

The AI-Ready Support Stack **Audit Checklist**

1

Audit your current state

Week 1 - 2

- Map out every tool your support agents use during a typical customer interaction
- Track how much time they spend in each system
- Survey agents about their biggest frustrations and where they waste the most time (this baseline assessment will help you measure the impact of changes)

2

Identify integration requirements

Week 2 - 3

- List all the systems where customer data currently lives (think CRM, ticketing platform, knowledge base, product database, billing system, analytics tools, communication platforms)
- Determine what data needs to be unified and accessible during support interactions

3

Evaluate AI solutions built for B2B

Week 3 - 4

- Look for platforms that : Offer robust integrations with your existing tech stack
- Can handle technical product questions Have been trained on real customer service interactions
- Provide unified access to customer data and company knowledge
- Can be deployed without months of implementation work.

Note: During evaluations, test the AI with your actual customer queries and scenarios. Generic demos won't reveal whether a solution can handle your specific complexity.

4

Start with a focused pilot

Week 4 +

- Choose one support team or one type of customer interaction where context switching is particularly painful (implement the unified AI solution for this group first)
- Measure impact on key metrics
 - Average handle time
 - First-contact resolution
 - Agent satisfaction
 - Customer satisfaction
- Gather feedback and refine before expanding

5

Expand and optimize

Week 8 +

- Based on pilot results, gradually expand to additional teams and use cases
- Continue measuring impact and gathering feedback
- Always remember, the goal isn't to automate everything overnight; it's to systematically eliminate context switching and enable your support team to work at their full potential.