

Prepare for an AI customer agent

The answers, policies, and handoff rules that help an agent support your team.

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Bring approved answers

Collect your common questions, product or service information, opening hours, contact routes, and relevant policies. Identify the owner who can confirm each source is current. Old or conflicting information should be resolved before it is used in customer answers.

Define what the agent may do

- Choose channels, supported languages, and the tone of voice.
- List approved actions, such as collecting an enquiry or checking a permitted source.
- Define when a human takes over: uncertainty, complaints, sensitive requests, or exceptions.
- Agree what customer information can be collected, why it is needed, and how it is handled.

Test real situations safely

Prepare normal questions, missing-information cases, and requests the agent must refuse or escalate. Include Arabic and English examples if both are needed. Review answer quality, handoffs, and any actions before launch. Access and platform approvals are confirmed during scoping.

Your checklist

0/4 complete

- ☐ Collect FAQs and policy links.
- ☐ Assign an answer reviewer.
- ☐ Write human handoff rules.
- ☐ Prepare representative test questions.

A USEFUL NEXT STEP

Send a non-confidential sample of the questions your team receives.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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