

Prepare for an AI voice agent

Plan call scenarios, booking rules, language, and human transfers.

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Choose the first call scenario

Start with one clear purpose, such as handling routine incoming enquiries or arranging appointments. Describe a successful call, approximate volume, business hours, languages or dialects, and the point where a person should take over.

Prepare the operating rules

- Call opening, identity checks if needed, approved answers, and closing.
- Calendar availability, time zones, booking changes, and no-availability cases.
- Transfer destination, after-hours handling, failed calls, and fallback contact.
- Your requirements for recording, notices, consent, retention, and outbound contact permissions.

Review a sample before launch

Use test numbers and safe examples to review pronunciation, interruptions, incorrect details, and transfers. Phone number availability, provider limits, integration access, and the applicable communication requirements must be checked for the actual project.

Your checklist

0/4 complete

- ☐ Choose an initial call scenario.
- ☐ Confirm language and working hours.
- ☐ Identify calendar and transfer owners.
- ☐ List recording and contact requirements.

A USEFUL NEXT STEP

Bring a sample call outline and the booking or transfer process.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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