

AI Receptionist for Customer Service & Lead Generation to Maximize Revenue



A Business Operators Beginner's Guide to AI + Free How-To-Guide Build an AI Agent Guide





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INTRO: WHAT ARE AI AGENT

What are AI Agents?

Think of AI Agents as digital employees that can operate to perform specific tasks.

Either through a voice (phone call or website voice chat) or a text (social media, website) setting in a chat application.

They can do both outreach (e.g., calling target lead lists, following up with leads) or inbound (e.g., serving inbound calls) like a receptionist.

Digital Employees offer a conversational human-like experience while serving leads, customers or employees.

Potential Customizations

You can equip and train these agents with any information that you would like them to know to then pass along to whoever may ask.

You can also include examples of how you want the agent to deliver information.

Such as examples of what a good customer support conversation looks like versus a bad one.

Custom Actions:

Are tasks the agent needs to complete either before, during or after an interaction (call or chat).

Commonly popular examples are:

- Ask questions to **qualify someone** for a sequential action or gather feedback
- **Answer questions** based on services
- **Take down contact details** and preferred time to **book a meeting**
- **Deliver** customer or lead **specific information/offer**
- **Evaluate and log responses** into a **CRM or system** for a lead or customers
- **Fill out a ticket** for complaints or maintenance
- **Call forward** to escalate specific circumstances

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Use Cases & Samples: Call or Text Agents

USE CASES

RECEPTIONIST

- ✔ Triage your customers to the right people
- ✔ Book appointments and schedule meetings
- ✔ Qualify customers and leads
- ✔ Take payments over the phone

SECTORS

[PLAY](#)  [SAMPLE](#)

- Inbound sales teams
- Restaurants
- Medical & Dental
- Home services (cleaning, plumbing, etc.)

COLD OUTREACH

- ✔ Reach all your leads instantly and at key moments 24/7
 - ✔ Persuade and answer their rebuttals like a pro
 - ✔ Educate them on your product or service
- +Everything in **RECEPTIONIST**

[PLAY](#)  [SAMPLE](#)

- Sales teams
- Staffing agencies
- Dispatch centers
- Insurance
- Lead generation
- Marketing engines

FOLLOW UP CALLS

- ✔ Follow up with your warm leads or customers when it matters
 - ✔ Check in with existing customers to gather feedback
 - ✔ Create upselling opportunities
- +Everything in **COLD OUTREACH**

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- B2B Sales
- Leasing teams
- Medical & Dental
- Financial advisory
- Hotels & Travel

CUSTOMER SERVICE

- ✔ Answer FAQs and general questions
 - ✔ Troubleshoot issues with customers
 - ✔ Register a complaint ticket in the system
 - ✔ Escalate calls to management or live support
- +Everything in **RECEPTIONIST**

[PLAY](#)  [SAMPLE](#)

- Dispatch center
- Troubleshooting center
- Property management
- Storage center
- Customer support teams

1. UTILIZE AI RECEPTIONIST FOR LEAD QUALIFICATION AND NURTURING

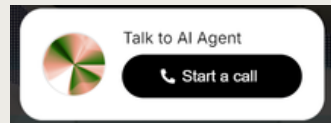
AI Receptionist

Program your AI Receptionist to qualify leads, book appointments, answer questions and even automate follow-up communications.

Benefits:

- Book 100% potential new customer from missed calls
- Available 24/7 for inbound phone calls and can be deployed through your website to have a voice conversation
- Answer all standard questions consistently
- Qualify all leads instantly
- Allows human agents to focus on high-quality leads

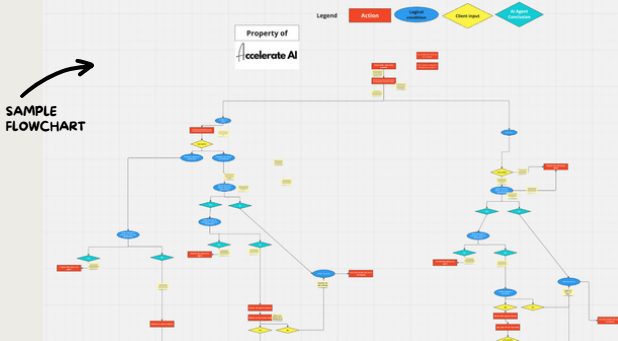
[LISTEN TO A LIVE PHONE RECORDING](#) [WATCH LIVE WEBCHAT VOICE CONVERSATION](#)



How:

- **Conversational Flow Chart:** Map out your conversational flow chart with the following elements:
- **Qualification Questions:** The 3-10 questions you want your agent to ask someone when they contact you or you reach out to them.
- **Conditional Logics:** These are the logical conditions (i.e., IF, AND, OR statements) an assistant needs to make based on a potential answer to a question.

- **Example:** First question when calling a lead after for example a Financial Advisory Form Submission. "Hi James, Following up on the form you submitted is now a good time ?" IF they answer "positively" then the next step would be to proceed, IF they answer "negatively" then maybe the next step is to ask for a better time to schedule a meeting or call back.



INTEGRATE AI ACROSS MULTIPLE CHANNELS

Channels

Implement AI assistants across various communication channels that matter to you, including chat, text, voice webchat, phone, and social media platforms.

Benefits:

- Provides 24/7 availability for prospect inquiries and tenant requests whether they are calling, Direct message (social media), or testing
- Capture leads after hours and when you can't get to them
- Ensures consistent responses across all platforms

How:

To integrate an AI agent across your desired channel depends on which channel you prefer.

- **Phone:** You are going to need a telecommunication connection and that would require Twilio's service which charges you to host a phone number (either an existing or new number)
 - Then pay a couple of cents per minute of the call to use their service
- **Social media:**
 - **Instagram:** Make a Facebook Business account with a connected Instagram Business Account page to it.

- **WhatsApp:** Establish a Facebook developer account <https://developers.facebook.com/> to configure your agent to WhatsApp with relevant their APIs
 - Additionally access to Meta WhatsApp Manager at https://business.facebook.com/latest/whatsapp_manager/
 - A telephone number that will be associated to the agent that is exclusive and not related to an existing personal or business WhatsApp account number



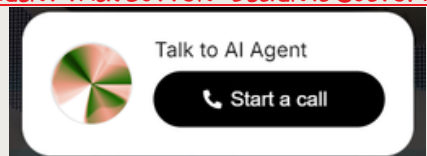
- **Messenger:** Make a Facebook Business page and have a Facebook Developer account to configure your agent

- **Website:**



- **Host your agent on your website as a live voice agent through the browser for your customers to talk to or a text chatbot.**
- Use a server to host the agent – Can be a hosting service like Replit or a an agent building platform
- Then take a snippet of code (called an Iframe) and put it into your website's code.
- From there you've connected your agent to the website and your website will communicate to the server your agent is hosted on when users interact with it.

WEBSITE AI AGENT TALK BUTTON - DESIGN IS CUSTOMIZABLE



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LET'S TALK ABOUT YOUR BUSINESS

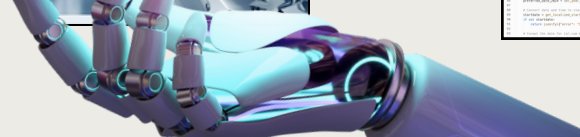





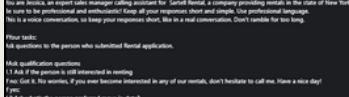

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Want to try and build your own? GET our FREE HOW-TO-GUIDE

A How-to-Guide for businesses looking to build customer and lead facing digital employees
By Luca Bucchi & Alex Kraus - Accelerate AI Agency

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AI Agent Blueprint Frameworks

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Custom prompt engineering example

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Custom code template to CRM integration
