

MANAGED VOICE AI FOR REAL OPERATIONS

WHERE WE CAN START

56 phone workflows

across 26 kinds of business

One page each. Every one of them is a call that repeats, has a defined finish, and ends in a record written back to the system your team already uses.

ONE PAGE

One workflow

EVERY PAGE NAMES

The finished record

PILOT

One workflow, thirty days

This is a menu, not a proposal. Nothing here is a commitment and nothing here is priced: pick the one call that is costing you the most, and we will map it properly before anyone builds anything.

PREPARED FOR

TODO(client)

PREPARED BY

Quickzot AI — the AI practice of Quickzot LLC

DATE

TODO(date)

VERSION

1.0

SECTIONS

- Clinical & health 20
- Legal, financial & professional 12
- Property & trades 12
- Vehicle, equipment & logistics 07
- Workforce & operations 05

A

How to read a page

Every page in this catalogue has the same seven parts, in the same order. They are the seven things that have to be settled before a voice agent can be trusted with a live line.

THE SITUATION	What is happening on that call today, and what it costs to leave it as it is. Written from the caller's side, not ours.
WHAT COMPLETE LOOKS LIKE	The finished record. This is the most important line on the page: it is what the pilot's completion rate is measured against, so a vague outcome here is an unmeasurable one later.
WRITES TO	The system of record the agent reads from and writes to. If a system has no write path, we say so and stop. An agent that cannot write the outcome is a voicemail with better manners.
ENGINE	Which of the three we would run this workflow on, and why. Chosen per workflow, not per client, and named in your monthly report.
STOPS FOR A HUMAN WHEN	Hard rules in the workflow, not suggestions in a prompt. Any caller who asks for a person gets one, without being asked why.
NEVER DOES	The boundary. Everything on this line is a thing the agent will not do even when a caller asks it directly.
COMPLIANCE	The obligations that shape the workflow. These are capability and process statements; Quickzot claims no certifications.

What is deliberately missing. There are no volumes, no percentages and no savings figures anywhere in this document. Those get measured against your own baseline in the working session, not borrowed from an industry benchmark. A threshold you are already beating is theatre.

Vendor names appear only as systems you may already run. No partnership is implied. We never claim a proprietary model — we select and operate other people's engines, and if a better one appears we move you to it without you re-platforming.

Index — clinical, legal and financial

Clinical & health

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Property & trades

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New patient enquiry

INBOUND

CLINICAL & HEALTH

A first-time caller wants to know whether you take their insurance, what a first visit costs, and when they can be seen. They are phoning three practices this afternoon and booking with whichever one answers.

WHAT COMPLETE LOOKS LIKE

An appointment on the schedule with patient name, DOB, phone, email, insurance carrier and reason for visit, plus a new patient record created.

WRITES TO

Practice management

Open Dental · Dentrix · Eaglesoft · Curve

ENGINE

ElevenLabs

A first impression. The caller is judging you on tone as much as on availability.

STOPS FOR A HUMAN WHEN

- ☒ Caller in pain, with swelling or bleeding, or describing trauma
- ☒ Any question about treatment, diagnosis or medication
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Give clinical advice or say whether something sounds serious
- ☐ Confirm what insurance will or will not cover

COMPLIANCE

HIPAA — BAA before a live call

Recording consent

Booking and rescheduling

INBOUND

CLINICAL & HEALTH

Existing patients moving, cancelling or booking a routine visit. The highest-volume call in the practice and the lowest-value use of a front desk hour.

WHAT COMPLETE LOOKS LIKE

The appointment moved or created in the schedule, the old slot released, and a confirmation text queued.

WRITES TO

Practice management

Open Dental · Dentrix · Eaglesoft · Curve

ENGINE

ElevenLabs

Shares a voice with new-patient calls; splitting engines mid-practice is not worth the saving.

STOPS FOR A HUMAN WHEN

- ☒ Caller reports pain or a problem with recent treatment
- ☒ A billing or insurance claim dispute
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Quote a treatment price beyond the published exam fee
- ☐ Confirm whether a named person is a patient

COMPLIANCE

HIPAA — BAA before a live call

Recording consent

Overflow and after-hours

INBOUND

CLINICAL & HEALTH

The line rings out during procedures, at lunch and after close. Every one of those calls currently reaches a voicemail box that first-time callers do not leave messages on.

WHAT COMPLETE LOOKS LIKE

Either booked, or a callback task assigned to a named person with the caller's number and the reason in their own words.

WRITES TO

Practice management

Open Dental · Dentrix · Eaglesoft · Curve

ENGINE

ElevenLabs

Out of hours the agent is the practice. Nothing else is answering.

STOPS FOR A HUMAN WHEN

- ☒ Any dental emergency, on the agreed script, to the on-call number
- ☒ Anything the workflow was not scoped to handle
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Decide whether a problem can wait until morning
- ☐ Promise a same-day appointment that is not on the schedule

COMPLIANCE

HIPAA — BAA before a live call

Recording consent

Out-of-hours escalation path agreed in writing

Recall and reactivation

OUTBOUND

CLINICAL & HEALTH

Patients overdue a hygiene visit, and patients with treatment plans presented and never scheduled. The cheapest revenue in the practice, and nobody has an hour to phone down the list.

WHAT COMPLETE LOOKS LIKE

Booked, or marked contacted with a reason and a next-contact date written back to the patient record.

WRITES TO

Practice management

Open Dental · Dentrix · Eaglesoft · Curve

ENGINE

Self-hosted

High-volume outbound to existing patients, where per-minute cost is the binding constraint.

STOPS FOR A HUMAN WHEN

- ☒ Any patient who raises a clinical concern on the call
- ☒ Any complaint about past treatment or billing
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Discuss a treatment plan's clinical content
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — hours, revocation, internal DNC

HIPAA — BAA

Recording consent

New patient intake

INBOUND

CLINICAL & HEALTH

First contact with the practice. Demographics, insurance, referring provider and the reason for the visit, all captured while the front desk is checking someone in at the counter.

WHAT COMPLETE LOOKS LIKE

A complete intake record: legal name, DOB, contact, insurance carrier and member ID, referring provider, chief complaint in the caller's words, and an appointment or a triage task.

WRITES TO

Electronic health record

athenahealth · eClinicalWorks · DrChrono · Elation · NextGen

ENGINE

Self-hosted

Every field on this call is PHI. Keeping the model inside controlled infrastructure shortens the security review.

STOPS FOR A HUMAN WHEN

- ☒ Chest pain, breathing difficulty, stroke symptoms, severe bleeding or suicidal ideation — stop, direct to 911, alert staff
- ☒ Any clinical question or symptom interpretation
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Triage, advise, or comment on whether symptoms are serious
- ☐ State what insurance covers or what a visit will cost

COMPLIANCE

HIPAA — BAA with every vendor in the call path

Minimum necessary — intake spec only

Recording consent

Scheduling and rescheduling

INBOUND

CLINICAL & HEALTH

Appointments by provider, visit type and location. Hold times on this queue push people to the portal, to the ER, or to a competitor with a shorter wait.

WHAT COMPLETE LOOKS LIKE

An appointment created or moved against the correct provider and visit type, with a confirmation queued.

WRITES TO

Electronic health record

athenahealth · eClinicalWorks · DrChrono ·
Elation · NextGen

ENGINE

Self-hosted

Same PHI boundary as intake, and volume high enough that per-minute economics matter.

STOPS FOR A HUMAN WHEN

- ☒ Any description of a medical emergency
- ☒ A request to be seen sooner on clinical grounds
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Decide clinical urgency in order to find a slot
- ☐ Confirm or deny that a named person is a patient

COMPLIANCE

HIPAA — BAA before a live call

Recording consent

Prescription refill request

INBOUND

CLINICAL & HEALTH

Refill requests arrive by phone all day, get written on paper, and are re-keyed later. The call is pure capture: nothing about it requires a clinician until the queue.

WHAT COMPLETE LOOKS LIKE

A structured task on the correct provider's queue with medication, pharmacy and last fill exactly as stated by the caller. No clinical decision made.

WRITES TO

Electronic health record

athenahealth · eClinicalWorks · DrChrono · Elation · NextGen

ENGINE

Self-hosted

Medication names and PHI on every call; the workflow is capture and route, not conversation.

STOPS FOR A HUMAN WHEN

- ☒ Any request to change or interpret a prescription rather than refill it
- ☒ Any report of a reaction or side effect
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Approve, deny or amend a prescription
- ☐ Advise on dosage, timing or interactions

COMPLIANCE

HIPAA — BAA before a live call

Controlled substances excluded from scope

Recording consent

Reminders and confirmations

OUTBOUND

CLINICAL & HEALTH

No-shows are a schedule problem and a revenue problem. A text that gets ignored does not rebook the slot; a call that reaches someone can.

WHAT COMPLETE LOOKS LIKE

Confirmed, rebooked, or cancelled with the slot released back to the schedule.

WRITES TO

Electronic health record

athenahealth · eClinicalWorks · DrChrono ·
Elation · NextGen

ENGINE

Self-hosted

The heaviest outbound volume in the practice, to
people who are already patients.

STOPS FOR A HUMAN WHEN

- ☒ Any clinical question raised during the confirmation
- ☒ Any request to change provider or visit type on clinical grounds
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ State the reason for the visit out loud before identity is confirmed
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — hours, revocation

HIPAA — minimum necessary on voicemail

Recording consent

Booking and rescheduling

INBOUND

CLINICAL & HEALTH

Reception is holding a distressed animal while the phone rings. Wellness visits, vaccinations and follow-ups are the calls that get dropped first.

WHAT COMPLETE LOOKS LIKE

An appointment on the correct DVM's schedule with patient name, species, breed, owner and reason for the visit.

WRITES TO

Practice information management

ezyVet · Cornerstone · AVImark · Covetrus Pulse · Vetspire

ENGINE

ElevenLabs

Owners calling about an animal are often distressed; warmth in the voice changes whether they book or hang up.

STOPS FOR A HUMAN WHEN

- Any described emergency — hit by car, seizure, breathing difficulty, bloat, collapse, toxin
- Any clinical question about symptoms or whether an animal should be seen
- Euthanasia enquiries, always, to a person

NEVER DOES

- ❑ Advise on symptoms or say whether something can wait
- ❑ Quote a treatment price beyond published exam fees

COMPLIANCE

Emergency script signed off by a DVM before go-live

Recording consent

Prescription and food refill

INBOUND

CLINICAL & HEALTH

Refills and prescription diet orders. High volume, entirely clerical, and currently interleaved with clinical calls on one line.

WHAT COMPLETE LOOKS LIKE

A refill task with medication, patient, last fill and preferred pharmacy or in-clinic pickup. No approval given.

WRITES TO

Practice information management

ezyVet · Cornerstone · AVImark · Covetrus Pulse · Vetspire

ENGINE

ElevenLabs

Runs on the same caller-facing voice as booking; owners do not distinguish between the two calls.

STOPS FOR A HUMAN WHEN

- ☒ Any question about whether a medication is working or should change
- ☒ Any report of a reaction after a dose
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Approve or amend a prescription
- ☐ Advise on dosage or substitution

COMPLIANCE

Recording consent

Refill approval stays with the DVM or technician

Overflow and after-hours

INBOUND

CLINICAL & HEALTH

Evenings, weekends and the middle of a busy consult block. The caller cannot tell whether their pet needs to be seen today, and the only thing answering is a recording.

WHAT COMPLETE LOOKS LIKE

Booked, escalated as urgent on the agreed script, or a callback task with the presenting concern in the owner's own words.

WRITES TO

Practice information management

ezyVet · Cornerstone · AVImark · Covetrus Pulse · Vetspire

ENGINE

ElevenLabs

Out of hours this call is the practice, and the caller may be frightened.

STOPS FOR A HUMAN WHEN

- ☒ Any described emergency — immediate warm transfer, then the emergency clinic details if unanswered
- ☒ Any owner who says it is urgent, on their word alone
- ☒ Euthanasia enquiries

NEVER DOES

- ☐ Triage, or decide that something can wait until morning
- ☐ Withhold the emergency clinic number for any reason

COMPLIANCE

Emergency script signed off by a DVM before go-live

Out-of-hours escalation path agreed in writing

Recording consent

Vaccination and wellness reminders

OUTBOUND

CLINICAL & HEALTH

Patients overdue vaccinations or an annual wellness visit. A postcard does not book an appointment; a call that can book on the spot does.

WHAT COMPLETE LOOKS LIKE

Booked, or marked contacted with a next-contact date written back to the patient record.

WRITES TO

Practice information management

ezyVet · Cornerstone · AVImark · Covetrus Pulse · Vetspire

ENGINE

Self-hosted

Outbound to existing clients at volume, where cost per minute is the constraint.

STOPS FOR A HUMAN WHEN

- ☒ Any clinical concern raised during the call
- ☒ Any owner reporting the animal has died
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ State which vaccinations are medically necessary
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — hours, revocation, internal DNC

Recording consent

New consultation enquiry

INBOUND

CLINICAL & HEALTH

Price-sensitive, comparison-shopping and high intent. The caller has a browser tab open on two competitors and is deciding on feel as much as on price.

WHAT COMPLETE LOOKS LIKE

A booked consultation with client contact, treatment area of interest and how they heard about you. Or a callback task carrying the same fields.

WRITES TO

Booking and client management

Boulevard · Zenoti · Mindbody · Aesthetic Record
· PatientNow

ENGINE

ElevenLabs

This niche sells on brand and warmth. A synthetic-sounding voice is actively off-brand here.

STOPS FOR A HUMAN WHEN

- ☒ Any medical question: suitability, contraindications, medications, pregnancy
- ☒ Any caller describing a complication after a treatment
- ☒ Any request for a guaranteed clinical outcome

NEVER DOES

- ☐ Say whether a treatment is suitable for a caller
- ☐ Quote a price beyond the published consultation fee

COMPLIANCE

Medical boundary — suitability goes to a licensed provider

HIPAA where the clinic is a covered entity

Recording consent

Booking and rescheduling

INBOUND

CLINICAL & HEALTH

Existing clients moving treatment appointments around work and childcare. Every move has to respect treatment duration and provider skill.

WHAT COMPLETE LOOKS LIKE

An appointment moved or created against the correct provider and treatment duration.

WRITES TO

Booking and client management

Boulevard · Zenoti · Mindbody · Aesthetic Record
· PatientNow

ENGINE

ElevenLabs

Same caller-facing voice as the enquiry line;
clients notice when it changes.

STOPS FOR A HUMAN WHEN

- ☒ Any question about prep, aftercare or whether to proceed
- ☒ Any report of a reaction since the last treatment
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Advise on treatment intervals on clinical grounds
- ☐ Waive a deposit or a late-cancellation fee

COMPLIANCE

Recording consent

HIPAA where the clinic is a covered entity

After-hours enquiry

INBOUND

CLINICAL & HEALTH

Most enquiries arrive in the evening, from people scrolling after work. By morning they have booked somewhere that picked up.

WHAT COMPLETE LOOKS LIKE

Booked, or a callback task with the treatment interest and contact captured.

WRITES TO

Booking and client management

Boulevard · Zenoti · Mindbody · Aesthetic Record
· PatientNow

ENGINE

ElevenLabs

The only voice representing the brand at the moment the decision is being made.

STOPS FOR A HUMAN WHEN

- ☒ Any complication or adverse reaction described out of hours
- ☒ Any medical or suitability question
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Take a clinical history
- ☐ Promise an appointment time not held in the system

COMPLIANCE

Out-of-hours escalation path agreed in writing

Recording consent

Confirmation and reactivation

OUTBOUND

CLINICAL & HEALTH

No-shows on booked consultations are the second biggest leak in the business, and clients drift past their treatment interval without anyone noticing.

WHAT COMPLETE LOOKS LIKE

Confirmed, rescheduled, or marked no-contact after the agreed number of attempts.

WRITES TO

Booking and client management

Boulevard · Zenoti · Mindbody · Aesthetic Record
· PatientNow

ENGINE

Self-hosted

Outbound at volume to existing clients, where cost per minute becomes the constraint.

STOPS FOR A HUMAN WHEN

- ☒ Any complication reported during the call
- ☒ Any complaint about a previous treatment
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Describe treatment history out loud before identity is confirmed
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — reactivation is marketing: consent, hours, revocation

Recording consent

Annual exam recall

OUTBOUND

CLINICAL & HEALTH

Patients due an annual exam, and patients whose contact lens supply has run out. Recall is a known revenue line that nobody staffs.

WHAT COMPLETE LOOKS LIKE

Booked against the correct optometrist and exam type, or marked contacted with a next-contact date.

WRITES TO

Optometry practice management

RevolutionEHR · Eyefinity · Crystal PM · OfficeMate

ENGINE

Self-hosted

Predictable outbound to existing patients at list volume.

STOPS FOR A HUMAN WHEN

- ☒ Any report of sudden vision change, flashes, floaters or eye pain — direct to urgent care and alert staff
- ☒ Any question about a prescription or a diagnosis
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Comment on whether a vision change is serious
- ☐ Release a prescription or lens parameters over the phone

COMPLIANCE

TCPA — hours, revocation

HIPAA where applicable

Recording consent

Plan-of-care series booking

INBOUND

CLINICAL & HEALTH

A plan of care is eight or twelve visits, not one. Booking the whole series in a single call is the difference between a completed course and a patient who drops out at visit three.

WHAT COMPLETE LOOKS LIKE

The full series booked against the correct therapist and visit type, with recurrence rules respected and the authorisation count recorded.

WRITES TO

Therapy practice management

WebPT · Prompt · Jane · ChiroTouch

ENGINE

Vapi

The call has to check capacity across many slots and hold them together mid-conversation. Tool-calling dominates.

STOPS FOR A HUMAN WHEN

- ☒ Any report of a new injury or worsening symptoms
- ☒ Any question about authorisation, visit limits or coverage
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Advise on exercises, pain or whether to attend
- ☐ Confirm how many visits insurance will authorise

COMPLIANCE

HIPAA — BAA before a live call

Recording consent

New client intake and waitlist

INBOUND

CLINICAL & HEALTH

Someone has worked up to making this call. If it goes to voicemail, a meaningful share of those callers do not try again.

WHAT COMPLETE LOOKS LIKE

An intake record with contact, presenting concern in the caller's own words, insurance and preferred modality, plus a booked assessment or a dated position on the waitlist.

WRITES TO

Behavioral health EHR

SimplePractice · TherapyNotes · Valant · Kareo

ENGINE

ElevenLabs

The most sensitive first impression in the catalogue. Tone is the entire call.

STOPS FOR A HUMAN WHEN

- ☒ Any expression of suicidal ideation, self-harm or crisis — stop the workflow, give the crisis line, alert the practice immediately
- ☒ Any caller describing abuse or immediate danger
- ☒ Any caller who asks for a person, at any point

NEVER DOES

- ☐ Assess, screen or comment on symptoms
- ☐ Suggest that a caller does or does not need care

COMPLIANCE

HIPAA — BAA before a live call

Crisis script signed off by a clinician

42 CFR Part 2 where substance use treatment is in scope

Refill status and pickup readiness

INBOUND

CLINICAL & HEALTH

The single most repeated question at the counter and on the phone: is it ready. It carries no clinical judgement and it consumes a pharmacy technician all day.

WHAT COMPLETE LOOKS LIKE

Status read back from the dispensing record, or a callback task on the technician queue where the record has no current status.

WRITES TO

Pharmacy management system

PioneerRx · QS/1 · Liberty · Rx30

ENGINE

Self-hosted

Medication data on every call, at counter volume. Cost and data boundary both point the same way.

STOPS FOR A HUMAN WHEN

- ☒ Any clinical question: interactions, side effects, whether to take a dose
- ☒ Any controlled substance enquiry
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Counsel on medication, dosage or substitution
- ☐ Confirm what has been dispensed to anyone other than the verified patient

COMPLIANCE

HIPAA — BAA before a live call

Identity verification before any status is read

Recording consent

New matter intake

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

A prospective client phones three firms. The one that answers and books a consultation gets the matter. This is the single most expensive miss in the business.

WHAT COMPLETE LOOKS LIKE

A lead record with caller name, contact, matter type, jurisdiction, key dates, opposing party for conflict screening, and a summary in the caller's own words. Plus a booked consultation or a callback task.

WRITES TO

Practice management

Clio · MyCase · Filevine · Smokeball · PracticePanther

ENGINE

ElevenLabs

An intake call is often the worst day of the caller's year. A flat voice loses the matter to the next firm on the list.

STOPS FOR A HUMAN WHEN

- ☒ Any caller in immediate danger, describing abuse, or in crisis — give the relevant hotline, alert the firm
- ☒ Any statute-of-limitations or filing-deadline question
- ☒ Any request for legal advice, however small

NEVER DOES

- ☐ Say whether someone has a case, or estimate a settlement
- ☐ Create any impression that the firm has been engaged

COMPLIANCE

No unauthorised practice — every escalation rule holds this line

Conflicts captured, never cleared

Intake treated as privileged from the first word

Consultation scheduling

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Booking onto the right attorney's calendar by matter type, with the right duration, without an intake coordinator reading a spreadsheet.

WHAT COMPLETE LOOKS LIKE

A consultation on the correct attorney's calendar with matter type and duration recorded.

WRITES TO

Practice management

Clio · MyCase · Filevine · Smokeball · PracticePanther

ENGINE

ElevenLabs

Runs on the same voice as intake; the caller experiences them as one call.

STOPS FOR A HUMAN WHEN

- ☒ Any substantive question about the matter
- ☒ Anything touching fees or engagement terms
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Quote a fee or a retainer
- ☐ Confirm that the firm will take the matter

COMPLIANCE

Recording consent, all-party states handled by announcement

Existing client status enquiry

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Clients ringing to ask where their matter stands. High volume, no value in the call itself, and it interrupts the people who could actually answer it.

WHAT COMPLETE LOOKS LIKE

A task on the case handler's queue with the client, the matter and the question. No status given on the call.

WRITES TO

Practice management

Clio · MyCase · Filevine · Smokeball · PracticePanther

ENGINE

Vapi

A lookup-and-route workflow against the practice management system, not a first impression.

STOPS FOR A HUMAN WHEN

- ☒ Any question about a deadline
- ☒ Any client expressing distress or dissatisfaction
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Give any case status, however harmless it sounds
- ☐ Discuss fees, invoices or trust balances

COMPLIANCE

Confidentiality — matter content never read back

Identity verification before any matter is acknowledged

After-hours and overflow intake

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

A large share of intake calls arrive in the evening and at weekends, when the alternative is an answering service that takes a name and a number.

WHAT COMPLETE LOOKS LIKE

The same intake record as a business-hours call, plus a next-business-day callback commitment.

WRITES TO

Practice management

Clio · MyCase · Filevine · Smokeball · PracticePanthier

ENGINE

ElevenLabs

Out of hours the agent is the firm, and the caller is usually in the middle of the event.

STOPS FOR A HUMAN WHEN

- ☒ Any caller in danger or in crisis
- ☒ Any custody, arrest or emergency filing situation
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Give legal advice at any hour
- ☐ Suggest a deadline is or is not still open

COMPLIANCE

No unauthorised practice

Out-of-hours escalation path agreed in writing

Recording consent

New quote enquiry — intake only

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Producers are licensed and expensive, and a large share of their phone time is intake that does not require a licence. The intake still has to be complete or the quote is wrong.

WHAT COMPLETE LOOKS LIKE

A complete intake record with the risk information on the approved script, and an appointment with a licensed producer. No quote, no coverage discussion.

WRITES TO

Agency management

Applied Epic · AMS360 · HawkSoft · EZLynx · QQCatalyst

ENGINE

Self-hosted

Dates of birth, addresses and driver detail on every call. Keeping the model inside controlled infrastructure shortens the carrier and E&O conversation.

STOPS FOR A HUMAN WHEN

- ☒ Any coverage question: what is covered, whether a claim would pay
- ☒ Any request for a premium figure or a binding decision
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Quote a premium, state a rate, or compare carriers
- ☐ Bind, alter or cancel coverage

COMPLIANCE

Licensing — unlicensed intake and scheduling only

E&O — scope boundary reviewed before go-live

Recording consent

Policy service request

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Address changes, vehicle adds, ID cards and certificates. No licensing exposure, high volume, and it is eating the service team's day.

WHAT COMPLETE LOOKS LIKE

A service task on the correct queue with policy number, requested change and effective date exactly as stated.

WRITES TO

Agency management

Applied Epic · AMS360 · HawkSoft · EZLynx ·
QQCatalyst

ENGINE

Self-hosted

Policy and personal data at volume, with the
same infrastructure boundary as intake.

STOPS FOR A HUMAN WHEN

- Any first notice of loss or active claim — immediate transfer, flagged task if unanswered
- Any question about whether a change affects coverage
- Any caller who asks for a person

NEVER DOES

- Advise on coverage, limits, deductibles or suitability
- Confirm that a requested change has taken effect

COMPLIANCE

Licensing boundary

Recording consent

Renewal and review outreach

OUTBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Renewals arrive whether or not anyone has spoken to the client. A review booked before renewal is a retention conversation; one booked after is a save attempt.

WHAT COMPLETE LOOKS LIKE

A review booked with a licensed producer, or marked contacted with a reason and a next-contact date.

WRITES TO

Agency management

Applied Epic · AMS360 · HawkSoft · EZLynx · QQCatalyst

ENGINE

Self-hosted

List-driven outbound to existing clients where per-minute cost is a real line item.

STOPS FOR A HUMAN WHEN

- ☒ Any coverage or premium question raised on the call
- ☒ Any notice of a claim or a loss
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Discuss the renewal premium or a rate change
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — hours, revocation, internal DNC

Licensing boundary

Recording consent

Overflow and after-hours

INBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Calls that currently reach a voicemail box. For a prospect that is a lost quote; for a client with a loss it is a bad experience at the worst moment.

WHAT COMPLETE LOOKS LIKE

Intake captured and routed to the correct queue, with a callback commitment and a next-business-day owner.

WRITES TO

Agency management

Applied Epic · AMS360 · HawkSoft · EZLynx ·
QQCatalyst

ENGINE

Self-hosted

Same data boundary as the rest of the agency workload.

STOPS FOR A HUMAN WHEN

- ☒ Any first notice of loss, at any hour, on the agreed path
- ☒ Any caller describing an accident in progress
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Take a first notice of loss beyond capturing that one exists
- ☐ Give any indication of whether something is covered

COMPLIANCE

Licensing boundary

Out-of-hours claims path agreed in writing

Season intake and document chase

OUTBOUND

LEGAL, FINANCIAL & PROFESSIONAL

From January the bottleneck is not preparation, it is missing documents. Chasing them is a list, a phone and a note in the practice system.

WHAT COMPLETE LOOKS LIKE

Each outstanding item confirmed as sent, refused or dated, written back against the client's job in the practice system, with an alert to the preparer when the list is complete.

WRITES TO

Tax practice management

Karbon · Canopy · TaxDome · Jetpack Workflow

ENGINE

Vapi

The call reads a per-client checklist and writes item-level status back mid-conversation.

STOPS FOR A HUMAN WHEN

- Any question about a tax position, a deduction or a liability
- Any client raising a notice from a tax authority
- Any caller who asks for a person

NEVER DOES

- ☐ Advise on any tax matter, however routine
- ☐ Confirm a refund amount or a filing date

COMPLIANCE

Client data — retention and access agreed in writing

TCPA — hours and revocation

Recording consent

Application document chase

OUTBOUND

LEGAL, FINANCIAL & PROFESSIONAL

A file stalls on two missing documents and nobody phones the borrower for three days. Rate locks do not wait for that.

WHAT COMPLETE LOOKS LIKE

Each outstanding condition confirmed, dated or refused against the loan file, and the processor alerted when the file is complete or blocked.

WRITES TO

Loan origination system

Encompass · Byte · LendingPad · Calyx

ENGINE

Self-hosted

Income, identity and asset data on every call, at file volume.

STOPS FOR A HUMAN WHEN

- ☒ Any question about rate, terms, approval or closing date
- ☒ Any borrower expressing hardship or distress
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Discuss rate, approval likelihood or loan terms
- ☐ Take an income or asset figure and treat it as verified

COMPLIANCE

GLBA — safeguards on borrower data

Licensing — no loan advice

TCPA — hours and revocation

Past-due invoice follow-up

OUTBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Commercial invoices go past due because nobody phoned accounts payable. The call is short, repetitive and consistently deprioritised.

WHAT COMPLETE LOOKS LIKE

Each invoice marked as promised-to-pay with a date, disputed with a reason, or requiring a named human, written back against the invoice in the ledger.

WRITES TO

Accounting and ERP

NetSuite · Sage Intacct · QuickBooks · Xero

ENGINE

Self-hosted

High-volume routine outbound to business contacts, where cost per call decides whether the campaign runs at all.

STOPS FOR A HUMAN WHEN

- ☒ Any dispute over the goods, services or the amount
- ☒ Any mention of insolvency, administration or legal action
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Negotiate a settlement, discount or payment plan
- ☐ Apply pressure, imply consequences, or contact anyone outside the agreed list

COMPLIANCE

Commercial debt only — consumer collection is out of scope

Calling hours and revocation enforced

Recording consent

Annual review scheduling

OUTBOUND

LEGAL, FINANCIAL & PROFESSIONAL

Every client is entitled to an annual review and the calendar does not fill itself. Advisers book them between meetings, or not at all.

WHAT COMPLETE LOOKS LIKE

A review booked on the correct adviser's calendar with meeting type and location, or marked contacted with a next-contact date.

WRITES TO

Advisory CRM

Redtail · Wealthbox · Salesforce Financial Services Cloud

ENGINE

ElevenLabs

A relationship call to a client who expects to hear a person on the other end.

STOPS FOR A HUMAN WHEN

- ☒ Any question about performance, holdings or markets
- ☒ Any instruction that sounds like a trade or a withdrawal
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Discuss any investment, balance or performance figure
- ☐ Accept an instruction of any kind

COMPLIANCE

No investment advice — scheduling only

Communications retention per the firm's obligations

Recording consent

Emergency service request

INBOUND

PROPERTY & TRADES

No heat, no water, an active leak, no power. Time-critical, revenue-dense, and arriving during the exact hour a cold snap has tripled the call volume.

WHAT COMPLETE LOOKS LIKE

A job created with the correct priority, address verified, access notes captured and a dispatcher alerted. Or a warm transfer where the workflow cannot place it.

WRITES TO

Field service management

ServiceTitan · Jobber · Housecall Pro · FieldEdge

ENGINE

Vapi

Capacity by trade and zone, a held slot, a job record and sometimes a live transfer, all inside one conversation.

STOPS FOR A HUMAN WHEN

- ☒ Gas smell, carbon monoxide, sparking, smoke or standing water near electrics — safety instruction, leave, call the utility or 911, then alert dispatch
- ☒ Any commercial or multi-property enquiry outside residential scope
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Diagnose a fault or say what a repair will cost
- ☐ Advise a caller to attempt any repair themselves

COMPLIANCE

Safety script signed off before go-live

Address read back and confirmed on the record

Recording consent

Routine service booking

INBOUND

PROPERTY & TRADES

Maintenance, tune-ups and non-urgent repair. Predictable work that still needs capacity checked against trade, zone and duration before a window can be promised.

WHAT COMPLETE LOOKS LIKE

A job on the schedule with service type, address, arrival window and customer contact.

WRITES TO

Field service management

ServiceTitan · Jobber · Housecall Pro · FieldEdge

ENGINE

Vapi

The same capacity and write-back machinery as the emergency workflow, without the urgency.

STOPS FOR A HUMAN WHEN

- ☒ Any description that turns out to be urgent
- ☒ Any dispute about an invoice or a previous job
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Promise an arrival time outside the agreed window rules
- ☐ Commit to a warranty position

COMPLIANCE

Address read back and confirmed

Recording consent

Overflow and after-hours

INBOUND

PROPERTY & TRADES

Evenings, weekends and demand spikes. The calls that ring out during a heat wave are the highest-intent calls of the year.

WHAT COMPLETE LOOKS LIKE

Booked, or a callback task with the number and the problem in the caller's own words.

WRITES TO

Field service management

ServiceTitan · Jobber · Housecall Pro · FieldEdge

ENGINE

Vapi

Has to reach on-call capacity and route correctly with nobody in the office.

STOPS FOR A HUMAN WHEN

- ☒ Any safety condition, on the agreed script
- ☒ Any caller who needs someone tonight rather than tomorrow
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Decide that a problem can wait until morning
- ☐ Dispatch a technician outside the on-call rules

COMPLIANCE

Safety script signed off before go-live

Out-of-hours escalation path agreed in writing

Confirmation and arrival window

OUTBOUND

PROPERTY & TRADES

An aborted truck roll costs a slot, the fuel and the technician's morning. A confirmation call the day before removes most of them.

WHAT COMPLETE LOOKS LIKE

Confirmed, rescheduled, or flagged as no-contact after the agreed number of attempts, written back on the job.

WRITES TO

Field service management

ServiceTitan · Jobber · Housecall Pro · FieldEdge

ENGINE

Self-hosted

Every booked job the day before is a large, entirely routine outbound list.

STOPS FOR A HUMAN WHEN

- ☒ Any customer who reports the problem has become urgent
- ☒ Any cancellation with a complaint attached
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Move a job outside the dispatcher's routing rules
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — service calls still governed by hours and revocation

Recording consent

Maintenance request

INBOUND

PROPERTY & TRADES

Residents report faults to the same line that leasing prospects call. Maintenance is obligation and volume; both sides of the line suffer for it.

WHAT COMPLETE LOOKS LIKE

A work order with unit, resident, category, priority, description in the resident's own words, and access permission recorded.

WRITES TO

Property management platform

AppFolio · Buildium · Yardi · Entrata · RentManager

ENGINE

Vapi

Identify a unit, categorise a fault, check availability across properties, sometimes transfer — all in one call.

STOPS FOR A HUMAN WHEN

- Gas smell, fire, flooding or no heat in freezing conditions — safety instruction, alert on-call, confirm delivery
- Any threat, harassment or domestic incident
- Eviction, notice, legal or lease-dispute questions

NEVER DOES

- ❑ Commit to a repair timeline beyond the agreed category SLA
- ❑ Confirm who lives in a unit

COMPLIANCE

Emergency alert path proven end to end before go-live

Recording consent

Leasing enquiry

INBOUND

PROPERTY & TRADES

A prospective tenant asking about availability, pricing and tours.
Revenue, time-sensitive, and currently competing with a blocked toilet for the same phone line.

WHAT COMPLETE LOOKS LIKE

A guest card with contact, desired move-in, bedrooms and budget, plus a booked tour or a callback task.

WRITES TO

Property management platform

AppFolio · Buildium · Yardi · Entrata · RentManager

ENGINE

ElevenLabs

A first impression of the building. Splitting this off the maintenance voice is a configuration change, not a rebuild.

STOPS FOR A HUMAN WHEN

- ☒ Any question that touches a protected characteristic
- ☒ Any request for an accommodation or a modification
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Ask or record anything outside the approved script
- ☐ Vary availability, pricing or terms by caller

COMPLIANCE

Fair housing — approved script only, no protected characteristics

Script signed off before go-live

Recording consent

Emergency maintenance

INBOUND

PROPERTY & TRADES

Flood, no heat, no power, lockout, gas. The obligation is immediate and the failure mode is a resident who could not reach anyone.

WHAT COMPLETE LOOKS LIKE

A priority work order created and the on-call maintenance number alerted, with confirmation that the alert was delivered.

WRITES TO

Property management platform

AppFolio · Buildium · Yardi · Entrata · RentManager

ENGINE

Vapi

The workflow's value is in the alert and the delivery confirmation, not in the conversation.

STOPS FOR A HUMAN WHEN

- ☒ Any habitability emergency — safety instruction first, then alert and confirm
- ☒ Any injury or medical situation
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Close the call before the alert is confirmed delivered
- ☐ Give a repair time on an emergency

COMPLIANCE

Alert path proven end to end before go-live

Out-of-hours on-call path agreed in writing

Tour confirmation and follow-up

OUTBOUND

PROPERTY & TRADES

Booked tours that nobody confirms become empty slots on a leasing agent's afternoon.

WHAT COMPLETE LOOKS LIKE

Confirmed, rescheduled, or marked no-contact, written back against the guest card.

WRITES TO

Property management platform

AppFolio · Buildium · Yardi · Entrata · RentManager

ENGINE

Self-hosted

Routine outbound to prospects who already supplied a number.

STOPS FOR A HUMAN WHEN

- ☒ Any question about terms, pricing or qualification criteria
- ☒ Anything touching a protected characteristic
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Quote terms not published for that unit
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

Fair housing — approved script only

TCPA — revocation honoured and written back

Recurring service scheduling

INBOUND

PROPERTY & TRADES

Quarterly and monthly service plans that have to land on a route, in a zone, with the right technician and the right chemical certification.

WHAT COMPLETE LOOKS LIKE

A service visit on the route with property, service plan, access notes and arrival window, and the recurrence updated.

WRITES TO

Field service management

PestPac · ServiceTitan · Briostack · FieldRoutes

ENGINE

Vapi

Route and capacity checks against zone and certification, mid-call.

STOPS FOR A HUMAN WHEN

- ☒ Any report of a sting, bite or reaction to a treatment
- ☒ Any question about chemicals, safety or pets and children
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Advise on treatment safety, chemicals or re-entry times
- ☐ Guarantee elimination or a result

COMPLIANCE

Chemical and safety questions go to a licensed technician

Recording consent

Storm surge intake

INBOUND

PROPERTY & TRADES

A storm passes and the phone does not stop for four days. The calls that ring out in that window are the entire season's margin.

WHAT COMPLETE LOOKS LIKE

A lead record with property address, damage described in the caller's words, insurance carrier and claim status, plus a booked inspection or a callback task.

WRITES TO

Roofing CRM

JobNimbus · AccuLynx · Roofr · ServiceTitan

ENGINE

Vapi

Surge capacity is the point of the workflow, and inspection slots have to be held mid-call.

STOPS FOR A HUMAN WHEN

- ☒ Any active water ingress, structural risk or injury
- ☒ Any question about what the insurer will pay
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Estimate a repair cost or a scope of work
- ☐ Advise on an insurance claim or a deductible

COMPLIANCE

No claim advice — insurance questions to a person

Address read back and confirmed

Recording consent

Unit availability and move-in

INBOUND

PROPERTY & TRADES

Availability, pricing and access questions across several sites, from callers who will rent from whoever answers first.

WHAT COMPLETE LOOKS LIKE

A reservation against a named unit and site with move-in date, contact and rate, or an enquiry record with the size and site requested.

WRITES TO

Storage management platform

storEDGE · SiteLink · Easy Storage Solutions

ENGINE

Vapi

Live inventory across sites, held for the duration of the call.

STOPS FOR A HUMAN WHEN

- ☒ Any question about a lien, an auction or a delinquent account
- ☒ Any dispute about a rate increase or a fee
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Waive a fee or vary the published rate
- ☐ Discuss the contents or status of another tenant's unit

COMPLIANCE

Lien and delinquency matters excluded from scope

Recording consent

Survey and estimate booking

INBOUND

PROPERTY & TRADES

Every job starts with a survey and every survey starts with a phone call full of addresses, dates, access details and stair counts.

WHAT COMPLETE LOOKS LIKE

A survey booked with origin and destination addresses, move date window, property size and access constraints captured.

WRITES TO

Moving CRM

SmartMoving · Supermove · MoveitPro

ENGINE

Vapi

Address and calendar lookups drive the call; nothing about it is a brand moment.

STOPS FOR A HUMAN WHEN

- ☒ Any request for a binding price on the call
- ☒ Any long-distance or interstate move outside pilot scope
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Give a price, a range or an hourly figure
- ☐ Commit to a crew size or a truck

COMPLIANCE

Addresses read back and confirmed

Recording consent

Service appointment booking

INBOUND

VEHICLE, EQUIPMENT & LOGISTICS

Oil changes, scheduled maintenance and diagnostics. The highest-volume call into the department, arriving while every advisor is at the desk with a customer.

WHAT COMPLETE LOOKS LIKE

An appointment on the shop schedule with vehicle VIN or plate, customer, service type, advisor and transport arrangement.

WRITES TO

Dealer management and scheduling

CDK · Reynolds and Reynolds · Tekion · Dealertrack · Xtime

ENGINE

Vapi

Capacity by service type and advisor, a vehicle lookup and a held slot, all mid-conversation.

STOPS FOR A HUMAN WHEN

- ☒ Any safety concern with the vehicle: brakes, steering, smoke, urgent warning lights
- ☒ Any warranty coverage or goodwill decision
- ☒ Any customer disputing an invoice or a previous repair

NEVER DOES

- ☐ Diagnose a fault or estimate a repair cost
- ☐ Confirm whether a repair is covered under warranty

COMPLIANCE

Vehicle data — VIN and history tied to an identifiable person

Recording consent

Repair status enquiry

INBOUND

VEHICLE, EQUIPMENT & LOGISTICS

Where is my car. Enormous volume, almost no advisor value, and the reason advisors stop picking up the phone by mid-morning.

WHAT COMPLETE LOOKS LIKE

Status read back from the repair order, or a callback task on the advisor's queue where the RO has no current status.

WRITES TO

Dealer management and scheduling

CDK · Reynolds and Reynolds · Tekion · Dealertrack · Xtime

ENGINE

Vapi

A live read of the repair order is the whole call. Tool-calling dominates.

STOPS FOR A HUMAN WHEN

- ☒ Any dispute about work performed or authorised
- ☒ Any warranty or goodwill question
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Promise a completion time not present in the repair order
- ☐ Authorise additional work

COMPLIANCE

Identity verified against the RO before status is read

Recording consent

Recall and campaign scheduling

INBOUND

VEHICLE, EQUIPMENT & LOGISTICS

A customer has a manufacturer notice in their hand and wants a date. The call needs a VIN lookup and a parts check before a date means anything.

WHAT COMPLETE LOOKS LIKE

An appointment booked against the campaign code with parts availability checked or flagged.

WRITES TO

Dealer management and scheduling

CDK · Reynolds and Reynolds · Tekion · Dealertrack · Xtime

ENGINE

Vapi

VIN lookup against open campaigns, mid-call, with a parts check behind it.

STOPS FOR A HUMAN WHEN

- ☒ Any safety concern described about the vehicle
- ☒ Any question about whether the vehicle is safe to drive
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Advise on whether a vehicle is safe to drive
- ☐ Confirm parts availability that the system has not returned

COMPLIANCE

Campaign code recorded on the appointment

Recording consent

Declined-work follow-up

OUTBOUND

VEHICLE, EQUIPMENT & LOGISTICS

Work quoted, presented and not approved. It is already priced, already documented and already wanted by the vehicle. Nobody phones the list.

WHAT COMPLETE LOOKS LIKE

Booked, or marked contacted with the reason and a next-contact date written back to the customer record.

WRITES TO

Dealer management and scheduling

CDK · Reynolds and Reynolds · Tekion · Dealertrack · Xtime

ENGINE

Self-hosted

A large recurring outbound list to existing customers, where cost per minute decides whether it runs.

STOPS FOR A HUMAN WHEN

- ☒ Any safety-critical declined item raised by the customer
- ☒ Any dispute about the original quote
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Re-price the declined work
- ☐ Call outside the agreed hours or after a revocation

COMPLIANCE

TCPA — marketing to an existing customer: hours, revocation, internal DNC

Recording consent

Roadside dispatch intake

INBOUND

VEHICLE, EQUIPMENT & LOGISTICS

A caller at the side of a road, often at night, often on a motorway shoulder. The information needed is short and specific and the clock is running.

WHAT COMPLETE LOOKS LIKE

A dispatch record with location, vehicle, fault, occupancy and safety status, assigned to a driver or escalated to a dispatcher.

WRITES TO

Towing dispatch software

Towbook · TRAXERO · Ranger SST

ENGINE

Vapi

Location capture and driver assignment mid-call, with a live transfer path.

STOPS FOR A HUMAN WHEN

- Any injury, collision, fire or occupant in a live traffic lane — direct to 911 first, then dispatch
- Any caller who cannot state a safe location
- Any caller who asks for a person

NEVER DOES

- Give an arrival time the dispatch system has not produced
- Advise a caller to move a vehicle or leave it

COMPLIANCE

Safety script signed off before go-live

Location read back and confirmed on the record

Availability and reservation

INBOUND

VEHICLE, EQUIPMENT & LOGISTICS

Contractors ring at six in the morning to find out what is on the yard for today. If the phone does not answer, the next yard's does.

WHAT COMPLETE LOOKS LIKE

A reservation against a named asset class with dates, delivery or collection, site contact and account, or an enquiry record where nothing is available.

WRITES TO

Rental management system

Point of Rental · Texada · Wynne

ENGINE

Vapi

Live inventory and date-range availability decide the call.

STOPS FOR A HUMAN WHEN

- ☒ Any question about operation, certification or safe use
- ☒ Any damage, breakdown or incident report
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Advise on operation or on whether an operator is qualified
- ☐ Confirm a delivery slot the system has not held

COMPLIANCE

Operation and certification questions to a person

Recording consent

Carrier check calls

OUTBOUND

VEHICLE, EQUIPMENT & LOGISTICS

Check calls on every active load, several times a day, made by coordinators who should be covering freight instead.

WHAT COMPLETE LOOKS LIKE

Location, ETA and status captured against the load in the TMS, with an exception flagged to a named coordinator where the ETA has moved.

WRITES TO

Transportation management system

McLeod · TMW · Alvys · Turvo

ENGINE

Self-hosted

The highest-frequency outbound workload in the catalogue, to the same drivers all day.

STOPS FOR A HUMAN WHEN

- ☒ Any accident, breakdown, injury or cargo incident
- ☒ Any detention, refusal or dispute at a facility
- ☒ Any driver who asks for a person

NEVER DOES

- ☐ Instruct a driver on routing, hours or a delivery decision
- ☐ Record an ETA the driver did not state

COMPLIANCE

Calling hours respected against driver hours of service

Recording consent

Shift backfill

OUTBOUND

WORKFORCE & OPERATIONS

A caregiver calls out at 5:40am for a 7am shift. Someone has to phone down a list of twenty before the client notices that nobody arrived.

WHAT COMPLETE LOOKS LIKE

The shift assigned to a named, eligible caregiver in the rostering system with confirmation, or the list exhausted and a coordinator alerted.

WRITES TO

Scheduling and rostering

WellSky · AxisCare · ClearCare · Bullhorn · HHAeXchange

ENGINE

Self-hosted

One call-out can trigger twenty dials, every morning. Per-minute economics dominate and the audience is internal staff.

STOPS FOR A HUMAN WHEN

- Any caregiver reporting a client emergency, a fall or a safety concern
- Any allegation of abuse, neglect or misconduct — straight to a named human, no exceptions
- Any pay, hours, discipline or employment dispute

NEVER DOES

- ❑ Assign a caregiver whose credentials have expired or who fails client match rules
- ❑ Discuss pay rates, hours worked or employment terms

COMPLIANCE

Credential enforcement in the write-back rules, not the conversation

TCPA — the heaviest outbound exposure in the catalogue

HIPAA where PHI is handled

Call-out intake

INBOUND

WORKFORCE & OPERATIONS

The call that starts the whole morning. It arrives before anyone is at a desk and it has to be logged accurately before backfill can begin.

WHAT COMPLETE LOOKS LIKE

The shift marked open with the reason and the caller confirmed, and the backfill workflow triggered.

WRITES TO

Scheduling and rostering

WellSky · AxisCare · ClearCare · Bullhorn · HHAExchange

ENGINE

Self-hosted

Staff-facing, at any hour, feeding directly into the backfill workflow.

STOPS FOR A HUMAN WHEN

- ☒ Any client emergency mentioned during the call-out
- ☒ Any allegation of abuse or neglect
- ☒ Any employment or pay question

NEVER DOES

- ☐ Accept a call-out on behalf of a third party without verification
- ☐ Discuss why another caregiver is unavailable

COMPLIANCE

Out-of-hours coordinator path agreed in writing

Recording consent

Candidate screening

OUTBOUND

WORKFORCE & OPERATIONS

First-pass screening against a role's hard requirements: credentials, availability, location, right to work. Entirely rules-based and entirely manual today.

WHAT COMPLETE LOOKS LIKE

A screening record against the role's hard requirements, and either an interview booked or the candidate marked not progressing with the reason.

WRITES TO

Applicant tracking

Bullhorn · JobDiva · Crelate

ENGINE

Self-hosted

Recruiting volume is high and repetitive; the call is a structured questionnaire.

STOPS FOR A HUMAN WHEN

- ☒ Any question about pay, terms or benefits
- ☒ Any disclosure of a disability or an accommodation request
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Ask anything outside the approved role-requirement script
- ☐ Make or imply an offer

COMPLIANCE

Approved script only — no protected characteristics

TCPA — candidate recruitment sits differently from staff calls

Screening criteria signed off before go-live

Client enquiry and overflow

INBOUND

WORKFORCE & OPERATIONS

A family or a facility calling about starting service, usually after something has changed at home. It is a first impression and it currently competes with backfill for the same phone.

WHAT COMPLETE LOOKS LIKE

An enquiry record with service type, location, hours needed, and an assessment booked or a callback task.

WRITES TO

Scheduling and rostering

WellSky · AxisCare · ClearCare · Bullhorn · HHAeXchange

ENGINE

ElevenLabs

A first impression, often at a difficult moment for the family. Splitting it off the internal voice is the point of per-workflow engine choice.

STOPS FOR A HUMAN WHEN

- ☒ Any description of a client in immediate need or danger
- ☒ Any clinical question about care needs
- ☒ Any caller who asks for a person

NEVER DOES

- ☐ Assess care needs or recommend a level of service
- ☐ Quote an hourly rate or a package price

COMPLIANCE

HIPAA where PHI is handled

Recording consent

Tier-0 ticket intake

INBOUND

WORKFORCE & OPERATIONS

Password resets, access requests and 'is it down' calls arrive on the same line as genuine incidents, and every one of them interrupts an engineer.

WHAT COMPLETE LOOKS LIKE

A ticket created with requester verified, category, affected system, impact and description in the caller's words, routed to the correct queue with priority set.

WRITES TO

PSA and ticketing

ConnectWise · Autotask · HaloPSA · Freshservice

ENGINE

Vapi

Identity verification, a service catalogue lookup and a routed ticket, all inside the call.

STOPS FOR A HUMAN WHEN

- Any suspected security incident, breach or phishing report — immediate transfer and a flagged ticket
- Any outage affecting multiple users or a production system
- Any caller who asks for a person

NEVER DOES

- ☐ Reset a credential or grant access
- ☐ Confirm whether a system is compromised

COMPLIANCE

Identity verification before any ticket is raised

Security incidents escalated, never triaged

Recording consent

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What happens next

Pick one workflow. Not three, and not a department. The one call that is costing you the most, run properly for thirty days on your own numbers.

STEP	DURATION	PRICE
00 Working session — pick the workflow, measure the baseline	30 minutes	Free
01 Call Map — the full specification for that workflow	One week	From \$1,500
02 Production pilot — one workflow, live	Thirty days	From \$6,000
03 Operate — tuning, monthly review	Ongoing	From \$1,200/mo + platform at cost

Platform and call minutes are billed at cost plus a stated margin, itemised separately. You always see what the infrastructure costs and what our work costs.

The completion standard. Every pilot is measured on four numbers agreed with you in advance: completion rate, containment rate, escalation latency and field accuracy. If the pilot has not met the agreed thresholds by day thirty, the operate phase is not billed until it does.

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Quickzot AI is the AI practice of Quickzot LLC, a New York company operating since 2023.