

Template: AI Customer Support Agent Setup Checklist

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Based on Article: "How to build an AI Customer Support Agent on WhatsApp ..."

Website: <https://answerridge.com>

A practical checklist for building and launching an AI customer support agent on WhatsApp.

Checklist Items:

- ☐ **1. Identify Common Customer Questions**
Start by listing the five to ten questions your team answers most frequently, such as order status or refund eligibility, to determine the scope of the AI agent.
Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)
- ☐ **2. Choose the Right Integration**
Connect the AI agent through an approved integration using the WhatsApp Business Platform to avoid risks associated with unofficial automation.
Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)
- ☐ **3. Prepare a Reliable Knowledge Base**
Merge duplicate articles, date them, and assign ownership to each topic to ensure the agent retrieves trustworthy answers.
Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)
- ☐ **4. Implement Intent Detection and Retrieval**
Add features that classify customer intent and pull relevant passages from the knowledge base, ensuring each response includes a confidence score.
Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)
- ☐ **5. Set Up Routing Rules**
Define rules based on team, priority, region, and language to efficiently manage the flow of inquiries.
Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)
- ☐ **6. Build Human Handoff Mechanism**
Incorporate a process for human handoff when confidence in the response is low or when the customer explicitly requests human assistance.
Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)



- ☐ **7. Test with Real Scenarios**
Use actual customer inquiries from previous transcripts to test the AI agent, ensuring it can handle real-world scenarios effectively.

Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)

- ☐ **8. Limit Initial Access and Monitor Performance**
Restrict the agent's reading capabilities, log all conversations, and have a human review the responses for the first few weeks post-launch.

Reference Section: [How to Build an AI Customer Support Agent on WhatsApp](#)

