What should an AI receptionist handle?

Use this guide to define a narrow, useful first role. A good starting point is capturing an after-hours enquiry and handing it to the right person.

☐ **01 Choose one job**

Select message taking, answers from approved business information, or booking a defined appointment type. Start with one before expanding.

☐ **02 Write the approved answers**

Provide opening hours, service areas, services, exclusions and booking rules. Name a person who keeps this information current.

☐ **03 Set clear limits**

List what it must never invent: prices, availability, promises, eligibility or specialist advice. Missing information should lead to a handover.

☐ **04 Design the human route**

Define who receives a callback request, what the caller is told and what happens when transfer fails. Do not promise immediate support unless staffed.

First job to pilot: _____

Make the handover useful to a human.

Sample opening

“Hello, you are speaking with the automated assistant for [business]. I can take a message for the team. What can I help you with?”

Capture only what the team needs

- [ ] **01 Reason for calling**

  A short summary in the caller’s own terms, the requested service and any relevant location.

- [ ] **02 Callback details**

  Confirm the name, preferred contact method and number or email. Repeat critical details back.

- [ ] **03 Agreed next step**

  Record whether the call was transferred, a message was taken or a booking was actually confirmed. Do not label a request as a booking.

Keep a fallback available.

If the assistant cannot help, offer the established human contact route. Collect minimal information and decide retention and recording arrangements before launch.

Test the calls you hope never happen.

☐ **01 Ordinary enquiry and unclear speech**

Try your common enquiry, background noise, an interrupted sentence and a corrected phone number.

☐ **02 Unknown question and human request**

Ask about an unpublished price or service. Ask to speak to a person. Confirm that the assistant follows the agreed limits.

☐ **03 Booking failure and unavailable team**

Test no free slots, an unavailable calendar and an unanswered transfer. A failed action must never be presented as completed.

☐ **04 Unexpected or urgent request**

Agree an escalation route suited to your business. The assistant should not attempt professional advice or improvise an emergency service.

Plan the pilot before connecting your phone.

Bring your call types, business information and handover rules. We can discuss where an assistant fits and what should stay with your team.
Book: https://vendrato.com/book