



HIGH-VOLUME OPPORTUNITY AUDIT

Before automating hundreds of conversations, map the **operating reality.**

Use this assessment when a business has more volume, more agents, multiple products, branches or languages than the Starter flow.

Conversation volume

Daily inbound conversations

Peak hours / days

Seasonality or campaigns

Team and ownership

Number of responders

Branches / departments

Current response SLA

Lead journey

Top enquiry categories

Qualification questions

What counts as qualified?

Systems

CRM / spreadsheet / ERP

Booking and payments

Existing WhatsApp setup



DESIGN QUESTIONS

Decide what the system may answer, route and escalate.

Routing

- ☐ **By product or service**
Who owns each category?
- ☐ **By location**
Branch or service area.
- ☐ **By language**
Supported languages and fallback.
- ☐ **By lead score**
High intent goes first.

Human escalation

- ☐ **Pricing negotiation**
Who approves exceptions?
- ☐ **Complaint or risk**
Immediate owner and SLA.
- ☐ **Custom request**
What should the AI never promise?
- ☐ **Explicit human request**
No friction or repeated questions.

Consent and messaging policy

Document how people opt in, which messages are transactional, which require templates, how STOP is handled and how channel ownership is recorded.

Failure behavior

If the AI is uncertain, the integration is unavailable or a send fails, what should the customer see and who is alerted?



MEASURE OUTCOMES

Define success before deployment.

Baseline

Median first response time

Qualification time per lead

Booking rate

Missed / unanswered rate

Target

Response target

Qualified lead rate

Human workload reduction

Show rate

Recommended phased build

Phase 1: one enquiry category, one team, one routing rule and one success metric.

Phase 2: add integrations, languages, branches and more complex decisions only after the first flow is stable.

High-volume systems need a scoped audit.

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Map scope