

Voice AI Agency Launch Checklist

01 / STRATEGY & OFFER

Client / project: _____ Owner: _____

Pilot version: _____ Review date: _____

Business model selection

- ☐ Name the model: referral, authorized resale, implementation, white-label software, or fully managed service.
- ☐ Record who contracts, bills, supports, owns access, and authorizes any resale or branding rights.

Evidence / decision: _____

Target customer definition

- ☐ Choose one client segment, one operational problem, and one workflow owner.
- ☐ Document the current call journey, baseline, exclusions, and who benefits from the proposed change.

Evidence / decision: _____

Vendor evaluation

- ☐ Verify required capabilities against current official documentation and the applicable plan.
- ☐ Test telephony, integrations, access isolation, handoff, export, and failure paths in your actual setup.

Evidence / decision: _____

First offer development

- ☐ Describe a bounded deliverable, supported hours, permitted actions, and an honest fallback.
- ☐ List client dependencies, change-control rules, and the evidence needed for acceptance.

Evidence / decision: _____

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02 / ECONOMICS & DELIVERY

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Pricing and unit economics

- ☐ Estimate setup labor and ongoing platform, telephony, storage, integration, monitoring, and support costs.
- ☐ Model expected, high-usage, and support-heavy scenarios; calculate gross margin on revenue, not markup.

Evidence / decision: _____

Client discovery

- ☐ Identify the buyer, workflow owner, technical contact, and launch approver.
- ☐ Verify authoritative business rules, system ownership, routing, and how exceptions reach a human.

Evidence / decision: _____

Pilot scope

- ☐ Limit initial workflows, locations, languages, integrations, and operating windows.
- ☐ Agree test cases, business outcomes, review sample, success criteria, stop conditions, and scope changes.

Evidence / decision: _____

Integration requirements

- ☐ Name the system of record, permitted read/write actions, credentials owner, and least-privilege access.
- ☐ Prove a successful transaction with a receipt or identifier; test retries, duplicates, outages, and expired access.

Evidence / decision: _____

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03 / TRUST & LAUNCH READINESS

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Data privacy and calling requirements

- ☐ Map audio, transcripts, summaries, and contact data; approve retention, access, deletion, and incident handling.
- ☐ For outbound calls, assess applicable consent, identification, calling restrictions, suppression, opt-out, and records.
- ☐ Review recording permission and sector-specific requirements with qualified advisers for the actual use case.

Evidence / decision: _____

Support and escalation

- ☐ Assign monitoring, urgent restoration, client communication, and vendor escalation owners.
- ☐ Define supported hours, response expectations, update approvals, human handoff, and offboarding.

Evidence / decision: _____

First launch readiness

- ☐ Pass ordinary, ambiguous, interruption, tool-failure, unanswered-transfer, and after-hours tests.
- ☐ Give the client a versioned runbook, access and billing map, rollback route, and training.
- ☐ Record go/no-go approval from the workflow owner; schedule a review of actual outcomes and costs.

Evidence / decision: _____