

EBOOK • 6 OUTBOUND USE CASES

Outbound voice AI that *drives revenue.*

Six ways growing businesses use AI voice agents to qualify leads, recover orders, fill calendars, grow accounts, win customers back, and get paid.



■ INTRODUCTION

From scripted dialers to *real conversations*.

For years, automated outbound calls could only read a script. They handled simple notices, like a delivery update or a payment reminder, and fell apart the moment someone asked a question.

Conversational voice AI works differently. Modern voice agents understand what people mean, hold a natural back-and-forth, handle objections, and take action in your systems while they talk: booking an appointment, updating a CRM record, or sending a secure payment link. The pause after someone speaks is now short enough that conversations feel natural.

That opens up outbound calls that actually drive revenue, not just deliver notices. This guide covers six use cases growing businesses are putting AI voice agents to work on: what each one fixes, how the call flows, what you need, what to measure, and where people and regulations set the limits.

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00 • BEFORE YOU START

Consent first. *Then a number.*

Outbound calling is regulated, and every call carries your brand. Get the rules right, then tie each use case to a metric you already track.

CONSENT AND COMPLIANCE

- ✓ Call people who asked to hear from you or have a current relationship with your business.
- ✓ In Canada, follow the CRTC's Unsolicited Telecommunications Rules, including the National Do Not Call List, permitted calling hours, and the rules on automated calls.
- ✓ In the US, the FCC treats AI-generated voices as artificial voices under the TCPA, so these calls generally need prior express consent.
- ✓ Say who's calling and that it's an AI assistant, and offer a person on request.

General guidance, not legal advice. Confirm your obligations with counsel before launching.

THE REVENUE MATH

ADDED REVENUE

extra conversions × average order value

VALUE TO THE BUSINESS

added revenue × gross margin

FIRST-YEAR ROI

$(\text{value in year one} - \text{cost in year one}) \div \text{cost in year one}$

PAYBACK

$\text{months to launch} + \text{build cost} \div (\text{monthly value} - \text{running cost})$

VOICE AGENT READINESS CHECKLIST

- ✓ Connected to your CRM, calendar, or order system, so the agent can act, not just talk.
- ✓ A call-recording and data-retention policy you can explain to customers.
- ✓ Approved scripts, offers, and prices the agent is allowed to use.
- ✓ Baselines recorded before launch: contact rate, conversion, and revenue.
- ✓ Clear hand-off rules and a live-transfer number.
- ✓ A frequency cap, so nobody gets called too often.

01

■ USE CASE 01

Qualify new leads while they're still interested

Call warm leads within minutes of their request, qualify them, and book the meeting before interest fades.

THE REVENUE LEAK

Inbound leads fill out a form, then wait hours for a callback. By the time someone calls, they have moved on or booked with a competitor.

How the call works

- 1 A lead submits a quote or contact form and agrees to be called.
- 2 The agent calls within minutes, confirms the request, and asks your qualifying questions: need, budget, timing, and location.
- 3 It answers common questions from your approved knowledge base.
- 4 Qualified leads get a meeting booked in your team's calendar, or a live transfer to a salesperson.
- 5 Every call is summarized and logged in your CRM.

SAMPLE CALL · ILLUSTRATIVE, FICTIONAL BUSINESS

AGENT

Hi Jordan, this is the virtual assistant at Harbourline Renovations, following up on the kitchen quote you requested a few minutes ago. Is now a good time?

CALLER

Sure, quickly.

AGENT

Great. Are you hoping to start within the next three months?

CALLER

Probably in the spring.

AGENT

Perfect. I can book a free site visit with our estimator. Would Tuesday at 10 or Thursday at 2 work better?

WHAT YOU NEED

- Web forms that capture consent to call
- Your qualification criteria
- Calendar and CRM connections
- A live-transfer number

WHAT TO MEASURE

Time from form to first call

Contact rate

Meetings booked per 100 leads

GUARDRAILS

Only call people who asked to be contacted. Say it's an AI assistant, and hand off immediately when someone asks for a person.

02

■ USE CASE 02

Recover abandoned carts and unfinished orders

Reach shoppers and clients who stopped short of checkout, resolve what held them up, and help them finish.

THE REVENUE LEAK

Shoppers stall at checkout over a delivery date, a sizing question, or a payment issue. Service clients start a booking or quote request and never finish it.

How the call works

- 1 A cart or booking is left unfinished by a customer who agreed to calls or texts.
- 2 After a short delay, the agent calls and asks what held them up.
- 3 It answers product, delivery, and policy questions from approved information.
- 4 It applies an approved offer if your rules allow, then texts a secure checkout or payment link.
- 5 The outcome is logged, and customers who say no aren't called again.

SAMPLE CALL • ILLUSTRATIVE, FICTIONAL BUSINESS

AGENT

Hi Priya, this is the assistant from Coastal Cycle Co. You left a bike in your cart earlier. Is there anything I can help with?

CALLER

I wasn't sure it would arrive before the 20th.

AGENT

It ships tomorrow and arrives in three to five business days, so before the 20th. Would you like me to text you a secure link to finish checking out?

CALLER

Yes, please.

WHAT YOU NEED

- Cart or booking events from your store or booking platform
- Product, shipping, and policy information
- Approved offer rules
- Customer consent

WHAT TO MEASURE

Recovered orders

Recovered revenue

Recovery rate by product or channel

GUARDRAILS

Send a secure link instead of taking card numbers over the phone, and limit it to one call per abandoned order.

03

■ USE CASE 03

Confirm appointments and fill calendar gaps

Confirm upcoming visits, reschedule in the same call, and offer open slots to people on your waitlist.

THE REVENUE LEAK

No-shows and late cancellations leave empty slots you can't sell, while staff spend hours on confirmation calls.

WHAT YOU NEED

- A scheduling system with calendar access
- Waitlist rules
- Your cancellation and rescheduling policy

How the call works

- 1 Ahead of each appointment, the agent calls or texts to confirm.
- 2 If the customer can't make it, it offers new times from your live calendar and reschedules on the spot.
- 3 Freed-up slots are offered to customers on your waitlist.
- 4 Your schedule updates automatically, and staff see a summary of every change.

WHAT TO MEASURE

No-show rate

Slots refilled from the waitlist

Staff hours spent on confirmations

SAMPLE CALL · ILLUSTRATIVE, FICTIONAL BUSINESS

AGENT

Hi Alex, this is the assistant from Kitsilano Physio, confirming your appointment tomorrow at 4 p.m. Will that still work?

CALLER

Actually, I need to move it.

AGENT

No problem. I have Thursday at 11 or Friday at 3. Which is better?

CALLER

Friday at 3.

AGENT

You're booked for Friday at 3. You'll get a confirmation text shortly.

GUARDRAILS

Keep sensitive details out of the call. For clinics, confirm the time without discussing the reason for the visit, and let staff handle exceptions.

04

■ USE CASE 04

Upsells and renewals at the right moment

Call customers when a renewal is due or their needs change, and help them choose the right option.

THE REVENUE LEAK

Renewals lapse quietly and customers outgrow their plans without hearing about better options, so revenue walks away unnoticed.

How the call works

- 1 A signal triggers the call: a renewal date, usage nearing a limit, or a seasonal service coming due.
- 2 The agent explains the options in plain language, using approved pricing.
- 3 It answers questions and processes the renewal, or books a call with an account manager.
- 4 It records the decision and respects a "not interested."

SAMPLE CALL · ILLUSTRATIVE, FICTIONAL BUSINESS**AGENT**

Hi Dana, this is the assistant from Peak Comfort Heating. Your furnace maintenance plan renews next month. Can I walk you through your options?

CALLER

Sure.

AGENT

You can renew as is, or add a cooling tune-up before summer for \$59. Would either work for you?

CALLER

Let's add the tune-up.

WHAT YOU NEED

- Renewal dates, usage, or service history
- Approved offers and pricing
- Billing or CRM connection

WHAT TO MEASURE

Renewal rate

Upgrade or add-on rate

Expansion revenue per customer

GUARDRAILS

No pressure tactics and no unapproved discounts. Make it easy to say no, and route complex account changes to a person.

05

■ USE CASE 05

Win back lapsed customers

Spot customers who've gone quiet and call them with a personal reason to come back.

THE REVENUE LEAK

Customers who used to buy regularly drift away, and nobody notices until they're gone.

How the call works

- 1 Order history flags customers who are past their usual reorder interval.
- 2 The agent calls with a relevant reason: their usual order, a new menu or service, or a seasonal offer.
- 3 It asks for feedback and flags any problems for your team.
- 4 Customers who are ready are booked or ordered on the spot.

SAMPLE CALL · ILLUSTRATIVE, FICTIONAL BUSINESS

AGENT

Hi Morgan, this is the assistant from Harbour Kitchen Catering. It's been a while since your team's last lunch order, and we've added a new seasonal menu. Would you like me to send it over?

CALLER

We've been meaning to book one, actually.

AGENT

Wonderful. Would the same order for about 40 people on the 12th work?

WHAT YOU NEED

- Order history with dates (a CSV export works)
- A current relationship or consent to call
- An approved offer
- For caterers, CaterBoost predicts who is due

WHAT TO MEASURE

Reactivated customers

Revenue from reactivated customers

Feedback themes

GUARDRAILS

Check Do Not Call and existing-relationship rules before calling. Limit attempts, and remove anyone who asks.

06

■ USE CASE 06

Collect past-due payments, politely

Remind customers about overdue invoices, answer their questions, and make it easy to pay.

THE REVENUE LEAK

Overdue invoices pile up because reminder calls are awkward and time-consuming, and cash flow suffers.

How the call works

- 1 Before and after the due date, the agent places a friendly reminder call.
- 2 After confirming it's speaking with the right person, it confirms the invoice and answers basic questions.
- 3 It texts a secure payment link, or sets up a payment plan within your approved rules.
- 4 Disputes and hardship requests go straight to a person.

SAMPLE CALL • ILLUSTRATIVE, FICTIONAL BUSINESS

AGENT

Hi, this is the assistant from Brightside Cleaning. Am I speaking with Sam Lee?

CALLER

Yes.

AGENT

Thanks, Sam. Invoice 1042 for \$380 was due last week. Can I text you a secure link to pay it?

CALLER

Oh, I missed that. Please do.

WHAT YOU NEED

- An invoicing or accounting connection, such as QuickBooks
- Secure payment links
- Payment plan rules

WHAT TO MEASURE

Days sales outstanding

Amount collected

Disputes resolved

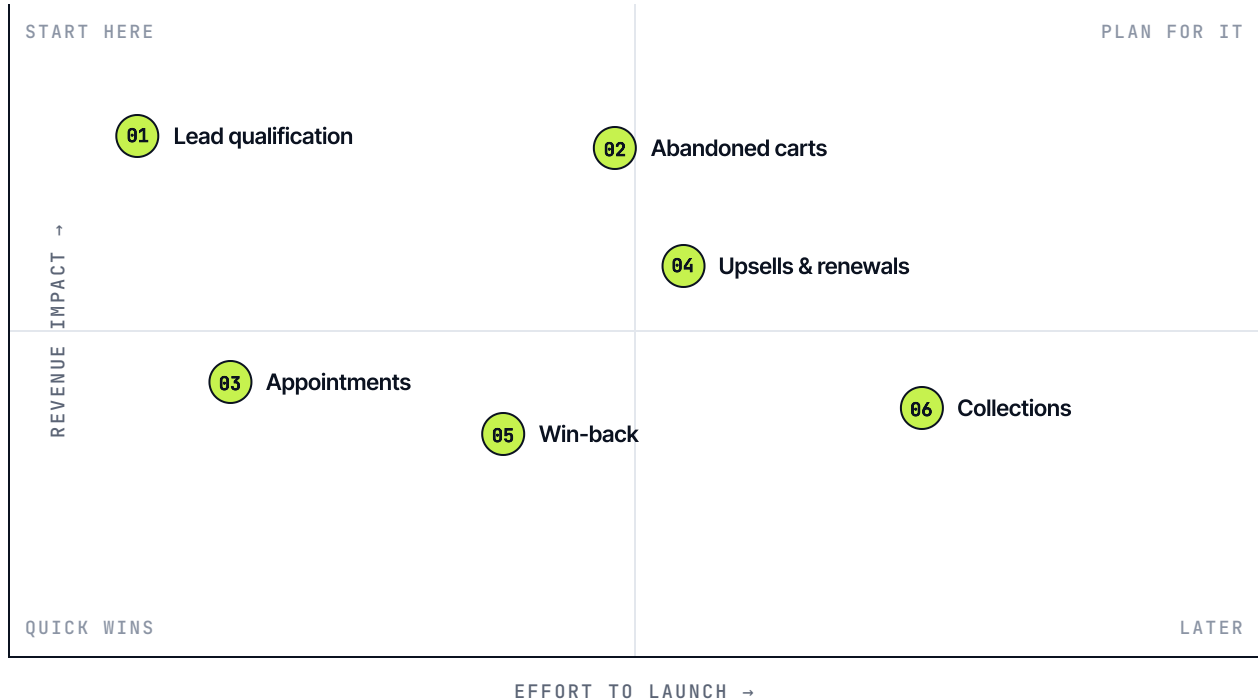
GUARDRAILS

Follow applicable collection rules on calling times and frequency. Verify identity before discussing balances, stay polite, and never threaten.

07 • WHERE TO START

Pick one. *Prove it. Then scale.*

Start where revenue leaks today and the people you'd call have already asked to hear from you. Here's where each use case typically lands; your own audit decides the order.



A 90-day plan

DAYS 1-14

Confirm consent and compliance, record baselines, and choose the first use case.

DAYS 15-45

Connect the agent to your systems, write approved scripts, and test on internal calls.

DAYS 46-75

Launch to a small group with people reviewing calls, then tune.

DAYS 76-90

Report results against the baseline and add the next use case.

Placement reflects typical starting points for growing businesses and is illustrative, not a benchmark.

Put voice AI to work *in your business.*

Omni Scale is an AI consulting firm that helps growing businesses win more leads, close more revenue, and automate busywork, with voice agents and automations built inside the tools you already use.

Free 45-minute AI audit

We review your calls, leads, and customer workflows and identify your top three opportunities, with a rough ROI for each.

Design, launch, and measure

We build your voice agent, connect it to your systems, set up compliant call flows, and report results against your baseline.

[Book your free audit at omniscale.ca](https://www.omniscale.ca)

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