AI FRONT DESK · CLINIC ONBOARDING · PROOF OF WORK

One intake form. A fully briefed AI front desk.

How an aesthetic clinic got an AI front desk that answers from approved facts and books real appointments, plus an onboarding app that turns one structured form into a configured GoHighLevel account.

BEFORE

Facts scattered everywhere

Website, price lists, documents and dozens of separate settings. An AI could sound right while the booking or CRM record was wrong.

AFTER

Collect once, approve, publish

One approved clinic record feeds the account, the AI's knowledge and the booking journey.

3	8	6	12
connected layers: app, GoHighLevel, AI	step repeatable onboarding journey	clinic information groups collected	delivered modules, end to end

Clinic name, AI name, website and account details withheld under NDA.

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01 / THE PROBLEM

A correct-sounding reply is not a correct booking.

The clinic needed more than an AI that could chat. It needed reliable facts, a natural voice, a booking journey that really works, and a clean handover to staff. And onboarding the next clinic should not mean doing it all again by hand.

AREA	BEFORE	AFTER
Clinic facts	Spread across the website, price documents, settings and staff memory.	Collected once in a structured intake, with the original files kept for reference.
Setting up a clinic	The same details typed by hand into many separate places.	Approved data mapped into the account automatically, then read back to confirm.
Website content	Copied as-is, including outdated offers and mixed-up branch details.	Website scan suggests answers with sources; nothing is published until a human approves it.
AI answers	Risk of confident replies with wrong prices or invented offers.	Answers drawn only from approved treatments, prices, policies and offers.
Bookings	A friendly “you’re booked” did not guarantee a real appointment.	Availability checked, the patient picks a real slot, the reply matches the actual result.
Staff handover	Context lost between the chat and the team.	Treatment interest, concerns and appointment status carried into CRM records and tasks.

The design principle: collect once, approve clearly, map to the right place, and verify the real result. A saved form, an API success and a completed booking are three different events, and the system never treats one as proof of the next.

02 / CLINIC ONBOARDING

From new clinic to working front desk.

Three layers work together: a custom onboarding app collects and approves the clinic's information, GoHighLevel runs conversations, calendars and CRM, and the AI front desk talks to patients. The next clinic follows the same eight steps.

01	**Prepare the account** Clinic sub-account from a reusable base snapshot.	GoHighLevel
02	**Invite the clinic** The owner gets a private link to the intake.	Onboarding app
03	**Complete the intake** Website scan and document upload pre-fill; the owner fills the gaps.	AI extraction
04	**Review and approve** Conflicts resolved, one submitted version approved.	Admin
05	**Connect the account** The right account verified before anything is written.	Read-only check
06	**Configure and publish** Approved facts mapped into Custom Values and AI knowledge.	GoHighLevel
07	**Authorise and test** Channels connected; real bookings and CRM records checked.	Chat, social, SMS
08	**Hand over** Team trained, ownership and support agreed.	Clinic team

03 / THE AI FRONT DESK

Sounds like your front desk. Answers like your price list.

The voice work aimed for a warm, casual front-desk style: short and natural, never scripted. That personality sits on top of the clinic's facts and action rules. It changes how an answer sounds, never its price, eligibility or medical meaning.

ROBOTIC

Before proceeding, please confirm your preferred appointment date.

FRONT DESK

What day works for you?

ROBOTIC

Thank you for your message. Your appointment details are as follows... (repeated in full)

FRONT DESK

You're welcome!

- ✓ **Approved answers only**
  Treatments, prices, preparation and aftercare come from approved clinic knowledge. Unknown details stay unknown.
- ✓ **Consistent offers and policies**
  Current offers and policy wording come from designated values, never improvised.
- ✓ **Real slots, not guesses**
  A preferred time stays a preference until availability is checked and the patient picks a slot.
- ✓ **Honest about actions**
  Confirmation, cancellation and retry wording matches what the system actually did.
- ✓ **Remembers the conversation**
  Treatment interest and first or returning visit are not asked twice.
- ✓ **Knows when to hand over**
  Human requests and medical concerns go to staff with the full context.
- ✓ **Opt-out handled properly**
  A real opt-out is respected; a normal sentence containing "stop" is not mistaken for one.

Wording examples show tone direction only. They are not patient transcripts.

04 / BOOKING, CRM AND HANDOVER

Every conversation ends in real records.

The AI starts the action, calendars and CRM store the result, and workflows keep the patient and the team informed.

Booking journey

CONVERSATION TO CALENDAR

- Capture treatment interest and preferred time
- Check real availability
- Patient selects an actual slot
- Appointment created in the right calendar
- Reply matches the real result
- Reschedule, cancel and status checks

CRM and workflows

WHAT THE TEAM SEES

- Contact details and treatment interest
- Appointment notes and pipeline stage
- Separate visits never overwrite history
- Confirmations and reminders
- Follow-ups and review requests
- Staff notifications and tasks

Safeguards

BUILT INTO THE PROCESS

- Admin and client access kept separate
- Integration credentials stored encrypted on the server
- Account identity checked before any write
- Saved values read back to confirm
- Backups and rollback on every release
- Developer handover package with tests

3	8	6	12
connected layers	onboarding steps	information groups	modules delivered

Scope note: this is a delivered system build, not a results report. No revenue, conversion or time-saving figures are claimed. Channel connections and final live acceptance are completed per clinic during onboarding.