

AI receptionist & lead response

Answer routine calls and respond to new inquiries through one connected process, from first contact to the next conversation.

This brief outlines a proposed engagement. Scope, fees, and delivery dates are confirmed after reviewing your requirements and existing systems.

BUSINESS OBJECTIVE

Capture useful customer details and help qualified inquiries reach your team or an appointment while you focus on the business.

PROPOSED SCOPE

- AI call coverage using approved answers, qualification questions, and transfer rules.
- Speed-to-lead responses for agreed website, chat, and advertising inquiry sources.
- Appointment requests or booking through compatible tools, with staff alerts and summaries.
- Agreed follow-up timing, contact permissions, stopping rules, testing, and support.

CLIENT REQUIREMENTS

- Phone and inquiry sources, business information, coverage hours, and contact permissions.
- CRM, calendar, booking rules, team contacts, and unanswered-transfer instructions.
- Representative inquiries, approved replies, and the follow-up schedule you want tested.

PROJECT DETAILS

Business name

Contact name

Current systems

Priority outcome

Implementation and review

AI receptionist & lead response

OPERATIONAL WORKFLOW

- 01** A customer calls or submits an inquiry through a connected source.
- 02** The system answers approved questions and collects the required details and contact permission.
- 03** It routes the request, offers supported booking, or prepares the next staff action.
- 04** Agreed follow-up stops on reply, opt-out, booking, or staff takeover; your team receives the context.

ACCEPTANCE CRITERIA

- Test calls and inquiries capture accurate details and reach the correct staff destination.
- Booking conflicts, duplicate events, unavailable tools, and unanswered transfers follow agreed rules.
- Reply, opt-out, booking, and staff-takeover tests stop further automated follow-up.

PERFORMANCE MEASURES

- Answered-call rate and time to a substantive response.
- Qualified conversations, completed bookings, and attributable booked work.

COST CONSIDERATIONS

- Call volume, duration, messaging, and software usage.
- Connected sources, booking complexity, coverage, and support.

DISCOVERY QUESTIONS

- 01** Where do calls or inquiries get missed today?
- 02** Which questions and next steps can follow approved rules?
- 03** When should a person take over, and who owns that response?

Discuss the scope

Call or text Gavin at (985) 232-8337. Use this brief to discuss your existing systems, required changes, and business objectives.

Downloading this brief does not submit an inquiry or confirm a project.