

AI Receptionist Checklist and Guide

Based on article: **Will an AI Receptionist Make My Customers Angry?**

Core idea

Customers may dislike badly designed AI, but the real comparison is often AI receptionist versus missed calls, hold queues or voicemail. AI works best as overflow support, not a replacement for good human service.

Suitability checklist

- ☐ Are calls regularly missed, sent to voicemail or returned late?
- ☐ Do customers often ask repeatable operational questions?
- ☐ Is after-hours enquiry capture valuable?
- ☐ Is a new customer worth enough to justify improving call handling?
- ☐ Can staff still handle complex, sensitive or high-value conversations?

☐ Would website chat be more useful than phone AI for this business?

Customer experience checklist

☐ The AI clearly identifies itself as an AI receptionist.

☐ It explains why it is answering.

☐ It uses a natural, easy-to-follow voice.

☐ It collects only necessary information.

☐ It can answer common questions from accurate business information.

☐ It provides a clear path to a human when needed.

Knowledge and boundaries checklist

☐ Services, opening hours, location and booking process are accurate.

☐ The AI knows what it should not answer.

☐ Clinical, legal, financial or sensitive advice is escalated where relevant.

☐ The AI does not invent information.

☐ Unknown answers trigger follow-up or escalation.

☐ Staff can review call summaries or captured details.

Testing checklist

- ☐ Ask common customer questions.
- ☐ Ask awkward, vague or unexpected questions.
- ☐ Interrupt and change direction mid-call.
- ☐ Test noisy or fast-speaking callers.
- ☐ Test requests to speak with a person.
- ☐ Review whether the AI sounds transparent, useful and respectful.

Implementation checklist

- ☐ Decide when AI answers: overflow, after-hours or all calls.
- ☐ Write a short transparent introduction.
- ☐ Connect booking or enquiry workflows only where reliable.
- ☐ Define escalation rules.
- ☐ Train staff on how to follow up AI-captured enquiries.
- ☐ Monitor complaints, missed calls, bookings and lead quality after launch.

Practical next steps

- 1** Measure missed calls and voicemail volume for two to four weeks.
- 2** List the top 20 questions callers ask.

3 Decide what AI can answer and what must go to staff.

4 Test the AI before it handles real customers.

5 Review outcomes against missed calls, bookings and customer feedback.