

BOUNDED SUPPORT ROLLOUT

AI Support Triage Launch Checklist

Start with a narrow job, clear source material and a visible path to a person.

How to use this

- 1 Name an owner for every section.
- 2 Test with past tickets before going live.
- 3 Review live work every day for two weeks.

SCOPE**Keep the first job narrow**

- ☐ Pick one inbox or channel.
- ☐ List the top 10 question types.
- ☐ Write what AI must never answer.
- ☐ Name the launch owner.

ROUTING RULES**Send risk to a person**

- ☐ Route urgent issues.
- ☐ Route billing issues.
- ☐ Route angry customers.
- ☐ Route legal questions.
- ☐ Test each routing rule.

SOURCES**Control what it uses**

- ☐ Use approved help docs only.
- ☐ Name an owner for each doc.
- ☐ Add a review date to each doc.
- ☐ Remove old or conflicting guidance.

HANDOFF**Make takeover clear**

- ☐ Define how a human takes over.
- ☐ Set a response time target.
- ☐ Show the customer that handoff happened.
- ☐ Keep the full conversation visible.

PRIVACY

Set data limits

- ☐ List what data the tool can see.
- ☐ Remove access it does not need.
- ☐ Set and record retention rules.
- ☐ Confirm who can view transcripts.

LAUNCH

Start small

- ☐ Set soft launch hours.
- ☐ Keep a person available for handoff.
- ☐ Review conversations daily for two weeks.
- ☐ Pause if the same error repeats.

TEST

Use real past work

- ☐ Select 30 real past tickets.
- ☐ Score each answer for correctness.
- ☐ Check whether routing worked.
- ☐ Fix sources and rules, then test again.

MEASURE

Watch the right signals

- ☐ Track first response time.
- ☐ Track handoff rate.
- ☐ Track wrong answers caught.
- ☐ Record customer feedback.

Launch record

Write the owner and target

LAUNCH DATE

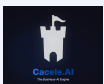
DAILY REVIEWER

HANDOFF OWNER

RESPONSE TIME TARGET

REVIEW DATE

GO, ADJUST OR PAUSE



Cacele.AI sets up bounded AI support with a real human handoff.
cacele.ai