Insulation Services Voice Agent

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Project Overview

This voice agent automates appointment booking for home insulation and rendering companies. It qualifies leads, books free surveys, updates Go High Level CRM in real-time, and sends internal notifications.

Key Goals

- Eliminate manual booking
- Capture accurate customer details
- Personalize experience for returning callers
- Trigger team alerts for high-intent leads

Tech Stack

- Retell AI – Voice agent platform
- n8n – Workflow automation and API integration
- Go High Level – CRM and calendar
- Twilio (optional) – SMS confirmations

Core Features

- Full appointment booking, rescheduling, and cancellation
- Lead qualification: self-funded vs grant, property type (detached, flat, etc.), exterior material
- New vs existing customer detection with personalized greeting
- Automatic GHL contact creation/update
- Custom field population: address, postcode, inquiry type, call summary
- Internal email notifications to sales team
- Spelling confirmation for name and address accuracy

Sample Conversation Flow

Caller: "I want to book external wall insulation"

Agent: Qualifies funding → property type → exterior → collects name (spelled), phone, address/postcode → checks availability → books survey → confirms → updates GHL → sends internal alert

Results & Impact

- 100% automated survey bookings
- Accurate data entry with zero typos
- Faster lead response for sales team
- Scalable for multiple insulation businesses

Contact

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