

FORTIFYING YOUR FRONTLINES

How to Use Virtual Receptionists for Small Business Growth



7 STEPS TO REDUCE INTERRUPTIONS, INCREASE
PRODUCTIVITY & MAXIMIZE REVENUE

smith

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INTRODUCTION

Running a small business isn't a full-time job. It's more often 24/7.

If you run a marketing firm, local IT services provider, e-commerce company, or any solo or small business, you know how hard it is to keep daily operations running smoothly. Leading a business means doing not only what you love, but also what you don't love: all those tasks that are required to keep your business humming day after day.

Many of those tasks involve communications, from answering phone calls and texts, to engaging with customers online. These tasks consume precious time and energy. To unlock the full growth potential of your business, you must hand off these core communication tasks. You need a receptionist.

But wait, this isn't the 1980s. Today, there's a superior solution: *virtual* receptionists for calls, chats, and texts. Exceptionally capable, efficient, accurate, and affordable, virtual receptionists are live (yes, human) staff, who work remotely to accomplish tasks and chores on your behalf.

Smith.ai gives you virtual phone receptionists, web chat agents, SMS text responders, and more. We're not a call center, and we don't run a noisy, impersonal operation. Our highly trained

career professionals work from quiet home offices and do almost everything an on-premise receptionist would do... except make coffee.

But we're more than human. Backed by powerful AI technology, Smith.ai receptionists surpass internal staff in many ways with instant spam blocking, language translation, sales-development workflows, and more.

Don't let another customer reach voicemail. Don't waste the time of sales staff on qualifying leads or support staff on triaging tickets. Deploy resources wisely by delegating, and save yourself and employees for more valuable work.

In this guide, we explain how to pinpoint the issues that stall growth and how to deploy remote receptionists to win and retain happy clients.

Our goal is to help you run a more productive, professional, and profitable business in record time, so you can capture more leads, increase revenue, reduce costs, and improve client satisfaction. It is possible to achieve both business goals and work/life balance. Read on to learn how to partner with Smith.ai on these objectives.

BUSINESS TRENDS HURTING SOLOPRENEURS & SMBs

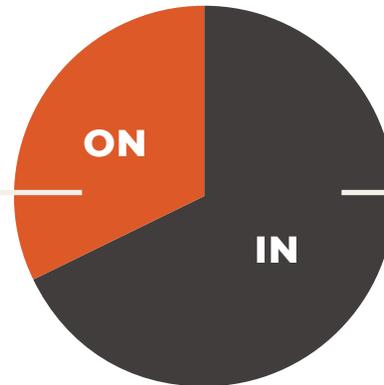


HOW DO SMALL-BUSINESS OWNERS SPEND THEIR TIME?

32%

Time spent working **ON** their business

Working ON your business includes the things that can directly result in revenue such as: development of new products and services, building skills, marketing, business development, implementing technology, and strategic planning.



68%

Time spent working **IN** their business

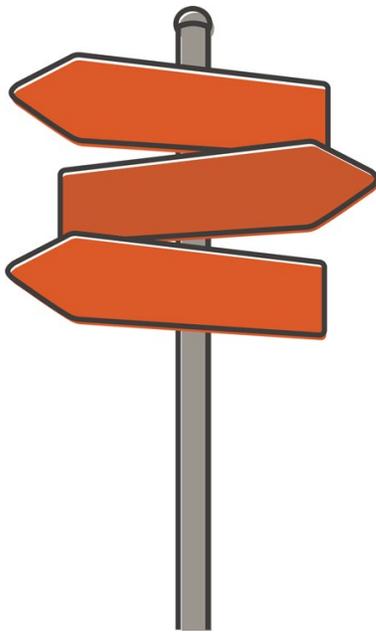
Working IN your business includes the tasks that are necessary, yet have a much lower return on your investment of time and energy. These are tasks that consume your time, but could be delegated to free up time for more high-level tasks. Administrative tasks like lead correspondence, simple client assistance, calendaring, and billing fall under this category.



75%

Would prefer to work **ON** their business

SEVEN DILEMMAS OF SMALL-BUSINESS OWNERS



So, you're losing leads, earnings, and valuable time.

Why? Because you're faced with difficult (and understandable) trade-offs.

Here are the top seven constraints of small-business owners.

1 Business Growth vs. Productivity

- Interruptions from calls, texts, and emails kill your productivity. You want to **minimize** interruptions.
- Potential clients demand quick response times. You want to **maximize** responsiveness to new leads.

2 Revenue vs. Non-Billable Time

- Invoicing and chasing down late payments drain time that could be spent on billable work. You want to **minimize** time-consuming billing tasks.

- You need (and deserve) to get paid. And not after a collections agency takes a 30-50% cut. You want to **maximize** revenue.

3 Intelligent Technology vs. Technology Skills

- Technology makes you more efficient. It's particularly important for solo and small business owners to automate tasks, processes, and data. You want to **minimize** routine tasks and administrative chores through software, apps, and AI-enhanced services.

THE SEVEN DILEMMAS



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→ Fewer and fewer businesses have in-house IT support. Your time isn't best spent building IT skills. You want to **maximize** your use of simple, intelligent tools that don't require frequent calls to a consultant.

4 Happy Clients vs. Satisfied Self

- Clients need businesses that not only deliver on their promises with high-quality products and services, but also respond to their needs, consistently and reliably. Less-responsive businesses receive more negative reviews, even if their products and services warrant five-star ratings. More-responsive business owners receive more repeat business and referrals. You want to **maximize** responsiveness to new and existing clients.
- Your time and your in-house staff members' time are best spent on work that only you can do — not intake, calendaring, and giving directions to the office. Plus, business owners and staff members who spend more time on work that matches their more-advanced skills report greater work satisfaction. You want to **minimize** time spent on low-skill tasks.

5 Operational Control vs. Sustainable Growth

- Controlling the business is one of the main reasons business leaders don't delegate. Control relates to your work methods, hours, clientele, and more. You take pride in how you work, and your company is tied to your identity. You want to **maximize** control over your operations and reputation.

→ Controlling everything is exhausting. You want work/life balance, or at least the option to delegate. There will come a point when you can't do everything and do it well. You want to **minimize** your business' reliance on you, and even your reliance on other staff members, if you have any, who require time off.

6 Lead Quality vs. Quantity in Digital Marketing

- Digital marketing campaigns are essential to drive new leads. You want to **maximize** your online presence.
- Online traffic is often lower quality, with lead-to-client conversion rates far below those seen through more vetted sources, like referrals. You want to **minimize** engagement with "bad" leads who just kick tires and waste time.

7 Receptionist Skills vs. Cost and Flexibility

- You recognize the need for a receptionist who is smart, reliable, thorough, productive, and who makes good decisions. You want to **maximize** your receptionist's impact with a wide "territory."
- You need to run a nimble business that withstands peaks and valleys in consumer demand. You want to **minimize** your exposure to the high fixed costs (salaries and benefits) and limited 40-hour workweeks of in-house receptionists.

SEVEN SOLUTIONS PROVIDED BY VIRTUAL RECEPTIONISTS



Here are the top seven ways virtual receptionists can solve those seven common issues plaguing solopreneurs and SMBs.



SOLUTION 1

Increase responsiveness through efficiently managed calls

There are many ways virtual receptionists can manage your calls so your business is responsive to leads and clients while you get revenue-generating work done.

Following your customized call-handling directions, virtual receptionists can:

- Provide a consistent, warm, and professional greeting, eliminating callers from reaching voicemail
- Identify and prioritize incoming communications, such as calls from a business partner or VIP client
- Route calls:
 - By time of day, day of week, and other schedule preferences
 - Based on the individual preferences of your partners and staff members
- Provide overflow call handling only: An attempt is made to reach you first, and the receptionists serve as a “backup” to prevent callers from reaching voicemail
- Block spam, unsolicited sales calls, and wrong numbers
- Transfer calls that meet your criteria for an “interruption,”

and notify you of such call-transfer requests via phone, SMS or chat app (your choice)

- Instead of simply taking a message, schedule call-backs on your calendar when you’re not immediately available to receive a call transfer
- Make outbound calls, in various capacities, to:
 - Leads who completed the “contact” form on your website
 - Clients who need a status update, directions to your office, or other non-confidential information
 - Clients with past-due invoices
 - Clients from whom you’d like to request a review or testimonial after completing work



SOLUTION 2

Qualify potential clients

Solution 1 addressed how you can promptly answer potential clients’ calls without interrupting your revenue-generating work. However, not every lead who contacts you is a good client for your business. When enlisting the help of a receptionist service, make sure the receptionists are not only capturing but also qualifying your leads, so that only those people or businesses who are well qualified to be your clients are live-transferred to you or receive time on your calendar for a call-back or consultation.

REMEMBER: A receptionist service is most useful when it not only responds to but also screens and filters your calls.

Follow these steps to standardize and hand-off lead qualification to virtual receptionists:

1. Identify your must-have criteria for leads. In addition to basic contact information, you could ask potential clients for:
 - A brief description of their need, or to select from a list of products or services you offer, if there are many
 - Their ZIP Code or county, if relevant to your ability to serve them or deliver to their location
 - How they heard about your business, so you can better track your marketing campaigns
2. Determine the minimum criteria that must be met for a lead to “pass” your qualification steps. Qualified leads will be invited to receive a call-back or schedule a consultation with you.
3. Determine the “next step” in the new-client vetting process. Is it a call-back, consultation, or should the receptionist attempt a live call transfer?
4. Determine your policy on consultations, including considerations for duration, format (phone, video call or in-person), and whether it will be free or paid.
5. Build an online form with the qualification questions above. Share the link to this form with your receptionists, along with your directions so they can qualify leads on your behalf.
6. If your receptionists will be scheduling call-backs and consultations for you, share the link to your online.
 - | **TIP:** A list of affordable calendaring solutions is available at <https://smith.ai/integrationtype/scheduling>
7. That’s it. Now sit back and watch as your calendar fills up only with appointments with well qualified leads!



SOLUTION 3

Schedule appointments

Virtual receptionists are capable of scheduling not only call-backs and consultations with potential clients, but also appointments with existing clients.

Once you choose an online scheduling tool, set up multiple appointment types that cover the full range of ways your client meetings take shape. For example, you can create appointment types for:

- Recurring client phone check-ins
- Conference calls
- On-site assessments
- Surveys and questionnaires
- Exit interviews

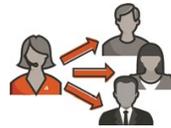
Provide a private link to these “meeting types” to your receptionist service, along with directions for booking each type of appointment.

Pro Tips:

- If you have multiple partners, staff, or departments at your business, create a calendar for each so you have appointment types based on their unique preferences and roles. For example, if you run a financial advisory firm, one advisor may prefer morning meetings only.
- If you prefer to review appointments before a booking

is confirmed, choose a calendaring solution that offers “booking with approval” such as ScheduleOnce. With this feature, receptionists can select up to 3 appointment times for a client, but the appointment is not confirmed until you review and select the time that best suits you.

- If multiple coworkers at your company are equally available to accept new client meetings, include their calendars on the same appointment type and let whoever is available first (or whenever the client prefers to meet) receive the booking. You can even prioritize bookings among multiple team members based on seniority, business specialty, and more. Round-robin and tiered scheduling rules work well for inside sales and technical support departments, where proper distribution of work is critical to business success.



SOLUTION 4

Provide appointment reminders, updates, and client check-ins

Virtual receptionists are useful not only for creating new appointments, but also for reminders, updates, and check-ins. Clients appreciate when businesses keep them regularly informed. Similarly, business owners and operators are happiest when clients appear for meetings on time, and promptly complete and return documents.

When you enlist the help of a receptionist service that offers **outbound calls** you can outsource the following tasks:

- **Appointment reminders**, to reduce cancellations and no-shows
- **Meeting updates and office directions**, to reduce delays and navigation-related errors
- **Client check-ins**, to deliver peace of mind to clients waiting for service or product delivery



SOLUTION 5

Collect payments

Payment collection is one of the most important aspects of any business, and thanks to easy, affordable, and compliant solutions like Stripe, Square, Quickbooks, PayPal, and Braintree, you can accept online credit card payments for a fee as little as 2.9%, a cost that is easily justified and far outweighed by the increased revenue you will receive (far faster).

Your clients make car payments, mortgage payments, college tuition, and many other significant charges online. Making payments to your business should be just as easy for them.

Virtual receptionists can accept payments by phone on your behalf for:

- Consultations
- Deposits

- Retainers
- Invoices
- Past-due payments

Pro Tips:

When it comes to late payments, our recommendation is to not just collect payments when the client finally calls with their payment method, but instead to have your receptionists make outbound calls to these clients. Simply provide a list of names, amounts, and phone numbers to your receptionists each month, and let them follow-up on your behalf.

Many business owners report that clients are more likely to fulfill payment requests that come from receptionists than those that come from themselves or their staff directly. These business owners cite the lack of personal connection as a benefit here: The close client-owner relationship can lead to awkward payment conversations; however, when the conversation is initiated by a neutral third-party like a receptionist, that can lead to greater comfort on the client's part.



SOLUTION 6

Monetize “bad” leads through systematic referrals

Let's revisit Solution 2. The lead qualification process yields both good leads who you're eager to convert into paying

clients, but it also yields “bad” leads who don't pass your qualification criteria. Many business owners and team members will let these leads “fall off” their radar as soon as it's determined that the lead isn't a good fit for their company, but that's a mistake: These leads often need a product or service similar to yours, and just because your business may not be able to or be interested in providing these products or services to them, that doesn't mean you can't earn revenue from them. The way to monetize these leads is through paid referrals. It's a straightforward process that can yield revenue up to 40% of the fees received by the “referred” business:

1. Identify the businesses in your industry or in a related industry whom you recommend, and who complement but do not compete with you. (Using marketing agencies as an example, this could include agencies who overlap with your metropolitan area, but whose services do not overlap. Perhaps your company only handles SEO and content, and another recommended agency manages only paid ads.)
2. Arrange referral-fee agreements with these businesses, and make a list with their contact information and the criteria that must be met for a lead to be referred to them.
3. Share this list (not including the details of the referral fees you will receive) with your receptionist service, along with any instructions for making approved referrals on your behalf.
4. That's it! Enjoy the additional revenue from your referrals when leads hire businesses who are better suited to serve them, based on your recommendation.

Pro Tips:

- Before accepting referral fees, be sure to review all of the relevant referral fee rules provided by organizations governing your industry, if applicable.
- Periodically review and update your list of referral businesses to reflect your current preferences and their capacity to handle new customers.



SOLUTION 7

Reduce data-entry chores and operational inefficiencies

Virtual receptionists reduce the time-consuming burdens of data entry, administrative chores, and follow-up tasks. Receptionist services that integrate with your business software produce the greatest impact.

Business owners should ask potential receptionist services about their “API” and Zapier integrations, which, simply put, indicate how capable the receptionist service's own software is at passing information into a business' existing systems.

Business owners must also use caution when discussing connecting their systems to a receptionist service. If the service requests a login or license for their own use for data entry and lookup, consider that a red flag: such access leaves businesses vulnerable to security and information leaks. Secure services like Smith.ai rely on software integrations instead of human-

driven access to pull or push data between systems.

Examples of time-consuming data entry tasks eliminated by properly integrated receptionist services include:

- CRM or intake software integration: Create contact records for new callers, update contact records for existing clients, and log call summary notes as new communication activities in each contact's "timeline."
- Calendar integration: Add new appointments with leads and clients, from simple 15-minute call-backs to one-hour in-person client meetings.
- Marketing automation software integration: Add new leads to your newsletter list and email marketing campaigns. Or, have your receptionist service send post-call email and text follow-up messages after conversations. Not every new lead will immediately convert into a new client; this way, your products and services stay top-of-mind.

Hand-off conference call coordination

Reduce time spent corralling conference call participants by leveraging conference call "convening" services like Smith.ai's Operator service. Your receptionist will gather everyone on the conference line at the scheduled time, and then invite you to join, so your time isn't spent chasing down participants or waiting for them to join.

Receive discrete call-transfer notifications

Your receptionist service should be discrete and enable you to run a more professional company. To that end, Smith.ai offers SMS notifications for incoming call-transfer requests in lieu of a phone call. When an incoming call would be impolite, inconvenient, or impossible (perhaps when you're dining with another client or business partner), this option allows you to

silently accept or reject a call transfer with the utmost discretion.



BONUS SOLUTION

Respond to inquires 24/7 by online chat and text, without the "switching" cost

Maintaining a website, social media profiles, and review site listings mean more channels through which leads can discover, vet, and contact your business. That often means more interruptions, logging in to check more online profiles and messages, and significant time spent "switching" between these channels. A receptionist service capable of responding to online chats, Facebook messages, and SMS texts significantly enhances the receptionists' usefulness and impact.

24/7 Web Chat

Leverage a receptionist service capable of staffing your business' online chat widget, and instruct receptionists to handle lead capture, qualification, and scheduling just as they would by phone. New clients often visit a business website before calling, so conversations handled through website chat often efficiently eliminate that first exploratory phone call. New leads who are well qualified are still treated with exceptional care.

Text Answering & Facebook Messages

Customers are increasingly comfortable casually messaging

businesses, and some even prefer to communicate via text or on Facebook. A receptionist service capable of answering these communications means your business delivers responses through the channel your clients prefer, and that demonstrates next-level service delivery that is clearly in-tune with client wishes and needs. When live agents respond immediately to incoming messages from your customers, you deliver an exceptional experience that separates you from your competition.

Pro Tip:

- You can also use receptionists to send email and SMS text follow-ups to leads who expressed interest in your product or service, but haven't purchased, booked a consultation, or taken the "next step."

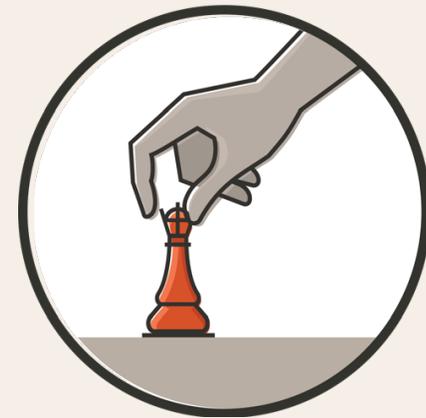
A service built for the true solo

Clients demand an instantaneous response, yet phone, chat, and text interruptions eat into precious time solo business owners reserve for productive work. Interruptions aren't frequent enough to warrant a full-time staff member's support, and resources are limited, so the solopreneur is stuck: neglect leads, neglect work production, and/or work longer hours.

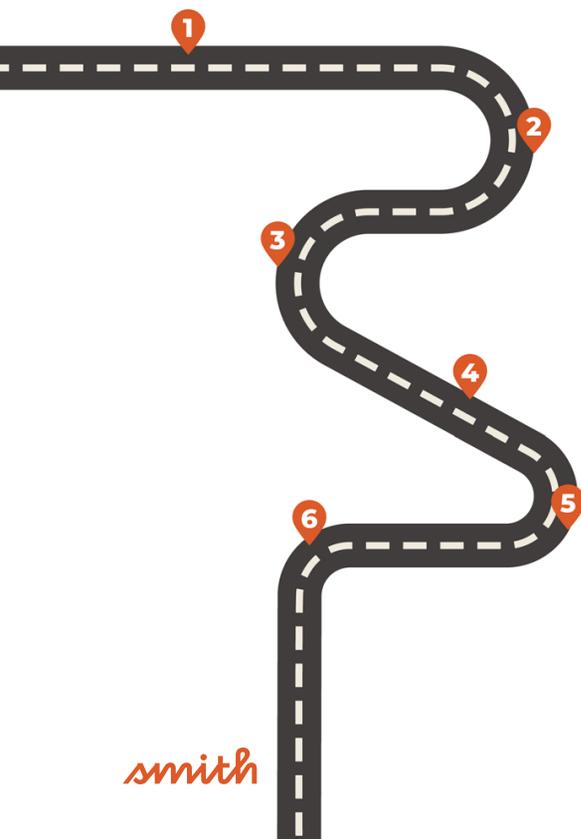
Virtual receptionists bridge the gap: Clients receive a fast and friendly response, along with a scheduled appointment to speak to the owner. Usage-based pricing means costs are contained with predictable bills.

SET YOUR GAME PLAN

It's up to you now. Follow these six simple steps for success.



READY TO START MAKING SOME HAND-OFFS?



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Here's what to do **next** to set your small business up for **success**.

1. Track your time for one week.
→ Log all of your time at work, identifying every task as either “required of me” or “not required of me.”

2. For all tasks that don't require your direct involvement, determine whether you will offload them using a new process, software, or service.
Tag each instance of work based on how you intend to handle it moving forward:
→ **Delegate:** Someone on your team will do it, instead of you
→ **Streamline:** You will stop or reduce the times you are doing it
→ **Automate:** You will use software or an app to do it
→ **Outsource:** You will hand it off to a service, such as virtual receptionists

3. Prioritize fixes by considering three factors: time consumption, importance, and urgency.
Tips:
→ Lead capture, qualification & scheduling are often easiest to outsource.
→ Data entry & lead follow-up are easily automated.
→ Use the [Eisenhower Decision Matrix](#) to guide you.

4. Fix the top three issues in the next 30 to 60 days, depending on scope, cost, and difficulty.
Always assess the risks of making changes to your business. Identify backup plans and options to reverse changes in case there are adverse effects. Avoid long-term contracts when implementing new software and services for maximum flexibility.

5. Wait two to four weeks after implementing each change to re-stabilize. Address another one to three issues per quarter.
Do not make too many changes at once, without identifying the impacts of your newest changes. This reduces the likelihood you will incorrectly attribute effects of one change to another change made around the same time.

6. Assess the impact of changes every quarter.
Consider the following impacts in your assessments:
→ Cost and time savings
→ New earnings, leads, and clients
→ Overall client satisfaction, as measured by client surveys and referral volume from existing clients
→ Changes to your work/life balance, stress levels, sleep quality, and other wellness indicators

GETTING STARTED WITH SMITH.AI VIRTUAL RECEPTIONISTS

Whether you're exploring using virtual receptionists for the first time or switching from another receptionist service, learn what makes Smith.ai special and how to get started in four simple steps.



WHAT'S SPECIAL ABOUT SMITH.AI VIRTUAL RECEPTIONISTS



Not every virtual receptionist service offers lead qualification, new client intake, outgoing calls, and referrals. Almost none have 30 software integration partners. Even fewer leverage AI. Smith.ai Virtual Receptionists offers unparalleled receptionist services by combining our proprietary AI software with best-in-class professional receptionists.

What is AI? That stands for “artificial intelligence.” It automates decision making, speeds up the completion of routine tasks, and reduces time by delivering answers that would otherwise require research. Human error is reduced and efficiency is drastically improved. It is the combination of artificial intelligence and human intelligence that sets Smith.ai apart from other virtual receptionist services. Examples of our use of AI include:

- Automatic spam blocking of 20 million numbers
- Caller identification for personalized greetings
- Easy status changes via SMS, such as “Do Not Disturb” when you can’t accept call transfers.
- Data integrations for accurate lead qualification, such as an instant ZIP Code check that identifies a potential client’s proximity to your service locations.

Smith.ai distinguishes itself further by billing per-call, not per-minute. Phone calls with leads who need to complete an intake form by phone or track down their credit card to book a consultation can take three to five minutes. You get predictable monthly costs when you’re charged per-call, and it’s also far easier to calculate your marketing costs.

Beyond AI and per-call pricing, Smith.ai offers the following exemplary services and features:

- Inbound and outbound calls
- Lead capture and qualification
- Appointment scheduling and reminders
- Call-backs to website leads
- Text & email follow-ups after calls
- Call screening, prioritization, and VIP lists
- Instant call summaries and daily summary reports
- Spanish-speaking receptionists
- Coverage 7 days a week

**BUSINESS OWNERS WHO USE SMITH.AI REPORT MORE QUALIFIED LEADS,
HAPPIER CLIENTS & IMPROVED WORK/LIFE BALANCE.**

“The ease of use, reasonable cost, and very professional staff have made this one of my best business decisions of the past year.”

KEVIN LEVINE, IMMIGRATION ATTORNEY

30+ WAYS SMITH.AI CONNECTS TO YOUR SOFTWARE

One of the reasons business owners prefer Smith.ai is our robust integrations with their business management, marketing automation, scheduling, and billing software.

Our integrations list grows weekly; here are just a few of our current partners.

For the latest updates, please visit <https://smith.ai/integrations>.



Salesforce



HubSpot



Zapier



ActiveCampaign



Agile CRM



Clio



Clio Grow



Practice Panther



Filevine



Capsule CRM



Calendly



Acuity Scheduling



ScheduleOnce



InfusionSoft



Wealthbox

GETTING STARTED IS EASY

1



Complete the new client [onboarding form](#).

2



Receive a 20-call free trial.

3



Select a monthly plan, starting at just \$140/month.

No contract or setup fees.
Change or cancel anytime.

4



Forward calls to Smith.ai.

[VISIT SMITH.AI TO LEARN MORE](#)

OTHER SERVICES FROM SMITH.AI: WEB CHAT & TEXT ANSWERING

Yes, there's more! Further improve your responsiveness to new leads with Smith.ai's integrated communication services.

ALSO FROM SMITH.AI: WEB CHAT & TEXT ANSWERING

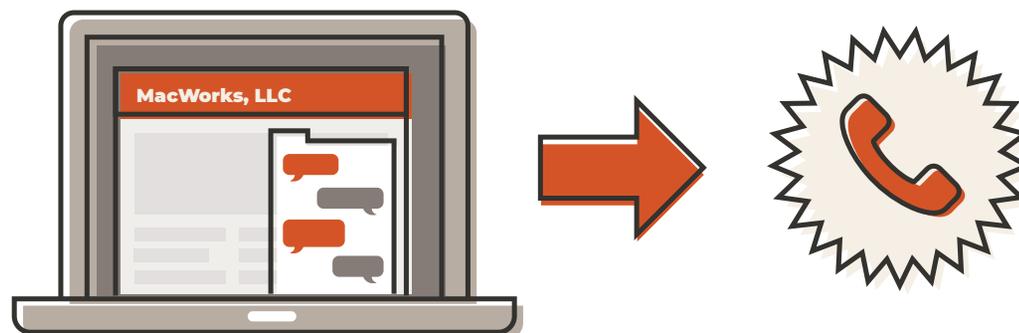
The fastest & friendliest way to capture leads *beyond* phone calls, starting at \$140/month.

Smith.ai is known for superior virtual receptionist services by phone. Now, our receptionists will also capture leads, book appointments, and complete client intake on your website, Facebook page, and text-enabled phone lines.

- 24/7 live chat agents, backed by our powerful AI technology
- Smart Q&A and knowledgebase
- Lead qualification & client intake sequences
- Appointment booking & payment collection
- Fully customized to reflect your brand and business needs
- Compatible with all devices, browsers, website hosting platforms & analytics tools
- Business management, intake, CRM, calendar & billing software integrations log contacts, transcripts & more
- Real-time language translation

“I’m amazed by how well leads are handled.
Very easy & affordable.”

JERRY ZIGMONT, MACWORKS, LLC



LEARN MORE AND SIGN UP AT [SMITH.AI/CHAT](https://smith.ai/chat)

**WANT MORE QUALIFIED LEADS, HAPPIER CLIENTS
& IMPROVED WORK/LIFE BALANCE?**

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specifically related to this eBook,
please contact hello@smith.ai.

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