

Introducing AI Phone Handling

A practical assessment for trades, technical service providers and mid-sized companies

Be more reachable by phone — without adding load to the office, foreman, dispatch or management.

AI phone handling records calls in a structured way, prepares callbacks and captures customer requests cleanly. The key point: it is **not a simple answering machine** und **not automated expert advice** — it has to fit your company's workflows, services, customers and responsibilities. This checklist supports a first assessment.

HOW AI PHONE HANDLING WORKS IN PRACTICE



Call



AI Intake



Request Card



Human Review



Callback · Appt.
Quote · Dispatch

Five Areas to Assess

○ suitable ○ prepare ○ review carefully



1 • Call Types

Which calls may the AI take?

○ ○ ○

- ☐ Recurring first-contact calls are clearly defined — callback, service, quote, fault report.
- ☐ Suitable calls kept separate from critical ones — no on-the-spot advice, no prices.
- ☐ The AI makes no binding decisions; it only prepares them.



2 • Required Details

What must be reliably captured?

○ ○ ○

- ☐ Name and callback number are captured and verified.
- ☐ Request, site and service area are summarised clearly.
- ☐ Missing details are flagged in the handover.



3 • Handover Routes

Where do the summaries go?

○ ○ ○

- ☐ The target system is defined: inbox, CRM, ticket or task board.
- ☐ Urgent requests are marked and routed separately.
- ☐ No new shadow storage alongside the existing process.



4 • Data Protection

Which data may be processed?

○ ○ ○

- ☐ Processed data, storage location and retention are clarified (GDPR, EU hosting).
- ☐ Customers are informed that calls are handled with AI support.
- ☐ Access to summaries is governed by roles.



5 • Escalation

What happens with urgent cases?

○ ○ ○

- ☐ Emergency terms and routing logic are defined.
- ☐ Complaints and escalations go to people, not into the standard flow.
- ☐ A fallback exists when the AI cannot classify a call confidently.

THE AI REQUEST CARD

CALLER

Name · Callback number

REQUEST

Short, clear summary

SITE

Address · Site · System · Building

SERVICE AREA

Repair · Maintenance · Quote · Appointment · Fault

URGENCY

As described by the customer — to be verified

MISSING DETAILS

Photos · Serial number · Dimensions · Contact

NEXT STEP

Callback · Scheduling · Clarification · Routing

Structure instead of chance — every detail where your team takes the next step.

People Decide On

- Priority
- Technical assessment
- Scheduling
- Price & quote
- Dispatch planning
- Approval & escalation

NEXT STEP

KrambergAI AI Initial Check

The structured way in — don't automate every call, start the right way.

- 1 Understand
- 2 Assess
- 3 Structure
- 4 Implement
- 5 Improve

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