

AI Readiness Checklist

for Support Teams



AI Readiness Checklist for Reliable Customer Service

- ☐ AI responses are based on approved, up-to-date knowledge base content
- ☐ AI responses are generated from verified company sources rather than unsupported assumptions
- ☐ AI is restricted to approved topics and workflows
- ☐ Sensitive or complex requests are escalated to human agents
- ☐ Confidence thresholds trigger human review
- ☐ Knowledge base content is regularly updated and optimized for AI retrieval
- ☐ AI conversations are audited for accuracy and compliance
- ☐ Complaints, reopens, and escalations are tracked
- ☐ Changes to prompts, workflows, and knowledge sources are reviewed and documented
- ☐ Customer data and support information are synchronized across connected systems
- ☐ Customer data is protected through appropriate privacy and access controls
- ☐ Customers can easily reach a human agent