

Audit your customer agent in an afternoon

Ten yes-or-no questions from "Building customer agents that fix, not just answer". Each "no" points to one principle in the post. Answer for the agent customers actually talk to today, not the one in your roadmap.

-
- | | | | |
|--------------------------|-----------|--|----------|
| ☐ | 01 | Can your agent look up the specific order, account or ticket the customer is talking about, without asking for something they already gave? CONTEXT | Yes / No |
|--------------------------|-----------|--|----------|
-
- | | | | |
|--------------------------|-----------|--|----------|
| ☐ | 02 | Do you know how much goes into your agent's context on each turn, and how much of it is tool definitions? CONTEXT | Yes / No |
|--------------------------|-----------|--|----------|
-
- | | | | |
|--------------------------|-----------|---|----------|
| ☐ | 03 | When an article is added or changed, is it checked against the rest of the knowledge base before customers see it? KNOWLEDGE | Yes / No |
|--------------------------|-----------|---|----------|
-
- | | | | |
|--------------------------|-----------|--|----------|
| ☐ | 04 | When someone flags a wrong answer, does the source change the same day? KNOWLEDGE | Yes / No |
|--------------------------|-----------|--|----------|
-
- | | | | |
|--------------------------|-----------|--|----------|
| ☐ | 05 | Does a returning customer get recognised, with that memory limited to them and kept apart from anything that authorises an action? MEMORY | Yes / No |
|--------------------------|-----------|--|----------|
-
- | | | | |
|--------------------------|-----------|---|----------|
| ☐ | 06 | For every action your agent can take, can you say who allowed it, how it is tested and how it is undone? ACTIONS | Yes / No |
|--------------------------|-----------|---|----------|
-
- | | | | |
|--------------------------|-----------|--|----------|
| ☐ | 07 | Does your voice agent keep the conversation going while a slow lookup runs? SILENCE | Yes / No |
|--------------------------|-----------|--|----------|
-
- | | | | |
|--------------------------|-----------|---|----------|
| ☐ | 08 | When the agent hands over, does the person see what was said, what was tried and why the agent stopped, within ten seconds? HANDOVER | Yes / No |
|--------------------------|-----------|---|----------|
-
- | | | | |
|--------------------------|-----------|---|----------|
| ☐ | 09 | Does every edit run against a fixed set of scenarios before it reaches a customer, including every one that has broken you before? TESTING | Yes / No |
|--------------------------|-----------|---|----------|
-
- | | | | |
|--------------------------|-----------|--|----------|
| ☐ | 10 | Do you count a conversation as resolved only when the customer doesn't come back about the same issue? COUNTING | Yes / No |
|--------------------------|-----------|--|----------|
-

Reading your score. 9 or 10 yes: you are measuring the right things; look at consistency next. 6 to 8: start with the lowest-numbered "no". 5 or fewer: start with questions 1, 3 and 9, because context, knowledge and testing decide whether every other fix holds.