

VOICE PLAYBOOK

Voice AI Deployment Playbook

The operator's guide to installing AI voice in a service business, what to set up, what to say, and what NOT to do.

2s

PICKUP TIME

690

CALLS PROVEN

24/7

UPTIME

WRITTEN BY

Saad Bellouadi

AI Operator · 690 calls → 163 booked appointments across real estate, clinics, solar

KEYWORD: **VOICE**

PROFITWITHAI.IO

VERSION 1.0

THE \$100K PROBLEM

Most service businesses are bleeding revenue through their phone.

They don't see it, because it's invisible.

No alert pops up when a call goes unanswered at 6:47 PM.

No dashboard shows the **\$15K deal** that walked away because nobody called back for 4 hours.

No report tells them the med spa down the street answered their prospect in 10 seconds and closed the appointment.

But the money's gone anyway.

THE NUMBER YOU'VE NEVER SEEN

For most service businesses, the phone is leaking somewhere between **\$30K and \$500K** a year. Nobody invoices for missed calls. Nobody bills you for hang-ups. So nobody sees it.

This playbook shows you how to plug the leak, with AI voice that answers every call in 2 seconds, 24/7, books appointments, and scales without hiring.

By the end of this PDF, you'll know exactly what to set up, what to say, what to avoid, and which platform to deploy on. **Let's go.**

THE 3 PHONE FAILURES

The 3 phone failures killing your pipeline.

Every service business has at least one of these. Most have all three.

01 Missed calls during business hours

Your team is on another call. Helping a client. At lunch. Closing a deal. The phone rings. Voicemail picks up. That prospect hangs up and calls your competitor.

→ TYPICAL IMPACT: 15-35% OF INBOUND CALLS MISSED

02 Slow response to after-hours inquiries

Lead calls at 7:30 PM. Goes to voicemail. Your team sees it at 9:12 AM the next morning. By then they've moved on.

→ TYPICAL IMPACT: 40-60% OF AFTER-HOURS LEADS NEVER CONVERT

03 No qualification before reaching your team

Your best sales person spends 20 minutes a day explaining pricing to tire-kickers. Meanwhile, ready-to-buy leads sit on hold.

→ TYPICAL IMPACT: 30-50% OF SALES TEAM TIME WASTED

BOTTOM LINE

You're not losing to competitors. You're losing to your phone system.

Fix one of these and you've justified the deployment. Fix all three and you've rebuilt the front door of the business.

WHAT IT DOES

What AI voice actually does (in plain English).

Forget the tech. Here's what it means for your business.

An AI voice agent answers your business phone using a natural-sounding voice that's indistinguishable from a human receptionist.

What it actually does

- Picks up every call within 2 seconds
- Greets the caller professionally using your business name
- Understands what the caller wants (questions, booking, pricing, info)
- Answers common questions using your business knowledge base
- Qualifies the lead (budget, timeline, needs)
- Books appointments directly into your calendar
- Transfers to a human when needed (triggers you set)
- Sends SMS / email follow-ups automatically
- Logs every conversation for your team to review

What it doesn't do

- Replace ALL human interaction, some conversations need humans
- Feel robotic, modern voice AI is shockingly natural
- Require technical knowledge to set up (no coding involved)

THE SIMPLE VERSION

A receptionist that never sleeps, never quits, never has a bad day, and costs **\$200–\$500/month** instead of \$3,500/month.

THE 5 USE CASES

The 5 use cases that **print money.**

Not every deployment is equal. Here are the 5 that consistently win.

01 Appointment booking

Inbound caller → AI qualifies → books directly into calendar.

BEST FOR: CLINICS, MED SPAS, LAW FIRMS, CONSULTANTS

02 After-hours lead capture

Caller outside business hours → AI captures details + books callback.

BEST FOR: REAL ESTATE, HOME SERVICES, SOLAR

03 Lead qualification routing

Inbound caller → AI qualifies → routes only sales-ready to human team.

BEST FOR: B2B, AGENCIES, HIGH-VOLUME LEAD BUYERS

04 Outbound follow-up

Website form filled → AI calls within 60 seconds to qualify.

BEST FOR: E-COMMERCE, COACHES, AD-DRIVEN BUSINESSES

05 Reactivation campaigns

AI calls cold / old leads to reactivate interest.

BEST FOR: CAR DEALERSHIPS, INSURANCE, SUBSCRIPTION SERVICES

THE RULE

Pick ONE use case. Deploy it clean. Scale from there. Trying to do all 5 at once = messy deployment, poor results, client blames the tech.

PROOF

Real deployment **case studies.**

These aren't theories. These are real campaigns.

REAL ESTATE BROKER

210 → 37

17.6% conversion rate. No human ever picked up the phone.

PRIVATE CLINIC

160 → 52

32.5% conversion rate. Replaced 2 full-time receptionists.

SOLAR BUSINESS

320 → 74

23.1% conversion rate. Runs 24/7, never sick, never quits.

TOTAL ACROSS 3 INDUSTRIES

Fully automated. Fully AI. Fully real.

690 → 163

Campaign data from AI voice systems I built and deployed. Inbound calls → qualified appointments booked.

The conversion rates aren't the lesson. The lesson is: no human picked up the phone, and the business made more money. That's the entire pitch.

THE ANATOMY

The anatomy of a great AI voice agent.

5 things every deployment needs, skip any of them and you fail.

01 Clear role definition

The AI needs to know exactly what it is. Not "assistant." Something specific: *"You are Sarah, the front desk coordinator at Glow Med Spa. You book aesthetic consultations."*

02 Tight knowledge base

Not 500 pages of marketing fluff. 10–15 pages of actual answers to real questions: pricing, hours, services, location, common objections.

03 Qualification script

Don't book everyone. Ask 2–3 qualifying questions: "Is this for yourself or someone else?" / "Have you had [service] before?" / "What's your timeline?"

04 Calendar integration

Direct booking, not "I'll have someone call you." If you can't book the appointment in the call, you failed.

05 Escalation triggers

Define when to transfer to a human: complex requests outside the knowledge base, frustrated callers (sentiment detection), high-value prospects, keywords like "emergency," "urgent," "complaint."

THE MISTAKE 90% OF OPERATORS MAKE

Deploying the AI with no qualification script. Result: calendar full of junk appointments, team hates the system, client cancels.

PRE-LAUNCH CHECKLIST

Pre-launch deployment checklist.

Do not ship without all 12 of these.

Setup

- Business phone number forwards correctly to AI
- Voice and persona defined (name, role, tone)
- Knowledge base uploaded (pricing, services, FAQs)
- Calendar integration tested (live booking, not mock)

Conversation flow

- Greeting script approved
- Qualification questions defined
- Booking flow tested end-to-end
- Escalation triggers set up

Fail-safes

- Human handoff tested, works reliably, not clunky
- After-call SMS / email confirmation working
- Call recording + transcript storage enabled
- Weekly performance review workflow set

THE 15-MINUTE REALITY TEST

Call your own number. Pretend you're a customer. Try to break it. If you can book an appointment smoothly → ship. If anything feels off → fix it before launch.

Every red flag a customer will hit, you should hit first. The 15-minute test isn't optional. It's the difference between a deployment that prints money and one that gets blamed.

THE SCRIPTS

The scripts that **actually convert.**

Three openers. Three qualifiers. Three closers. Copy these.

OPENERS · FIRST 3 SECONDS

01 · GENERIC SERVICE

"Hi, thanks for calling [Business Name], this is Sarah. How can I help you today?"

02 · REAL ESTATE

"Hey, this is Alex from [Brokerage]. Are you looking to buy, sell, or just exploring options?"

03 · CLINIC / MEDICAL

"Hi, this is Maya from [Clinic Name]. Are you calling to book an appointment or do you have questions about our services?"

QUALIFIERS · 2-3 MAX

01 · TIMELINE

"Is this something you're looking to book this week, this month, or just exploring?"

02 · FIT

"Have you [had this service / bought a home / worked with a clinic like ours] before?"

03 · DECISION STAGE

"Are you comparing options, or ready to move forward if we're the right fit?"

CLOSERS · BOOK, DON'T CHASE

01 · DIRECT CLOSE

"Based on what you shared, I'd recommend [Action]. I can get you in at [X] or [Y], which works better?"

02 · INFO + BOOK

"Great, I'll text you a link with the details and I've got two slots next Tuesday. Which works: 11 AM or 3 PM?"

03 · ESCALATE

"You're exactly who we work with. Let me get our senior [expert] to call you in the next hour, what's the best number?"

THE RULE

Always end every call with a concrete next step. Book the appointment, schedule the callback, or confirm the info sent. Never "we'll be in touch."

RED FLAGS

Red flags: what kills AI voice deployments.

Watch for these or your deployment dies in 30 days.

01 Too long-winded greetings

"Hi! Thanks so much for calling! I'm Sarah the virtual assistant at" Nobody has time for this. Keep it under 10 words.

02 No qualification, everyone books

Your calendar fills with tire-kickers. Team hates the system. Client cancels. [Fix](#): tight qualification script.

03 AI hallucinates business details

"We offer Botox for \$99" when you actually charge \$399. [Fix](#): rigid knowledge base. Never let the AI guess pricing or policies.

04 No weekly optimization

Set it and forget it → degrades within 60 days. [Fix](#): review 10–20 random call recordings weekly. Tune the script based on what you hear.

05 Trying to replace the entire sales process

AI handles inbound, qualification, and booking. Humans close complex deals. Trying to make AI close \$50K deals = dead deployment.

THE TRUTH

AI voice is a scalpel, not a sledgehammer. Used right, it transforms a business. Used wrong, it becomes a liability.

RECOMMENDED PLATFORM

My recommended platform.

I've deployed on multiple platforms. Here's what I use now.

There are 5–10 solid voice AI platforms on the market. I've tested most of them across real deployments in real estate, clinics, solar, and more.

The one I keep coming back to is **Voxtra**.

Why Voxtra

- Deploy in 15 minutes, no coding, no technical onboarding
- Natural voice, callers don't realize it's AI
- Built for service businesses, pre-configured for appointment booking, lead qualification, after-hours capture
- Full call analytics, every call recorded, transcribed, analyzed
- Calendar integration, books direct into Google Calendar, Calendly, Cal.com
- Free trial, no credit card, you can test it before paying anything

START TODAY · FREE TRIAL

Try Voxtra free

Deploy your first AI voice agent in 15 minutes. Pickup in 2 seconds. No credit card.

VOXTRA.AI

NOT A PITCH, A RECOMMENDATION

Use whatever platform fits your business. But if you're starting today and don't know where to begin, start with Voxtra. Save yourself 20 hours of tool comparison.

START TODAY

Start today.

This playbook means nothing if you don't deploy.

Your next 48 hours

- Hour 1:** Sign up for a free trial at voxta.ai
- Hour 2:** Pick ONE use case (booking, after-hours, qualification)
- Hour 3:** Upload pricing, services, FAQs as knowledge base
- Hour 4:** Build your qualification script (use page 9)
- Hour 5:** Run the 15-minute reality test (page 8)
- Hour 6:** Forward your business line. Live.

Want help building an agency around this?

Inside my private community:

- Live walkthroughs of real voice deployments
- The exact scripts & prompts I use
- Weekly teardowns of what's working, what's dying
- Direct feedback from me

JOIN THE COMMUNITY

\$47 / month - Cancel anytime

A filtered network of operators who are actually deploying.

[PROFITWITHAI.IO/COMMUNITY](https://profitwithai.io/community)



**Speed wins.
Make the call.**

Saad Bellouadi

Founder, ProfitWithAI