

AI phone assistant launch checklist

Choose one call path, resolve open questions, and test the handoffs before a real-call pilot.

First call path to test:

Pilot owner:

Review date:

☐ **Map the current calls**

Name the call types, current destinations, staff owners and the specific problem to test.

☐ **Approve the answers**

Check hours, locations, service descriptions and callback wording; name an update owner.

☐ **Write the boundaries**

No legal advice, case evaluation, representation promises or invented response-time commitments.

☐ **Keep intake minimal**

Agree on essential contact fields, excluded information and how callback details are confirmed.

☐ **Define every handoff**

Set a destination, hours, staff owner and unavailable-transfer fallback for each call path.

☐ **Resolve vendor questions**

Review storage, retention, deletion, access, data use, recording settings, integrations and costs.

☐ **Test awkward calls**

Use synthetic details: corrections, interruptions, advice requests, urgent issues and failed transfers.

☐ **Verify the next action**

Confirm notifications arrive, details are accurate and a person can act on the summary.

☐ **Set review and rollback**

Name a reviewer, compare actual results with the baseline, and keep a way to pause or revert.

Open question or failed test to resolve before launch:

Discuss your intake workflow with Chris Costa. Setup, provider usage and implementation are scoped for the chosen pilot.

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Operational planning resource. Your firm reviews requirements for its intended use.