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# The Travel Agency Guide to Agentic AI

From a phone that rings out at the busy hours to a digital consultant that answers every enquiry, qualifies the trip and books the routine, while knowing exactly where the professional line sits.

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**PUBLISHED BY**

Agntic.ai  
AI voice agents & digital workers

**EDITION**

2026 · Australia  
General information only

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## — FOREWORD

# Demand is back. Capacity is not.

In the 2024 to 2025 financial year, Australians made just over twelve and a quarter million short-term overseas trips, up almost twelve per cent on the year before and more than a million above the pre-COVID record.<sup>1</sup> Travel is not just back; it is busier than it has ever been. Yet almost every one of those trips begins the same way it always has: with an enquiry. A phone call at lunchtime, an email after dinner, a walk-in on a Saturday morning. Behind each one is a consultant already on another line, mid-quote, holding a supplier on the other phone.

Most agencies are not short of interest. They are short of capacity at the one point where interest arrives: the phone, the inbox and the front desk. Calls ring out at the busy hours. Leisure travellers shop three agencies at once and book with whoever answers first. Quotes go out and are never followed up. A client whose flight is cancelled at midnight reaches a recorded message. None of it appears on a profit and loss statement, which is exactly why it goes unaddressed for years.

This guide is about a specific, practical answer to that problem: an agentic artificial intelligence (AI) voice agent that works the phones and the routine administration around them, so your consultants can do the part of the job that actually wins and keeps clients. It is written for agency owners, managers and consultants who want to understand what this technology does, what it must never do, and how to put it to work without misleading a client or mishandling their money or their personal information.

We have tried to be honest throughout. There is a clear line we keep returning to, the line between handling an enquiry and giving binding professional advice, and a good deal of this guide is spent making sure the technology stays firmly on the right side of it.

**Brad Riley**

CEO, Agntic.ai

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1. Australian Bureau of Statistics (ABS), Overseas Arrivals and Departures, Australia, 2024–25 financial year. Short-term resident returns totalled 12,261,080, up 11.6% on 2023–24 and more than one million above the previous record set in 2018–19.

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**WHAT IS INSIDE**

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# Agentic AI, in plain language

Before the benefits, the basics. What a digital worker is, why it is different from the chatbots you have already met, and the single boundary that makes it safe to use in an agency.



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**THE IDEA**

## A worker, not a chatbot.

You have used generative AI already. You type a question, it writes you an answer, and the conversation ends there. It is a clever tool, but it waits for you and does nothing on its own.

Agentic AI is the next step. An **agent** does not just talk. It is given a goal, a set of rules and access to the tools it needs, and it carries the task through from start to finish. For an agency, the goal is usually simple to state: answer the enquiry, understand what the traveller wants, and complete the booking or the request, the same way a capable consultant would.

That is why we call it a **digital worker** rather than a chatbot. It speaks naturally on the phone, it listens, it asks the follow-up questions your team would ask, destination, dates, how many travelling, rough budget, and then it acts: it checks availability, holds or books the routine fare or package, confirms it, and sends the reminder. When something falls outside its rules, it hands over to a consultant.

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## A chatbot answers. A digital worker finishes the job, then knows when to step back.

The difference matters most after hours and at the busy hours of the day. A chatbot on your website might capture a form. A digital consultant actually picks up the phone at 7am, at lunchtime and at 9pm, holds a real conversation, and leaves a qualified enquiry or a confirmed booking in your system by morning.

None of this replaces your team. It removes the repetitive, interruptive work that stops your consultants from doing the parts of the job that genuinely need a person: the complex multi-stop itinerary, the honeymoon, the corporate account, the anxious client who needs reassurance.

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**THE ONE RULE**

## What it must never do.

A digital consultant in a travel agency is built around a boundary that protects both the traveller and your business. It handles the enquiry and the routine administration around a booking. It does not, on its own, give binding professional advice or take a client's money beyond the limits you set.

That means it does not assure a traveller they will be allowed into a country, it does not confirm a visa or passport requirement as final, it does not advise on whether a particular insurance policy is right for them, and it does not promise an outcome it cannot guarantee. If a caller's request turns on any of those, the agent's job is not to improvise. Its job is to capture the enquiry accurately, give only your documented, approved information, and bring a consultant in to confirm and complete it.

**THE LINE, IN ONE SENTENCE**

**The agent handles enquiries and routine bookings. Binding advice and the final word on money always belong to a consultant.** Where a trip turns on a visa, an entry rule, a health requirement or a non-routine payment, the agent gathers the detail, states only what your agency has approved, and hands to a person to confirm. It never guesses on something a traveller will rely on.

This is not a limitation we apologise for. It is the design. An agency that adopts this technology should be able to say, hand on heart, that no traveller was ever given binding advice by a machine and no client's money was ever moved outside the rules. Everything in the rest of this guide is built on top of that promise, and Section Five sets out exactly how it is enforced.

# A day on the phones

The cost of a busy front desk does not appear on any report. It shows up as a tired team, a quote that went cold and a traveller who quietly booked elsewhere. Here is the day as your consultants actually live it.



## — DANA'S TUESDAY · A FOUR-CONSULTANT AGENCY

# Two phones, one inbox, a counter to watch.

Dana is a senior consultant at a busy leisure agency. Nothing here is unusual. That is the point.

## MORNING

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9:05 **Doors open, phones already lit.** Five calls in the first fifteen minutes. Dana answers what she can while a walk-in waits at the counter and a supplier holds on line two.

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9:40 **Two callers give up on hold. One wanted to confirm a Bali package before the fare changed. One was a new enquiry for a European tour. Neither leaves a message.**

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11:20 **The quote that needs chasing.** Dana sent a detailed cruise quote on Friday. She means to follow it up. The phone rings again before she can.

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12:45 **Lunch. The desk is down to one consultant. Nine calls come in over the hour. Three are answered.**

## AFTERNOON

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2:30 **Document deadlines.** Final payments and passenger details are due on three bookings this week. Dana meant to ring those clients this morning. The list rolls to tomorrow, again.

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4:50 **A flurry of after-school enquiries about school-holiday travel. Two are quoted on the spot; the rest are promised a call back that may not come.**

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6:10 **Phones to message bank. From now until 9am, every caller hears a recording. A client whose connection was cancelled tonight is among them.**

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**THE INVISIBLE COST**

## None of it was anyone's fault.

Dana is good at her job. The agency is well run. And yet by the end of the day a couple of enquiries never turned into bookings, the Friday quote sat untouched, and three clients still have not been reminded that their final payment falls due this week.

This is the trap of front-desk work in travel. The losses are real but invisible. A missed call is not recorded as a missed call; it is simply a caller who tried you and then tried the agency, or the online travel agency (OTA), that picked up. A cold quote does not announce itself; it just sits in the system. A lapsed deadline looks like one awkward phone call, not like the booking that almost cancelled because nobody chased the payment.

Because nobody can see the cost, nobody can justify hiring against it, and the team is asked to absorb a little more each year. The work that gets dropped is always the same work: the calls at the edges of the day, the second follow-up on a warm quote, the reminder about documents. The work, in other words, that a digital consultant is built to pick up.

The rest of this guide is about handing that specific layer of work to an agent, so the next Tuesday looks different: every enquiry answered, every quote followed up, every deadline flagged, and Dana free to do the human part of her job properly.

# The five jobs a digital consultant does best

Not everything should be automated, and a good deal of what a consultant does never will be. These five jobs are where an AI voice agent is genuinely strong, and where agencies see the change first.



## — WHERE IT EARNS ITS PLACE

# Five jobs, done properly, every time.

**JOB 01****ANSWERED**

## Answering the phone and the overflow

Every call picked up on the first ring, at every hour, including the lunchtime spike and after close. No hold queue, no message bank, no traveller lost to the OTA or the agency that answered.

**JOB 02****QUALIFIED**

## Qualifying the enquiry and capturing the brief

The agent asks the questions a consultant would: destination, dates, travellers, rough budget, must-haves. It hands your team a complete brief, or books the simple, well-defined trip straight into your system.

**JOB 03****FOLLOWED UP**

## Quote follow-up and lead nurture

The warm quote that never got a second call, chased patiently and on time. The slow, repetitive follow-up that always gets dropped first is exactly where bookings are won or lost.

**JOB 04****REMINDED**

## Deadlines, documents and confirmations

Final-payment dates, passenger details, passport and visa document deadlines, and pre-departure confirmations, sent without fail so nothing slips and no booking is put at risk by a missed date.

**JOB 05****TRIAGED**

## After-hours enquiries and disruption triage

When a flight is cancelled at midnight or a connection is missed, the agent answers, gathers the booking reference and the facts, gives only your documented options, and escalates anything urgent to your on-call consultant straight away. The traveller reaches a calm, useful voice instead of a recording.

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 WHY THESE FIVE

## High volume, low judgement, high impact.

The jobs worth handing over share a shape. They happen often, they follow rules you already have, and getting them wrong costs you bookings. That is precisely the shape an agent handles well, and where a consultant is wasted.

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# 12.3m

short-term overseas trips by Australians in 2024–25, up 11.6% on the year before and a new record. The constraint is answering demand, not finding it.

ABS OVERSEAS ARRIVALS AND DEPARTURES, 2024–25

# \$13.0bn

estimated revenue for the travel agency and tour arrangement sector in 2025–26, after five years of strong recovery.

IBISWORLD, 2025

# \$69bn

the value of the Australian travel industry represented by its peak body, a market with no shortage of enquiries to answer.

ATIA TRAVEL TRENDS REPORT, 2025

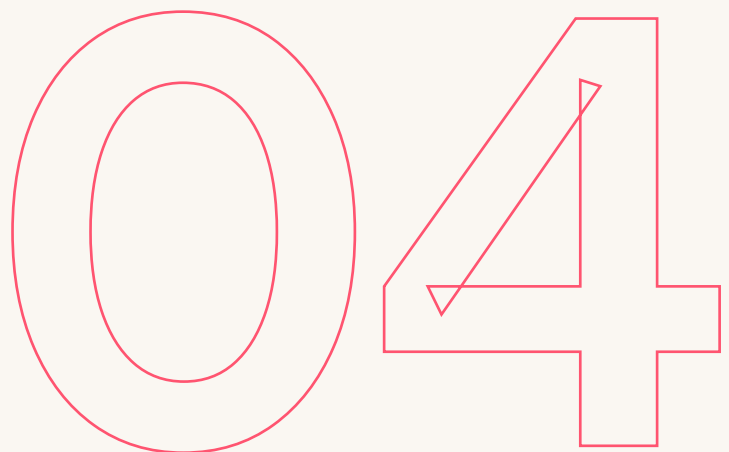
Read those numbers together and the case is straightforward. Demand is not the problem. The problem is the narrow set of moments where a traveller tries to reach you and cannot, or where a warm quote is never chased. Hand those moments to an agent and you keep the work you were already winning.

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Sources: ABS, Overseas Arrivals and Departures, Australia, 2024–25 financial year (12,261,080 short-term resident returns). IBISWorld, Travel Agency and Tour Arrangement Services in Australia, 2025 (industry revenue around \$13.0 billion in 2025–26). Australian Travel Industry Association (ATIA), Travel Trends Report, 2025 (industry valued at around \$69 billion).

# What a ringing-out phone really costs

A missed call feels like nothing. A handful of them, every day, for a year, is a different story. Here are the four quiet leaks, and what they add up to.



## — THE LEAKS LEDGER

## Four leaks, one total.

The weekly figures below are illustrative drivers for a four-consultant leisure agency, not a quote. They use an agency margin of about \$300 per booking, the commission or service fee you keep, not the value of the trip. Every agency's numbers differ. The value of laying them out is that the leaks stop being invisible.

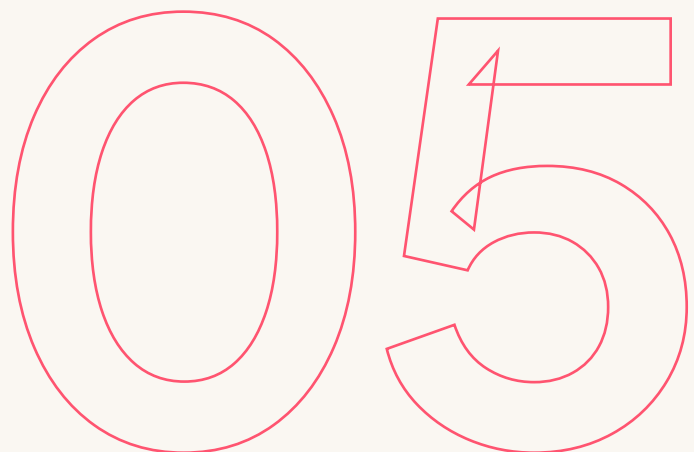
<p><b>Calls that ring out</b></p> <p>~18 a week unanswered at the busy hours; about 4 in 10 were genuine new enquiries, converting at ~30%, so ~2 bookings lost (\$300 margin each).</p>	<b>\$600</b> /wk
<p><b>Callers who give up on hold</b></p> <p>~8 a week who leave no message. Roughly one booking a week walks to the agency or OTA that answered first.</p>	<b>\$300</b> /wk
<p><b>After-hours enquiries</b></p> <p>~12 a week hit a recording between close and open; the motivated ones book online or elsewhere overnight, costing ~1.5 bookings.</p>	<b>\$450</b> /wk
<p><b>Quotes that go cold</b></p> <p>Warm quotes that are never followed up a second time; reliable, timely follow-up recovers ~1.5 bookings a week.</p>	<b>\$450</b> /wk
<p><b>The combined leak</b></p>	<b>\$1,800</b> /wk

That is roughly \$86,000 a year leaking quietly through four holes, none of which shows up on an invoice. You do not need these exact numbers to act; even at half the assumptions the annual cost dwarfs the price of closing it. A digital consultant addresses all four at once: it answers the calls that ring out, it removes the hold queue, it works after hours, and it follows up every quote. Section Eight builds the full model with your own numbers.

Figures illustrative. The \$300 margin per booking is a conservative placeholder for a leisure agency's commission or service fee; substitute your own. Weekly lines sum to \$1,800, or about \$86,000 across 48 trading weeks.

# Consumer law, privacy and the line you never cross

This is the section that matters most for an agency and the one most guides skip. How the consumer law applies, how client money and personal data are protected, and exactly how the agent is kept on the right side of binding advice.



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**THE RULES YOU ALREADY WORK TO**

## Consumer law, and your good name.

Travel agents in Australia have not needed a licence since the national licensing scheme and the Travel Compensation Fund were wound up on 30 June 2014. In their place stands the voluntary AFTA Travel Accreditation Scheme (ATAS), run by the industry's peak body, under which accredited agencies agree to meet training, conduct and compliance standards each year.<sup>2</sup>

What did not change is the Australian Consumer Law (ACL), which applies to every travel business in the country. It prohibits misleading or deceptive conduct and false representations, and it carries consumer guarantees that services be delivered with due care and skill. For an agency, that means a price, an inclusion or an availability must never be stated as fact unless it is true. A careless promise is not just a service failure; it can be a breach of the law.

This is the first reason a digital consultant is built around a boundary. The agent quotes only from your live, approved pricing and availability. It does not invent a fare, guess at an inclusion, or assure an outcome it cannot verify. If the system does not have a firm answer, the agent says so and brings in a consultant rather than filling the gap with a guess.

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## A careless promise on the phone is not just a lost client. Under the consumer law, it can be a breach.

The same discipline applies to money. The agent works inside strict limits on what it can take and confirm. It can hold a booking or take a deposit against your documented rules, but a non-routine payment, a refund, or anything outside those limits is passed to a person. Card details are handled to the security standard your agency already follows, never read back, stored loosely or repeated where they should not be.

None of this is retrofitted. It is how the agent is built, because in travel the cost of getting it wrong falls on a real traveller mid-trip, and on your reputation the moment they get home.

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2. Travel Agents Repeal legislation took effect 30 June 2014, ending state licensing and the Travel Compensation Fund; the industry moved to the voluntary ATAS scheme run by the Australian Federation of Travel Agents (AFTA). Australian Consumer Law obligations apply to all travel businesses regardless of accreditation (state and territory consumer protection agencies; AFTA/ATAS).

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**PERSONAL DATA AND BINDING ADVICE**

## How the line is held.

To book travel you collect some of the most sensitive details a person holds: full name, date of birth, passport number, sometimes payment and health information. Under the Privacy Act 1988 (Commonwealth) and the Australian Privacy Principles (APPs), that information must be collected only for the purpose at hand, with the traveller's knowledge and consent, and kept secure. From 10 December 2026 a recent amendment also requires businesses to tell people in their privacy policy when decisions affecting them are made by substantially automated means, so plan for that disclosure now.

### THE AGENT WILL

- + Quote from your live, approved pricing and availability only

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- + Capture the brief and book simple, well-defined trips to your rules

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- + Take a deposit or hold within the limits you set

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- + State your documented entry, visa and document guidance as general information

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- + Hand to a consultant whenever a caller asks, or the request leaves its rules

### THE AGENT WILL NOT

- Assure a traveller they will be admitted to a country

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- Confirm a visa, passport or health rule as the final word

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- Advise whether a specific insurance policy suits a person

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- Move money outside your documented limits

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- Promise an outcome it cannot verify against your systems

### HUMAN IN THE LOOP

A consultant is never removed from the relationship. The agent is a layer in front of the routine, with clear escalation paths back to your team and a standing instruction to hand over the moment a conversation needs professional judgement. You set the rules; the agent keeps to them; you can see everything it did.

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**GOVERNANCE YOU CAN SHOW**

## Built to be inspected.

Travel runs on trust, and a digital consultant should add to your accountability, not subtract from it. Because every interaction is logged, transcribed and summarised, you have a clearer record of front-desk activity than most agencies keep today, when a phone call leaves no trace at all. If a client later disputes what was quoted or agreed, you can see exactly what was said.

That record supports the obligations you already meet: your consumer-law duties not to mislead, your privacy policy and consent practices under the APPs, and, if you are accredited, the conduct standards of the ATAS code. The agent operates inside those frameworks rather than around them. Sensitive details are collected only when needed, used only for the booking, and held to the security standard you set.

It also makes review simple. You can listen back, read transcripts, and adjust the agent's rules in plain language. If you decide it should never quote a particular product, or should always escalate a particular kind of call, that change is made once and applied to every call from then on. Consistency, in other words, becomes a setting rather than a hope.

This guide is general information, not legal advice. Before you go live, your own consumer-law and privacy obligations should be confirmed with the appropriate adviser. What the technology gives you is a front desk that is easier to govern, not harder.

# Under the bonnet

You do not need to be technical to use this, but it helps to know what is happening when the phone rings. Here is the whole thing, in six parts.



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**HOW IT WORKS**

# Six parts, one conversation.

**PART 01**

## It picks up and listens

The agent answers in a natural voice, on the first ring, and tells the caller they are speaking with your agency's automated assistant. It understands ordinary speech, accents and interruptions.

**PART 03**

## It writes to your system

It connects to your booking and customer systems through permissioned access, reads live availability and pricing, and writes the qualified enquiry or confirmed booking straight in. No double entry.

**PART 05**

## It works after hours

Evenings, weekends and the lunchtime gap are covered without extra rostering. The enquiries and bookings that greet your team in the morning are already captured.

**PART 02**

## It follows your rules

Approved products and fares, deposit and payment limits, supplier preferences, opening hours: it works from the rules you set, in plain language, not from guesses.

**PART 04**

## It escalates cleanly

When a call needs a consultant, turns on binding advice, or involves money beyond its limits, it hands over to your team or your on-call line. It never improvises on something a traveller will rely on.

**PART 06**

## It reports back

Every call is logged, transcribed and summarised. You see volumes, outcomes, quotes to chase and anything escalated, and you tune the rules from there.

# Before you switch it on

You can stand up a working agent quickly. The agencies that get the most from it spend a little time first, getting the groundwork right. Here is what to map across two weeks.



## — THE GROUNDWORK

# An hour of mapping saves a month of patching.

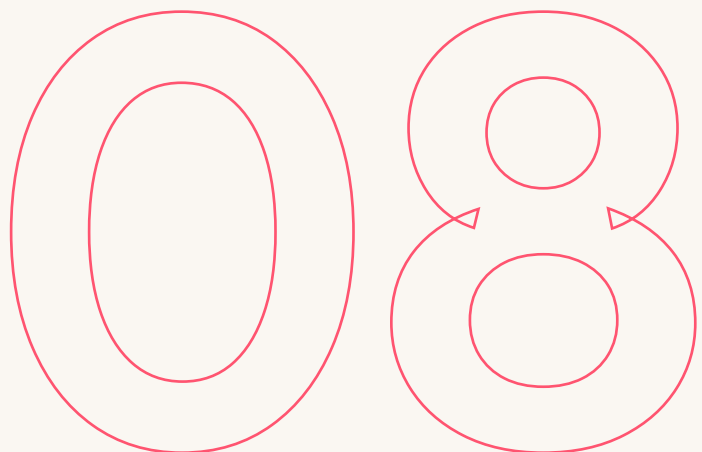
Getting an agent live is fast. The difference between a good launch and a frustrating one is whether you have written down the things your consultants currently hold in their heads. Work through this list before you go live.

- Your top ten reasons travellers call, in order
- Your booking rules: deposits, holds, who can confirm what
- What must always go to a consultant, and to whom
- The approved wording for visa, passport and entry guidance
- Consent wording for collecting traveller information
- The products and suppliers the agent may quote, and those it may not
- Payment limits the agent can take, and where money stops
- Your after-hours and disruption escalation path
- Your quote follow-up and document-deadline timing
- Who owns the agent's rules and reviews its reports

This is a fortnight of light work, not a project. Most of it is writing down decisions you have already made informally. Once it is on paper, the agent can be configured to match exactly how your agency already runs, which is the whole point: it should sound and behave like your team, on its best day.

# Building the business case

An illustrative model, not a promise. Plug in your own numbers and the shape of the return tends to hold: it pays for itself on captured enquiries alone, before you count the hours.



## — AN ILLUSTRATIVE MODEL

## Where the return comes from.

A worked example to show the mechanism, not a quote. The numbers are illustrative and rounded; replace them with your own. The point is that the three returns stack, and the first one usually covers the cost by itself.

### THE SCENARIO · A FOUR-CONSULTANT LEISURE AGENCY

Takes roughly 200 enquiry calls a week and misses about 30, mostly at the busy hours and after close. Around 4 in 10 of those missed calls were genuine new enquiries, converting at about 30%. Agency margin per booking, the commission or service fee kept, conservatively \$300. The agency sends a steady stream of quotes, many of which are never chased a second time.

Where the return comes from	Illustrative annual figure
<b>Captured enquiries</b> 30 missed calls/wk × 40% genuine enquiries × 30% conversion × \$300 margin × 48 weeks. The biggest line, and after-hours calls alone often cover the fee.	<b>\$52,000</b>
<b>Recovered quotes</b> Timely, reliable follow-up turning ~2 otherwise-cold quotes a week into bookings × \$300 margin × 48 weeks.	<b>\$29,000</b>
<b>Consultant hours returned</b> About 10 hours/wk no longer spent on repetitive calls and chasing, at a \$45 fully-loaded rate × 48 weeks. Capacity, not cash, but real.	<b>\$22,000</b>
<b>Cost of the agent</b> Indicative annual platform cost for an agency of this size, plus the groundwork time in your first fortnight.	<b>(\$14,000)</b>
<b>Net illustrative return</b> Recovered revenue and returned hours, less the cost of running it.	<b>\$89,000</b>

Read it conservatively and the case still holds. Halve every assumption and the model clears the cost of the agent several times over, on captured enquiries alone, before the returned hours and the better client experience are counted. We will build this with your real numbers in a short call rather than ask you to take a generic figure on faith.

# What you don't need

Some of what holds agencies back is not cost or risk, but a set of assumptions that are simply not true. Here are the ones worth retiring before you start.



## — MYTHS WORTH RETIRING

# Less than you think.

## YOU DON'T NEED

- To replace your consultants. The agent takes the repetitive layer, not the people

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- To rip out your booking system. It connects to what you already run

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- To be technical. The rules are written and changed in plain language

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- A long IT project. A working agent is a matter of days, not quarters

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- To let it give binding advice or freelance with money. By design, it never does

## YOU DO NEED

- + A clear picture of why travellers call, and your booking rules

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- + Agreement on what always goes to a consultant

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- + Your approved entry guidance and consent wording confirmed

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- + One owner inside the agency who watches the reports

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- + A willingness to start with one job and grow from there

The honest summary is that the barrier is smaller than the reputation of "AI in travel" suggests. You are not rebuilding your agency. You are adding a reliable, well-governed layer to the front desk and keeping a firm hand on what it is allowed to do.

# In practice

Three composite agencies, drawn from the kinds of deployments this technology suits. The names are illustrative; the situations are not.



## COMPOSITE CASE STUDIES

# What changed, and how fast.

## COMPOSITE · LEISURE AGENCY

### A four-consultant suburban agency

High call volume, lunchtime drop-offs, quotes never chased twice.

# 0

calls to message bank after going live, day or night

## The lunchtime gap, closed.

The agency's worst hour was the middle of the day, when one consultant covered the desk and most calls went unanswered. The agent now picks up every call at the peak and after close, qualifies the enquiry, and books the simple trips straight into the system.

Within the first fortnight the quote follow-up list, which had been rolling over for weeks, was worked through by the agent on a set schedule, and the team noticed warm leads converting that would once have gone quiet.

## COMPOSITE · CRUISE & TOURING

### A specialist cruise agency

No after-hours cover; evening enquiries lost to online sellers.

## After hours

enquiries now captured and qualified instead of lost

## The evening enquiry, kept.

Most new enquiries came after dinner, when the agency was closed and the traveller was comparing a cruise across several sites. The agent now answers, captures the brief and the cabin preferences, and books a call-back with a consultant, so the agency wakes to qualified leads rather than a silent message bank.

COMPOSITE · CORPORATE  
& MULTI-SITE

## A multi-branch travel group

Leisure and corporate desks  
across three locations, one  
shared line.

**3→1**

branches, one consistent front  
desk, every call answered the  
same way

## One front desk for three branches.

Calls bounced between branches and were handled differently at each. The agent gave the group a single, consistent front desk: it routes to the right desk and consultant, captures the brief against each branch's products, and applies the same approved wording and consent everywhere.

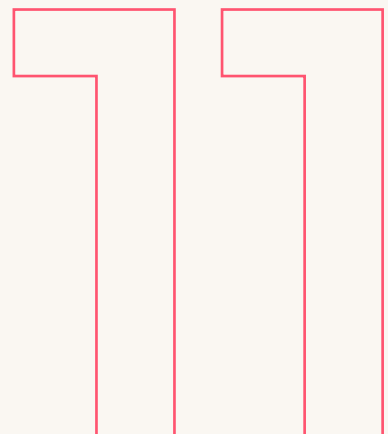
Consultants at all three branches were freed from the phones during business hours, and the group could finally see, in one place, how many enquiries came in and what happened to them.

### A NOTE ON THESE EXAMPLES

These are composites built to illustrate common patterns, not named clients. Your agency's results depend on your call volume, your booking rules and how you choose to use the agent. We are happy to talk through a realistic picture for your specific business.

# Questions agencies ask

The questions that come up in almost every first conversation, with straight answers.



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**FREQUENTLY ASKED**

# The honest answers.

## Will travellers know they are talking to an AI?

Yes, always. The agent tells callers plainly that they are speaking with your agency's automated assistant. Transparency is a requirement, not an option, and callers can ask for a consultant at any time.

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## Can it give advice on visas, entry rules or insurance?

It can pass on your agency's approved, documented guidance as general information, but it does not give the binding word. Anything a traveller will rely on, a visa, an entry rule, whether a policy suits them, is confirmed by a consultant. That boundary is the heart of this guide.

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## Does it work with our booking system?

It connects to common booking and customer systems through permissioned access, reading live availability and pricing and writing qualified enquiries or confirmed bookings. We confirm compatibility with your specific system before you commit to anything.

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## Can it take payments?

Within strict limits you set. It can take a deposit or hold a booking to your documented rules, handling card details to the security standard you already follow. Non-routine payments and refunds are passed to a person. Money never moves outside the limits you define.

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### **Will it replace our consultants?**

No. It takes the repetitive, interruptive layer of the work so your team can focus on complex itineraries and the clients who need a human. Agencies generally redeploy their people onto higher-value work rather than reduce them.

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### **What happens with a complex or upset caller?**

It hands over. The agent is built to recognise when a conversation has left its rules or needs professional judgement, and to escalate cleanly to your team. You decide in advance which situations always go to a person.

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### **Can it handle an after-hours disruption?**

It triages it. The agent answers, gathers the booking reference and the facts, gives only your documented options, and escalates anything urgent to your on-call consultant straight away. The traveller reaches a calm voice instead of a recording.

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### **How long until it is live?**

Days, not quarters. The groundwork in Section Seven is the main task, and most of it is writing down how your agency already runs. After that, configuration and testing are quick.

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### **What if we want to change how it behaves?**

You change the rules in plain language and the change applies to every call from then on. Consistency becomes a setting. You can also listen back and read transcripts whenever you like.

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# Your first seven days

A short, concrete path from reading this guide to a live agent answering your phones. Three steps, one week.



## FROM HERE TO LIVE

# Start with one job. Grow from there.

**DAYS 1-2****Map the basics**

Work through the Section Seven checklist. Pin down your top call reasons, booking rules, payment limits, escalation points and approved wording. This is the real work.

**DAYS 3-5****Configure and test**

We set the agent up to match your rules, connect it to your booking system in a controlled way, and test it together against real call scenarios until it sounds like your agency.

**DAYS 6-7****Go live on one job**

Start with a single job, often after-hours calls or quote follow-up, watch the reports, then widen its remit once you trust it. Small start, fast confidence.

**THE ONE DECISION TO MAKE THIS WEEK**

You do not need to commit to a full rollout. Pick the single job that hurts most right now, the lunchtime gap, the after-hours calls, or the quote list that never gets chased, and let an agent take just that. The rest follows from what you learn.

When you are ready, the best next step is a short walkthrough where we build a realistic picture for your agency: your numbers, your rules, and a clear view of what the agent would and would not do. No generic figures, no pressure.

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# Answer every enquiry. Never cross the line.

A digital consultant that works your phones, your quotes and your reminders, governed by your rules and kept firmly clear of binding advice and your clients' money. Built for Australian agencies.

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## TALK TO US

Agentic.ai  
Book a 20-minute walkthrough for your agency

## ABOUT THIS GUIDE

General information only.  
Not legal or professional advice.  
Confirm your obligations with the appropriate adviser.