

AI phone-agent implementation checklist

A working evaluation sheet for business and technical owners. Complete one workflow before adding others. This is an evaluation aid, not a certification or a promise of QuickVoice functionality.

Project / workflow: _____ Business owner: _____ Technical owner: _____

Review date: _____ Intended callers: _____ Decision date: _____

1. Define the business job

- ☐ Choose one call type: appointment request, answering-service intake, support triage, or lead qualification.
- ☐ Write the exact successful outcome, including the system where it must be recorded.
- ☐ List questions the agent may answer and actions it may request. List prohibited topics/actions.
- ☐ Identify a human fallback, staffed hours, contact destination, and expected next step when unavailable.
- ☐ Record baseline call attempts, answered calls, relevant outcomes, staff time, and cost over a named period. Use aggregates, not caller transcripts, in the business case.
- ☐ Define decision thresholds before the pilot: acceptable completion rate, failed/escalated-call rate, duplicate-action count, and maximum cost. Enter actual thresholds: _____.

2. Confirm implementation dependencies

- ☐ Assign an engineer or implementation partner. Confirm the required console, API, worker, database and provider setup.
- ☐ Verify the exact deployment version and documented setup path. A local startup is distinct from a functioning carrier-connected call.
- ☐ Confirm LiveKit, telephony and model-provider accounts, quotas, permissions, credentials and expected costs.
- ☐ Check each calendar/CRM/helpdesk operation individually: available API, authentication, permissions, field mapping, errors and duplicate prevention. Do not assume a logo means a working integration.
- ☐ Prepare a small approved knowledge set with an owner and update date; remove contradictory or expired answers.
- ☐ Record who operates infrastructure, responds to incidents, reviews calls, changes prompts and pays provider bills.

3. Review data and caller handling

- ☐ Map audio, transcript, recording, contact data, tool requests, logs and backups to their actual storage/processors.
- ☐ Decide data access, retention and deletion requirements; verify them in the chosen deployment.
- ☐ Have the responsible business reviewer confirm caller notices, consent needs and any relevant sector obligations. Obtain required provider agreements before sensitive data is used.

- [] Use synthetic examples and consenting staff for initial tests. Keep credentials and personal information out of public screenshots.
- [] Document where the agent must stop, escalate or decline to act; test those cases.

4. Test a realistic call set

Scenario	Expected result	Actual result / evidence	Owner
Normal request with all information	Correct next step; one recorded outcome	_____	_____
Missing or ambiguous information	Clarify without guessing	_____	_____
Caller interrupts or corrects details	Use corrected information	_____	_____
Unknown answer	Admit uncertainty; use documented fallback	_____	_____
Calendar/tool/provider unavailable	No false booking or false success	_____	_____
Duplicate request or retry	No duplicate side effect	_____	_____
Caller asks for a human	Follow the configured escalation path	_____	_____
Out-of-scope or sensitive request	Stop or escalate per agreed policy	_____	_____
No answer / voicemail / wrong contact	Record correct disposition; apply retry policy	_____	_____
Poor audio or unexpected language	Clarify or fall back; do not claim comprehension	_____	_____

5. Decide using measured results

- [] Reconcile outcome counts against source systems, including failed attempts and human follow-up.
- [] Enter observed inputs and provider quotes in [the cost worksheet](#); replace every illustrative input.
- [] Compare the pilot with a comparable baseline period and disclose staffing, demand or process changes.
- [] Review failures with the business owner and engineer; fix and retest material issues.
- [] Record a clear decision: expand, revise and retest, or stop. Keep a rollback plan and a reachable owner.

Decision: _____ Reason/evidence: _____ Next review: _____