

Voice agent proposal for [Client name]

Prepared by [Agency name] for [Contact name] · [Date] · Valid for [30] days

How to use this template

Replace everything in [brackets] with your own details, delete this box and the notes in italics, and keep only the sections that apply. Nothing here is a promise about any tool: write only what you will really deliver.

1. Summary

[Client name] receives calls about [appointments, prices, opening hours]. We will set up a voice agent that answers them [24 hours a day / outside business hours], in [Spanish and English], and passes to your team every call that needs a person.

The goal: [no call goes unanswered / the front desk stops being interrupted / every after-hours caller gets an answer]. We will measure it with the number of calls answered, the calls transferred to your team and the minutes used each month.

2. What is included

- One voice agent for [number, for example the main line], with a script written from the information you give us.
- A knowledge base with your services, prices, hours and the answers to your most frequent questions.
- Connection of your business number [by forwarding / by a SIP trunk / a new number].
- Rules to transfer the call to a person: who, in which hours and what happens if nobody answers.
- [Calendar or CRM connection for booking appointments, if it applies].
- A greeting that tells callers they are speaking with an AI and, if recording is on, that the call may be recorded.
- [Number] test calls with you before going live, and adjustments from what we find.
- [A dashboard or a monthly report] with calls, answered rate, minutes used and the calls that were transferred.

What is not included

- Telephone carrier charges and number rental, unless we agree otherwise in writing.
- Integrations with systems other than the ones listed above.
- More than [2] rounds of changes to the script each month.
- Legal advice on recording calls or on telling people they speak with an AI: please check the rules where your callers are.

3. Plan and price

Item	Price	Notes
Setup (one time)	US\$[___]	Script, knowledge base, number connection and tests.
Monthly plan	US\$[___] per month	Includes [___] minutes of calls.
Extra minutes	US\$[___] per minute	Minutes beyond the included ones, billed at the end of the month.
Billing	Monthly, on the [1st]	By [invoice / card]. Payment due in [7] days.

Note for you, delete before sending

Not sure what to charge? Put your provider's cost per minute, your plan and your client's expected usage into the minutes calculator at teldash.com/resources/minutes-calculator to see your margin before you send this.

4. Timeline

When	What happens	Who
Week 1	We collect the information and the access we need.	[Client] and [Agency]
Week 2	We build the agent and test it internally.	[Agency]
Week 3	Test calls with your team and adjustments.	[Client] and [Agency]
Week 4	Go live, and a review of the first calls.	[Agency]

5. What we need from you

- Business hours, including holidays.
- Your services, prices and the answers to the questions callers ask most.
- The numbers to answer and the numbers to transfer to, with their hours.
- The names and roles of the people who receive transferred calls.
- Your decision on recording calls, and approval of the greeting.
- One contact who can approve changes within [2] business days.
- Access to [calendar / CRM], if it applies.

6. Calls, recordings and data

Callers will hear that they are speaking with an AI and, if recording is on, that the call may be recorded. We agree the wording with you. Recordings and transcripts are kept for [____] months and are seen only by [the people you name]. If a caller asks for their data to be deleted, we will tell you how to do it.

7. Terms

- Term: [month to month / [__] months], renewing automatically.
- Cancellation: with [30] days' notice, in writing.
- Unused included minutes [do / do not] roll over to the next month.
- If we need to change the price, we will tell you [30] days before it takes effect.
- We will respond to problems within [1 business day]. We do not promise uninterrupted service, because it depends on the telephone and AI providers we use.
- The scripts and the knowledge base written for you are yours.

8. Acceptance

	[Client name]	[Agency name]
Name		
Title		
Signature		
Date		