

AI Readiness Checklist

for Support Teams



AI Readiness Checklist for Accurate and Reliable Customer Service

- ☐ AI responses are grounded in approved, up-to-date, and verified company knowledge sources
- ☐ AI provides citations, source references, or traceable knowledge links where appropriate
- ☐ AI is configured to admit uncertainty instead of generating speculative answers
- ☐ AI is restricted to approved topics, products, and workflows
- ☐ Low-confidence, sensitive, or complex requests are automatically escalated to human agents
- ☐ Knowledge base content is regularly reviewed, updated, and optimized for AI retrieval
- ☐ AI retrieval and search mechanisms return the most relevant and current information
- ☐ AI performance is monitored through conversation audits, complaints, reopens, and escalations
- ☐ Changes to prompts, workflows, models, and knowledge sources are reviewed, tested, and documented
- ☐ Customer data and support information are synchronized across connected systems to prevent outdated responses
- ☐ Customer data is protected through appropriate privacy and access controls
- ☐ Customers can easily reach a human agent when needed