

Template: AI Helpdesk Routing and Escalation Evaluation Checklist

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Based on Article: "How to Choose an AI Helpdesk With Routing and Escalation Built In: A 2026 Buyer's Guide"
Website: <https://answerridge.com>

A practical checklist to assess AI helpdesk platforms focusing on routing, escalation, and operational behavior to ensure reliable customer support resolutions.

Checklist Items:

- ☐ **1. Verify AI Resolution Confidence and Source Controls**
Test the system with real customer questions to check if AI answers meet your confidence threshold and are generated from approved content sources.
Reference Section: What an AI Helpdesk With Routing and Escalation Built In Actually Is
- ☐ **2. Test Intent, Language, Sentiment, and Urgency Detection**
Submit mixed-language, unclear, or emotionally varying requests to confirm the platform accurately detects the customer's intent, language, sentiment, and urgency.
Reference Section: What an AI Helpdesk With Routing and Escalation Built In Actually Is
- ☐ **3. Evaluate Channel-Aware Routing Consistency**
Confirm that routing rules apply uniformly across all channels—chat, email, and knowledge base—ensuring identical intent handling and queue assignment.
Reference Section: What an AI Helpdesk With Routing and Escalation Built In Actually Is
- ☐ **4. Configure and Test Escalation Rules**
Set up escalation triggers based on risk, SLA breaches, low confidence, sentiment, or account value, and verify that escalation ownership and fallback queues function as expected.
Reference Section: What an AI Helpdesk With Routing and Escalation Built In Actually Is
- ☐ **5. Confirm Human Handoff Completeness**
Demonstrate a live transfer from AI to a human agent ensuring the agent receives full conversation history, customer intent, and reason for escalation without customer repetition.
Reference Section: What an AI Helpdesk With Routing and Escalation Built In Actually Is
- ☐ **6. Assess Knowledge Base Learning Loop Functionality**
Review how the platform captures failed AI answers, creates content update tasks, and manages feedback and review controls to continuously improve the knowledge base.
Reference Section: What an AI Helpdesk With Routing and Escalation Built In Actually Is

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- ☐ **7. Review Reporting and Cost Tracking Capabilities**
Ensure the system provides detailed reports on resolved tickets, transfer rates, channel performance, and costs with data export features for finance and operations analysis.

Reference Section: [What an AI Helpdesk With Routing and Escalation Built In Actually Is](#)

- ☐ **8. Validate Routing and Escalation Across Real Ticket Types**
Use your actual support data to score the platform's routing by channel coverage parity, escalation control flexibility, and alignment to your team's common ticket drivers.

Reference Section: [Why Routing and Escalation Should Drive the Buying Decision](#)

- ☐ **9. Confirm Escalation Ownership and Fallback Procedures**
Check that escalation processes assign clear ownership, include fallback queues, and require human approval for sensitive or high-risk cases.

Reference Section: [Why Routing and Escalation Should Drive the Buying Decision](#)

