

AI EMPLOYEE / RECEPTION & BOOKING

Give callers a next step while your team is on the job.

Built around your business

Routine questions. Appointment requests. A clear handoff to your team.

THE MOMENT

What happens when the call arrives at the wrong moment?

Your team is busy

You're with a customer. The office is busy. Someone wants to know if you serve their area or have an appointment available.

A clear next step

The next step shouldn't depend on someone remembering to call back later.

THE WORKFLOW

Build the response around your business.

01 / Approved answers

Use the services, hours and coverage information you approve.

02 / Agreed scheduling path

Book where the calendar supports it, or capture an appointment request.

03 / Human handoff

Route questions outside the agreed scope to your team. Decide what information they need to review afterward.

ILLUSTRATIVE WORKFLOW

A homeowner asks about service coverage and an appointment.

Answer

Use approved business information.

Schedule or request

Follow the agreed appointment process.

Hand off

Bring in the team when the request falls outside the agreed scope.

Illustrative workflow, not a customer result or live demo.

THE SCOPE

Know what's included before setup begins.

Implementation

Scope, configuration and agreed testing.

Platform access

The services required to run the workflow.

Optional management

Defined review, updates and support responsibilities.

A software subscription does not include unlimited custom setup.

THE NEXT STEP

Book a consultation.

Review the call flow

We'll review your current process and determine whether AI reception is a useful fit.

Agree on the work

If there is a fit, the next deliverable is a scoped recommendation.
Book at createmomento.com/book-call/.