Stop answering basic questions on the phone

> *“Half the calls I take are just asking for our hours, location, or parking, which interrupts real work.”*

Category: operations **Setup Time:** ~30 minutes **Estimated Hours Saved:** 4 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Set up a simple phone menu (IVR) that answers the most common questions before the phone even rings on your desk. By routing callers with 'Press 1 for hours and location, Press 2 to book, Press 3 for anything else', you immediately filter out non-revenue calls. You can have a pre-recorded message answer the basic questions and only ring your actual phone when a human really needs to speak to you.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **OpenPhone:** **(paid)**
- **Dialpad:** **(paid)**
- **Google Voice:** **(free-tier)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Write down your top 3 questions**
   Keep a tally for one week. Usually it's hours, location, and pricing/booking.

2. **Record a greeting**
   Keep it fast. 'Thanks for calling [Business]. For hours and location, press 1. To receive a text with our booking link, press 2. To speak with our team, press 3.'

3. **Configure the routing**
   In your phone system, set Option 1 to play a recorded message, Option 2 to trigger an auto-text, and Option 3 to ring your devices.

4. **Test every option**
   Call from your cell phone to ensure the routing works and the audio is clear.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Do customers hate phone trees?

A: They hate 9-option mazes. A simple 3-option menu that gives them the answer faster than waiting on hold is appreciated.

Q: Which phone system supports interactive voice response (IVR) menus without expensive hardware?

A: OpenPhone (Business plan at /user/mo), Dialpad (/user/mo), and Google Voice for Workspace (Standard tier at /user/mo) all provide cloud IVR call routing.

Source: dgfcorporations.com/fixes/call-routing-menu/ · Free to use, modify & deploy

Master Client Ownership · Zero Agency Retainers