ChatGPT

Designing and Optimizing Outbound AI Cold-Calling Agents (Assistable.ai + GHL)

1. How Assistable.ai Outbound Call Agents Work

Dynamic Fields & Custom Values: Assistable.ai integrates with GoHighLevel (GHL) to pull in contact-specific data and preset values for personalization. *Dynamic fields* refer to contact attributes (e.g. first name, last name, lead details) that the AI can reference using placeholders like `{{contact.first_name}}`. *Custom values* are static constants or account-wide info (e.g. company name, promo URLs) referenced as `{{custom_values.value_name}}`. In practice, you define placeholders for dynamic info (e.g. `{client_name}`) which get replaced with actual contact data at runtime, while custom values ensure certain info (like your agency's phone number or a standard offer) is always included [1] [2]. This system lets your AI agent greet contacts by name, mention their last appointment date, credit score, etc., making calls feel highly personalized. For example, Emma's script might include: "Hey *{{contact.first_name}}*, I'm calling back about your solar consultation last *{{contact.last_appointment_month}}*…" – these curly-brace tokens get filled in automatically from the GHL contact record.

Prompt Snippets & Templates: Rather than one giant script, Assistable uses *modular prompt snippets* to build the AI agent's persona and behavior. You can mix and match template "snippets" for common functions and style guidelines. For instance, built-in snippets include **Identity** (who the AI is and role), **Personality Traits**, **Style Guardrails** (e.g. "be concise, avoid jargon"), **Response Guidelines**, **FAQs** for common questions, and **Booking Protocol** for scheduling appointments. Each snippet is a block of instructions in the prompt that covers a specific aspect. Using these ensures your assistant has a consistent character and follows best practices. For example, an Identity snippet might say: *"You are Emma, a friendly, laid-back solar consultant for Rate Reduction CA…"*, while a Style snippet ensures the AI speaks casually and avoids sounding like a telemarketer. By breaking the global prompt into sections, you create a **modular structure** that's easier to manage and update (versus one long monologue). This modular approach is crucial – *concise, sectional prompts work far better than a single complex block*, especially in Assistable [3] .

Tools & Actions (Tasks, Extraction, Scheduling): Assistable AI agents can perform actions via **Tools** – essentially giving the AI "hands" to interact with GHL. There are different tool types, all configurable in the assistant's settings [4] :

- *Platform Tools:* Pre-built actions that do tasks in GHL for you, such as updating contact info, managing calendars, creating CRM tasks, etc. For example, a "Book Appointment" tool can check a linked GHL calendar and schedule a meeting, or an "Update Contact" tool might fill in a field like `contact.disposition`. These come with built-in logic so the AI just needs to invoke them (often by following your prompt instructions).

- *Extraction Tools:* These allow the AI to **extract information from the conversation and save it into a GHL custom field** [5] . For instance, you might add an extraction tool to capture the contact's **average monthly electric bill** or email address if the AI asks for it. The assistant's prompt can be written to say, *"By the way, roughly how much is your monthly power bill?"* – when the user answers, the AI will parse the number and automatically populate your `Avg Monthly Bill` custom field in GHL. This is extremely useful for qualification data capture.

- *Add/Remove Tag Tools:* The AI can tag contacts in GHL based on conditions (e.g. add a "Not Interested" tag if the prospect declines, or "Call Back" tag if they request a later follow-up). Tagging is powerful because it can trigger GHL workflows (more on that below).

- *Custom API Tools:* For advanced cases, you can create custom tools that call external APIs (or GHL's API) to do things beyond the built-ins. For example, sending an invoice or looking up external data. The API response is fed back into the AI's context.

- *Call Transfer:* (Specific to voice agents) You can set up a Transfer tool that allows the AI to hand off the call to a human or another number if needed (e.g. transfer to a live rep when a lead is hot).

Using these tools, your AI caller becomes **action-oriented**. You'll want to configure key tools like **"Check Availability"** and **"Book Appointment"** for scheduling, **"Create Task"** for any follow-up tasks, and extraction tools for any lead info you need to capture on the call. *Assistable's voice AI is pre-injected with a basic booking workflow*, but you must still attach a calendar and these tools to actually let the AI book appointments [6] [7]. In short, give your assistant the right "abilities" and it can book meetings, update fields, add notes, etc., all during the live call.

Internal Logic: Rejections, Fallbacks & Branching: A well-designed Assistable agent handles different conversation paths gracefully. Much of this comes from how you write the prompt and leverage Assistable's settings:

- *Rejection Handling:* Prepare your assistant with instructions and examples for common objections (e.g. *"Not interested," "Too expensive," "I need to think about it,"* etc.). Assistable allows you to include a dedicated **Objection Handling** section in your prompt where you list typical objections and how to respond [8] [9]. Top-performing AI agents use multiple sales frameworks here – e.g. a classic **Feel-Felt-Found** approach or other empathetic responses – rather than a single canned reply [10] [11]. By giving the AI a "playbook" of objection responses in the prompt, you ensure it can pivot naturally when a homeowner resists. For example, if a customer says *"I'm not interested anymore,"* Emma might reply with a gentle acknowledgment and a reason to reconsider: *"Got it, I hear you. Honestly, a lot has changed lately – new incentives came out that might make it worth a second look. Would it hurt if I share the latest info?"* This kind of dynamic branching is mostly handled by the AI following your prompt examples rather than hard code. **Keep objection responses short and targeted** – perhaps 1–2 lines each – so the AI can recall them quickly in the flow [12].

- *Fallback Scripting:* Fallbacks are the lines or actions the AI should use if the conversation isn't going as planned – for instance, if the contact is unresponsive or continues to decline. In Assistable, you typically incorporate these instructions into the **Important** or **Tasks** sections of your prompt. A common voice fallback is handling **dead air**: If the call connects but the person hasn't said "hello" (maybe they're confused or silent), it's best practice for the AI to *not* jump straight into the pitch. Instead, configure a **"silent start"**: have the AI wait for the contact to say hello first [13]. You can set this in Assistable's call settings (choose "Contact starts – Silent start" for outbound calls). Then, include a fallback if silence persists – e.g. *"If the contact does not respond within 5–10 seconds,* *say: 'Hello? [Name]?...' then pause briefly and proceed with the intro."* [14]. This way the AI sounds polite and human, and you avoid the common robocall giveaway of talking over a prospect's greeting.

- *Branching Conversation Flows:* While the AI (using an LLM) will handle a lot of dialogue nuance, you can design basic branches using **conditions and tags**. For example, in your prompt's task list you might instruct: *"If contact says they already have solar, gracefully wrap up – tag them 'AlreadyHasSolar' and end the call."* Or *"If contact expresses interest, proceed to schedule – use the Calendar tool."* The heavy lifting of true branching (like if/then logic) can also be done with Assistable's platform logic or GHL workflows. The key is not to overstuff the prompt with complex conditional instructions (avoid deeply nested "if they say X then do Y then if Z..." in one prompt – that's better handled by the system or multiple prompts) [15]. Give the AI straightforward guidance and let GHL or Assistable handle the rest via triggers (e.g. different tags for different outcomes). In practice, a *linear prompt structure* that mirrors a normal call works best: introduction, qualification questions, pitch, **if interested -> booking**, **if hesitant -> objections**, and **close** [16] [17]. This keeps the AI focused and prevents confusion. Remember, *concise and modular beats convoluted*: it's been observed that a clear, sectioned prompt in Assistable yields more reliable performance than a tangled flowchart in text [18] [19].

2. Integrating Assistable Agents with GoHighLevel Workflows

One of the big advantages of Assistable.ai is its deep integration with GoHighLevel – meaning your AI calls can seamlessly update contact records and trigger GHL automations. Here are best practices for integration:

Updating GHL Fields During Calls: As the AI gathers information or reaches outcomes, make sure to log that data in GHL for later use. Using the **extraction tools** mentioned, you can map conversational data to custom fields. For example, if your campaign needs the homeowner's electric bill or roof type, add those as custom fields in GHL and attach extraction tools for them. In the prompt, instruct the AI to politely ask those questions if the fields are empty (and only if empty, to avoid redundancy). The AI will then fill the fields behind the scenes. All this info (plus a call transcript) will be saved to the contact's **Conversation** in GHL. The platform is capable of logging *every answer, tag, and call recording directly into the CRM* – so use that to qualify leads in real-time [20] [21]. For instance, *Emma* might ask "By the way, about how much is your monthly electric bill?" and once the user answers, the `Avg Monthly Bill` field gets updated. This **data capture & CRM sync** is key – *during calls, AI can capture key info (budget, location, etc.) and log it directly into GHL* for your team to review [22].

Triggering Workflows from AI Outcomes: Leverage **tags and custom fields** updated by the AI to kick off automated follow-ups in GHL. A common pattern is to have the AI apply different tags depending on call results (these can be done via the Assistable "Add Tag" tool or even by configuring the *Make AI Call* outcome). For example: *"Add tag 'AI-Booked' when appointment is scheduled"* or *"Tag = Not Interested if the contact firmly declines."* In GHL, you can set up workflows triggered by these tags. A workflow could listen for *"Contact Tag Added: AI-Booked"* to then send an immediate confirmation SMS/email to the lead, update an opportunity pipeline stage, and notify a human team member. Likewise, a *"Not Interested"* tag might trigger a long-term nurture sequence or simply log the disposition. Essentially, the AI agent's actions on the call become signals that GHL can respond to. Real-world users often segment their leads by intent this way: the AI might sort leads into buckets (e.g. *"ready to talk now," "call back later," "not interested"*) by tagging or setting a field, and each bucket has its own follow-up strategy [23]. **Example:** An AI cold-call workflow for a wholesaler might be: *Step 1: AI calls and qualifies. Step 2: If lead is hot (positive response), AI books a discovery* *call and adds tag “Hot Lead”. Step 3: If lead isn’t interested, AI tags “Not Interested” and perhaps triggers a drip campaign. Step 4: If no answer, AI leaves voicemail and tags “No Pickup” for a later SMS follow-up.* This way, **every AI outcome routes into a GHL workflow** without manual intervention.

Automating Task Assignments and Handoffs: When the AI successfully books an appointment or identifies a hot lead, you likely want a human to step in next. You can automate task assignments in a few ways: - Use the **“Create Task” tool** in Assistable to have the AI itself create a task in GHL (e.g. “Follow up call scheduled with John Doe on Friday”). This requires configuring a platform tool with task details. The AI can be prompted like: *“If appointment is booked, create a follow-up task for the account manager.”* - Alternatively, rely on GHL’s workflows: for instance, trigger a workflow on “Appointment Booked” (GHL natively can trigger when a calendar event is created) or on the tag “Hot Lead” as above. That workflow could have an action to **Assign User** (e.g. assign the contact to a closer or specific team member) and perhaps send an internal notification (email/SMS to the team) that “Emma (AI) booked a call with John Doe for Thursday at 3pm.” GHL lets you dynamically insert contact details in those notifications. - Another tip: If your process involves a live transfer (say the AI can transfer calls to a live rep when someone is ready to talk *now*), you’d configure the **Transfer Call tool** in Assistable and also ensure your phone routing in GHL (or Twilio) can handle that. For example, have the AI ask “Would you like to speak to a consultant now?” – if yes, use the transfer tool to conference in your sales line. In GHL, you’d have provided a number or SIP for the transfer target. This effectively automates warm transfers for immediate conversion.

Syncing Dispositions and Notes: It’s good practice to capture a call outcome summary for each contact. You might have a custom field *“AI Call Disposition”* (values like *Booked, No Answer, Not Interested, Callback Scheduled,* etc.) that the AI or a webhook updates at the end of the call. Assistable can fire a webhook to GHL with call results, which you can use to update fields or add an admin note to the contact [24]. For example, after each call, have Assistable send a webhook containing the conversation summary or outcome; a little script or Zap could then write that into the contact’s notes or a field. This ensures when your team looks at a contact record, they see exactly what happened on the AI call.

Overall, integrating an AI agent means *designing a closed-loop system*: the AI initiates the call via a GHL workflow (using the **“Make AI Call”** action that Assistable installs in your account), the call runs and updates the contact’s info in real-time, and then GHL workflows react to those updates for post-call actions. **Pro Tip:** Before going live, map out these triggers step by step (perhaps in a flowchart) – e.g. *“AI dials -> if booked, then… if not interested, then…”* – and set up the corresponding GHL automations. This ensures no lead falls through cracks and the AI truly augments your pipeline efficiently.

3. Cold-Calling AI Best Practices (What Top AI Agents Do Right)

Designing a high-converting cold-call AI is as much about **sales strategy** as it is about tech. Successful AI callers tend to emulate the habits of top human sales reps, while leveraging the AI’s unique advantages (speed, data access, 24/7 work rate). Below are key best practices:

- **Sound Human, Build Rapport:** The best AI agents have a natural, friendly tone – they **don’t** read like a formal script or robot. Write prompts that encourage a *conversational, “laid-back” voice and human-like reactions*. Use interjections and small talk tokens (e.g. “hey,” “no worries,” “gotcha,”) to make the AI’s speech fluid. Avoid overly salesy language. In practice, this means instructing the AI with phrases like “speak as if chatting with a neighbor” and including casual contractions or even a touch of slang (appropriate to your audience). *Conversational phrasing is crucial* – you want to **avoid sounding like a**

telemarketer or a chatbot [25]. Top agents often start calls with a friendly, *"Hey [Name], this is [Agent] from [Company] – how've you been?"* instead of a stiff pitch. This instantly breaks the ice.

- **Leverage Personalization & Context:** High-performing calls make the prospect feel known and valued. Program your AI to reference any relevant context you have. For example, if the lead previously inquired or had an appointment, have the AI mention that: *"Last time we spoke in {{contact.last_contact_month}}, you were looking at solar for your home – a lot's changed since then."* Using the **information already in the GHL contact record** (like name, last appointment date, city, etc.) grounds the call in familiarity [26]. Likewise, if your system logs their **electric bill amount or home type**, the AI can work that in: *"I saw you have a $200 electric bill – we might cut that in half."* This kind of personalization boosts engagement. *(Make sure to keep these references accurate and up-to-date via your field syncing.)*

- **Write Conversion-Focused Prompts (Urgency & Curiosity):** Your prompt should equip the AI with language that creates a sense of urgency and curiosity in the prospect. Successful cold-call scripts often introduce a *"what's in it for me"* early on and hint at something new or time-sensitive to grab attention. For example: *"I'm reaching out because there are new state incentives that could expire soon, and you might be in a perfect spot to take advantage."* Or *"The reason I'm calling is some big changes came down in California's energy programs – honestly, now might be a way better time to look at solar than when we last spoke."* This kind of line, which Emma uses, immediately piques interest by suggesting the homeowner could miss out by not listening [27] [28]. In your prompts, explicitly tell the AI to **highlight benefits to the customer and recent changes**. Additionally, instruct it to ask open-ended questions that spark curiosity. For instance, after a brief intro, a top-performing AI might ask: *"Just out of curiosity, what held you back last time? Because some programs now address exactly that."* This not only gets the prospect talking (and reveals objections), but also creates a gap the AI can fill with new info. **Key point:** Always frame features as benefits. Instead of saying "We have net-metering 3.0 policy," say "There's a new policy that could significantly cut your costs – kind of a big deal for homeowners like you." Urgency and curiosity, delivered in a helpful tone, drive the prospect to stay on the call.

- **Maintain Rapid Cadence with 80/20 Listening:** In sales, there's an oft-cited 80/20 rule – the prospect should do 80% of the talking, and you (the sales rep) only 20% [29]. The same principle applies to AI calls. You want your AI to **avoid long monologues**; instead, it should speak in short bursts and then *listen* (i.e. wait for the user's response). Prompt your AI with this guidance: e.g. *"Keep your turns concise – one or two sentences – then let the person respond."* This creates a back-and-forth rhythm that feels like a natural dialogue rather than a robocall. Also, the AI should ask questions throughout to engage the listener. Top cold-call agents often use a quick, upbeat cadence – they don't pause so long that the call feels awkward, but also don't drone on. You can simulate this by instructing a *lively tone* and even using filler words or brief affirmations ("Mm-hmm," "Right, exactly.") to show active listening. Critically, **active listening** skills should be baked into the AI: have it acknowledge what the person says and adapt. For example, if the homeowner mentions a concern, the AI should dynamically adjust and address it (which the LLM will do if your prompt provides guidance for objections). Summarizing or mirroring the prospect's words is another good technique (for a human or AI). E.g., if the person says "I don't have time," the AI might mirror "Totally understand – busy schedules are why we keep this super short." By listening more than it talks, the AI uncovers the prospect's needs. In short, tell your AI to **be inquisitive and patient**: ask one question at a time, then pause. This will naturally enforce an 80/20 talk-listen balance (the AI can even be instructed to keep responses under, say, 20 seconds each). Remember, silence isn't bad – better to pause and prompt the prospect than to talk over them. This approach not only feels more human, it also helps the AI gather clues to use in the sale.

- **Explain Concepts at a 3rd-Grade Level:** Homeowners are not solar experts (and technical jargon can kill interest fast), so ensure the AI explains any solar concepts or offerings in **simple, relatable terms**. A good rule is to aim for a 3rd-grade or layman's comprehension level. That means using plain language and everyday analogies, not industry acronyms. For example, rather than "Your PV system can yield a significant ROI," say "Solar panels can make **free power from sunlight**, which could save you a lot on your electric bill." If there are new programs or complex incentives, have the AI compare them to something familiar: *"Think of it like a phone trade-in program, but for your energy – if you produce extra power, you get credit for it."* One technique is to have the AI *briefly ask permission to explain*: *"It's a new state program – mind if I share in 10 seconds how it works in plain English?"* This prepares the listener and ensures brevity. In your prompt's style guardrails, explicitly say *"avoid technical jargon or buzzwords; explain things as if to a friend with no solar background."* In Emma's personality profile, for instance, one trait is being **"patient and educational without overwhelming with technical jargon"** [30] [31]. This has the AI focus on what matters to the homeowner (savings, reliability, simplicity) rather than terminology. When testing your AI, if you spot any response that feels too complex, refine the prompt to simplify further. Oftentimes, giving a few example explanations in the prompt can calibrate the AI's language level.

- **Strong Objection Handling & Fallbacks:** Expect that many cold-call recipients will resist booking an appointment initially – great AI agents shine in how they handle this pushback. You should equip the AI with **empathetic, confidence-building responses** to common objections. The key best practice is to *acknowledge the prospect's concern ("I understand…") and then address it with a reassuring twist*. For instance, a top-performing script might handle *"I need to talk to my spouse"* with something like: *"Of course! I'd want you both to have all the info. If it helps, we can schedule the call when you're together, so you can decide as a team."* This technique (acknowledge + solution) keeps the door open. Another example: *"I'm not interested anymore"* could be met with *"Got it – a lot of people felt that way, but the only reason I'm reaching out is the landscape has changed. Out of curiosity, was it the cost that turned you off? Because there are new $0 down options now."* Notice how that response both respects their stance and injects curiosity about something new. We see similar patterns in the refined Emma script: for *"Not interested"*, it suggests the AI reply, *"Understood. Just curious – is it because of how the old programs worked? The new setup is completely different now."* [32]. For *"Too expensive"*, Emma's prompt is to say *"I hear you. That's actually why most folks go solar – with the new no-money-down plans, you're really just swapping a high electric bill for a lower solar payment."* In your prompt, provide at least one response per major objection (No time, Not interested, Too expensive, Need to think, Had a bad experience, etc.). Keep them concise and **positive** in tone. Also include a general instruction like *"handle objections calmly and use a friendly tone – never argue"*. A good AI agent also knows when to back off: if the prospect has truly shut down the conversation, the AI should gracefully end on a positive note (a final fallback line). You might program a humorous or friendly sign-off so the call ends with goodwill. For example, *"Hey, no worries – I don't want to pester you. If you get a $400 power bill and regret not chatting, you know who to call!* [laugh gently] *Have a great day!"* A light touch of humor can leave a better impression than a hard sell. Just ensure any humorous fallback is polite and appropriate. As one expert prompt revision put it: *"Don't force it. If they're not ready, leave the door open without burning the bridge."* [33]. In practice, that means the AI should say it's okay and they can reach out anytime later, rather than pushing further. Design these fail-safe lines so your AI knows how to exit gracefully when a lead is truly cold.

4. Improving Your AI Agent's Prompt (Emma Example Enhancements)

If you already have a draft prompt for an AI agent (like "Emma"), there are several ways to optimize it for better results. Based on our research and an in-depth prompt audit for a solar call agent, here are key recommendations:

- **Use a Modular Structure:** Break the global prompt into clear sections (identity, personality, style, tasks, etc.) rather than one huge block of text. A modular prompt with labeled sections helps the AI understand context and retrieve the right info at the right time. For example, have a section **## Identity** that defines the agent's role and company, a **## Personality Traits** list (e.g. friendly, knowledgeable, not pushy), **## Important** call behaviors (like silent start or always confirm appointment), **## Tasks** or call flow steps, and a dedicated **## Objection Handling** section. This not only mirrors a typical call script outline, but also makes it *easier for the LLM to navigate*. As noted earlier, **concise, sectional prompts outperform long monologues** in Assistable [18]. It also makes maintenance easier – you can tweak one section (say, update the objection responses) without rewriting everything. Emma's prompt, for instance, was refactored into markdown sections for each aspect, yielding a cleaner and more effective structure [34] [26]. Make liberal use of bullet points in these sections (the AI actually parses bullet lists well). For instance, instead of a paragraph of how to handle objections, list them as bullet points under an Objection Handling header. Prompting guidelines from an expert emphasized: *use bullet-pointed examples, not long paragraphs – they're easier for the model to reference during the live call* [19]. Also keep each bullet/snippet succinct. This modular approach prevents the AI from getting "lost" in a sea of text and reduces the chance of it producing irrelevant or repetitious content.

- **Keep Dialogues in Short Bursts:** Train your AI to speak in **short, natural sentences** and avoid dumping too much at once. Long-winded responses not only sound robotic but also risk losing the customer's attention. In Emma's refined prompt, the guidance was to use **short, friendly responses** that acknowledge the user and then *"gently guide them forward"* [35]. For example, if a homeowner says "I'm busy right now," a short burst reply might be: "Totally fair – I'll be super quick." (then follow with a quick ask or offer). Contrast that with a bad long reply: "I understand you're busy; however, I only need a brief moment to discuss something that could benefit you financially…" – too lengthy and formal. It's a good practice to include in your **Response Guidelines** section something like: *"- Keep responses brief (1-3 sentences) and in a conversational tone."* During objections, especially, stick to at most 1-2 lines per response [36]. This also ties into the 80/20 rule above – the AI should not hog the conversation. One technique is to structure your prompt's **Tasks/Call Steps** with turn-by-turn behavior. For example: "1. Introduction – greet and verify you have the right person (one sentence greeting, one sentence reason for call). 2. Qualifying question – ask if they are the homeowner… (then wait for answer). 3. Pitch value – one or two sentences about new solar incentives…" etc. By explicitly scripting the *cadence* in steps, you enforce that short burst rhythm. Additionally, make sure your AI uses **confirmation questions** to keep the dialogue interactive (e.g. *"Does that make sense?"*, *"You with me so far?"*) rather than dumping a monologue. In summary, brevity and interactivity are key – as one internal guideline put it, avoid long storytelling or complex chains of logic in a live convo [37] .

- **Incorporate Field Capture Logic:** A great prompt is **data-aware** – it instructs the AI when to collect missing info and when to skip what you already have. Review your script for opportunities to seamlessly capture important fields. For example, if your business needs the homeowner's email and it's not in GHL yet, add a step in the prompt: *"If no email on file ({{contact.email}} is empty), ask politely for their best email to send info."* You can do this for any important qualifying data (electric bill, roof type, spouse name, etc.). In the Assistable interface, you might have seen a note like "Always capture missing contact info before ending the call: e.g. avg_monthly_bill." – that is exactly the idea. Make it a task near the end of the call flow: *"Before wrapping up, ensure you've gathered: [list of fields]. If any are missing, ask now."* The AI will then use the extraction tools to record it. Not only does this enrich your CRM, but it also signals a thorough, personalized approach to the prospect ("Let me grab your email to send those figures over – what's the best address?"). Just be sure to phrase these asks conversationally and perhaps justify them (people are wary giving info to unknown callers). For instance: *"By the way, if we get cut off, what's a good email to send the program details? I have [what GHL has] as a placeholder."* Also, avoid asking too many things in a row – spread field capture questions naturally in the convo. A modular prompt allows you to incorporate conditions like this. The benefit is huge: your **AI becomes a lead qualifier**, not just an appointment setter, by logging key data (budget, timeline, etc.) right into GHL [38] [21] . That saves your human team time later. So, identify the 2-3 must-have fields for your use case and explicitly instruct the AI to capture them if missing.

- **Add a Touch of Humor (Tastefully) for Fallbacks:** While AI should stay professional, a bit of *warm humor or personality* can make your agent more engaging – especially when handling rejection or ending a call. We saw in the solar agent's style guidelines an idea of *sprinkling dry humor, particularly about relatable pain points (like high utility bills)* [39] [40] . This can disarm prospects. For example, if someone is on the fence, the AI might chuckle, *"Heck, with how crazy electric rates are here in SoCal, it's getting harder not to go solar!"* [41] . This kind of light remark, placed appropriately, shows the agent is human-like and not just reading a script. Similarly, a **humorous fallback line** can be something self-effacing or empathetic. Perhaps if the prospect says "Not interested, don't call me," the AI could reply gently: *"Understood – I'll crawl back to my solar cave now. (Just kidding.) But seriously, thanks for your time – if you ever change your mind, we're here."* Said with the right tone, it can leave a better last impression. The goal is *not* to turn your call into a comedy show, but a one-liner at the right moment can create a connection. When adding humor, consider your audience and brand voice – e.g. a laid-back solar campaign in California can use casual jokes, whereas a legal services agent might stay more formal. In Emma's case, her persona included being *"subtly humorous when appropriate, especially about California's notorious utility rates"* [42] , which gave her room to crack a small joke about $800 summer bills, for example. When updating your prompt, you could add a bullet under **Tone/Style** like "- **Humor:** Feel free to use a light, tasteful joke to ease tension (e.g. joking about how crazy high electric bills are)." Also, be sure the AI knows *when to skip humor* – if the prospect is angry or very curt, humor might backfire. Generally, instruct it to use humor only in a positive or neutral moment, not when the person is upset. By infusing a bit of personality, you make the AI more memorable and likable, which can improve conversion indirectly.

In summary, improving your AI prompt means **refining structure, brevity, logic, and personality.** The refined prompt should read like a ready-to-go call flow for a skilled human rep, with clear sections and a friendly vibe. When you implement these changes (modularity, short bursts, field checks, and a dash of humor), the difference in the AI's performance can be dramatic – it will sound more confident and natural, follow the intended flow more reliably, and handle the unpredictable nature of calls more gracefully.

5. Real-World Insights and Advanced Tips

Finally, let's touch on some insights from real users and official documentation that can help you build AI agents that truly convert:

- **Follow Proven Workflows and Metrics:** Case studies show that AI voice agents can drastically increase efficiency when used smartly. For instance, companies in healthcare and tech reported boosting appointment booking rates by 60% and cutting lead costs by 70% using voice AI for outbound calls [43]. The takeaway: use your AI to do the heavy lifting of dialing and initial qualifying, and free your human team to focus on the warm leads. Also, scale is achievable – some organizations have dozens of AI agents making hundreds of thousands of calls per month [44]. So, don't be afraid to expand your AI's role once you nail the script; it can maintain consistency even at high volume.

- **Utilize "Silent Start" and Compliance Features:** As mentioned, always configure your outbound AI calls with *contact-led start* (silent start) to avoid talking over people. This small setting significantly improves call connection quality and reduces hang-ups [45] [46]. It makes the experience feel like a normal call where the agent says "hello" **after** the prospect does. Many carriers' spam filters also prefer this, since bots that play audio immediately are often flagged. So in Assistable's Voice settings, choose the option for the AI to wait for the contact to speak first (and ensure your prompt covers the fallback if they don't). Compliance-wise, also mind local call times and any required disclosures – you might include in the prompt something like *"if asked, gently admit you're an AI assistant"* if that's part of your compliance (varies by use case).

- **Trust the AI's Strengths – Don't Over-engineer the Prompt:** Assistable's built-in AI models (whether GPT-4, Claude, etc.) are **already optimized for conversation**. The official docs note that the system injects certain behaviors like proper booking etiquette automatically [47]. This means you should keep your prompt **focused and not overly prescriptive**. A common mistake is trying to preempt every possible scenario in the prompt (leading to a bloated, confusing prompt). Instead, provide a clear goal and a few examples, and let the AI's natural language ability fill the gaps. The Assistable team advises simplifying booking instructions to something like: *"Get your availability and book an appointment by conversing about available times, then secure the slot the user prefers."* – rather than writing a long script of every calendar permutation [47]. In testing, simpler prompts often yield more consistent behavior because the AI isn't trying to juggle too many explicit instructions. In short, *guide the AI on what to do, rather than what not to do*. As one support article quipped, telling the AI "Don't do X" can backfire (the AI still thinks of X – the "pink elephant" problem) [48]. So frame your prompt positively: what it *should do* at each step.

- **Continuous Tuning with Real Calls:** Once your AI agent is live, monitor its performance and iteratively refine. Listen to call recordings or transcripts in GHL to spot where the AI might be deviating or struggling. Maybe it doesn't handle a new objection well – you can then add that scenario to the prompt. Or perhaps it speaks too fast/slow – you could adjust the *Autopilot wait time* setting or add a note like "pause briefly between sentences." Treat the prompt as a living document that you tweak based on real conversations. Also watch the data: track how many calls lead to appointments, how long calls last, where drop-offs happen, etc. For example, if you see many calls end right after the intro, maybe the intro needs to be more engaging or less “spammy”. You might A/B test two different opening lines via two AI agents and see which yields better engagement. The beauty of Assistable + GHL is you can deploy changes quickly and at scale.

- **Use GHL Automation for Multi-Touch Cadence:** Top performers don’t rely on a single call – they orchestrate a *cadence* of calls and texts. You can do this by combining your AI calls with GHL workflows. For instance, if an AI call goes to voicemail or isn’t picked up, have a workflow send a text from your AI or a ringless voicemail afterward (“Hey, I just tried you…”). The PDF we reviewed suggested multi-channel follow-ups: automatically send SMS, email, etc. if no answer [49]. You can schedule the AI to call again a few days later if still no response. By automating these touches, you mimic a diligent sales rep who never gives up, which can dramatically increase contact rates. Just be sure to remove leads from the sequence once they engage (the workflow triggers and tag logic will help here).

- **Backup Plans for AI Limitations:** Even the best AI may occasionally get tripped up or a call might go off-script. Plan for this. For example, have a **“failover to human”** option: if the AI is unable to handle something or the user asks for a manager, you might programmatically transfer to a human or schedule a callback by a human. One strategy mentioned in the community was assigning a *fallback number* or route if the AI fails, so the call can go to a voicemail or live agent [50]. Additionally, keep an eye on the AI’s knowledge cutoff – if a prospect asks something factual outside the prompt (e.g. “What’s my current utility rate?”), the AI might guess incorrectly. For critical info, use the Knowledge Base feature or provide the AI with relevant data through custom values or tools. And always keep your prompt updated with current offers and policies (AI doesn’t magically know your latest promo unless you tell it!).

- **Community and Support:** Lastly, tap into the Assistable.ai community (the Skool group, etc.) for power-user tips. Many agencies share prompt templates and success stories for various niches (solar, real estate, insurance, etc.). You might find a prompt snippet or technique that you hadn’t considered. The community tutorials clarify concepts like using custom values vs fields in webhooks [51] [52], and the Assistable YouTube channel has walk-throughs on connecting everything. Since AI is evolving fast, staying in the loop with these resources will help you continuously improve your AI caller.

By following these guidelines – harnessing Assistable’s dynamic field injections, integrating tightly with GHL automation, and applying cold-call best practices to your AI’s script – you can design an outbound call agent that is **engaging, efficient, and effective**. Done right, your AI agent will sound like a top sales rep who never sleeps: personalizing each call, handling objections with ease, capturing valuable data, and seamlessly handing off hot leads to your team. Good luck, and happy calling!

Sources:

- Assistable.ai Knowledge Base and Community Threads (custom fields vs values, integration tips) [1] [2] [4] [47]
- *Emma* Prompt Optimization Dialogue (solar AI agent case study) [18] [35] [32]
- Real-World AI Cold Calling Insights (performance stats and workflow examples) [43] [22]

- SDR Best Practices – 80/20 Listening Rule in Sales Calls [29]

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