DavidAgents

AgentsFast · Owner worksheet
Fill in a saved copy, or print and write.

One-page front-desk brief

Decide what your front desk may say and promise. Use this with an AI front desk, a new hire or an answering service. Keep answers short; refer to detailed instructions where needed.

Business name

Kept up to date by

Last reviewed

01 What we do, and don’t

Services in plain words, the area you cover, and jobs you turn away.

02 Hours and time zone

When you answer, when you work, your time zone, and what should happen after hours.

03 Pricing limits

Exactly which fees, prices or ranges may be quoted. What should be said about everything else?

04 Requests versus confirmed bookings

Who confirms a time, and how? Until that happens, call it a requested time, not a confirmed booking.

05 When and how to bring in a person

Include urgent issues, upset customers, questions outside this brief, and changes requested for someone else. Write the approved steps, how the alert reaches you, and what the customer is told.

06 What the record must keep

Contact details, the need in their words, what was requested, what was or wasn't promised, and the next step with a name on it. Add where the record belongs and any extra requirements.

Keep it current. Update this brief when prices, hours or services change. Read a few records each week, and test with made-up inquiries before relying on it. A brief reduces guesswork; it doesn't guarantee perfect answers.

Keep your completed copy with your business instructions. Guide: davidagents.ai/guides/before-ai-answers.html