

AI Agent Platform

Evaluation Checklist





1 Support Goals Alignment

- Can the platform be configured to prioritize your primary support objective (e.g., ticket deflection vs. resolution speed) without custom development?
- Does it support different goal configurations across channels (chat, email, etc.)?
- Can AI behavior be segmented by customer type, region, or support use case?
- Does the platform track and report how AI actions influence key performance indicators (KPIs)?
- Can goals be updated without requiring major workflow redesign?



2 Workflow Design and Logic

- Can workflows process multiple inputs (intent, history, customer data) within a single flow?
- Can the AI take actions (e.g., updating records, triggering APIs) directly within workflows?
- Can the platform handle edge cases without falling back to vague or generic responses?
- Can workflow updates be deployed without disrupting operations?
- Can multiple steps or agents collaborate within a single workflow?



3 AI Reasoning and Support Intelligence

- Can the AI maintain context across multiple messages?
- Does it handle vague or incomplete queries without making incorrect assumptions?
- Can it manage follow-up questions within the same context?
- Can the AI adapt responses based on urgency, issue type, or escalation risk?
- Does it handle uncertain situations smoothly without degrading the customer experience?



4 Omnichannel Support

- Can conversations continue across channels without losing context?
- Are responses consistent across chat, email, social, and voice?
- Are channels supported natively (without excessive dependence on third-party connectors)?
- Is there a unified interaction history available across all channels?



5 Human Handoff and Collaboration

- Can escalation rules be defined based on confidence or failure conditions?
- Does full conversation context (including actions taken) transfer during handoff?
- Are AI-generated summaries clear and usable for agents?
- Can agents take over without restarting the interaction?
- Are collaboration tools embedded within the workflow?

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Knowledge Management and Training

- Can AI use both structured (KB articles) and unstructured data (tickets, documents)?
- How quickly are knowledge updates reflected in AI responses?
- Can content be updated without disrupting existing responses?
- Are approval workflows, versioning, and rollback controls available?

7

Integration Ecosystem

- Are prebuilt integrations available for key systems (CRM, help desk, ERP, etc.)?
- Can the platform pull data in real time?
- Do integrations support two-way updates (not just read access)?
- Are low-code or no-code integration tools available?
- Can integrations be customized for specific workflows?

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Analytics and Reporting

- Does the platform clearly track resolved, assisted, and failed interactions?
- Does it measure deflection based on workload reduction rather than just session count?
- Does it provide insights at the workflow, intent, and automation-step levels?
- Can reporting be customized for both operational and leadership needs?
- Does it automatically highlight performance issues or declines?

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Security, Privacy, and Compliance

- Does the platform meet required standards (e.g., GDPR, SOC 2) with verifiable certifications?
- Does it encrypt data in transit and at rest across all components?
- Are access permissions configurable across users, roles, teams, and environments?
- Are all actions logged for auditing and compliance purposes?
- Does it support data storage, masking, and deletion controls?

10

Pricing and Total Cost of Ownership

- Is the pricing model clear (e.g., per interaction, per agent, usage-based)?
- Are setup, onboarding, and integration costs transparent?
- Do costs scale predictably with usage?
- Are key features (automation, APIs, integrations) clearly included or listed as extras?
- Are there no hidden or unexpected charges?

11**Vendor Reliability and Final Validation**

- Does the vendor provide clear escalation paths and respond promptly to issues?
- Is the documentation regularly updated and detailed enough for effective troubleshooting?
- Is ongoing support available beyond the initial onboarding phase?
- Is platform performance consistent across real customer deployments?
- Does the vendor demonstrate experience with teams of similar scale or complexity?

12**Implementation Readiness and Operational Scalability**

- Is the setup process straightforward and not heavily dependent on developer involvement?
- Can teams quickly configure and launch workflows using templates or pre-built components?
- Can AI agents be effectively monitored, retrained, and optimized over time?
- Does the platform scale across teams, regions, and ticket volumes without requiring major rework?
- Are operational ownership and governance controls clearly defined?