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Voice AI Pilot Planning Guide

AI INNER CIRCLE · WEEKLY INTELLIGENCE

1

1. Collect

1. Collect five examples of repetitive inbound questions, then circle the one that leads to the clearest business action.

2

2. Write

2. Write a single pilot objective, such as qualify the caller and offer the correct appointment path.

3

3. List

3. List the minimum caller details required for that objective, then create a matching custom field for each detail.

4

4. Draft

4. Draft the opening in plain language, state the purpose of the conversation, and ask only one question at a time.

5

5. Map

5. Map three primary paths: qualified, unqualified, and incomplete, with a defined next action for each.

6

6. Add

6. Add clarification prompts for vague answers so the conversation can recover without restarting the intake.

7

7. Connect

7. Connect the qualified outcome to a HighLevel calendar path and route incomplete outcomes into a follow-up workflow.

8

8. Test

8. Test interruptions, changed answers, silence, and requests that fall outside the pilot's intended scope.

9

9. Review

9. Review whether every test creates an accurate record and a visible next step, then revise the weakest question or handoff.