

AI TOOLS

Phone Agent Creation

A phone agent designed for the process you need to automate

Configure an AI voice agent with its own **objective, script, voice, and number** to manage sales, collections, operations, or Human Resources calls and record the results in your systems.

AI voice agent

Ready to call

Objective

Confirm appointments

Script

Approved process

Voice

Neutral English

Result

Zoho CRM record

Talk to a specialist

THE CHALLENGE

Necessary calls take too much **team time**

Confirm an appointment. **Remind someone about a payment.** Make first contact. Validate information. Follow up. Conduct an initial interview.

These conversations are necessary for processes to move forward, but as volume grows, so does the time teams spend **dialing numbers, repeating questions, and recording results.**

Phone Agent Creation lets you create an **AI phone agent** specifically configured to do that work.

- 1 It is not about using the same agent for every call.
- 2 Its purpose is defined.
- 3 What it should say and what information it needs to obtain are defined.
- 4 What should happen after the conversation is defined.

An agent configured for **your process**



01 We define the objective

We establish what the agent must resolve and the **expected result** of each conversation.

02 We design the conversation

The **script, voice, and instructions** it must follow during calls are configured.

03 We configure the number

The agent uses the **defined phone number** to carry out the conversations.

04 We connect the contacts

The **list** it must work on and the information needed for each call are established.

05 The agent makes the calls

It carries out the conversations according to the configured **purpose and rules**.

06 The result returns to your systems

Depending on the implementation, the result can be recorded in applications such as **Zoho CRM, Zoho Books, Zoho Desk, Zoho Projects, or Zoho People** so the process can continue from there.

USE CASES

A voice agent can handle different **types of calls**



Sales

Configure an **agent** to make first contact, qualify prospects, follow up, and reactivate contacts.

The information obtained can return to **Zoho CRM** to continue sales management.



Finance

Automate **calls related** to payment reminders, pending invoices, collections follow-up, and payment confirmations.

Results can be incorporated into **Zoho Books or Zoho CRM**, depending on the process.



Operations

Use **agents** for appointment confirmations, reminders, status inquiries, and initial information collection.

The conversation can integrate with **Zoho Desk, Zoho CRM, or Zoho Projects**.



Human Resources

Configure **calls** for candidate prequalification, selection process follow-up, reminders, and contacts during new employee onboarding.

Results can be recorded in **Zoho CRM or Zoho People**, according to the implementation.

OPERATIONAL IMPACT

What changes for **your team**?



Fewer repetitive calls

Conversations with a **defined objective and structure** can be handled by the agent, leaving the human team available for cases that require their intervention.



A consistent process

The agent works from the **instructions and script** established for that use case.



More contact capacity

The **call volume** no longer depends exclusively on the number of people available to make calls manually.



Information available to continue the process

The result of each conversation can return to the **corresponding system**, preventing the call from being separated from the rest of the operation.

COMPARISON

Phone Agent Creation and DialRun: **two different needs**

Both solutions share **voice agent capabilities**, but they address different needs.



DialRun is designed for teams to run and manage **AI calling campaigns** over Zoho CRM lists.

Phone Agent Creation

Phone Agent Creation is oriented toward building a **phone agent adapted to a specific client process**, which may belong to sales, finance, operations, or Human Resources.

The goal is not to add another campaign platform, but to implement an agent that responds to the **rules and needs of a concrete process**.

What companies is it **designed for**?

Phone Agent Creation is especially useful for **organizations** that:

- 1 Make a significant volume of calls with **repetitive objectives**.
- 2 Have phone processes that follow **defined rules or scripts**.
- 3 Need to increase their **contact capacity**.
- 4 Want to use voice agents beyond the **strictly commercial** scope.
- 5 Need call results to continue inside their **business applications**.

An agent built around **your process**

InterConnecta configures the agent according to each implementation: **objective, voice, script, number, contacts, and integration** with the corresponding systems.

The same capability can be applied to **different areas**. What changes is the process the agent must execute.

Which repetitive calls are still taking up your team's time?

Talk to an **InterConnecta specialist**.

Talk to a specialist