



APPWT WEB & AI SOLUTIONS

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The AppWT AI Receptionist Personality Picker Quickstart

AI Receptionist

Written by Anthony “Tony” Paris

AppWT Web & AI Solutions (AppWT LLC, a family company)



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A NOTE ON SPELLING

This manual is read in the United States, Canada, the United Kingdom and Australia. Where a word is spelled differently in different countries, both spellings appear the first time the word is used, like color/colour. After that, one spelling is used so the page stays easy to read.

HOW TO USE THE TECHNICAL NOTES

Smaller italic notes marked *For your tech person* hold the deeper detail: exact settings, file names and commands. You can skip every one of them and the manual still makes complete sense. Hand them to whoever looks after your website.

IMPORTANT

This manual describes security practices that AppWT uses and recommends. It is written as general guidance for business owners. It is not legal advice, and it is not a guarantee that any system cannot be attacked. Security reduces risk. No honest provider will promise to remove risk entirely.

Every incident described in this manual comes from work AppWT actually performed. Client identities are deliberately withheld, because a client's security incident is not ours to publish. Where the business involved is AppWT itself, we name ourselves.

A Note From Tony

The call that started this book was booked as a technical call. A plumbing company wanted their AI receptionist checked, because it was answering every call and booking almost nothing. Nothing was broken. The settings were fine. The receptionist opened with a thirteen-second greeting about the company's history, and every caller with water on the floor spoke over it.

I have been building and fixing things for business owners since 1997, and the same shape of problem keeps arriving in a new outfit. Somebody buys a tool, compares it carefully against the wrong criteria, and then cannot work out why the result is disappointing. With AI receptionists the wrong criteria are feature lists, and the right criteria are things a feature list cannot hold: pace, warmth, question order, and what the receptionist says when it does not know the answer.

So this is a short book about a hiring decision. That is not a metaphor I picked to sound clever. You are choosing who speaks first to every customer you have, including the ones who call at seven in the morning with a problem and three other numbers to try. Nobody would hire a receptionist by reading a list of things they can do. Everybody buys software that way, and the buying habit follows the software into a decision it does not fit.

Here is what I promise. Every chapter ends with something written down. A caller profile taken from your own calls. A weighted scorecard with the date on it. A greeting cut to one breath. A list of the facts the receptionist may state and a failure line for everything else. Twelve test conversations with a veto rule. Six numbers you compute from your own data. Every worked example in these pages uses generic businesses and figures you supply, because I have not seen your town, your callers or your calendar.

Here is what I will not promise. I will not tell you how much a personality lifts a booking rate, because any figure I gave you would be a figure from somebody else's business dressed up as a law. The pattern I will stand behind is that a modest setup with a well matched voice usually beats an expensive setup with a mismatched one. The size of that gap is yours to measure, and chapter twelve shows you how in about ten minutes a week.

Three areas in this book stop and send you elsewhere, and I want that stated before you start. Call recording and consent, disclosure of automated systems, and what a business is permitted to say about health, legal or financial matters are all governed by rules that differ by state and by country, and several of them have been revised since 2024. This is business information and it is not legal advice. A licensed attorney in your own state settles all three in one short conversation, and it is worth having that conversation before launch rather than after a complaint.

This is an expanded edition. The first version was a quickstart in the strict sense, six short chapters covering the tone test, the industry patterns, the greeting, the handoff and the measurement. All of that is still here and none of it has been softened. What is new is the machinery underneath. A weighted scorecard with written anchors, because a good ear produces a decision nobody can explain a year later. A chapter on the settings a personality is actually made of, because owners describe faults in feelings and feelings cannot be adjusted. A blind bake-off, because your own preference is the least reliable input you have. A chapter on the sentences that cost real money, because a receptionist that guesses at a price has made a promise your business then has to keep.

One thing has changed since the first edition and it is worth naming. Owners used to ask whether callers would accept talking to an automated system at all. That question has largely settled itself, and the question that replaced it is sharper. Callers will accept a receptionist that admits its limit and gets them to a person. They will not accept one that traps them in a loop, and they will not forgive one that told them something untrue with complete confidence. Chapters nine and ten exist because of that shift.

Some of what you find here will be uncomfortable. Your own preferred voice may lose the bake-off to the one your front desk picked. A greeting you wrote carefully may need to lose two thirds of its words. The persona that sounds most impressive may be the one that invents an answer under pressure, and the rule in chapter eleven says you remove it anyway. Those are ordinary outcomes and the book treats them as ordinary. What matters is that you decided with evidence in front of you and a date written beside the decision.

One last thing. Your caller profile, your greeting, your fact list and your measurement sheet belong to you, whatever product you happen to be using this year. Tools change and get replaced. A written specification for how your phone should be answered outlasts all of them, and it is the part nobody can sell you. Every page here is written so you can do the work yourself, or organize it into a short brief for somebody who helps you, and still check the result.

Anthony “Tony” Paris

Founder, AppWT Web & AI Solutions · Livonia, Michigan

How to Use This Manual

This manual is built to be worked with a pen in your hand. Keep one folder, on paper or on screen, and put every output in it as you go. Twelve chapters produce one specification, and the last chapter turns it into a checklist with dates on it.

The parts

Part One settles what you are actually choosing. Chapter 1 treats the pick as a hiring decision and gives you the four dimensions every candidate gets scored on. Chapter 2 builds a caller profile from evidence you already own, which is two weeks of calls or one busy afternoon beside the phone. Chapter 3 runs the tone test on your own staff and explains what a split vote means. Chapter 4 turns all of it into a weighted score with written anchors and a tie-break rule. Nothing is bought yet, and that is on purpose.

Part Two fits the voice to the room. Seven caller families sorted by the state people arrive in rather than by trade, with the opening each one needs. Then heritage and language handled honestly, including the pronunciation list that takes an hour and saves you a year of small embarrassments. Then the settings a personality is actually made of, with the symptom each one produces when it is wrong. The part closes with the greeting, the arcs and the failure line.

Part Three covers launch, limits and proof. The handoff triggers that must always reach a person, and the five steps of a transfer nobody has to repeat themselves through. The six sentence patterns that cost real money, with a safe replacement for each. A twelve-conversation bake-off scored blind, with a veto rule written down before anybody knows who will trip it. Then the six numbers, the one-change-at-a-time rule, the full selection checklist and the twelve-month retest.

The boxes, and what each one means

DO THIS TODAY

A gold box is one action you can finish now. If you only ever act on the gold boxes, you will still be far safer than when you started.

FROM OUR FILES

A dark box is a real incident from AppWT work. Nothing in these boxes is invented. Where a detail was never verified, we say so rather than fill the gap.

FOR YOUR TECH PERSON

A smaller italic note like this one carries the professional detail: exact file names, headers, settings and commands. Skip every one and the manual still reads completely. Forward them to your web person.

The sheets, the tables and the few code blocks

There is almost no code in this book. The three code blocks are column headings for sheets you build yourself: the persona spec sheet, the greeting skeleton, and the bake-off score sheet. Type them into any spreadsheet or document you already use. The technical notes are short and practical, covering things like exporting call records, testing the transfer path, keeping one source for facts across two channels, and reading transcripts in a batch. Skipping one never breaks a chapter. Hand it to whoever helps with your phone system, then check the result yourself.

What this book does not promise

No booking rate is promised and no lift figure is quoted, because both depend on a customer base I have not seen. Nothing here is legal advice, and three chapters stop and say so. This is not a setup guide for any particular product either, so you will find no menus, no screenshots and no vendor pricing in it. Website widget placement, page load cost, lead routing and transcript retention belong to the longer AppWT receptionist title, and this one points at them rather than repeating them badly.

If you only have one afternoon

Do four things, in this order. Sit beside whoever answers your phone and log thirty calls on five columns: intent, opening line, pace, words used, outcome. Read your current greeting out loud with a timer and cut it to one comfortable breath. Write the failure line, meaning the sentence the receptionist says when it does not know the answer. Then write down the four baseline numbers you have today, which are calls per week, how many were answered, how many booked, and how many arrived outside opening hours. All four are free, all four take an afternoon, and the last one cannot be done later at any price.

Where to keep the outputs

Keep one folder and name it with the year. The caller profile, the weights, the scorecards including the losing ones, the persona spec sheet, the pronunciation list, the fact list, the bake-off transcripts and the change log all live in it, each with a date on the front. Put the thirty-day, ninety-day and twelve-month reviews on the same calendar as your other renewals, alongside your insurance and your business license/licence, because a review with no date attached is a review that does not happen. Keep the old versions too, since last year's greeting is what tells you whether this year's is better.

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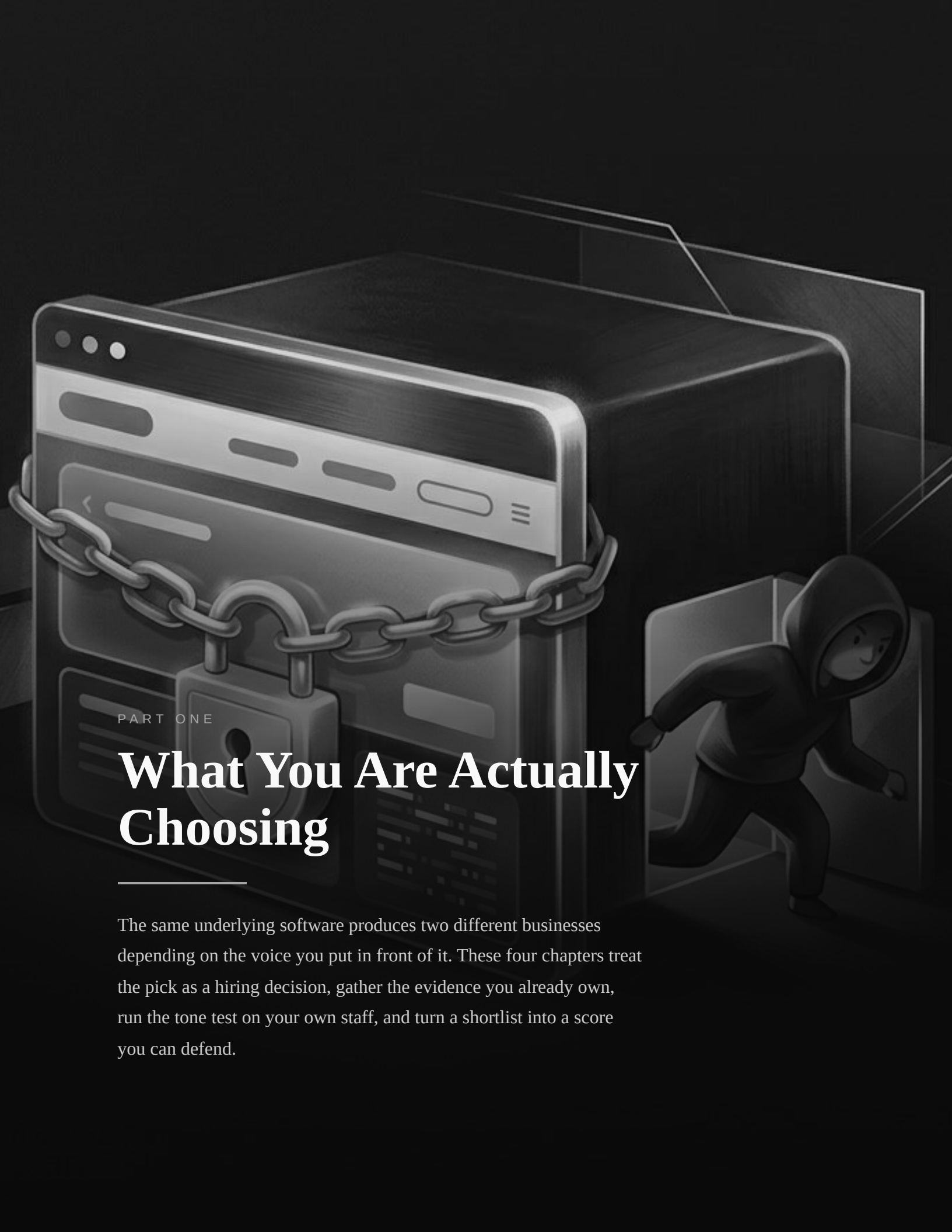
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PART ONE

What You Are Actually Choosing

The same underlying software produces two different businesses depending on the voice you put in front of it. These four chapters treat the pick as a hiring decision, gather the evidence you already own, run the tone test on your own staff, and turn a shortlist into a score you can defend.



The Same Brain, Two Completely Different Businesses

Chapter 1. Why the personality decides the result more than the feature list does

Two businesses can buy the same AI receptionist, switch on the same features, and get opposite results. The difference is the voice in front of the software. This chapter treats the pick as a hiring decision and gives you the four dimensions every candidate gets scored on before you listen to a single sample.

A three-chair dental practice and a two-van plumbing company sign up for the same AI receptionist in the same week. Same software. Same plan. Same feature list, ticked the same way. Both owners switch it on for after-hours calls first. Six weeks later the dental practice has quietly turned it off, and the plumbing company has moved it onto daytime overflow because it keeps catching work the front desk was missing. Nothing about the product changed between those two buildings. The only thing that differed was the voice, and the voice is the whole product as far as the caller is concerned.

That is the argument of this book in one paragraph. Choosing an AI receptionist is a hiring decision, not a software purchase. You are not comparing storage limits. You are deciding who answers your phone at seven in the morning when a customer has a problem and three other numbers to try. The underlying language model, the configuration and the feature set can be identical across two candidates, and the customer experience will still split in two, because voice, pace, warmth and word choice are what the caller actually meets.

What a Personality Actually Changes

It helps to be precise about what moves when you swap a persona, because the word personality sounds vague and the settings underneath it are not. A persona is a bundle of concrete decisions. Every one of them is adjustable, and every one of them is visible to the caller in the first fifteen seconds.

- The voice itself: pitch, accent, and how much air sits behind it.
- Speaking rate, and whether the rate changes when the caller sounds rushed.
- How long the receptionist waits before deciding the caller has finished a sentence.
- Vocabulary. Technical terms, or plain words a first-time caller already knows.
- How much rapport it builds before it asks for the first piece of information.
- The order it asks for things, which decides how much a caller has to explain before getting help.
- What it does with silence, which is either an invitation or an interrogation depending on the persona.
- The exact sentence it uses when it does not know the answer.

None of those appear on a comparison chart. All of them decide whether a caller books. The pattern worth planning around is that a modest configuration with a well matched personality tends to beat a far more expensive one with a mismatched personality on the things you care about, which are completed bookings and how customers describe the call afterwards. Treat the size of that gap as something to measure inside your own business rather than a figure to accept from anyone, including us. Chapter twelve shows you how to measure it.

PLAIN ENGLISH

The same AI brain feels completely different depending on the voice and personality you give it. A cheaper setup with the right personality will usually beat an expensive setup with the wrong one, because the caller never sees the setup. The caller only hears the voice.

FOR YOUR TECH PERSON

A persona is assembled from three layers that are usually configured in different places. The voice layer turns text into speech and owns pitch, accent and speaking rate. The instruction layer owns character, vocabulary and what the receptionist refuses to do. The tool layer owns what it can actually look up or write, such as a calendar or a customer record. When you ask a vendor what you can change yourself, ask about all three, because control of one is often sold as control of the persona.

The Four Dimensions

Every candidate personality gets scored on four dimensions. Score all four before you listen to a single voice sample, because a sample heard early anchors your ear and you will spend the rest of the process defending a first impression. The four are heritage, tone, expertise and customer intent. Each one answers a different question, and each one draws on evidence you already own.

DIMENSION	THE QUESTION IT ANSWERS	EVIDENCE YOU ALREADY OWN	WHAT GOES WRONG WHEN YOU SKIP IT
Heritage	Does a culturally familiar voice remove friction for the people who actually call?	The languages spoken at your counter, the names in your customer records, the area you serve.	Either a voice that feels foreign to your regulars, or a cultural voice adopted by a business that does not serve that community.
Tone	What emotional state is the caller in when the phone connects?	Recorded calls, and the first sentence callers say before anyone asks a question.	Speed reads as indifference to an anxious caller, and warmth reads as stalling to a caller in a hurry.
Expertise	Does the persona need trade vocabulary, or does it need plain words?	The three questions callers ask most often, written in the caller's own language.	A receptionist that cannot tell two of your services apart, and books the wrong one.
Customer intent	Do callers want to book, ask, complain, or check on something they already bought?	Your call log sorted by outcome, and the reason each call ended.	One conversational path for four different jobs, which serves the most common one and fails the rest.

Heritage is the dimension people either overweight or refuse to look at. Handled well it is simple. A culturally familiar voice removes a small friction at the start of a call for a customer base that shares that background. It does not create demand, it does not fix a bad price, and it never substitutes for competence. The honest position is that the effect is real, modest, and only visible in your own numbers. Chapter six draws the line between an invitation and a costume, and gives you a decision table for a mixed or multilingual customer base.

Tone is the dimension with the widest spread of outcomes, which is why chapter three gives it a whole test. Expertise decides whether the receptionist can hold a conversation about your services without guessing, and guessing is the single most expensive habit a receptionist can have. Customer intent is the one owners forget, because they picture the caller who wants to book and forget the caller who is angry, the caller who is already a customer, and the caller who dialled the wrong number.

Why Feature Lists Win the Comparison and Lose the Call

Most buyers compare feature lists. That is not laziness. A feature list is easy to compare, it fits in a table, and two people can look at it and agree on what it says. Voice fit is harder to judge on paper, and voice fit is the part the caller actually experiences. So the comparison gets made on the easy thing, and the decision gets made on the hard thing, and nobody notices the swap until the numbers come in.

THE DEMO THAT SOUNDED PERFECT AND BOOKED NOTHING

A two-van plumbing company watched a vendor demonstration and picked the persona that sounded most polished. It opened with a full paragraph about the company's history and values before offering to help. In the demo that sounded professional. On real calls it failed a specific way. A caller with water on the floor does not want a paragraph, and the owner could hear it in the recordings, because callers started talking over the greeting about eight seconds in. The owner did one thing. He cut the greeting to a single breath and moved the availability question to the front. He did not change the voice, the plan or the price. He kept the rest of the setup identical for four more weeks so he could see what one change did. That is the method the rest of this book teaches, and the fix cost nothing but an afternoon.

THE DEMO TRAP

A vendor demonstration plays the persona at its best, on a script written to flatter it. Ask to hear the same persona handle your three most common caller questions instead, in your own words, including the one your staff hate answering. A voice that sounds impressive in a demo can still lose the call when the pacing fights the caller's expectations.

FOR YOUR TECH PERSON

Ask for a sandbox number before you commit to anything. A number you can call from your own phone, at any hour, with the setup you would actually run, is worth more than any amount of recorded demonstration. If a sandbox is not available, ask why, and treat the answer as part of the evaluation.

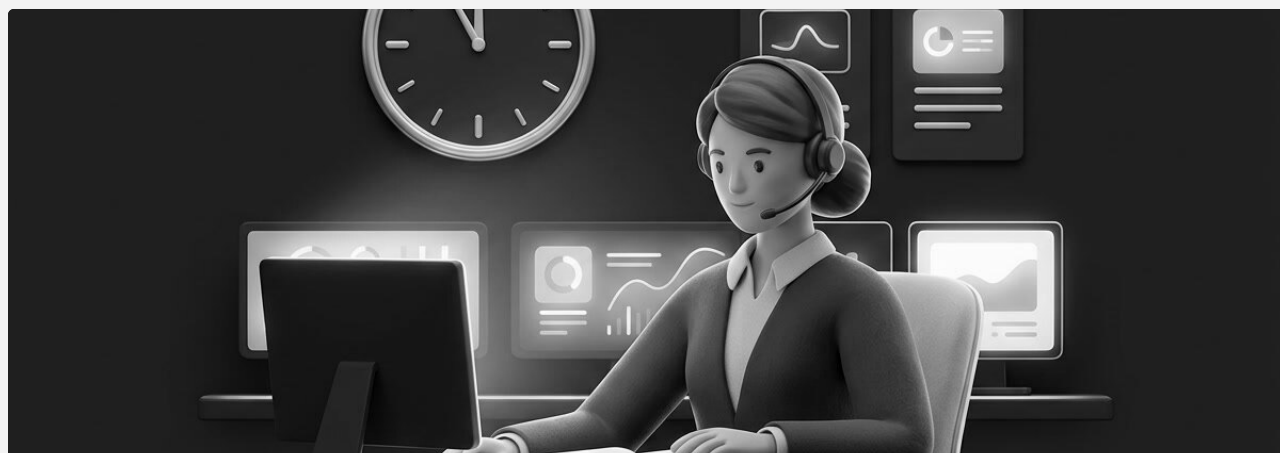
There is one more reason to score before you listen. A voice sample is a performance, and you are a bad audience for it. You know your own business, you already know the answer to every question in the script, and you cannot un-know it. Your callers know none of that. Scoring on four dimensions first forces you to describe the caller before you describe the voice, and the description of the caller is the thing that should decide the pick.

You are not buying software. You are hiring the first person every customer meets.

One last framing before the work starts. A catalog/catalogue of named personalities is a set of starting hypotheses, not a set of answers. Two hundred candidates does not make the choice harder, it makes it possible, in the same way that a large pool of applicants makes a hiring decision better rather than worse. What makes the choice hard is having no method. The next chapter builds the method from the cheapest evidence you own, which is the calls already coming into your business this week. Read those first, and you will recognize/recognise the right persona when you meet it, because you will already have written down what it has to do.

WHAT TO REMEMBER

- Choosing an AI receptionist is a hiring decision, and the personality is the part the caller actually meets.
- A personality is a bundle of concrete settings, including pace, vocabulary, question order and what happens in a silence.
- Score every candidate on heritage, tone, expertise and customer intent before you listen to a single voice sample.
- A feature list is easy to compare and does not decide the call, so do not let it decide the purchase.
- A vendor demonstration is a performance on a friendly script, so ask for your own three questions instead.
- Any claim about how much a personality lifts your results is only worth what your own before and after numbers say.



Read Your Own Calls Before You Read Any Personality Card

Chapter 2. Building the caller profile from evidence that is already sitting in your business

Your own preference does not decide this, and neither does a listing page. The people who call you decide it. This chapter turns two weeks of ordinary calls into a written caller profile, and gives you the five things to record so the profile survives an argument.

Every owner has a picture of their customer in their head. That picture is usually built from the memorable calls, and memorable calls are not typical calls. The customer who complained at length, the one who bought the biggest job, the one who was rude to the front desk. Those three take up more room in memory than the forty quiet callers who booked without incident. Pick a persona from the picture in your head and you will be fitting a voice to three people out of forty-three.

So start with evidence you already own and did not have to buy. Your recent calls, the people who answer your phone, and the text of your reviews all describe the customer you actually get rather than the one you imagine. This chapter turns that raw material into one page. That page is the specification the persona has to meet, and every later chapter reads from it.

Two Weeks, or One Busy Afternoon

There are two honest ways to gather the material. If you record calls and you are permitted to review them, listen to two weeks of them. If you do not record, sit beside whoever answers the phone for one busy afternoon with a pad. The afternoon is worse evidence than the two weeks, and it is far better than nothing. Do not wait for a perfect data set. A rough profile written this month beats a precise one written never.

Before you listen to a single recording, confirm what you are allowed to do with it. Call recording consent rules differ by state and by country, and some places require every party on the call to consent rather than just one. The rules also apply to how long you keep the recording and who inside the business may hear it. A licensed attorney in your own state settles this in one short conversation, and it is worth having before you build a habit around recordings. Nothing in this book is legal advice.

FOR YOUR TECH PERSON

Strip personal details before a transcript leaves the room it was recorded in. Replace names, phone numbers, addresses and account numbers with placeholders, and keep the mapping somewhere separate if you need to trace a call back. Do the replacement with a script rather than by hand, because hand redaction misses one instance in every long transcript and the one it misses is usually a phone number.

1. Listen to two weeks of recorded calls, or sit beside whoever answers the phone for one busy afternoon.
2. Write down the three questions callers ask most often, word for word, in the caller's own language rather than yours.
3. Note the pace. Do callers rush straight to the point, or do they chat first and arrive at the reason slowly?
4. Note the vocabulary. Technical callers want precise terms, and everyday callers want plain words and no acronyms.
5. Mark every call that ended without a booking, and write one sentence on why it ended.

Step two is the one people shortcut, and it is the one that pays. Write the question in the caller's words, not the corrected version. A caller who asks whether you can come out today is not asking about your service window. A caller who asks how much to fix a tooth is not asking for your fee schedule. The persona has to answer the question that was asked, so the question has to be recorded as asked. Keep the ungrammatical version. Keep the local word for the thing. That vocabulary is what you will paste into the script in chapter eight.

Step five is the one that changes the pick. A call that ended without a booking failed at a specific point, and the point is usually one of five: the caller could not get a price, the caller could not get a time that worked, the caller was put on hold and left, the caller reached voicemail, or the caller did not feel understood. Those five failures need five different fixes, and only two of them are personality fixes. Knowing which failure dominates stops you buying a voice to solve a scheduling problem.

The Five Things to Record on Every Call

Keep the log small enough that a busy person will actually keep it. Five columns is the limit. More columns produce a beautiful sheet for three days and an empty sheet afterwards. Tally marks are fine. Precision is not the goal, and the pattern shows up quickly once thirty calls are on the page.