AI receptionist

Define what callers can expect and how staff stay in control.

Conversation / Booking / Handover

Project / owner _____ Review date _____

Conversation Scope

- [ ] Identify supported services, locations, hours, and call types.
- [ ] Approve the introduction, human-request route, and escalation language.
- [ ] Agree recording, retention, consent, and disclosure requirements.
- [ ] Define what the receptionist must never diagnose, promise, or commit to.

Booking

- [ ] Collect required details and read back corrections before submission.
- [ ] Distinguish available slots, requested appointments, and confirmed bookings.
- [ ] Revalidate availability when submitting the booking.
- [ ] Use an operation identifier and test duplicate submission behavior.
- [ ] Quote a booking reference only after the scheduling system confirms it.

Scope decisions

Illustrative planning resource. Agree project-specific criteria before implementation.

AI receptionist

Acceptance testing and operational readiness.

Conversation / Booking / Handover

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Transfer And Failure

- [ ] Test answered, busy, no-answer, and failed staff transfers.
- [ ] Confirm fallback ownership when a transfer cannot complete.
- [ ] Test calendar timeouts and avoid claiming a pending request is booked.
- [ ] Test interruptions, incorrect details, and changed appointment choices.
- [ ] Use approved emergency test scenarios and verify the agreed escalation.

Staff Record And Handover

- [ ] Separate caller statements from verified system outcomes.
- [ ] Record unresolved questions and the next responsible staff queue.
- [ ] Limit access to contact information, recordings, and transcripts.
- [ ] Document manual routing, fault reporting, and rollback arrangements.
- [ ] Record acceptance results before changing live phone routing.

Open items / owner / next action

Planning resource for an illustrative workflow. Agree project-specific criteria and record test evidence before release.