



01

FREE GUIDE

How an AI receptionist works (and how to test one this week)

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The plan

1. Count the calls you miss in one normal week (section 4 shows you how, on your own phone).
2. Write down the 10 questions callers ask you most, with your real answers.
3. Call two AI receptionists yourself and score them against that list.

1. Start here if you've never used AI

You don't need to know anything about AI to read this. Here's the short version of what you need.

What "AI" means in this guide. AI here means software that can understand ordinary language, typed or spoken, and answer back in ordinary language. The best-known examples are chatbots like ChatGPT and Claude: websites or phone apps where you type a question and they write an answer back, like texting a very fast assistant. They're free to try, and you'll use one in this guide to write your fact sheet.

What an AI receptionist is. It's the same kind of technology, answering your phone. A caller rings, and instead of voicemail or a menu ("press 1 for..."), they hear a natural voice that greets them with your business name. They say what they want in their own words. It answers from the information you gave it, takes their details, and sends you a written note about the call.

What it's good at:

- Answering the same common questions, calmly, every time
- Picking up when you're busy, on a job, with a patient, or closed
- Taking a name, number and reason for the call without forgetting any of it
- Writing a short summary so you don't have to listen to voicemail

What it's bad at:

- Anything you didn't tell it. It only knows what's on the fact sheet you give it.
- Being right every time. AI can say something wrong in a completely confident voice. A well set up receptionist is told to say "I'll have someone call you back" instead of guessing, and you'll test for this in section 8.
- Judgement calls: whether to take a job, whether to give a discount, whether something is urgent in a way you didn't foresee

It doesn't replace you. It handles the routine calls and the ones you'd otherwise miss, and passes the rest to a person.

You can hear one before deciding anything. Section 8 shows you how to test one by calling it, which costs nothing but a few minutes.

Words you'll see

Word	What it means
AI receptionist	A phone line that answers calls with a natural voice, using facts you give it. Also called an AI phone assistant or voice agent.
Chatbot	A website or app you type to, which writes back. ChatGPT and Claude are chatbots.
Prompt	The message you type to a chatbot. This guide gives you prompts to copy.
Fact sheet	The document you write for the receptionist: your hours, services, area, common questions and rules. It answers only from this.
Hand-off (or transfer)	When the receptionist passes a caller to a real person, or alerts one.
Hand-off rules	Your written list of which calls must go to a person, and how.
Call summary	The short written note you get after each call: who, their number, what they wanted, what they were told.
After hours	Any time your business is closed.
Missed call	A call nobody answered. Your phone's call list shows these.

2. Why it's worth knowing about

Many people who reach voicemail don't leave one. They hang up and call the next business on the list. Whether that's happening to you is easy to check, and section 4 walks you through it in one normal week.

The second reason is time. A lot of calls are the same few questions: are you open, do you do this, roughly how much, do you come to my area, can I book. None of them needs you personally, but each one pulls you off the work you were doing. In a clinic it pulls the front desk away from the patient in front of them. On a job site it means climbing down a ladder with wet hands.

The third reason matters more as a business grows. With five or fifty staff, calls land on whoever is nearest, and the answers vary with who picked up. An AI receptionist answers from one fact sheet, so every caller hears the same hours, the same service list and the same policy. You can check that, too, because every call leaves a written summary.

It doesn't replace the calls that need you: the upset long-time customer, the complicated quote, the emergency. A good setup finds those calls faster and passes them on.

3. What happens on a real call

Here's one call, start to finish:

1. A customer rings at 7:40pm. You're at dinner.
2. The line picks up on the first or second ring and greets them with your business name.
3. They ask whether you fix a leaking outdoor tap and whether you cover their neighbourhood.
4. It checks your fact sheet: yes to both. It asks for their name, number and a good time to call back.
5. It tells them when to expect your call. (Some services also send a confirmation text.)
6. You get the summary on your phone and call back in the morning.

Nothing on that call needed a person, and the customer didn't go to a competitor.

Here's one that goes differently. A caller says water is coming through their ceiling right now. Your fact sheet says that's an emergency and gives a number to transfer to, or a person to alert. The receptionist says it's passing them on, and does. The decision about what counts as urgent was yours, made in advance, which is why it worked at 7:40pm without you.

And one where it doesn't know. A caller asks whether you can match another company's quote. That isn't on your fact sheet. A well set up receptionist says it can't answer that, takes their details, and tells them someone will call back. You see the question in the summary, and if it comes up a lot, you add an answer to the fact sheet.

4. Step one: count the calls you miss

Before you decide anything, get a real number. It takes a week and no new tools.

On an iPhone: open the **Phone** app (the green icon with a white handset). Find your list of recent calls (labelled **Recents** or **Calls**, depending on your version of iPhone software). Missed calls are shown in red, and there's usually a way to filter the list to missed calls only.

On an Android phone: open the **Phone** app and look for **Recents** or **Call history**. Missed calls usually have a red or crossed-arrow icon. Some phones let you filter to missed calls only.

On an office phone system: most business phone providers show a call log in their online account or on the phone itself. If you're not sure, call your provider and ask: "Can I see a list of missed and unanswered calls for the last week?"

Each evening for one normal week, write down:

- How many calls you missed
- What time they came in (during the day, lunch, evenings, weekends)
- How many of those people left a voicemail
- How many you called back, and how many you reached

A simple table on paper works:

Day	Missed	Left voicemail	Called back and reached
Mon			
Tue			
Wed			
Thu			
Fri			
Sat			
Sun			

At the end of the week you'll know two things: how many calls you're missing, and when. If most come in while you're on jobs, that's one kind of setup. If most come after hours, that's another.

Try this now (2 minutes): Open your phone's recent calls and count the missed ones from yesterday. Then count how many of those numbers you called back.

5. What it can and can't do

What an AI receptionist is generally good at:

- Answering common questions from the facts you gave it

- Taking a message with the details you asked for
- Staying calm with a rude or confused caller
- Answering at any hour, including several calls at once
- Writing a summary of every call

Where it needs care:

- **Anything not on the fact sheet.** A good one says "I don't know, I'll have someone call you back." A poorly set up one guesses. You decide which by how you set it up and by testing it.
- **Prices.** If your prices depend on the job, it should give a range you've approved or none at all. It should never make one up.
- **Judgement calls.** Whether a job is worth taking, whether to give a discount, whether a patient needs to be seen today. Those go to a person.
- **Bookings.** Some services can book into a calendar. That only works if your calendar is kept accurate, and it's worth testing separately.

It can sit in front of your main number all day, pick up only when you're busy or closed, or answer a separate line. Which fits depends on your missed-call count from section 4.

Features differ between services and change often. Use this guide as the list of questions to ask, and ask each service directly what it does.

6. Write your fact sheet

A fact sheet is the document the receptionist answers from. It's only as good as what you tell it: a vague fact sheet gives vague answers. You can write it in a Word document, a Google Doc, or on paper first and type it later. Plain sentences are best, the way you'd brief a new hire on their first day.

Before and after: one line of a fact sheet

Vague:

COPY THIS

Service area: Lower Mainland.

A caller asks "Do you come to Mission?" and the receptionist has to guess.

Clear:

COPY THIS

We cover Langley, Surrey, Abbotsford and Maple Ridge. We don't go north of the Fraser River past Maple Ridge, or east of Abbotsford. If someone is outside that, tell them politely we don't cover their area.

Now it can answer "no" with confidence, and the caller isn't left waiting for a callback that won't come. (These towns are an example. Use your own.)

The fill-in fact sheet

Copy this into a document and fill in every bracket. Delete the brackets as you go.

COPY THIS

Business name and how to greet callers: [Name]. Greet callers with: "[Thanks for calling Name, this is the automated assistant. How can I help?]"

Hours: [Days and times]. **After hours:** [what to tell callers, for example "take their details and say we'll call back the next business day"].

What we do: [Every service, in plain words.]

What we don't do: [Every service people ask for that you don't offer. Say what to tell them.]

Where we work: [Towns or neighbourhoods, and where you don't go.]

Prices: [Either "Never give prices; say someone will call with a quote" or the ranges you're happy to share.]

Common questions and our answers: 1. [Question] [Answer, the way you'd say it out loud.] 2. [Question] [Answer.] (up to 10)

Always collect: Name, phone number, [address / type of job / best time to call / how they heard of us].

Hand-off rules: Pass the call to a person, or alert [name] at [number], when: [emergencies you define, a complaint, a big job, someone asking for the owner]. Say to the caller: "[what it should say while it passes them on]."

Never say: [Promises about dates, prices you don't publish, anything medical or legal, anything else.]

Step by step

1. **Gather what you already have.** Your website text, any price list you share, your cancellation or refund policy, and notes you give new staff.

2. **Listen to yourself for a week.** Keep a note by the phone. Each time a caller asks something, jot it down. By Friday you'll have your top 10.
3. **Write the answers the way you say them.** "Yes, we come out to Langley and Surrey, not past the river" is better than "Service area: Lower Mainland".
4. **Write the "we don't" list.** Every service people ask for that you don't do. This stops the receptionist saying yes to work you'll have to turn down.
5. **Decide the hand-off rules.** What's an emergency in your business? Who takes it, on what number, at what hours? What happens after hours?
6. **Decide what to collect.** Name and number, always. Then whatever helps you call back well.
7. **Check it with the prompts in section 7** to find the gaps before a customer does.

For a bigger business, give each location or department its own section. Hours, contacts and services can differ, and callers will ask about the one near them.

Try this now (5 minutes): Write just the "what we don't do" list. Most owners find it's longer than they expected.

7. Use a chatbot to write and check your fact sheet

You don't have to write the fact sheet alone. A free chatbot like ChatGPT or Claude can draft it from your website and then quiz it for gaps.

If you've never used one

1. On a computer, open your web browser and go to **chatgpt.com** or **claude.ai**. On a phone, install the **ChatGPT** or **Claude** app from the App Store or Google Play (check it's made by OpenAI or Anthropic).
2. Click **Sign up** and make a free account with your email. It will send you a code or link to confirm.
3. You'll see a message box at the bottom of the screen. That's where you paste the prompts below.
4. **To copy a prompt from this guide:** on a computer, click at the start of it, hold the mouse button and drag to the end, then press **Ctrl + C** (Mac: **Command + C**). On a phone, press and hold on the first word until it highlights, drag the handle to the end, and tap **Copy**.
5. **To paste it:** on a computer, click in the message box and press **Ctrl + V** (Mac: **Command + V**). On a phone, press and hold in the message box and tap **Paste**.
6. **Fill in the brackets.** Replace every part in [square brackets] with your own details, and delete the brackets. Where it says [paste], paste your own text there.

7. Press **Enter** or tap the arrow to send.

8. **If the answer isn't right, tell it what to change** in the same chat: "Shorter." "We close at 5, not 6."
"Take out the part about weekends." It remembers the whole conversation.

To copy your own website text: open your website, click at the start of the text on a page, drag to the end, and copy it the same way. Do one page at a time if it's long.

Don't paste customer names, numbers or anything private. The fact sheet is about your business, not your customers.

The prompts

Turn your website into a fact sheet

COPY THIS

Here is the text of my business website: [paste]. Write a one-page fact sheet for a phone receptionist: hours, services, services we do NOT offer, service area, and the 10 questions a caller is most likely to ask, with answers taken only from this text. Mark anything you had to guess with [?].

Find the gaps

COPY THIS

Here is my receptionist fact sheet: [paste]. Act as 5 different callers (a new customer, an angry customer, an emergency, a price shopper, someone asking for a service we don't offer). For each, show where the sheet has no answer.

Write the hand-off rules

COPY THIS

My business is [type]. List the situations where a phone assistant should stop and pass the caller to a person, and what it should say while it does.

Plain-spoken answers

COPY THIS

Here are my answers to common caller questions: [paste]. Rewrite each one so it sounds natural spoken out loud on the phone: short sentences, no lists, no abbreviations, under 40 words each. Keep every fact exactly as I wrote it.

The after-hours script

COPY THIS

My business is [type], open [hours]. Write what a phone assistant should say to callers outside those hours: when we'll call back, what to do in an emergency [fill in], and what details to take. Keep it friendly and under 60 words.

Test questions for any service

COPY THIS

I'm about to test an AI phone receptionist for my [type of business]. Write 15 test questions a real caller might ask, including three awkward ones, two that aren't covered by a normal fact sheet, and one from someone who is upset. Put them in the order I should ask them.

The chatbot will sometimes fill a gap with a guess that sounds right. That's why the first prompt asks it to mark guesses with [?]. Check every [?] and every fact before you use the sheet.

8. How to test one this week

Call two AI receptionists as if you were a customer. Ours answers on 778-504-7535 at any hour, so you can start there. Have your list of questions and the test questions from the last prompt in front of you.

The scorecard

Print this or copy it onto paper. Score each receptionist on each line: 2 for good, 1 for so-so, 0 for poor.

Question	Receptionist A	Receptionist B
Did it answer the question, or dodge?		
Did it avoid making anything up?		
Did it take my name and number without being asked twice?		
Did it know when to pass me to a person?		
Did it understand me when I spoke normally, fast, or with noise?		
Did it handle being interrupted?		

Question	Receptionist A	Receptionist B
Did it stay calm when I was annoyed?		
Would my best customer be happy with that call?		

Try to trip it up, on purpose

- Ask about a service the business doesn't offer.
- Ask for an exact price on a job that depends on the details.
- Interrupt it halfway through a sentence.
- Speak quickly, or call from your car or a noisy room.
- Say you're unhappy and want to speak to the owner.

A good one sounds calm, says "I don't know, I'll have someone call you" when it should, and never invents a price or a promise.

Questions to ask the service itself

- What do I get after each call: a summary by text, by email, or in an app?
- How do I change the fact sheet myself, and how quickly do changes take effect?
- What happens when it can't answer?
- How does it pass a caller to a person, and what happens if that person doesn't pick up?
- Does it record or transcribe calls? Where is that kept, and for how long?
- Can it pick up only when I'm busy or closed, or does it have to take every call?

9. Your first month with one

If you go ahead, don't put it in front of every call on day one. Start with the calls you already miss: after hours, lunch, or when the line is busy. You keep answering the rest yourself, so you can compare.

Week one. Read every summary the same day. Look for three things: questions it couldn't answer, answers you'd have worded differently, and callers who should have been passed to a person and weren't. Each one is a line to add or fix on the fact sheet.

Week two. Ring it yourself from a number it won't recognize and ask the questions that went wrong. If the answers are right now, move on.

Weeks three and four. Compare your missed-call count with the week you counted in section 4. Read the summaries once a day instead of after every call.

By the end of the month you'll know which calls it handles well and which should always come to you. That's when to decide whether it should pick up more of your calls, and you can decide from the summaries rather than from a feeling.

10. Worked examples

These are made-up businesses, written to show how the setup works. They aren't customers.

A plumbing company, 6 staff

The owner counts missed calls for a week and finds most come in while he and his crew are on jobs. His fact sheet covers the towns they serve, the work they don't take (new builds, septic), and one hand-off rule: water actively leaking or no heat in winter goes straight to the on-call phone. Everything else becomes a summary with name, number, address and a description of the problem. He calls back in batches at lunch and at five.

A family law firm, 14 staff

The firm doesn't want an assistant discussing anyone's case, so the fact sheet is short and strict: office hours, the areas of law they practise, how a first consultation is arranged, and "never give legal advice or discuss a case; take a name and number and say a staff member will call". Every caller who mentions an existing file is passed to reception during office hours. After hours, it takes a message. The summaries let the reception team start the morning knowing who to call first.

A property management company, 50 staff

The company manages several buildings and gets a steady stream of tenant calls. The fact sheet has one section per building, with the office hours, the rules on move-ins and parking, and the emergency line for each. Its hand-off rules separate emergencies (flood, fire, no heat, a lockout) from routine requests (a dripping tap, a noise complaint). Routine calls become written summaries that the maintenance team works through each morning, and nobody has to write down a voicemail by hand.

11. Privacy and callers

A few things to settle before you switch one on:

- **Tell callers it's an assistant.** A greeting like "You've reached [business], I'm the automated assistant" is honest and avoids confusion.
- **Say if calls are recorded.** If the service records or transcribes calls (turns them into written text), tell callers at the start, and ask the provider where recordings are kept and for how long.
- **Keep private detail out of the fact sheet.** It holds facts about your business, not about your customers.
- **Keep private detail out of chatbots too.** When you use ChatGPT or Claude to write the fact sheet, paste your website and your own notes, never customer information.
- **In regulated work** (health, law, finance), check with your professional body or privacy adviser before an assistant takes any detail that touches a client file.

12. When it goes wrong: troubleshooting

What happened	What to do
It gave a wrong answer.	Find the line in the fact sheet it used and rewrite it more clearly. If there's no line, add one.
It guessed instead of taking a message.	Add to the fact sheet: "If a question isn't answered here, say someone will call back, and take their details." Test it again.
It said yes to a service you don't offer.	Add that service to the "what we don't do" list, with what to tell callers.
It didn't pass an emergency on.	Rewrite the hand-off rules with the exact words callers use ("water coming through the ceiling", "no heat"). Test it at night.
It passed too many calls to you.	Your hand-off rules are too wide. Narrow them to real emergencies and named situations.
Callers sound confused by it.	Rewrite answers the way you'd say them out loud, shorter. Use the "plain-spoken answers" prompt.
The summaries miss details you need.	Add them to "always collect" on the fact sheet.
Your hours or services changed.	Update the fact sheet the same day, then call it and check.

What happened	What to do
The chatbot's draft fact sheet has wrong facts.	That's expected. Check every line against the truth, especially anything marked [?].

13. Common mistakes and fixes

- **Letting it guess.** If your sheet doesn't cover a question, it should take a message, not improvise. Test this on purpose.
- **Forgetting what you don't do.** A receptionist that says yes to a service you don't offer creates an angry customer tomorrow. Write the "we don't" list.
- **No hand-off rule for emergencies.** Decide in advance what counts as urgent and where that call goes, and test it at night.
- **Writing the fact sheet like a website.** Headings and bullet points read badly out loud. Write answers the way you'd say them.
- **Setting it up and never touching it.** Hours change, services change, staff change. Update the sheet the same day.
- **Never reading the summaries.** The summaries show what customers actually ask. Update the fact sheet from them every month.

14. Printable checklist

Before you try any service

- ☐ Counted missed calls for one normal week (section 4)
- ☐ Wrote down the 10 most common questions and my real answers
- ☐ Wrote the "what we don't do" list
- ☐ Wrote hand-off rules: what's urgent, who takes it, at what hours
- ☐ Decided what to collect from every caller
- ☐ Decided what it must never say
- ☐ Checked the fact sheet with the "find the gaps" prompt

When testing

- ☐ Called at least two receptionists

- ☐ Filled in the scorecard for each
- ☐ Tried to trip each one up
- ☐ Asked each service the six questions in section 8

First month

- ☐ Started with missed and after-hours calls only
- ☐ Read every summary in week one
- ☐ Fixed the fact sheet from what I found
- ☐ Compared missed calls with the week I counted

15. Quick reference

- An AI receptionist answers your phone in a natural voice, from a fact sheet you write, and sends you a summary of each call.
- It doesn't replace you on the calls that need you.
- Count your missed calls for a week before deciding anything.
- The fact sheet decides the quality. Include what you don't do.
- A free chatbot can draft and check the fact sheet. Check every fact it writes.
- Decide your hand-off rules in advance: what's urgent, who takes it, when.
- Test with real questions, score them, and try to trip it up.
- Tell callers it's an assistant, and say if calls are recorded.
- Read the summaries and update the sheet every month.
- Hear one now: 778-504-7535.

Want it set up for your business? [Book a free call](#)

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