VOICE AI IMPLEMENTATION CHECKLIST

A practical guide for connected customer experiences

1 STRATEGY

- [ ] Identify repetitive, high-volume call types suitable for Voice AI
- [ ] Define clear business goals for customer experience, efficiency, and employee experience.
- [ ] Start with one or two use cases before expanding

2 VOICE AI & HUMAN ESCALATION

- [ ] Define when Voice AI should escalate to a live agent
- [ ] Include escalation rules for complex or emotional conversations
- [ ] Ensure AI can recognize when human judgement is needed

3 AI CALL TRANSFER & CONTEXTUAL TRANSFER

- [ ] Preserve customer authentication during handoff
- [ ] Pass the reason for the call to the live agent with conversation history
- [ ] Eliminate the need for customers to repeat themselves

4 TECHNOLOGY & INTERGRATION

- [ ] Intergrate Voice AI with your CRM and telephony platform
- [ ] Preserve existing technology investments where possible
- [ ] Test end-to-end, AI-to-live agent handoffs

5 Sucess Metrics: A Guided Review

1. Customer Impact

Are CSAT and First Contact Resolution imporving?
Is customer effort decreasing?

1. Operational Signals

Are containment and hendle-time gains leading to faster, smoother resolutions?

1. People & Next Steps

Are employees adopting the tools?
What should be refined before expanding?

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