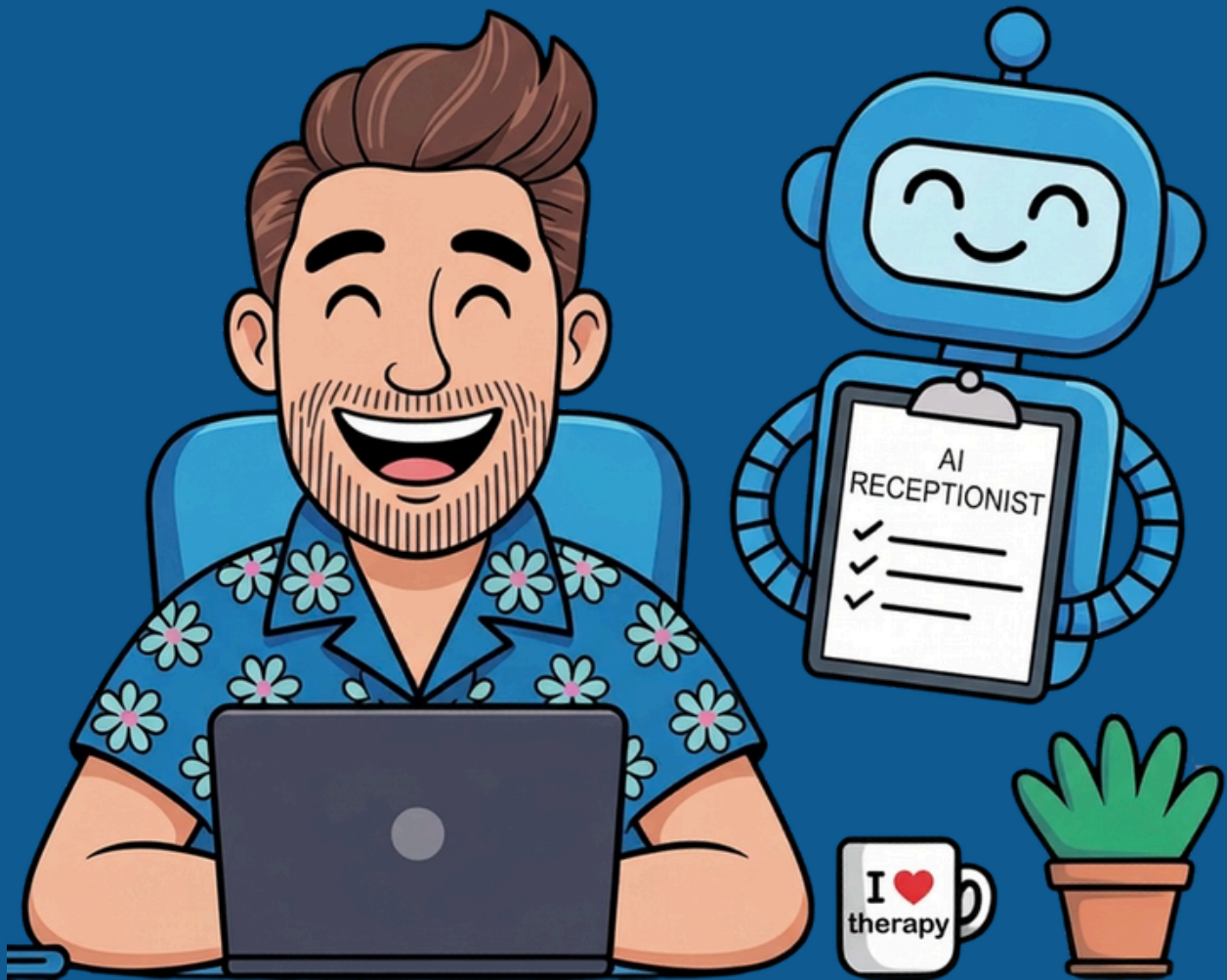


The AI RECEPTIONIST BLUEPRINT

The 4 Essential Parts of an AI Receptionist
for Your Therapy Practice



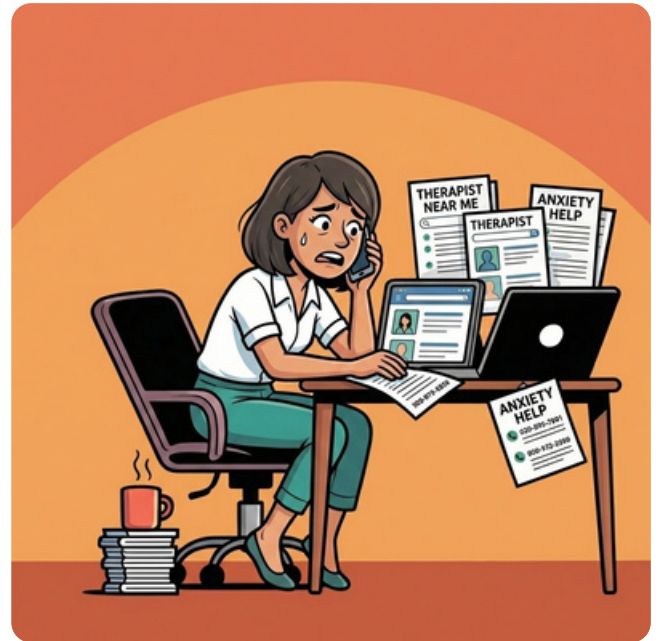
From
productivetherapist

ARE YOU LOSING POTENTIAL CLIENTS?

Here's a stat that should make you uncomfortable: **78%** of clients choose the first practice that responds to their inquiry. Not the best therapist. Not the cheapest option. The first one to pick up.

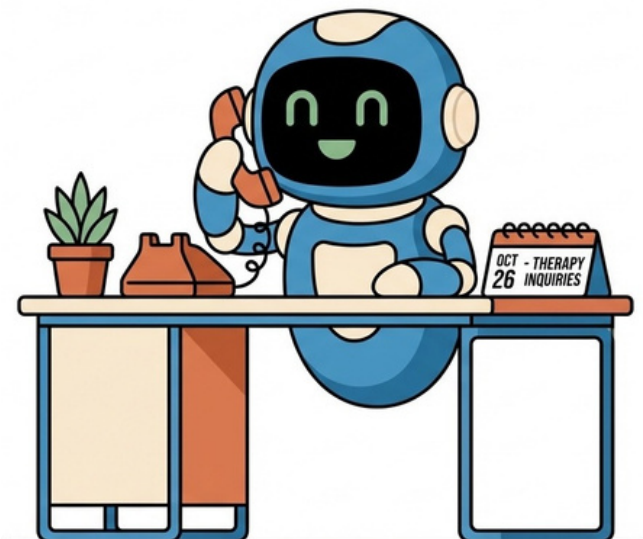
And here's the kicker, the average therapy practice takes **2-3 hours** to respond. Some take a full day. A few? Never respond at all.

Meanwhile, that potential client has already called two other practices, booked with one, and moved on with their life.



THE FIRST RESPONSE REALITY

Practices that respond within 1 minute see 391% higher conversion rates.
An AI receptionist can respond in under 10 seconds. Every. Single. Time.



A well-built AI receptionist is warm, knowledgeable, and empathetic. It knows your practice, understands your specialties, and guides potential clients through the exact same process your best intake coordinator would, just faster, and 24 hours a day.

In this guide, I'm going to walk you through the 4-part framework we use to build AI receptionists for therapy practices. You'll get real examples, practical tips, and enough of a foundation to understand what goes into building one for your practice

1. AGENT DETAILS

Before your AI receptionist can help anyone, it needs an identity and some basic instructions. Think of this like onboarding a new front desk team member, you wouldn't hand them a phone and say 'good luck.' Agent Details are the configuration settings that define who your AI is and how it presents itself.

WHAT GOES INTO AGENT DETAILS?

Agent Name	The name your AI introduces itself as
Business Name	Your practice name
Voice	The AI voice persona — gender, tone, speed, etc.
Language	Primary language for conversations
Timezone	Ensures accurate scheduling references
LLM Model	The AI engine powering conversations
Initial Message	The first thing your agent says

Agent Name: Jennifer

Business Name: InTune Family Counseling

Voice: English, Female, Response Speed Moderate

Initial Message: "Thanks for calling InTune Family Counseling. I'm Jennifer, a friendly AI assistant. How can I help you today?"

The voice matters more than you'd think. Your agent's voice is the first impression a potential client gets of your practice. For therapy, you want something warm and calm, not corporate or overly perky. People reaching out for therapy are often nervous. Meet them there.

2. AGENT GOALS

This is where most DIY attempts go sideways. People build an agent that can answer questions, but forget to tell it what the point of the conversation is. Your AI receptionist isn't a search engine. It's an intake assistant (a really warm, empathetic one).

1. Book the consultation call — This is the #1 job
2. Collect key information — Name, email, reason for therapy, insurance
3. Create a warm first impression — People are often anxious or uncertain

KNOWLEDGE BASE VS. THE PROMPT

KNOWLEDGE BASE	PROMPT
Facts about your practice	How the agent should behave
Clinician bios & specialties	Conversation flow and steps
Insurance panels & rates	Tone and personality guidelines
Office hours & locations	Crisis handling protocols
FAQs (parking, telehealth, etc.)	Escalation rules
Selected website content	Role definition & boundaries

Pro tip:

Your knowledge base shouldn't include your entire practice website content.



3. AGENT ACTIONS

Goals are the destination. Actions are the vehicle. This is what separates a basic AI receptionist from an advanced AI receptionist.

DURING THE CALL

- Check calendar availability
- Book an initial consultation
- Answer FAQs from the knowledge base
- Match caller to the right clinician
- Transfer to a human

AFTER THE CALL

- Update your CRM with contact info
- Add a call summary to the contact record
- Send confirmation messages
- Trigger automated follow-up
- Notify your team via email

Here's where it gets technical:

Each of these actions requires integration with your existing systems, your calendar, phone system, and email tools.

Getting the AI to talk is the easy part. Getting it to actually do things inside your connected software platforms? That's where most DIY projects stall out.



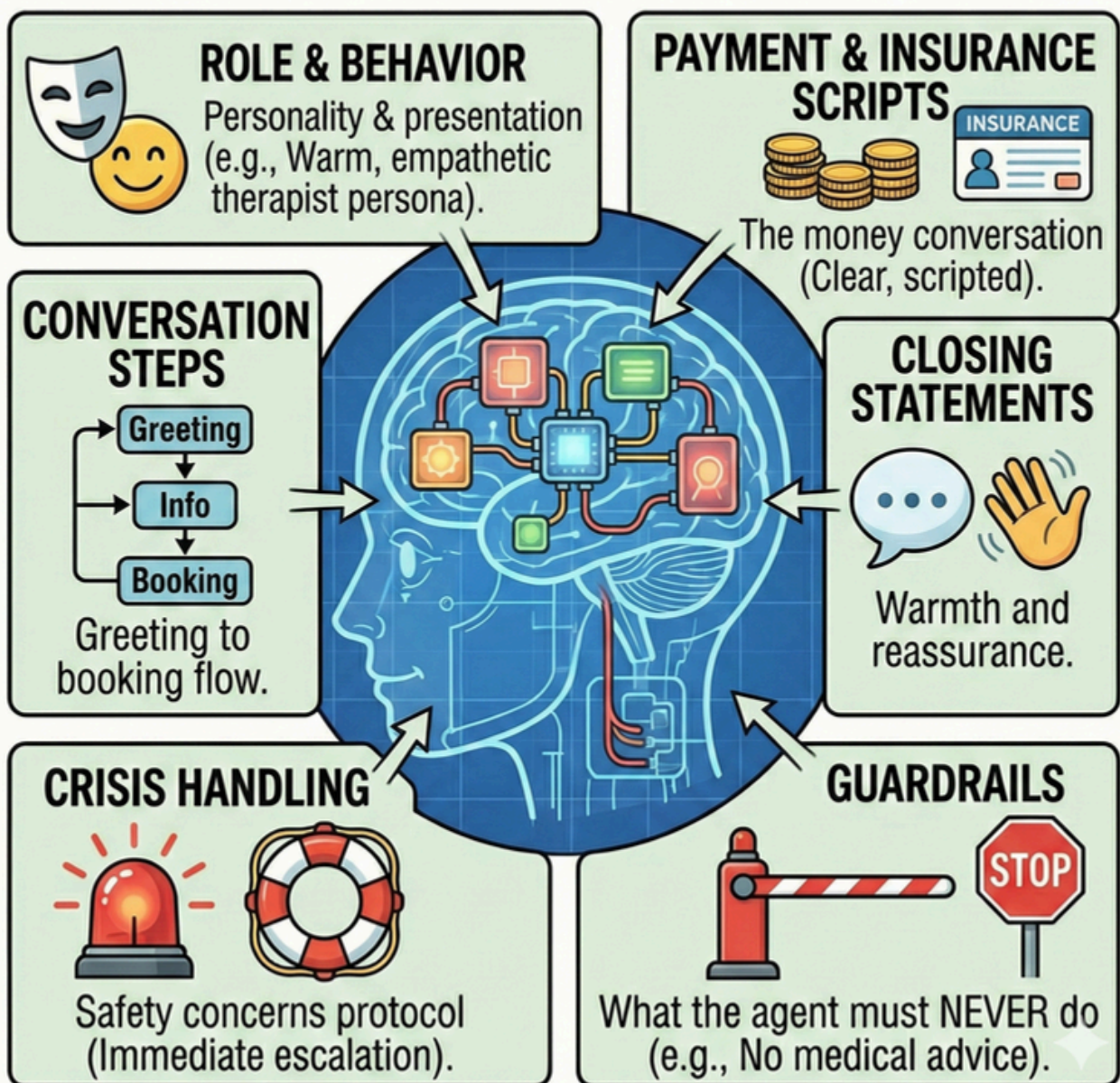
Important:

Your agent should never provide clinical advice, diagnose, or make promises about treatment outcomes. It's a receptionist, not a clinician

4. AGENT PROMPT

If the knowledge base is the brain and the actions are the hands, the prompt is the personality and the playbook that brings it all together.

ANATOMY OF A GOOD AGENT PROMPT



PROMPT SAMPLE

SAMPLE PROMPT SNIPPET (Simplified)

ROLE & BEHAVIOR

You are Jennifer, a warm and professional AI assistant at InTune Family Counseling.

- Speak naturally, like a helpful front desk team member
- Never say you're an AI unless asked
- Use a warm and understanding tone

STEPS TO FOLLOW

1. Greet the caller and collect name + email
2. Ask what's bringing them to therapy
3. Offer a consultation time and confirm

CRISIS HANDLING

If caller expresses safety concerns: "I hear that you're going through something really difficult. Please call or text 988 for immediate support."

[... continues for additional pages ...]

THE ICEBERG EFFECT

What you see above is maybe 20% of a production-ready prompt. A full prompt can be hundreds to thousands of words long and accounts for many scenarios. It takes significant iteration and testing to get it dialed in just right.

WHY MOST AI AGENTS FALL SHORT

Getting one that actually works requires:

- Training it on the specifics of your practice
- Ensuring HIPAA compliance and data security
- Crafting responses that sound human, not robotic
- Ongoing monitoring and refinement based on real conversations
- Understanding of insurance, scheduling, and common client questions

Most AI tools are either too generic for therapy practices or they require constant tweaking to get right.

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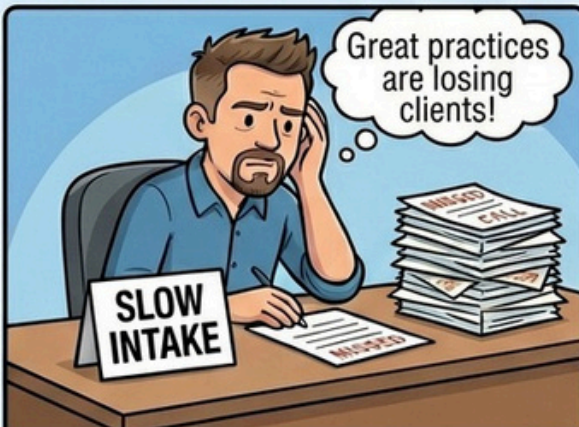
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YOUR NEXT STEP

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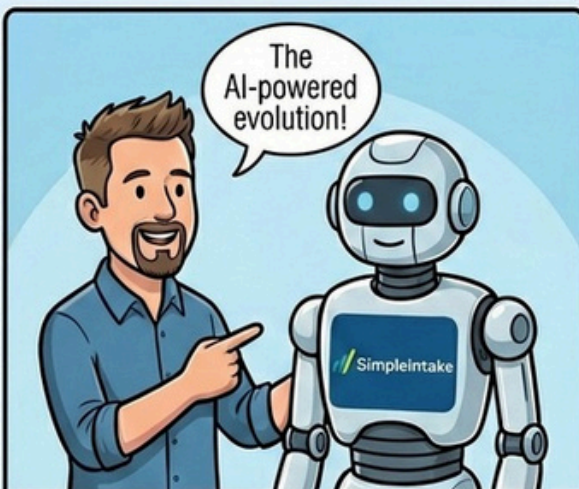
MEET URIAH: FOUNDER OF PRODUCTIVE THERAPIST



FORMER GROUP PRACTICE OWNER:
Tired of slow intake processes.



SINCE 2018: Helping hundreds streamline their intake.



SIMPLEINTAKE: The AI-powered intake solution.



THE GOAL: Turning more inquiries into booked clients.