

Making the Decision: Your Voice AI Checklist

As you evaluate solutions, focus on partners who understand the unique complexities of multi-location operations. The right AI voice agent platform should feel like an extension of your team by delivering consistent service that reinforces your brand while providing the flexibility to meet local needs.

It's not a matter of choosing between AI and human staff but rather strategically combining the two. Agentic AI handles the scalable, repetitive interactions with consistency, such as lead qualification, scheduling appointments, and processing customer requests, while your human team focuses on the complex, relationship-driven work that differentiates your brand.

Look for solutions where the AI acts as a helpful AI assistant that's friendly, humanlike, and able to sense intent and context to streamline tasks and improve efficiency. The ability for the AI to confirm understanding with phrases like "makes sense" during conversations is important for building rapport and clarity. Also, it's important that you evaluate whether the platform can handle millions of concurrent calls globally with ultra-low latency, ensuring enterprise-grade scalability and reliability.

This checklist is designed to help you systematically evaluate voice AI providers through a variety of criteria, including the availability of forward-deployed engineers for rapid deployment and integration, and whether developers have access to robust tools and APIs for customization. As you review potential solutions, consider features such as automatic testing in a test center for accuracy and response quality, configuration flexibility with thousands of options and integrations, multilingual support for over 100 languages, and the use of a visual flow designer to build conversation flows.

Also, assess the platform's ability to process customer requests naturally, sense caller intent, and integrate with industries like financial services, healthcare, and customer support while ensuring high-compliance environments for data security and regulatory standards.



Technology and Performance

- ✔ Low latency response times for natural conversations
- ✔ High accuracy in understanding accents and varied speech patterns
- ✔ Natural-sounding voices that align with your brand
- ✔ Ability to handle complex, multi-turn conversations
- ✔ Proven capture rate of 90%+ for inbound calls
- ✔ Containment rate of 60% to 75% without human handoff
- ✔ Agentic AI capabilities for autonomous task completion

Multi-Location Capabilities

- ✓ Centralized management dashboard for all locations
- ✓ Location-specific customization (i.e., hours, services, promotions)
- ✓ Ability to instantly deploy updates across all locations
- ✓ Location-specific analytics and reporting
- ✓ Consistent brand voice across all locations
- ✓ Support for regional variations and local promotions
- ✓ Scalable architecture that grows with your business

Integration and Systems

- ✓ Full integration with your existing POS system
- ✓ CRM integration for customer data synchronization
- ✓ Scheduling system compatibility
- ✓ Real-time inventory connectivity (if applicable)
- ✓ API availability for custom integrations
- ✓ Data export capabilities for analysis
- ✓ Compatibility with existing telephony infrastructure

Scalability and Flexibility

- ✓ Ability to handle thousands of concurrent calls
- ✓ Quick onboarding process for new locations
- ✓ Flexible pricing that scales with your business
- ✓ Support for seasonal demand fluctuations
- ✓ Easy script updates and modifications
- ✓ Multi-language support (if needed)
- ✓ Performance consistency during peak periods

Human Handoff and Hybrid Operations

- ✓ Smooth escalation to human agents when needed
- ✓ Full conversation context passed during handoff
- ✓ Customizable escalation triggers
- ✓ Options for agent-assist mode
- ✓ Emergency protocols for urgent situations
- ✓ Queue management during high-volume periods
- ✓ Hybrid workflow optimization

Analytics and Insights

- ✓ Real-time call monitoring and dashboards
- ✓ Conversion tracking for bookings/orders
- ✓ Customer sentiment analysis
- ✓ Performance metrics by location
- ✓ Call recording and review capabilities
- ✓ ROI measurement tools
- ✓ Actionable operational insights

Compliance and Security

- ✓ TCPA compliance for automated calls
- ✓ Data security and encryption standards
- ✓ PCI compliance for payment processing (if applicable)
- ✓ Privacy policy alignment with regulations
- ✓ Regular security audits and updates
- ✓ Clear data retention policies
- ✓ Industry-specific compliance requirements

Support and Partnership

- ✓ Dedicated account management
- ✓ Technical support availability and response times
- ✓ Training resources for your team
- ✓ Regular platform updates and improvements
- ✓ Community or user forum access
- ✓ Case studies in your industry
- ✓ Onboarding and implementation support

Cost and ROI Considerations

- ✓ Transparent pricing structure
- ✓ Clear implementation costs
- ✓ Projected ROI based on your call volume
- ✓ Comparison with current staffing costs
- ✓ Contract terms and flexibility
- ✓ Success metrics and guarantees
- ✓ Total cost of ownership analysis

Industry-Specific Features

- ✓ Menu management (restaurants)
- ✓ Upselling capabilities
- ✓ Appointment scheduling (automotive/services)
- ✓ Inventory checking (retail)
- ✓ Order modification handling
- ✓ Payment processing integration
- ✓ Industry-specific workflows and templates