

# AI Readiness Checklist

Is your CX organization prepared to implement generative AI? Great question! Here are some steps you should consider as you get ready for the generative AI revolution.

- **Define the Objective:** Understand your goals and define success metrics. Which areas of your support operation do you want to automate vs. offer agent interaction?
- **Identify Stakeholders:** Build a DACI (driver, approver, contributor, informed) framework. What other teams/individuals should be involved?
- **Obtain Executive Buy-In:** Receive approval from leadership and secure funding.
- **Clear Roadblocks:** Align compliance requirements with security and legal teams.
- **Design the Experience:** How do you want customers to navigate your offering? What information can you gather from end-user interactions to help inform your product and CS teams?
- **Prep your Knowledge Base:** If starting from scratch, begin with your most frequently received questions and concerns.
- **Prepare for Change:** Create a change management plan for support agents and, as necessary, your customers.
- **Experiment:** Start small and ramp up or go full blast. Validate that your success metrics are moving in the right direction.