



AI OPERATIONAL READINESS

CHECKLIST FOR CONTACT CENTRE MANAGERS





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Five areas. 21 actions. A clear picture of where you stand

HOW TO USE THIS CHECKLIST

Work through each section with your operations, data, and technology leads. For each item, mark its current status and capture a note on the responsible owner and target completion date. Use the Readiness Score Summary at the end to identify where to focus your immediate effort.

Status key: : **COMPLETE**

IN PROGRESS

NOT STARTED

Completed by:

Team/Site:

Review Date:



01 DATA DEFINITIONS & METRIC CONSISTENCY

Does every team and system speak the same language?

Audit your core KPI definitions across all connected systems

Confirm that handle time, AHT, FCR, CSAT, adherence, and occupancy are calculated identically across your WFM, CRM, contact centre platform, and BI tools.

Status

Notes: _____

Document and publish a single definition for each critical metric

Create a shared metric glossary accessible to all teams – operations, QA, workforce planning, and analytics. Version-control it.

Status

Notes: _____

Identify and resolve conflicting field definitions across integrated platforms

Where definitions differ, determine the authoritative source and update downstream systems. Flag unresolvable gaps for escalation.

Status

Notes: _____

Assign ownership of each metric definition

A named person or team is accountable for maintaining each definition – not just where the data lives, but what it means and what decisions it informs.

Status

Notes: _____



02 DATA GOVERNANCE & LINEAGE

Can you trace every output back to its source?

Map data lineage for your top 10 operational reports

For each report: identify source system, transformation logic applied, business rules used, and any manual overrides or adjustments made before distribution.

Status

Notes: _____

Confirm AI and analytics outputs are explainable to a non-technical stakeholder

If a team leader or executive asks why a metric or AI recommendation looks the way it does, can you walk them through the logic clearly and completely?

Status

Notes: _____

Implement a data quality monitoring process

Regular, automated profiling of key data fields – completeness, consistency, freshness, and accuracy – across all integrated sources. Not a one-off audit.

Status

Notes: _____

Establish an audit trail for AI-assisted decisions

Any decision informed by AI output – staffing, routing, performance flags, escalations – should have a documented rationale that can be reviewed and defended.

Status

Notes: _____



03 DATA OWNERSHIP & ACCOUNTABILITY

Can you trace every output back to its source?

Identify a named data owner for each operational domain

Workforce data, customer interaction data, quality data, financial data. Each domain needs an accountable owner who can validate what the data produces, not just where it is stored.

Status

Notes: _____

Define the escalation path when data quality issues are identified

When an AI output flags an anomaly or a report number looks wrong, who investigates? What is the decision tree? How quickly must it be resolved before operations are affected?

Status

Notes: _____

Confirm human decision checkpoints are built into AI-assisted workflows

AI recommends and explains. Humans decide and act. Every consequential AI output – staffing recommendations, performance flags, anomaly alerts – should have a named human review step.

Status

Notes: _____



04 REAL-TIME OPERATIONAL INTELLIGENCE

Can your team access answers at the speed decisions are made?

Map the current path from performance question to answer

How long does it take a team leader to answer: 'Why did handle time spike this morning?' Track every step – who they ask, where the data lives, how long it takes to arrive.

Status

Notes: _____

Identify which performance questions require a report request or analyst intermediary

These are your highest-impact automation targets. Questions that take hours or days to answer are generating operational lag that AI can eliminate.

Status

Notes: _____

Validate that live operational data reflects all connected platforms – not just one

A real-time view built on one system's data is still a partial picture. Confirm your operational intelligence layer unifies data across WFM, CRM, contact centre platform, and QA tools.

Status

Notes: _____

Test the speed and reliability of your current KPI refresh cycle

How stale is the data when your team leaders start their shift? How stale is it when they make a staffing or routing decision? Measure it. The gap matters.

Status

Notes: _____



05 AI MODEL GOVERNANCE & DRIFT MANAGEMENT

Are you confident your AI outputs are still accurate – right now?

Document which decisions in your operation are currently AI-assisted

Staffing recommendations, routing logic, quality scoring, anomaly detection, forecasting – inventory every AI-assisted touchpoint across your operation.

Status

Notes: _____

Establish a model drift review cadence

AI models calibrated on historical data become progressively less accurate as conditions change. Define a regular review schedule – monthly minimum – to compare outputs against operational reality.

Status

Notes: _____

Define clear thresholds for when an AI output should be reviewed before action is taken

What is the trigger – deviation size, confidence level, flagged data quality issue – that requires human review before an AI recommendation is acted upon?

Status

Notes: _____

Confirm data residency and AI governance compliance across all integrated AI tools

Where is AI reasoning occurring? Where is data being sent? Confirm alignment with your organisation's data residency requirements and any applicable regulatory obligations.

Status

Notes: _____

Brief your operations and QA teams on how to identify and report anomalous AI outputs

Where is AI reasoning occurring? Where is data being sent? Confirm alignment with your organisation's data residency requirements and any applicable regulatory obligations.

Status

Notes: _____



READINESS SCORE SUMMARY

Items Complete

Items in Progress

Items not Started

Total Items

Score 16–21 complete:

Stage: Strong foundation.

Suggested Strategy: Prioritise remaining items and monitor drift continuously.

Score 8–15 complete:

Stage: Solid progress.

Suggested Strategy: Address governance and real-time intelligence gaps as the next priority.

Score 0–7 complete:

Stage: High exposure.

Suggested Strategy: Begin with metric definitions and data ownership, these unlock every other section.



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AskEmite puts the intelligence from your governed emite data directly into the hands of your operations team – no SQL, no report queue, no waiting.

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Speak to an emite specialist

If this checklist has surfaced gaps you want to address with expert support, we are ready to help. Bring your completed checklist and we will start there.

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