

# AI Employee Training Document Template

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Structure Your AI's Knowledge Base for Best Results

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**From:** *Hire AI, Not People* by Shawn Kercher | Chapter 6

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## Instructions

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This document becomes your AI employee's brain. Everything it needs to know goes here. Be thorough—gaps in this document become gaps in your AI's performance.

Review and update this document monthly, or whenever you notice the AI struggling with something.

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## Section 1: Company Overview

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*Help the AI understand who it represents.*

### Business Name

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### What We Do (2-3 sentences)

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### Who We Serve (target customer)

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### What Makes Us Different

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## Our Values/Approach

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## Section 2: Services/Products

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List everything the AI might need to discuss.

### Service/Product 1

Name: \_\_\_\_\_

Description: \_\_\_\_\_

Price/Range: \_\_\_\_\_

What's included: \_\_\_\_\_

Who it's for: \_\_\_\_\_

Common questions about this: - Q: \_\_\_\_\_

A: \_\_\_\_\_ - Q:

\_\_\_\_\_ A:

\_\_\_\_\_

### Service/Product 2

Name: \_\_\_\_\_

Description: \_\_\_\_\_

Price/Range: \_\_\_\_\_

What's included: \_\_\_\_\_

Who it's for: \_\_\_\_\_

Common questions about this: - Q: \_\_\_\_\_

A: \_\_\_\_\_ - Q:

\_\_\_\_\_ A:

\_\_\_\_\_

### Service/Product 3

Name: \_\_\_\_\_

Description: \_\_\_\_\_

Price/Range: \_\_\_\_\_

What's included: \_\_\_\_\_

Who it's for: \_\_\_\_\_

\_\_\_\_\_  
*(Add more as needed)*

### Section 3: Policies

*Clear policies prevent confusion.*

#### Pricing Policy

\_\_\_\_\_  
\_\_\_\_\_

#### Cancellation Policy

\_\_\_\_\_  
\_\_\_\_\_

#### Refund/Guarantee Policy

\_\_\_\_\_  
\_\_\_\_\_

#### Deposit/Payment Policy

\_\_\_\_\_  
\_\_\_\_\_

#### Service Area (if applicable)

\_\_\_\_\_

#### Hours of Operation

\_\_\_\_\_

## Booking/Scheduling Policy

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## Section 4: Frequently Asked Questions

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*The questions you hear over and over.*

#	Question	Answer
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

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## Section 5: Voice Guidelines

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*How the AI should sound.*

## Tone

(Circle all that apply)

Formal / Professional / Friendly / Casual / Warm / Direct / Playful / Authoritative

## Communication Style

**Message length:** Short & punchy / Conversational / Detailed

**Greeting style:** \_\_\_\_\_

**Sign-off style:** \_\_\_\_\_

## Personality Traits

The AI should come across as: 1. \_\_\_\_\_ 2.

\_\_\_\_\_ 3.

\_\_\_\_\_

## Words/Phrases TO Use

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Words/Phrases to AVOID

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Sample Messages (in the right voice)

**Initial greeting:** \_\_\_\_\_

\_\_\_\_\_

**Answering a pricing question:** \_\_\_\_\_

\_\_\_\_\_

**Confirming an appointment:** \_\_\_\_\_

\_\_\_\_\_

**Handling "I need to think about it":** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Section 6: Behavior Rules

*How to handle specific situations.*

### Standard Situations

Situation	AI Should...
Customer asks about pricing	
Customer wants to book	
Customer asks question not in FAQ	
Customer seems hesitant	
Customer mentions competitor	
Customer asks for discount	
Customer is in a hurry	

### Edge Cases

Situation	AI Should...
Customer is outside service area	
Customer's request is outside our scope	
Customer has unrealistic timeline	
Customer is price shopping	
Customer had bad past experience	

### Escalation Triggers

*AI should IMMEDIATELY escalate when:*

Customer expresses anger or frustration

Customer explicitly asks for a human

Question is about: \_\_\_\_\_

Request involves: \_\_\_\_\_

Opportunity is above \$ \_\_\_\_\_

Situation involves: \_\_\_\_\_

### Escalation Message

*What the AI says when escalating:*

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## Section 7: Qualification Criteria

*How to determine if someone is a good fit.*

### Qualified Lead Criteria

Located in: \_\_\_\_\_

Budget of at least: \$ \_\_\_\_\_

Timeline within: \_\_\_\_\_

Needs: \_\_\_\_\_

Decision maker: [ ] Yes required [ ] Not required

### Disqualification Criteria

*Politely decline if:*

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Disqualification Message

*What to say when someone isn't a fit:*

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## Section 8: Integration Details

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*What systems does the AI connect to?*

### CRM

- System: \_\_\_\_\_
- What to log: \_\_\_\_\_

### Calendar

- System: \_\_\_\_\_
- Appointment types: \_\_\_\_\_
- Availability rules: \_\_\_\_\_

### Other Integrations

- \_\_\_\_\_
  - \_\_\_\_\_
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## Section 9: Update Log

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*Track changes to this document.*

Date	Change Made	Reason

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## Pro Tip: Mine Your Best Calls

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Record your best customer calls—the ones where everything clicked. Transcribe them and feed them into ChatGPT or Claude with this prompt:

*“Summarize how this person talks to customers. What phrases do they use? How do they handle objections? What’s the tone?”*

Use the output to refine Section 5 (Voice Guidelines) and Section 6 (Behavior Rules).

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*From Hire AI, Not People by Shawn Kercher*

*[hummingagent.ai/book-resources](https://hummingagent.ai/book-resources)*