

Launch checklist for a new client's voice agent

Client: [Client name] · Agent: [Agent name] · Go-live date: [Date]

Go through it with your client, section by section. Everything unchecked at the end of a section is a reason not to move on yet.

1. Before the kickoff

- ☐ Proposal signed and the first payment or setup fee collected.
- ☐ One person at the client is named to approve changes, with their phone and email.
- ☐ Kickoff call scheduled with everyone who answers the phone today.
- ☐ You know what the client wants to achieve (fewer missed calls, after-hours coverage, fewer interruptions) and how you will measure it.

2. Information from the client

- ☐ Business hours, including holidays and special days.
- ☐ Services, prices and conditions the agent may mention.
- ☐ The 10 questions callers ask most, with the answers the client wants given.
- ☐ What the agent must never say or promise (discounts, diagnoses, deadlines, anything that needs a person).
- ☐ Languages to answer in, and the tone: formal or friendly.
- ☐ How to pronounce the business name, the staff names and the street names.
- ☐ What to ask every caller: name, phone number and reason for the call.

3. Phone line

- ☐ Number the agent will answer: the existing line or a new one.
- ☐ Forwarding or the SIP trunk configured, and a test call reaches the agent.
- ☐ Caller ID shows what the client wants on outbound calls, if there are any.
- ☐ Numbers to transfer to, by department and with their hours.
- ☐ What happens if the person does not answer a transfer: take a message, voicemail or call back.
- ☐ The telephone carrier has no limit that would cut calls at busy hours.

4. The agent

- ☐ Instructions (the prompt) written, reviewed and approved by the client.

- ☐ First message approved: it says it is an AI and, if recording, that the call may be recorded.
- ☐ Knowledge base loaded with prices, hours, policies and answers.
- ☐ Calendar or CRM connected, and a test booking appears where it should.
- ☐ Voice and speed chosen and approved by the client.
- ☐ What is saved after each call (summary, name, phone, outcome) is defined.

5. Recording, privacy and rules

- ☐ The client decided whether to record calls and for how long to keep recordings and transcripts.
- ☐ The recording and AI notice was checked against the rules where the client and its callers are. This template is not legal advice: ask a lawyer if in doubt.
- ☐ The client knows who can listen to recordings and read transcripts.
- ☐ There is a way to handle a caller who asks for their data to be deleted.

6. Testing

Make at least ten calls, some of them by the client's own staff, and write down what fails.

- ☐ A caller who asks for what the agent should do (the normal case).
- ☐ A caller who interrupts the agent several times.
- ☐ A caller with a bad line, background noise or a strong accent.
- ☐ A caller who is angry or in a hurry.
- ☐ A question the agent should not answer: it hands the call to a person or says it cannot help.
- ☐ A caller who asks for a human from the first sentence.
- ☐ A call outside business hours.
- ☐ A caller who switches between Spanish and English, if the agent should handle both.
- ☐ A wrong number, silence and a hang-up in the middle.
- ☐ Every transfer reaches the right person.
- ☐ All the fixes were made and the failed calls were repeated.
- ☐ The client has listened to the test calls and signed off in writing.

7. Going live

- ☐ Number switched to the agent at a quiet hour, with the client's team warned.
- ☐ The client's staff know how transferred calls arrive and what the caller has already said.
- ☐ You listen to the first 20 calls the same day.
- ☐ A contact and a way to reach you quickly, if something goes wrong in the first days.
- ☐ A way to turn the agent off and send calls back to the client's team.

8. The first 30 days

- ☐ Review of the first week's calls with the client, and a list of changes.
- ☐ Instructions and knowledge base updated from what callers really asked.
- ☐ Answered rate, transfers and missed calls reviewed.
- ☐ Minutes used compared with the plan, and a talk with the client if the usage is far from it.
- ☐ First invoice sent with the usage that is billed.
- ☐ Monthly review booked.