

The 24/7 Front Desk: Setup Checklist

Answer every lead, even when you are on a job. Start at Level 1 and add a level when you are ready.

1 START HERE

Map where leads reach you

- ☐ Phone calls ☐ Text messages ☐ Website form ☐ Google Business Profile messages

For each one, write down who answers it today and where the lead ends up.

2 LEVEL 1

Missed-call text

- ☐ Turn on missed-call text-back in your business phone app.
- ☐ Write the text: say who you are, say you will follow up, and ask what they need.

EXAMPLE TEXT

Hi, this is [Name] at [Business]. Sorry we missed your call. We will call you back. What can we help you with?

3 LEVEL 2

AI text assistant

- ☐ Connect an AI (artificial intelligence) text assistant to that same number.
- ☐ Give it your services, service area, and hours.
- ☐ Give it the one question it must get answered before it hands the lead to you, such as the job address.

4 LEVEL 3

AI receptionist

- ☐ Decide: buy or build.
- ☐ **Buy:** sign up for a ready-made AI receptionist service. Fastest to set up.
- ☐ **Build:** make your own on Retell AI for more control.

Comment **BUILD** for the step-by-step AI Agent Build Plan.

5 EVERY LEVEL

Every lead lands in one place

- ☐ Pick one place: a Google Sheet, a CRM (customer relationship management) tool, or your email.
- ☐ Check that every lead arrives with the caller's name, phone number, and what they need.
- ☐ It happens automatically. No one copies leads over by hand.

6 RULES FOR ANY AI ASSISTANT

Before it talks to customers

- It says it is an AI assistant, at the start and whenever asked.
- It never quotes a firm price. You give prices.
- Emergencies go straight to your phone.
- It never promises an appointment time it cannot see on your calendar.
- When a customer asks for a person, it hands off to a human.

7 TEST

Test it like a customer

- ☐ From another phone, call your business number and let it ring out.
- ☐ Text your business number from that phone too.
- ☐ Confirm both leads got logged with name, number, and need.
- ☐ Test again after every change you make.