FERNVAY
CONSULTING, LLC

A PRACTICAL GUIDE FOR SMALL-BUSINESS OWNERS

Before You Buy an AI Receptionist

What to figure out first, what to ask vendors, and how to tell whether you need one at all. Work through it with a pen in an afternoon.

- Do you actually need one? A one-week check
- What changes by industry
- Red flags
- Seven questions to answer before you shop
- Twelve questions to ask any vendor
- A 30-day rollout plan

STEP 1

Do you actually need one?

The answering is the easy part. Before you compare tools, find out what is really coming in and where it gets lost.

Run a one-week tally

For seven days, mark every customer contact: calls, texts, web forms, social messages and emails. Note when it came in and what happened to it. Your phone log, voicemail and inbox will cover most of it.

Channel	Business hours: answered	Business hours: missed or late	After hours / weekends	What did they want?
Phone calls				
Texts				
Website forms / chat				
Social messages (Facebook, Instagram, WhatsApp)				
Email				

"Late" means whatever is too slow for your customers. For an emergency service that may be ten minutes; for a planned project it may be the same day.

Signs it will help

- A real share of contacts arrives after hours or while everyone is on a job.
- The same handful of questions (hours, prices, service area, availability) eat up the day.
- Callers who reach voicemail rarely call back.
- Booking takes several back-and-forth messages.
- Customers write to you in more than one language.

Signs to fix something else first

- Most contacts are answered fine. The leak is in follow-up after the first reply.
- Leads get answered, but quotes sit for days.
- Your calendar is out of date, so nothing can book into it reliably.
- Nobody would read or act on what the AI collects.
- Volume is low enough that one person can cover it with a simple auto-reply.

Rule of thumb: an AI receptionist fixes response. It does not fix what happens after the response. If your tally shows most leads are answered but still go nowhere, start there.

STEP 2

Seven questions to answer before you shop

Write your answers down. They become your requirements, and they make vendor demos much easier to judge.

01 What comes in, and when?

Use your tally. Missing calls at 9pm calls for a different setup than missing them at noon while everyone is on a job.

Write down: your top three channels and the hours you're not covered.

02 What should it handle, and what should it hand off?

Typical jobs: answer common questions, collect details, book appointments, sort urgent from routine. Decide which ones it does on its own and which always go to a person.

Write down: your ten most common questions and the right answer to each.

03 Where does the information go?

An AI that answers but drops the details in an inbox nobody checks just moves the leak. Name the place (calendar, CRM, job tracker, a shared inbox) and the person who acts on it.

Write down: "When a new lead comes in, _____ sees it in _____ and does _____ within _____."

04 What must it never do?

Common lines: promise a price or a date, give medical, legal or financial advice, take payments, argue with an upset customer, guess when it doesn't know, or pretend to be a person. We recommend it introduce itself as your virtual assistant; some states have rules about disclosing AI to customers.

Write down: your "never" list, and how it will introduce itself, before any setup starts.

05 How does a person take over?

Decide what triggers a handoff (an emergency, an upset customer, a request for a person, a big job), how you're alerted (text, call transfer, email) and what the customer is told while they wait.

Write down: who gets the handoff, by day and after hours.

06 Which channels and languages?

Voice, text, website chat and WhatsApp are often different products. Start with the one where you lose the most. If your customers speak Spanish, make sure it handles Spanish well, not just a translated menu. If it will text customers in the US, plan for number registration (see page 5).

Write down: the first channel, and which ones can wait.

07 Who keeps it up to date?

Hours, prices, services and policies change. An assistant working from last season's information does more harm than good.

Write down: who owns updates, and how often they review conversations.

STEP 3

What changes by industry

The seven questions apply everywhere. What it should capture, and where it must stop, depends on your business.

Home services

HVAC · PLUMBING · ROOFING · ELECTRICAL

Separate emergencies (no heat, active leak) from routine work and get emergencies to a person fast. Capture address, ZIP (are they in your area?), the problem and photos.

Never: quote a price for work nobody has seen.

Dental, medical and veterinary clinics

FRONT DESK

Good for hours, directions, booking, rescheduling and intake. Urgent symptoms go straight to your emergency instructions or a person.

Never: give clinical advice. In the US, if patient health information is involved, ask whether the vendor will sign a Business Associate Agreement (BAA) under HIPAA.

Legal and financial services

INTAKE

Collect the matter type, deadlines and contact details, and book the consultation.

Never: give advice or suggest an outcome. Make clear that contacting you doesn't create a client relationship, and route anything confidential to a person.

Salons, spas and studios

BOOKING

Booking, rescheduling, deposits and reminders do most of the work. Spell out your cancellation and no-show policy so it's stated the same way every time.

Never: book services your staff isn't qualified for, or overlap appointments.

Real estate and mortgage

LEAD QUALIFICATION

Respond fast, ask a few qualifying questions (timeline, area, budget range, pre-approval) and book showings or calls.

Never: quote rates or promise approval. Follow fair housing rules in every answer.

Restaurants and catering

RESERVATIONS

Hours, menu questions, reservations and large-party or catering inquiries, which should go to a person quickly because they're worth the most.

Never: make allergen guarantees.

Travel advisors

INQUIRIES AND CHANGES

Answer first questions, collect trip details and book the consult. For changes to an existing booking, collect the request in writing and send it to the advisor to approve.

Never: confirm a change with a supplier on its own.

Online stores

MESSAGING AND WHATSAPP

Product questions, order status, shipping and payment instructions after hours, with the order details handed to the team in the morning.

Never: issue refunds or change orders without a person.

STEP 4

Twelve questions to ask any vendor

Bring these to every demo. A good vendor answers them plainly; vague answers tell you something too.

- ☐ **How is it priced?** Per minute, per message, per conversation, or flat? What would a typical month of yours cost?
- ☐ **What's included,** and what costs extra (phone numbers, extra channels, languages, integrations)?
- ☐ **Does it connect to my calendar and CRM,** or will someone retype everything?
- ☐ **How does handoff work?** Can it transfer a live call, or text me in real time?
- ☐ **Can I read every conversation** and listen to recordings?
- ☐ **What does it do when it doesn't know?** Ask them to show you.
- ☐ **Who owns the data,** and can I export it if I leave?
- ☐ **How well does it handle Spanish** (or your customers' language)? Ask to test it.
- ☐ **Who sets it up,** how long does it take, and who updates it later?
- ☐ **Can I test it** with real scenarios before going live? Check that it tells callers they're speaking with an AI.
- ☐ **What's the contract?** Length, cancellation, and what happens to my number if I cancel.
- ☐ **For health or legal work:** how is sensitive information stored, and will you sign a BAA if I need one?

STEP 5

Red flags

- "It replaces your front desk." It handles volume and hours; people still handle judgment.
- No clear way for a person to take over a conversation.
- You can't see transcripts or recordings.
- A long contract with no trial or test period.
- Your data or phone number can't leave with you.
- A demo where it never says "I don't know," or that is built to pass as a person.

One more test: call or message it the way your least patient customer would. Interrupt it, ask two things at once, switch languages, ask for a person. How it handles that matters more than the polished demo.

If it will send text messages in the US: plan for 10DLC registration. Carriers require businesses texting customers from a regular 10-digit number through a software platform to register the business and how it uses texting (known as A2P 10DLC). Unregistered messages are often filtered or blocked, and approval can take days to weeks, so start before go-live, not after.

- Ask the vendor: **do you handle the registration, and what does it cost?**
- Have ready: your legal business name, EIN, website, and how customers agree to receive texts.
- Get clear consent before texting, and honor STOP requests. Marketing texts need stronger consent than appointment or service updates.
- A toll-free number is an alternative, but it needs its own verification.
- General information, not legal advice.

STEP 6

A 30-day rollout plan

Start narrow, read everything, then widen. Most problems show up in the first week of real conversations.

WEEK 1

After hours only

Turn it on outside business hours, on one channel. Read every conversation daily. Note wrong answers and missed handoffs.

WEEK 2

Fix the answers

Update the questions it got wrong, tighten the "never" list and test the handoff on purpose.

WEEK 3

Add booking or hours

Let it book into your calendar, or extend it to busy daytime hours. Keep reading conversations, now every few days.

WEEK 4

Measure

Compare with your week-one tally: contacts answered, appointments booked, handoffs, and anything that went wrong.

What to track each week

Measure	Why it matters
Contacts answered after hours	The reason you bought it. Compare with your tally.
Appointments or orders it started	Shows whether answering turns into business.
Handoffs, and how fast a person picked up	The handoff is where most setups quietly fail.
Wrong or "I don't know" answers	Your update list for next week.

Rather have this done for you?

This guide is the first half of what we do in a Free Workflow Review: we look at how leads reach you today, where they wait, and whether an AI receptionist is the right fix or something simpler is. If it is, we can set it up and connect it to the tools you already use.

fernvayconsulting.com · Free 30-minute Workflow Review

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