



## AI voice assistant 101:

# A buyer's guide to smarter call handling

Hello. I just bought a new home and I need landscaping.



Congratulations! I can help with that.



## When every call counts

Have you ever missed a call from a potential new client because you were busy helping someone else? Or missed an opportunity because your hands were tied up with day-to-day tasks that just couldn't wait — like managing schedules, responding to urgent emails, or juggling multiple responsibilities at once?

These moments are frustrating, and all too familiar when trying to balance growth with the demands of running a small business.

With an AI voice assistant, that problem disappears before it even starts. It enables you to:

- ✓ Capture every call
- ✓ Nurture every lead
- ✓ Prevent missed opportunities

And that's the difference between losing a lead and landing a new customer.

## What is an AI voice assistant?

An AI voice assistant is an advanced call responder that interacts with your callers using natural, human-like voices tailored to reflect your brand's tone and personality. Think of it as your 24/7 virtual receptionist that answers calls, helps address caller questions, gathers contact details, and even coordinates appointment requests.

### The rise of AI call handling

AI voice assistants are becoming essential for small businesses and agencies looking to stay responsive, even when staff is unavailable.

### Why inbound calls matter

While emails and live chats are widely used, inbound calls remain the highest-intent touchpoint for service-driven businesses. These are potential leads who are ready to talk and likely ready to buy.

### Enter the AI Voice assistant

AI voice assistants transform the way you handle calls. They bridge the gap between caller intent and business availability, transforming missed calls into quality leads.

**28% of all business calls go unanswered, which are missed opportunities to capture new leads.**

\*Derived from CallRail Voice Assist beta participant insights, comparing performance during the program to the six months prior to enrollment

# Why more businesses are turning to AI voice assistants

Whether it's after-hours, peak hours, or just overflow, AI voice assistants are built to help you stay connected — even when your team isn't available.

Business need	How AI voice assistants help	How this improves your marketing
<b>After-hours lead capture</b>	Keeps the phone “on” when your team is off, so you don’t leave revenue on the table	Extends campaign availability and reach into evenings and weekends
<b>Peak-hour overflow</b>	Handles calls when no one else can, helping you capture every call even during busy times	Reduces CPL by ensuring high-intent leads aren’t wasted
<b>Lead qualification</b>	Asks intake questions and filters for intent, reducing time spent on unqualified leads	Improves lead quality and conversion efficiency
<b>Answering questions</b>	Answers common questions like business hours or services offered	Frees up staff time and improves consistency across campaign-driven traffic
<b>Appointment requests</b>	Collects availability so you can efficiently follow up to confirm the appointment or send an automated follow-up text	Captures intent signals that support downstream conversion tracking
<b>Campaign optimization</b>	Allows you to run ads after hours without forwarding calls to a live assistant or cell phone	Enables smarter ad targeting, higher rankings, and more accurate performance attribution
<b>Consistency and branding</b>	Delivers a friendly, professional experience on every call, regardless of who’s available	Reinforces brand perception across all touchpoints
<b>Visibility into every call</b>	Provides call transcripts, lead scores, and conversation logs	Equips marketers with full context for better follow-up and analysis
<b>Every call attributed to marketing</b>	Ties calls to specific campaigns, ads, or keywords	Clarifies what's driving results and improves budget allocation
<b>Agency support</b>	Ensures no clients’ paid campaign call goes unanswered or untracked	Provides more value to clients and maximizes media spend

# Meet CallRail's Voice Assist

---

## Why Voice Assist stands out

Voice Assist isn't your average AI assistant. It offers near-instant usability with easy setup and lives within the CallRail platform, delivering complete attribution without blind spots. With all your insights in one place, plus flexible voice and notification customization, Voice Assist helps you work smarter and stay in control.

---

## Key features



### Ready in minutes

Voice Assist is tailored to your business, trained on your past conversations and website content, no extra effort or technical expertise required. While other tools start from scratch or rely on generic templates, CallRail does the heavy lifting for you. You can customize the voice, tone, and call flows to match your brand, so the AI assistant behaves exactly how you'd want it to — providing a seamless, on-brand experience for every caller from day one.



### Handles overflow and after-hours calls

Activate Voice Assist whenever you need, 24/7 — whether it's for after-hours coverage, handling overflow during peak times, or screening leads. Every call is handled professionally, from taking appointment requests (for you to confirm later), answering questions about your business, and capturing lead details, to scoring the lead. This allows you to prioritize the most qualified, high-intent opportunities without taking extra time out of your day.



### Custom call flows

Unlike rigid bots with static prompts, Voice Assist lets you tailor greetings, intake questions, and handoff rules. This creates a seamless experience that feels thoughtful, not robotic. You also decide when Voice Assist handles a call and when it gets routed to a human, giving you full control over the caller journey.



### Real-time lead scoring

While some tools log every call equally, Voice Assist evaluates each interaction using AI-powered tagging and scoring. This gives your team instant visibility into which calls are high-intent and should be prioritized first.

# Meet CallRail's Voice Assist



## Notifications

Following Voice Assist handled calls, you'll receive key summaries and insights from each conversation directly to your inbox. You can choose to receive these notifications immediately after each call, or get a consolidated summary daily, weekly, or monthly, helping your team stay informed and act quickly on high-priority opportunities.



## Ad platform integration

Since Voice Assist integrates seamlessly into CallRail, it also integrates with your ad platforms and CRM. Data flows in as soon as the call is handled, so you can enhance ad performance and refine your targeting strategies.



## Ideal for small businesses and agencies

Handle more calls without adding headcount, reduce missed leads, and show clear ROI for every campaign. With Voice AI, small businesses can deliver big-business responsiveness and availability without added costs. Agencies can capture every campaign-driven call, providing value to clients and strengthening marketing attribution, all without overburdening their team.



## Built into CallRail

Calls handled by Voice Assist appear directly in the CallRail platform, complete with answer status filters, automatic tags, and an identifying icon. You can easily view caller intake details in the timeline, slide-up panel, individual call view, and email notifications. Plus, you can provide feedback on the captured information to help Voice Assist continually learn and improve.

### How agencies can capture every campaign-driven call

If you're running paid campaigns for clients, every missed call is wasted ad spend.

Offering your clients a modern voice assistant ensures no high-intent lead slips through the cracks, even after hours or during peak volume.

With the right AI voice solution, agencies can:

- ✓ Ensure attribution for every call tied to PPC, LSAs, and SEO
- ✓ Answer leads 24/7 without staffing extra reps or relying on clients to pick up
- ✓ Send conversion signals back to ad platforms for better targeting and lower CPL
- ✓ Streamline client reporting with transcripts, lead scores, and call summaries

Voice assistants don't just protect your campaigns — they make your agency look great.

# Buyer's checklist: What to look for in an AI voice assistant

Use this checklist to evaluate any AI voice assistant you're considering. Each capability not only impacts the caller experience but also affects lead capture, campaign ROI, and your team's efficiency.

- ☐ **Attribution and call tracking**  
Know exactly which ads, keywords, or channels are generating phone calls using dynamic tracking numbers and multi-channel attribution. This clarity helps you double down on what works and eliminate wasteful spend.
- ☐ **24/7 Availability + overflow handling**  
Ensure no lead is lost due to limited hours or busy staff by using intelligent call routing rules. Stay responsive even when your team can't answer.
- ☐ **Customizable greetings and voices**  
Keep branding consistent by choosing how your AI assistant sounds and what it says — tailored to your business tone and audience.
- ☐ **Lead intake questions**  
Capture key information upfront with intake scripts tailored to your services. More context equals better follow-up.
- ☐ **Lead scoring or intent tagging**  
Automatically assess lead quality using scoring or tagging to identify which callers are high priority, so your team follows up strategically and closes faster.
- ☐ **CRM and platform integrations**  
Choose a voice assistant that syncs caller data directly into your business, marketing, and CRM platforms like HubSpot, Clio, or Salesforce, without manual effort.
- ☐ **Ad signal support**  
Push conversion data back to platforms like Google Ads and LSAs to boost targeting precision and lower cost-per-lead.
- ☐ **Privacy compliance**  
Meet legal standards and build customer trust with secure data handling and consent policies.
- ☐ **Quick setup and training**  
Look for a solution that launches your AI assistant fast with minimal tech lift. No steep learning curve or long delays.
- ☐ **Control over call flows**  
Decide exactly when the AI steps in, what it handles, and when a human should take over. You remain in control of the caller experience.

The right AI voice assistant doesn't just answer the phone. It supports your lead strategy, budget efficiency, and customer experience — all in one platform, without needing to connect or manage multiple tools.

Hello! I know it's late, but can I schedule an appointment?



No problem. I can help you with that.



**John Smith**

CALL IN-PROGRESS



**Sarah J.**

SCHEDULE REQUEST

+\$2,500



**Charlotte R.**

MESSAGE TAKEN

+\$1,500

## Turn missed calls into revenue

With CallRail's Voice Assist, you never have to choose between serving your current customers and capturing new ones. It works seamlessly in the background so you never miss a lead, a question, or a chance to convert.

### Here's what you gain:

- ✓ **More leads captured**  
No matter when they call, Voice Assist has you covered
- ✓ **Fewer missed opportunities**  
AI picks up when your team can't
- ✓ **Smarter ad spend**  
Rank higher and connect every call to the campaign that drove it

Your next customer could be calling right now. Don't lose them to voicemail, or worse, to your competitor.

**Try Voice Assist free**

**CallRail**