LoftyBiz Call Script and After-Hours Booking Checklist

Write what the assistant may do, your three questions, the handoff rules, and a weekly missed-call count.

Example figures. General education, not financial, legal or tax advice. Results vary. These are examples, not promises.

1. What the assistant may and may not do

Write a one-page script before you connect any tool to your phone or calendar.

The assistant may	The assistant must hand off to a person
Book a standard visit or move an existing one	
Answer opening hours, parking or location questions	
Take a name and a preferred time	
	Anything clinical, legal, or about treatment or results
	Anything about prices for a full plan (not the published callout fee)
	Swelling, bleeding, severe pain, or water coming through right now

2. Three questions and an honest greeting

Keep the greeting short and honest: tell the caller they are speaking with your automated assistant, and that they can ask for a person at any time.

#	Question (edit to fit your business)	Why you ask
1	New or existing customer?	So the assistant books the right kind of slot
2	What is the visit or job for?	So urgent cases are handed off at once
3	Which day and time suit you? / What is the address?	So a live calendar or an on-call person can take it

3. After-hours path and rota

Show the after-hours fee before the booking is confirmed. One named person gets every urgent job, with a backup if they do not accept in time.

Night / date	On call (name)	Backup	Accepted in time?	Notes

4. Weekly missed-call count

Count the calls you missed last week, and when they came in. The times tell you where an assistant helps. Figures below are a blank weekly card, not a result.

Day	Morning missed	Lunch missed	Evening / after hours missed	Booked by the assistant	Handed off	Notes
Mon						
Tue						
Wed						
Thu						

Fri						
Sat						
Sun						
WEEK TOTAL						

5. Five awkward practice calls before you go live

Try the line as a customer would. Fix the script, then try again.

#	Awkward request (edit)	What broke	Script change	Tried again?
1	A strong accent			
2	A parent booking for three people			
3	Someone who only wants to complain			
4	An urgent case that must be handed off			
5	A routine request that should wait until morning			

Keep the count, the script and the rota in Systex (our own product) at loftybiz.net, or click the link in the description.