling, it removes the "what about nights" fear on the spot.
- For businesses that fret about reviews or growth, lead with automatic Google reviews.
- For high-cancellation businesses, lead with waitlist slot-filling and no-show recovery.

Close the demo the same way every time: "Everything you just saw runs for you automatically, day and night, for less than a part-time hire."

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