SCALED GROWTH AGENCY

Voice AI Onboarding Worksheet

The in-person setup interview. Every scenario a caller can bring to your phone line — decided by you, built by us.

This worksheet mirrors your online setup review. Work through it together in one sitting; every answer becomes a rule your AI host follows on every call. Nothing here is mandatory — where you have no preference, our default applies and it is written on the page.

BUSINESS

LOCATION (IF MORE THAN ONE)

OWNER / DECISION MAKER

BEST CELL & EMAIL

CONDUCTED BY

DATE · TARGET GO-LIVE

How to use this worksheet

Read each topic aloud in order. Each one opens with a one-line introduction, then **our default** — the way the AI host will behave if the owner has no preference. Tick **Keep this default** and move on, or tick **Customize** and capture the specifics in the numbered items. The dashed **If time allows** box holds follow-ups for a thorough session; skip it when time is short. We already pull your hours, address, phone number, menu and links from your website, so this worksheet asks only what a website cannot tell us.

Say
Spoken word for word — sets the topic up in plain language.

Read aloud
Our default policy. It is a promise: the AI does exactly this unless told otherwise.

Numbered items
Questions to ask. Write the answer on the line, tick the box, or fill the grid.

OPENING SCRIPT — READ BEFORE TOPIC 01

"Thanks for sitting down with me. This takes about forty-five minutes and it is the only setup conversation we need. I am going to walk through every reason a customer calls you — hours, orders, reservations, catering, complaints, after-hours — and for each one I will tell you how the AI host handles it by default. If that works for you, we move on. If you want it different, tell me and I will write it down."

"Nothing here is mandatory, and nothing is permanent — you can change any of it later with a text or an email. When we are done, we build it, test it with you on a live call, and only then switch it on."

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PART A **Your Business** — Identity, cutoffs, and how the phone line is wired.

01 Business Basics

The few identity details a website does not tell us — your AI host gives them out on every call, so they have to be exactly right.

SAY *"Let's start with the basics. We already pull your address, phone number and hours from your website — these are the few details it does not tell us, and your host gives them out on every call."*

READ ALOUD **How we handle it — unless you say otherwise**

The details on file are used word for word on every call. Anything unknown is never guessed — the AI offers to take a message or text a link instead.

☐ Keep this default ☐ Customize — as noted below

1. Business name, exactly as it should be spoken

2. How the name is pronounced (if callers get it wrong)

3. Cross-streets or landmark a first-timer navigates by

4. How do you describe parking or the entrance to a first-timer?

5. Where should rideshares and delivery drivers pull up?

IF TIME ALLOWS

One sentence describing the restaurant the way you would want a host to say it

Neighborhood or plaza name people navigate by

02 Last Orders, Cutoffs & Closures

The time you stop taking orders is usually earlier than the time you close — the detail that most often goes wrong on the phone. Your regular hours come from your website.

SAY *"Next: cutoffs and closures. Your regular hours we already have from your website. Most places stop taking orders before the doors close — I want the real last-call times so the AI never accepts an order your kitchen can't make."*

READ ALOUD **How we handle it — unless you say otherwise**

Your posted hours are quoted exactly; when you are closed, the AI states when you reopen. Orders are accepted up to the cutoff times on file and never after. If no cutoff is on file, orders are accepted until closing.

☐ Keep this default ☐ Customize — as noted below

1 Last call, by day

	Mon–Thu	Friday	Saturday	Sunday
Last pickup / phone order				
Last seating (walk-in)				
Last kitchen order (dine-in)				
Last delivery order				
Large / catering-size orders				

2 An order that comes in right at the cutoff should be

☐ Accepted ☐ Declined politely ☐ Transferred to the kitchen to decide

3 Brunch-only or lunch-only windows, a mid-afternoon break between services, or anything your website gets wrong about your hours?

4 Holiday closures or seasonal schedule changes we should know about now?

IF TIME ALLOWS

Nights when the kitchen closes early without notice — how should the AI find out?

Major holiday hours (Christmas Eve, New Year's Eve, Mother's Day, Thanksgiving)

Last call for drinks

How early do you want the AI to say "we're closing soon" to a late caller?

03 Phone Line & Call Flow

How calls physically reach the AI, and what callers hear first. Nothing changes with your carrier.

SAY *"Now the plumbing. Your number stays your number — we forward calls to the AI line. Let's decide which calls forward, and whether you want a short menu in front of the AI."*

READ ALOUD **How we handle it — unless you say otherwise**

Your existing number stays yours. Calls forward to a dedicated AI line — every call, or only the ones nobody picks up. Every call opens with a brief "calls are recorded" notice. Your team can always take the line back.

☐ Keep this default ☐ Customize — as noted below

1 Numbers customers call besides the one on your website _____ Phone provider / system _____

2 Which calls should the AI answer?

☐ Every call, immediately ☐ Only calls no one picks up after ___ rings ☐ Only after hours / when closed

☐ Overflow during rush only ☐ Other: _____

3 Do you want a short keypad menu before the AI?

☐ No — the AI answers directly (recommended) ☐ Yes — options below

4 Keypad menu options (if wanted)

Press	Goes to
1	
2	
3	
4	
5	

5 Is a "calls are recorded" notice at the start of every call acceptable? (Required in some states; standard on all our lines.)

☐ Yes ☐ No _____

6 Numbers that must NEVER be forwarded to the AI (fax, alarm, private line)

_____

IF TIME ALLOWS

Who in your business can pick up the phone and still reach the AI line for a test? _____

Any existing voicemail greeting or auto-attendant we should retire _____

04 Greeting & Personality

How your AI host sounds, and how it introduces your business on every call.

SAY *"Let's talk about how it sounds. I'll read you our standard greeting, and you tell me if you want it word for word or changed."*

READ ALOUD **How we handle it — unless you say otherwise**

Calls are answered "[Business name]. Calls are recorded — how can I help?" in a natural voice matched to your brand. Short answers, one question at a time, never a sales pitch.

☐ Keep this default ☐ Customize — as noted below

1. How should the phone be answered — word for word?

2. Should the assistant introduce itself with a name?
   ☐ No name (recommended) ☐ Yes — name: _____

3. Voice
   ☐ Female, warm and calm ☐ Female, upbeat and quick ☐ Male ☐ Other: _____

4. Tone
   ☐ Polished and professional ☐ Friendly neighborhood ☐ Playful / on-brand personality
   ☐ Other: _____

5. Languages your callers use beyond English
   ☐ Spanish ☐ Polish ☐ Italian ☐ Portuguese ☐ Other: _____

6. Words or phrases you never want used on your phone line (e.g. "you're all set," "no problem," slang)

7. How should it refer to your team?
   ☐ "our team" ☐ "the kitchen" ☐ Real names: _____

IF TIME ALLOWS

Menu items or names with a specific pronunciation (we build a pronunciation guide) _____

A signature sign-off line, if you want one _____

05 Reservations

How bookings should work — or exactly what to say if you don't take them.

SAY *"Reservations. Tell me how you take them today, and how big a party you're comfortable letting the AI book on its own without a person looking at it."*

READ ALOUD **How we handle it — unless you say otherwise**

Parties up to your limit are booked within your reservation hours, with a text confirmation. Larger groups: details are collected and your team is alerted. If no system is on file, the AI collects requests for your team to confirm rather than booking directly.

☐ Keep this default ☐ Customize — as noted below

1. Reservation system

   ☐ OpenTable ☐ Resy ☐ SevenRooms ☐ Toast Tables ☐ Our portal (no system needed)

   ☐ Walk-in only — no reservations ☐ Other: _____

2. Largest party the AI may book on its own _____ Bigger groups → transfer / collect details for callback (circle) _____

3. Last seating time _____ Walk-in-only days or dayparts _____ How far ahead can someone book? _____

4. Deposits or card holds — for which party sizes or dates?

   ☐ Yes ☐ No _____

5. Special occasions the AI should ask about and note (birthdays, anniversaries, proposals)?

   _____

6. Same-day bookings

   ☐ Allowed ☐ Call-ahead only ☐ Never same-day

7. How long is a table held for a late party? _____ Bringing a cake / decorations: allowed? fee? _____

8. Dates that work differently (Valentine's, Mother's Day, New Year's Eve — set menus, prepaid, walk-in only)?

   _____

   _____

IF TIME ALLOWS

Patio or specific-room requests — bookable, or "request noted, not guaranteed"? _____

High chairs, wheelchair seating, quiet-table requests — anything the AI should proactively ask? _____

Weather: should the AI mention rain chances when someone books the patio? _____

06 Waitlist & Wait Times

What the AI says on a busy night when a caller asks "how long is the wait?"

SAY *"On a Friday night someone calls and asks how long the wait is. What do you want the AI to say — and can it put them on the list?"*

READ ALOUD **How we handle it — unless you say otherwise**

The AI never quotes a wait time it cannot know. It invites the caller in, explains call-ahead seating if you offer it, and does not add anyone to a waitlist unless you give it a system or a rule.

☐ Keep this default ☐ Customize — as noted below

1 Walk-in wait times

☐ AI may give a typical range by night (fill in below) ☐ AI transfers to the host stand for a live wait

☐ AI says "come on in — first come, first served"

2 Typical waits the AI may quote

	Weeknight	Fri / Sat	Sunday
Typical wait (dinner)			
Peak hours			

3 Waitlist system

☐ Toast Tables ☐ Yelp Waitlist ☐ Paper / host stand ☐ None ☐ Other: _____

4 Call-ahead seating

☐ Yes — AI may note a call-ahead and alert the host ☐ No

IF TIME ALLOWS

Bar seating or first-come areas the AI can suggest while a table opens _____

07 Phone Orders

What the AI may sell over the phone, and what it should promise about timing.

SAY *"Phone orders. This is where the AI earns its keep — but it can only sell what you let it sell, and it can only promise the timing you give me."*

READ ALOUD **How we handle it — unless you say otherwise**

Orders are read back for confirmation, quoted at roughly 25 minutes for pickup, and confirmed by text. Alcohol and market-price items are never sold by phone.

☐ Keep this default ☐ Customize — as noted below

1 Do you take pickup orders by phone?

☐ Yes — AI takes the full order ☐ AI texts an online-ordering link only ☐ No phone orders

2 Pickup time the AI quotes

Pickup time to quote	Lunch	Dinner	Fri / Sat rush	Large orders
Minutes				

3 Items that should never be sold over the phone (market-price, alcohol, family-style, specials)?

4 Payment

☐ Pay at pickup ☐ Card link by text (pay before pickup) ☐ Either — caller's choice

☐ Card only — cash callers transfer to staff

5 Substitutions and modifications

☐ Freely ☐ Limited to menu options ☐ None

6 Curbside: where to park, what to do

Order-ahead for later today / future day?

7 Utensils, napkins, sauces

☐ Included by default ☐ On request only

IF TIME ALLOWS

The one item callers always describe the wrong way (so we teach the AI the alias)

Minimum order or per-item limits for phone orders

Names the kitchen ticket should show (caller name vs. order number)

08 Delivery

What the AI says the moment a caller asks "do you deliver?"

SAY *"Someone asks 'do you deliver?' — what's the answer, and which app do you actually want them to use?"*

READ ALOUD **How we handle it — unless you say otherwise**

Delivery callers are directed to your delivery apps, with a texted link on request. The AI does not take delivery orders directly.

☐ Keep this default ☐ Customize — as noted below

1 Delivery

☐ Own drivers (in-house) ☐ Third-party apps only ☐ No delivery

2 Preferred app to steer people to (fees differ)

Delivery radius / minimum, if in-house

3 Delivery cutoff, if earlier than closing

Delivery fee / free-delivery threshold

IF TIME ALLOWS

Neighborhoods, hotels, or office parks you deliver to (or refuse)

Catering-size deliveries — same rules, or through the catering contact?

09 Catering, Private Dining & Events

Typically your highest-value calls — configured so no inquiry is lost, at any hour.

SAY *"Catering and private events are the most valuable calls you get, and the ones most often lost to voicemail. Let's make sure every one of them lands with a person."*

READ ALOUD **How we handle it — unless you say otherwise**

At any hour, the AI collects the date, headcount, contact, and requirements, then notifies your team immediately by text and email. It does not quote prices.

☐ Keep this default ☐ Customize — as noted below

1 What you offer

☐ Drop-off trays ☐ Full-service with staff ☐ Private dining room ☐ Full buyout ☐ Off-site events

☐ Other:

2 Minimum notice

Minimum party size / minimum spend

Deposit required?

3 During business hours, transfer these calls to (name / number)

4 After hours, the AI should collect

☐ Date & time ☐ Headcount ☐ Name & phone ☐ Email ☐ Occasion ☐ Budget ☐ Dietary needs

☐ Venue (on-site / off-site) ☐ Other: _____

5 Who is alerted the moment a lead comes in (name / cell / email)

_____

6 May the AI quote prices?

☐ Never — leave all numbers to the event contact ☐ Starting prices only ("packages start at…")

☐ Yes, from the catering menu

7 Private room capacity / event space

_____

How far you travel; travel or delivery fee

_____

IF TIME ALLOWS

Holiday catering — special menus and order deadlines _____

Where the catering menu lives (PDF, website, form the AI can text) _____

Corporate / recurring catering accounts that should always get through _____

10 Menu, Specials & Sold-Out Items

Where menu truth lives, and how day-to-day changes reach your AI host.

SAY *"The menu. I need to know where the true, current menu lives — and how you'll tell us when something changes or sells out mid-shift."*

READ ALOUD **How we handle it — unless you say otherwise**

Answers come only from your official menu — exact names and prices. The AI recommends from your list of favorites, never invents a dish, and never guesses a market price.

☐ Keep this default ☐ Customize — as noted below

1 The most accurate, current menu is

☐ POS (Toast, Square, Clover…) ☐ Website ☐ Online-ordering page ☐ Printed / PDF menu

☐ Other: _____

2 Daily or weekly specials reach us by

☐ Text ☐ Email ☐ Portal ☐ Same as the website — we pull it

3 When you 86 an item mid-shift

☐ POS marks it sold out — AI follows same-day ☐ Someone texts us ☐ Not needed

4 House favorites the AI should recommend when asked "what's good?"

_____

_____

5 Market-price or seasonal items where the AI must never state a number?

_____

IF TIME ALLOWS

Portion guidance callers ask for (“does the family tray feed six?”) _____

Items only available dine-in (never phone or pickup) _____

Menu items with a house nickname callers use _____

11 Allergens & Dietary Questions

Safety-critical. Exactly what the AI may claim — and when it must hand off to your kitchen.

SAY *“Allergies are the one place we'd rather the AI say too little than too much. Tell me what you're comfortable having it claim, and when it should hand off to your kitchen.”*

READ ALOUD **How we handle it — unless you say otherwise**

Allergy questions are answered conservatively from your menu. For a severe allergy, or anything not listed, the AI says it cannot guarantee and offers to connect the caller with your team. It never calls a dish allergen-free unless you have told us so.

☐ Keep this default ☐ Customize — as noted below

1. How detailed should allergen answers be?
   - ☐ General only — always hand off for specifics
   - ☐ Item-level, from the menu notes you give us
   - ☐ Item-level, and the AI may ask the kitchen (transfer)
2. The AI may confirm, when the menu says so
   - ☐ Gluten-free options ☐ Vegan / vegetarian ☐ Nut-free ☐ Dairy-free ☐ Halal ☐ Kosher
   - ☐ Other: _____
3. Shared fryer, shared grill, or cross-contact you want disclosed every time?
   - ☐ Yes ☐ No _____
4. Kitchen or manager contact for allergy questions _____

   Celiac vs. “gluten-sensitive” — separate answer? _____

IF TIME ALLOWS

A dish you get asked about constantly (“is the risotto gluten-free?”) — the exact answer _____

Modifications the kitchen will and will not make for dietary needs _____

12 Bar, Alcohol & Happy Hour

Bar questions are frequent and legally sensitive — the AI needs firm rules.

SAY *"Bar and alcohol. By default the AI never sells alcohol over the phone — let's confirm that and get your happy hour exactly right."*

READ ALOUD **How we handle it — unless you say otherwise**

Alcohol is dine-in only and never sold by phone. Happy hour is quoted exactly as you give it and described as in-house only. Specific beers, wines, and cocktails are described only from your list.

☐ Keep this default ☐ Customize — as noted below

1. Bar hours, if different from the kitchen (and not on your website)

   Full bar / beer & wine only / no alcohol

2. Happy hour days & times (if not on your website)

   Happy hour: bar only, whole restaurant, dine-in only?

3. Happy hour deals the AI may quote (exact prices)?

4. Alcohol to go (where legal)

   ☐ Never ☐ Sealed beer / wine with a food order ☐ Cocktails to go

5. Signature cocktails or drafts worth naming (or "taps rotate — never name a beer")

IF TIME ALLOWS

Wine list or bottle service questions — answer, or hand to the bar?

ID policy, age limits at the bar, 21+ hours

13 Entertainment, Games & Events

"Is the game on?" "Who's playing tonight?" — the AI should know, or know where to send people.

SAY *"Entertainment. Live music, trivia, the big game — callers ask. Give me the standing schedule and how you want the AI to handle what it doesn't know."*

READ ALOUD **How we handle it — unless you say otherwise**

Entertainment and events are described only from the schedule you give us. Cover charges and ticket prices are quoted only when you confirm them; otherwise the AI points callers to your event page or ticket link.

☐ Keep this default ☐ Customize — as noted below

1 Standing weekly schedule — anything not already on your website or social pages

Night	What happens	Time	Cover / minimum
Mon			
Tue			
Wed			
Thu			
Fri			
Sat			
Sun			

2 TVs & sports: which packages / leagues; sound on?

Game-day reservations or "first come"?

3 Where we can pull your event calendar from (website, Facebook, Instagram, ticket site)

4 Holiday or seasonal events already scheduled (NYE, St. Patrick's, Super Bowl, Mother's Day brunch)?

IF TIME ALLOWS

Video gaming, pool, darts, or arcade — availability and age rules

Private-event buyouts of the entertainment space — who handles them

14 Gift Cards, Loyalty & Promotions

Quick answers the AI should have ready — and offers it should (or should not) bring up.

SAY *"Gift cards, rewards, promotions. Quick one — where are gift cards sold, and is there anything the AI should mention or must never mention?"*

READ ALOUD **How we handle it — unless you say otherwise**

Gift card questions are answered from your published information, with a texted link on request. Balances, refunds, and exceptions are never promised. Promotions are mentioned only when you have approved them.

☐ Keep this default ☐ Customize — as noted below

1. Gift cards sold
   ☐ In person ☐ Online ☐ Both ☐ Not offered
2. Balance check: how a caller checks a balance _____ Gift cards valid at other locations? _____
3. Current promotions the AI should mention when relevant — and any it must never mention
   _____
   _____
4. Loyalty / rewards program: name, how to join, what it earns
   _____
5. Bulk or corporate gift-card orders → who handles
   _____

IF TIME ALLOWS

Coupons, third-party deals (Groupon), or discounts the AI should politely decline to honor _____

Senior, military, or student discounts _____

15 House Policies & Common Questions

Frequently asked questions your line should answer consistently every time.

SAY *"House rules and the everyday questions. I'll run through the list — a quick answer on each is all I need."*

READ ALOUD **How we handle it — unless you say otherwise**

Common questions — parking, kids, accessibility, dress code — are answered from what is on file. Anything unknown becomes a message for your team, never a guess.

☐ Keep this default ☐ Customize — as noted below

1. Parking — where, free or paid, validation? _____ Wheelchair accessible? Accessible restroom? _____

2 Dress code

Kids welcome? High chairs? Kids eat free nights?

Dogs on the patio?

3 BYOB / corkage fee

Outside cake or dessert fee

Automatic gratuity (party size, %)

4 Split checks — allowed, up to how many?

Card minimum, cash discount, cards not accepted

5 Wi-Fi for guests?

Outdoor seating: covered? heated? reservable?

Smoking / vaping

6 Lost & found — how callers reclaim items

Atmosphere in one line (date night, family, sports bar)

IF TIME ALLOWS

Noise level / good for a quiet conversation?

Restroom for non-customers, charging, stroller space — the odd but real questions

Photography, filming, or influencer visits — policy

16 Changes, Cancellations & "Where's My Order?"

Follow-up calls about something already in motion — the AI must know what it can touch and what belongs to your team.

SAY *"Follow-up calls: 'I need to change my order,' 'I'm running late,' 'cancel my reservation.' What can the AI handle itself, and what goes to your team?"*

READ ALOUD **How we handle it — unless you say otherwise**

Order status and changes after an order is placed go to your team — the AI transfers during service or takes a message. Reservation changes and cancellations are handled by the AI when it booked the table; otherwise it collects the details for your team. Refunds are never promised.

☐ Keep this default ☐ Customize — as noted below

1 "Is my order ready?" / "Where's my order?"

☐ Transfer to the kitchen / counter ☐ Take a message, text the team ☐ AI gives the quoted time only

2 Changing or cancelling an order already placed

☐ Transfer ☐ AI collects the change and texts the kitchen ☐ Not allowed after ___ minutes

3 Reservation changes & cancellations

☐ AI may modify / cancel ☐ Cancel only — changes go to staff ☐ Everything goes to staff

4 Late-arrival grace period

No-show policy / fee

Refund or comp requests → who decides

5 Anything the AI should say to a caller who is running late or asks to hold a table?

IF TIME ALLOWS

Third-party delivery problems (missing items from a DoorDash order) — send them to the app, or help? _____

Left-behind credit cards or items — pickup process _____

17 Texts & Links the AI May Send

The AI can text links and confirmations — you decide which, and from which number.

SAY *"The AI can text callers — a menu link, an ordering link, a reservation confirmation. Let's list which links you want it to have, and who provides them."*

READ ALOUD **How we handle it — unless you say otherwise**

With the caller's okay, the AI texts links and confirmations from your dedicated business number — one text per request, never marketing. Order and reservation confirmations go out automatically.

☐ Keep this default ☐ Customize — as noted below

1 Links the AI may text

☐ Menu ☐ Online ordering ☐ Reservations ☐ Directions ☐ Gift cards ☐ Catering / private events

☐ Job application ☐ Events / tickets ☐ Loyalty sign-up ☐ Other: _____

2 Recap text to every caller with a summary of the call

☐ Yes — every caller ☐ Only when something was ordered or booked ☐ No

3 Texts should show your restaurant name as the sender line (e.g. "[Name]: your order link…")

☐ Yes ☐ No _____

IF TIME ALLOWS

A texted "we're closed — here's what we can do" message for after-hours callers _____

PART C **Your Team**

Who gets reached, who gets alerted, and how heated or after-hours calls are handled.

18 Reaching a Human

When the AI should hand a call to your team — and exactly where that call should go.

SAY *"Now your team. When should the AI hand a call to a person, and exactly which phone should ring? Be specific — this number is where the call physically lands."*

READ ALOUD **How we handle it — unless you say otherwise**

Callers who ask for or need a person are transferred to your main line. If no one answers, the AI takes a message and texts your team immediately. No one is called overnight.

☐ Keep this default ☐ Customize — as noted below

1 Situations that should ALWAYS reach a person

☐ Caller asks for a person ☐ Large parties ☐ Complaints ☐ Catering / events ☐ Press / media

☐ Emergencies ☐ Pay-at-pickup orders ☐ Existing-order questions ☐ Other: _____

2 Where transferred calls ring

	Number	Who / where it rings	Hours it is answered
Primary transfer			
Second fallback			
After hours (or "none")			

3 If nobody answers the transfer

☐ Voicemail on that line ☐ AI takes a message and texts your team (recommended) ☐ Try the second fallback first

4 Rush windows when no one should be interrupted — the AI takes a message instead

_____

5 Different people for different call types (optional)

Call type	Transfer to (name / number)
Reservations & large parties	
Complaints	
Catering / events	
Vendors / suppliers	

IF TIME ALLOWS

Should the AI announce who is calling and why before connecting (a "whisper")? _____

A manager who wants to be reached by cell for specific callers only _____

19 Upset or Frustrated Callers

Exactly how a heated call should be handled — routed to a person, or captured for a fast callback.

SAY *"Upset callers. The AI stays calm and never argues — but you decide whether it hands them straight to a person or takes their details and promises a callback."*

READ ALOUD **How we handle it — unless you say otherwise**

The AI stays calm, never argues, and never discusses money. It records the caller's name, number, and issue, commits to a callback, and texts your alert contact immediately.

☐ Keep this default ☐ Customize — as noted below

1. Heated call →
   ☐ Transfer immediately ☐ Take details, promise a callback ☐ Transfer during service; callback otherwise
2. If transfer: host stand / manager cell (number) _____
   If callback: who is alerted, and how fast do you commit to calling back? _____
3. Anything the AI should say — or never say — to calm things down?
   _____
   _____
4. May the AI ever offer a remake, refund, or comp?
   ☐ Never mention money ☐ Remake only ☐ Manager decides — AI says "a manager will make it right"
5. Food-safety concern → special handling _____
   Abusive or threatening caller → end politely / transfer _____
6. Wrong or missing items at pickup
   ☐ Resolve on the spot (transfer) ☐ Log for a manager + callback

IF TIME ALLOWS

Online-review threats ("I'm going to post this") — response you want _____

20 Alerts to Your Team

Who hears about what, the moment it happens — texts and emails to the right people.

SAY *"Alerts. Every reservation, catering lead, complaint, and message can be texted or emailed the moment it happens. Let's build the roster — who gets what."*

READ ALOUD **How we handle it — unless you say otherwise**

Reservations, large-party requests, catering leads, complaints, and messages are texted and emailed to your alert contact as they happen. A daily summary is available on request.

☐ Keep this default ☐ Customize — as noted below

1 Alert roster — tick what each person receives

Name	Role	Cell	Email	Resv.	Cater.	Compl.	Msgs	Daily

2 Quiet hours — no one's phone buzzes after _____

Different managers on different days? _____

Alerts the owner wants personally, always _____

3 Daily call summary email

☐ Yes — to: _____ ☐ No

4 Full transcript of every call by email

☐ Yes — to: _____ ☐ No — portal only

IF TIME ALLOWS

A shared inbox or group text your managers already use _____

21 Vendors, Sales Calls, Press & Job Seekers

The calls you don't want interrupting service — handled politely, without wasting your team's time.

SAY *"The calls you don't want: salespeople, robocalls, and the ones you do want but not during a rush — suppliers, job applicants, the press. Quick rules for each."*

READ ALOUD **How we handle it — unless you say otherwise**

Sales calls and robocalls are ended politely without reaching your team. Job seekers are given your application process. Legitimate suppliers and callers you name always get through.

☐ Keep this default ☐ Customize — as noted below

1. Vendors & salespeople
   ☐ End the call politely ☐ Take a message for the owner ☐ Route to an email address: _____
2. Existing suppliers and callers who SHOULD always get through (names / companies)
   _____
   _____
3. Job applicants
   ☐ Website / careers link ☐ Email a résumé to: _____
   ☐ Apply in person — days & times: _____
4. Currently hiring? Which roles?
   _____
   Donation / sponsorship requests — standard answer
   _____
5. Press, media, reviewers, influencers
   ☐ Take a message for the owner ☐ Transfer to: _____
   ☐ Give a press email: _____
6. Callers that must always get through — utility, landlord, health inspector, alarm company
   _____

IF TIME ALLOWS

Known spam or scam patterns you already deal with (Google listing "verification," merchant services) _____

22 After-Hours Calls

How calls are handled while you are closed — the line is answered 24/7.

SAY *"After hours. The line answers around the clock. Let's decide what it does at 11 PM or 2 AM — and whether anything is ever worth waking someone up for."*

READ ALOUD **How we handle it — unless you say otherwise**

The line is answered 24/7. While closed, the AI answers what it can and captures reservation requests and catering leads for the morning. No one is woken up.

☐ Keep this default ☐ Customize — as noted below

1. While closed, the AI should
   ☐ Answer everything it can (hours, directions, menu) ☐ Take reservation requests ☐ Take catering / event leads
   ☐ Take orders for the next open day ☐ Other: _____
2. A catering or event lead at 2 AM
   ☐ Collect everything, alert the team in the morning ☐ Collect everything, text the team now
   ☐ Ask them to call back during hours
3. Is anything urgent enough to ring someone's cell after hours? What, and whose?

   _____

   _____
4. True emergencies (alarm, flooding, break-in) → contact _____

   Overnight closing message the AI should give _____

IF TIME ALLOWS

Holiday-week or vacation closures — a special message for that period _____

23 Other Locations

We keep each location's phone line completely separate unless you tell us otherwise.

SAY *"If you have other locations: our default is this line represents this location only — it never mentions or transfers to the others. Tell me if you want that different."*

READ ALOUD **How we handle it — unless you say otherwise**

This line represents this location only. Other locations are never mentioned, quoted, or transferred to unless you request it.

☐ Keep this default ☐ Customize — as noted below

1. Do you have other locations? (names)
   ☐ Yes ☐ No _____

2 Should this line ever mention or transfer to them?

☐ Never (recommended) ☐ Give the other location's number when a caller clearly wants it ☐ Transfer to it

3 Gift cards / loyalty valid at every location?

Anything that differs by location (menu, hours, delivery)

IF TIME ALLOWS

A shared catering or events team that serves all locations

24 Regulars, VIPs & Nuisance Callers

Who your team should hear about the moment they call — and the callers you never want to hear from again.

SAY *"Last one for the team: regulars and VIPs you want flagged the moment they call — and any prank or scam callers you already know about."*

READ ALOUD **How we handle it — unless you say otherwise**

Returning callers are recognized by phone number. Numbers you flag as spam or abusive are blocked automatically; prank calls are ended politely.

☐ Keep this default ☐ Customize — as noted below

1 VIPs and regulars your team should hear about immediately (name, number if known, why)

2 Known prank, scam, or harassing numbers or patterns

3 When a returning caller is recognized

☐ Greet by name ☐ Do not use the name — just skip repeat questions ☐ Treat every call fresh

IF TIME ALLOWS

Neighbors or businesses that call about noise, parking, or deliveries — who handles

25 Anything Else

Anything relevant to your phone line that the topics above did not cover.

SAY *"Before we wrap: what did I miss? Pet peeves from past phone experiences, the one thing that must never happen on a call, anything a great host would just know."*

READ ALOUD **How we handle it — unless you say otherwise**

No default applies — anything you tell us here is built in.

☐ Keep this default ☐ Customize — as noted below

1. Pet peeves from past phone experiences — yours or your customers'

2. The one thing that must NEVER happen on a call

3. Anything unique about how you operate that a great host would know

4. Your busiest nights (so the AI sets honest expectations) | Slowest nights / best time to call for a person

PART D Launch

How we work together from here to go-live.

26 Working Together & Go-Live

How updates reach us, how we test, and when you go live.

SAY *"Finally, logistics. Who is my day-to-day contact, how will you send us changes, and when do you want this live?"*

READ ALOUD **How we handle it — unless you say otherwise**

You get a portal login with every call, transcript, and recording. Menu and hours changes sent by text or email take effect the same day. We run test calls with you before going live and check in after the first week.

☐ Keep this default ☐ Customize — as noted below

1. Day-to-day contact (name / role) | Cell | Email

2. Portal login goes to (email) | Who else needs portal access

3 Send us updates by

☐ Text ☐ Email ☐ Portal ☐ Phone call

4 Target go-live date

Best day / time for the test-call session

Who joins the test call

5 Test-call scenarios to run together

☐ Hours & directions ☐ A full pickup order ☐ A reservation ☐ A catering lead ☐ An upset caller

☐ A transfer to staff ☐ After-hours call ☐ Other:

6 Staff briefing: who tells the team what the AI does, and what they should say if a customer asks about it?

7 First check-in (date)

30-day review (date)

Billing contact

Decision summary

Fill in at the end of the session and read it back to the owner — this is what we build first.

Greeting (word for word)

Assistant name / voice / languages

Calls forwarded: all / no-answer / after-hours only

Primary transfer number & who it rings

Fallback if unanswered

Alert contact (name / cell / email)

Quiet hours

Reservations: system & largest party the AI books

Phone orders: full / link-only / none · payment mode

Delivery answer

Catering: who is alerted

After-hours policy

Menu source & how changes reach us

Items never sold by phone

The one thing that must never happen on a call

What happens next

Within 2 business days	We configure the AI host from this worksheet and load your menu, hours, and policies.
Test-call session	You call the test line with us and run the scenarios you checked above. Anything that is not right is changed on the spot.
Go-live	Forwarding is switched on at the time you choose. Your team is briefed. Your portal login is active.
First week	We review every call, tune wording and edge cases, and check in with you.
Ongoing	Text or email changes any time — same-day updates. A 30-day review is on the calendar.

Session notes

Sign-off

Confirms the answers in this worksheet are accurate and authorizes Scaled Growth Agency to configure the voice AI accordingly. Changes remain free and same-day.

OWNER / AUTHORIZED SIGNER

DATE

SCALED GROWTH AGENCY

DATE

Recordings and transcripts of calls are stored in your client portal and used only to operate and improve your phone line. Menu, hours, and policy changes sent to us by text or email take effect the same day. The AI never quotes a price, hour, or policy that is not on file — it takes a message instead.