AI receptionist: launch checklist

What to prepare, what to ask your vendor and how to fill in the knowledge base

PREPARE

- [ ] Services with prices and durations
- [ ] Staff and their schedules
- [ ] Booking, rescheduling and cancellation policy
- [ ] Address, parking, directions
- [ ] 30–50 frequent customer questions (from past chats)
- [ ] Your booking system / CRM and whether it has an API

ASK YOUR VENDOR

- [ ] What data does the bot answer from — and what happens when it doesn't know?
- [ ] How does it hand a conversation to staff?
- [ ] Who owns the bot, the code and the knowledge base?
- [ ] Where is customer data stored?
- [ ] What will model usage cost per month at our volume?
- [ ] Can we test it on our real questions before paying?

LAUNCH

- [ ] Start with one channel (e.g. website or WhatsApp)
- [ ] Review conversations daily for the first 2 weeks
- [ ] Rule: medical questions → book a consultation
- [ ] Notify staff about every booking
- [ ] Remind customers 24 h and 2 h before
- [ ] After a month — add the other channels

KNOWLEDGE BASE TEMPLATE

Service	Professional teeth cleaning
Price	$120
Duration	60 min
Staff	Dr. Irene, Dr. Oleg
Preparation	Don’t eat 1 hour before the visit
FAQ	Does it hurt? — No, it’s painless…