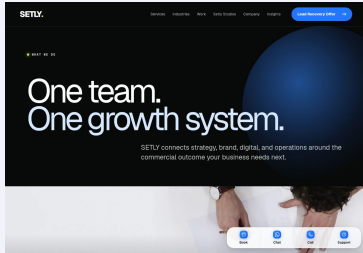


AI voice reception planning sheet

Prepare call handling before choosing a voice or script.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 List common call reasons and the desired route for each.
- 2 Define business hours, transfer destinations and fallback messages.
- 3 Decide how recording, privacy notices and caller preferences will be handled with the provider and appropriate advice.
- 4 Run test calls for interruptions, unclear speech and failed transfers.

EXAMPLE - ILLUSTRATIVE

An urgent service request reaches the designated team route rather than looping through FAQs.

CHECK YOUR RESULT

Can a caller reach a person or clear fallback when automation cannot help?

AI voice reception planning sheet

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Call reason:**Approved response:****Transfer destination:****After-hours behavior:****Notice requirements to review:****Test result:****DONE WHEN**

Can a caller reach a person or clear fallback when automation cannot help?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.