

● [01 / CALL DESIGN]

SHOEB LODHI - GROWTH SYSTEMS ARCHITECT

AI Voice Agent Script Guide

Design transparent call flows that qualify, book and hand off cleanly.

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I write the exit paths before the sales script. A useful voice agent knows when to ask, when to stop and when a person needs to take over.

The call flow

Permission gate → AI disclosure → Goal → Qualify → Book or hand off → Confirm next step

1. **Before dialing:** check the approved audience, permission evidence, suppression state, local contact hours and callback preference.
2. **At connection:** name the business, disclose the AI assistant and explain the purpose. Give the person a choice to continue.
3. **During qualification:** ask one relevant question at a time, use known answers and confirm anything ambiguous.
4. **At conversion:** use verified availability or a real transfer. Never invent a booking, price, approval or human response.
5. **At the end:** repeat the agreed next action, responsible person, timing and permitted channel.
6. **After the call:** save a factual summary and one clear outcome. Stop incompatible workflows.

Write the brief before the prompt

Business name / approved pronunciation

Primary goal: one outcome

Inbound, requested callback or approved outbound

Who the agent is allowed to contact

Required questions / maximum call length

Human owner / backup / operating hours

What the agent must never promise, infer or collect

Build rule: the agent can collect context and arrange a conversation. A qualified person owns clinical judgment, legal advice, eligibility decisions and nonstandard commercial terms.

All scripts are templates. Replace bracketed fields, approve the knowledge behind each claim and test the entire flow before real calls.

● [02 / OPENING & PERSONA]

Be clear about who is calling.

Use the AI disclosure at the start of each new call. Do not make the caller ask whether the assistant is human.

Opening: outbound or requested callback

“Hello, may I speak with [first name]? I'm [assistant name], an AI assistant calling for [business] about your [specific inquiry or agreed callback]. Is now a suitable time for a short conversation? You can ask for a person at any point.”

If someone else answers, do not disclose the inquiry topic. Ask for the intended person or leave a neutral callback message under the approved policy.

Opening: inbound

“Thank you for calling [business]. I'm [assistant name], an AI assistant. I can help with [approved scope] or arrange a callback from the team. What would you like help with?”

Add the approved recording notice and choice at the point required by the business's reviewed process. The sample opening alone is not a complete consent or recording process.

Persona and tone

- Calm, direct and helpful.
- Short turns with room to interrupt.
- Use the caller's preferred language.
- Read names, dates and amounts slowly.
- Say “I do not know” when information is missing.

Conversation rules

- Ask one question, then wait.
- Do not speak over a person.
- Never fake empathy or personal experience.
- After a misunderstanding, rephrase once.
- If still unclear, offer a human callback.

When it is a bad time

“Of course. Would you prefer a callback at a specific time, a message on a permitted channel, or no further contact?”

When the caller wants a person

“I can arrange that. May I tell the team what you need help with, or would you prefer to explain it directly?”

Assistant name / voice / language

Approved disclosure and recording wording

Pronunciations, words to avoid and tone notes

● [03 / QUESTION BANKS]

Ask only what changes the next step.

Choose a short branch for the service. These are discovery prompts, not eligibility rules.
Do not ask every question on every call.

Real estate

Question	Use the answer to
"Are you looking to buy, rent or sell?"	Select the right service and agent queue.
"Which areas and property types are you considering?"	Match the search and record flexible preferences.
"What budget range are you comfortable sharing?"	Record a stated range with currency. Do not infer affordability.
"When would you like to move or make a decision?"	Set timing, nurture track and a suitable viewing next step.
"Would you prefer a viewing or a call with an agent?"	Choose the appropriate calendar after checking current inventory.

Medspa

Question	Use the answer to
"What would you like to discuss at a consultation?"	Capture the caller's objective without diagnosing a condition.
"Is this your first visit with [business]?"	Select new-client or existing-client assistance.
"Would you like a consultation before choosing a service?"	Route suitability questions to a qualified clinician.
"Which location and appointment times work for you?"	Check a suitable consultation calendar.

Do not collect detailed medical history in a general qualification call. Use an approved secure intake process. Clinical concerns go to the clinic's designated professional.

Immigration

Question	Use the answer to
"What would you like an advisor to help you explore?"	Capture the goal in the caller's own words.
"Do you have a destination or programme in mind?"	Route the inquiry without promising an available pathway.
"Is there a date or deadline the advisor should know?"	Flag a reported deadline for human verification.
"Would you like an initial consultation, and in which language?"	Book the correct advisor and language support.

The agent does not determine visa eligibility, give legal advice or promise a decision. Collect sensitive documents only through the approved secure intake channel.

● [04 / OBJECTIONS & RECOVERY]

Respond without pressure.

Answer the concern, then offer a choice. A refusal or opt-out is an outcome the system must respect.

Caller says	Approved response pattern
"Are you a real person?"	"I'm an AI assistant for [business]. I can help with basic questions and scheduling, or arrange a person to call you."
"How did you get my number?"	"The record says [verified source and date]. If that does not sound right, I can stop here and ask the team to review it." Never invent a source.
"I am just researching."	"That is fine. Is there one question I can help answer, or would you prefer to leave it here?"
"It is too expensive."	"I can share the current approved information or ask the team to discuss options. Which would be useful?" No unapproved discount or financing claim.
"Can you guarantee the result?"	"I cannot promise an outcome. A qualified team member can explain the process, limitations and what may be suitable."
"Do not call me again."	"Understood. I will record your request and stop this outreach." Apply suppression, cancel queued outreach and end the call.
"I already spoke to someone."	"Thank you. I can ask your contact person to follow up. May I confirm who you spoke with?" Pause duplicate sequences.

Recovery when the agent is uncertain

"I may have misunderstood. Did you mean [brief neutral clarification]?"

After another failed clarification: "I do not want to record that incorrectly. Would you like a person to help?"

Recovery when a tool fails

"I cannot check [availability or information] right now. I have not confirmed anything. I can arrange a callback or try again while you wait."

Record the attempted action, tool failure, caller preference and assigned follow-up. Never fill a failed lookup with a plausible answer.

Top local objection and approved response

Confirm the action, then the promise.

Calendar writes and accepted transfers are the evidence. A fluent script cannot substitute for either.

Booking sequence

- 1. Confirm the service, location, appointment length and caller's timezone.
- 2. Check live availability. Offer two specific options with date and timezone.
- 3. Repeat the selected slot and ask permission to create the booking.
- 4. Create once with a request ID. Check for an existing booking before retrying.
- 5. Confirm only after success. Save the booking reference and send details on a permitted channel.

"I can offer [day, date, time and timezone] or [alternative]. Which suits you?"

Before creation: "Shall I book [service] with [host] at [location] for [full date and time]?"

After success: "That is confirmed. Your reference is [ID]. [Permitted confirmation channel] will have the details and how to change the appointment."

Warm transfer

"I can connect you with [team or person] about [purpose]. May I share a short summary so you do not need to repeat yourself?"

Check availability, send the brief and wait for a person to accept. If nobody accepts, return to the caller and offer a callback. Do not leave the caller in an indefinite hold state.

Handoff packet	Required context
Identity and permission	Lead ID, verified contact, language, allowed channel and summary-sharing preference.
Conversation	Goal, confirmed answers, exact unresolved question and any disputed fact.
Action	Owner, due time with timezone, appointment or callback reference and transcript location.

No available person or slot

"The team is unavailable right now. Would [specific callback window and timezone] work? I will record the request; the team will confirm the time."

Offer a callback window only from the staffed policy. A requested time remains pending until accepted. For cancellation or rescheduling, update the existing appointment and stop stale reminders.

Transfer destination / fallback queue	Maximum hold / callback commitment
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Handle silence and timing well.

A voicemail is not consent, and an answered call is not necessarily the intended person.

Neutral voicemail, if approved

“Hello, this is [assistant name], an AI assistant for [business]. Please call [verified callback number] if you would like to speak with the team. Again, the number is [number]. Thank you.”

Use a neutral business identity approved for the service. Do not mention a treatment, immigration case, budget, address or other sensitive inquiry detail. Leave no voicemail when the approved policy or the person's preference says not to.

Agreed callback

“What day, time and timezone would suit you? May [business] call you at this number about [agreed purpose]?”

“I have recorded [full date, time and timezone] as your requested callback. [Explain whether it is confirmed or awaiting the team].”

Example operating defaults for testing - replace with an approved contact policy.

Outcome	Record	Next action
No answer	Attempt time, local timezone and voicemail status.	Use an approved retry time. Check suppression again.
Requested callback	Exact time, purpose and allowed channel.	Cancel generic retry tasks. Assign this callback.
Wrong person / number	Contact mismatch without adding unnecessary details.	Stop dialing; route for correction.
Repeated no answer	Attempt count and last permitted action.	Reach the configured limit, then pause the track.
Caller disconnected	Last confirmed fact and incomplete action.	Check whether a booking was created before any retry.

After-hours inbound

“The team is currently closed. I'm the AI assistant and can record your request or help with approved appointment options. The next staffed callback window is [window and timezone]. Would you like me to request a callback?”

Do not represent the assistant as emergency support. If a caller describes an immediate safety concern, follow the business's approved urgent-response instructions and route to a person where available. Do not improvise medical or legal advice.

Approved contact hours / timezone source	Retry limit / minimum gap / callback owner
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● [07 / REVIEW BEFORE LAUNCH]

Approve the boundaries.

These are general operational reminders, not legal advice. Rules differ by caller location, business activity, channel and purpose. Have the appropriate reviewer approve your use case.

Outreach and recording review

- ☐ Identify where the business and recipients are located and which local rules need review.
- ☐ Confirm the authority and consent required for this audience and purpose before dialing.
- ☐ Store the source, timestamp, wording and scope of any permission being relied on.
- ☐ Approve the AI disclosure and any recording notice, timing, choice and non-recorded alternative.
- ☐ Set applicable contact hours, do-not-contact checks, retry limits and an easy opt-out.
- ☐ Verify the business identity and caller ID configuration. Never impersonate a human caller.
- ☐ Test opt-outs across the dialer, CRM, messaging and future scheduled workflows.

Information and access review

- ☐ Limit questions to what this step needs. Move sensitive intake to an approved secure process.
- ☐ Define who can access call audio, transcripts, summaries and exported reports.
- ☐ Set retention and deletion handling with the responsible reviewer.
- ☐ Review telephony and AI vendor processing arrangements for the intended data and locations.
- ☐ Restrict knowledge to approved information with an owner and review date.
- ☐ Route complaints, access requests and disputed information to a named person.

Record the decision

Approval item	Reviewer / date / reference
Audience, purpose and contact policy	
AI and recording wording	
Knowledge and specialist boundaries	
Data handling and vendor setup	

A caller saying “yes, now is fine” is a conversation choice. It does not replace the business's review of whether the initial outreach, recording or later marketing is permitted.

● [08 / TESTING SCORECARD]

Test the awkward calls first.

Use staged calls before a limited pilot. Keep the script version, tool logs and expected result for each test.

Score: 0 = failed; 1 = inconsistent or needs editing; 2 = passed with evidence. This is an internal release rubric, not a performance benchmark. Rows marked **gate** must score 2 before launch.

Scenario	Expected behavior	Score
AI identity / gate	Discloses the AI role at opening and answers identity questions honestly.	
Permission and opt-out / gate	Blocked audience is not dialed; an opt-out cancels queued contact.	
Recording choice / gate	Approved notice and alternative work at the required point.	
Question relevance	Uses known answers and asks one useful question at a time.	
Noise, interruption, accent	Stops speaking, clarifies and offers a person if uncertain.	
Unsupported advice / gate	Does not invent rules, suitability, prices or guaranteed outcomes.	
Calendar conflict or timeout / gate	No false confirmation or duplicate booking on retry.	
Human request / gate	Transfers to an accepting person or creates an owned callback.	
Voicemail, wrong person	Protects inquiry details and follows the contact policy.	
After-hours, timezone	Uses the correct staffed window and repeats the timezone.	
Summary and outcome	Facts, unknowns, owner and next action match the call.	
Total	Resolve every failed gate regardless of total.	/ 22
Script version / tester / test date		Failed scenario / fix owner
Evidence reference / retest result		Pilot owner / pause switch / review date

During the pilot, review mixed outcomes: bookings, refusals, abandoned calls and handoffs. Report connected calls, completed qualification, confirmed bookings, opt-outs and human corrections with their denominators.

Want help implementing this?

Bring one call goal, the approved question bank and a difficult test recording. We can turn them into a bounded voice workflow.

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