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Chatbot Launch Checklist

Everything to verify before your AI chatbot goes live with real customers — 34 checkpoints across design, accuracy, testing, handoff, security, and monitoring.

A free checklist from The Nexa Solutions · thanexasolutions.com

How to Use This Checklist

A chatbot that isn't ready for launch doesn't usually fail loudly — it fails quietly, giving a wrong answer to a customer with total confidence, or getting stuck in a loop with no way out. This checklist covers the specific things worth verifying before your chatbot is talking to real customers, not just a test account.

Go through each section before launch day. Anything unchecked isn't automatically a blocker, but it should be a deliberate decision to launch without it — not an oversight discovered after a customer hits it.

Before you even open this checklist

Make sure the chatbot has a narrow, defined scope — “answer questions about our return policy and order status”, not “handle all customer service.” A tightly scoped bot that says “I'm not sure, let me connect you with someone” for anything outside its scope will outperform an ambitious one that guesses.

SECTION 1

Conversation Design & Scope

6 items

- ☐ **The chatbot's scope is written down in one or two sentences, not left implicit.**
A clear, narrow scope statement is the single biggest predictor of a chatbot that behaves well.
- ☐ **We've listed the top 15–20 questions customers actually ask, based on real support history.**
Design the bot around real questions, not a guess at what customers might ask.
- ☐ **The bot has a clear, natural way to say "I'm not sure" instead of guessing.**
A confident wrong answer damages trust far more than an honest "I don't know, let me connect you with someone."
- ☐ **The bot's tone and personality match our brand voice.**
A mismatch (too casual for a law firm, too stiff for a lifestyle brand) is noticeable to customers immediately.
- ☐ **We've decided what the bot should never do or say, not just what it should.**
Explicit boundaries (no medical/legal/financial advice, no discount promises) are easy to miss until tested.
- ☐ **The welcome message sets accurate expectations for what the bot can help with.**
Prevents customers from asking things outside scope in the first message and getting frustrated immediately.

SECTION 2

Knowledge & Data Accuracy

4 items

- ☐ **The information the bot draws from (FAQs, policies, product data) is current, not outdated.**
An AI system is only as accurate as the source material it's given.
- ☐ **Pricing, policy, and inventory information is connected live where possible, not hard-coded.**
Hard-coded facts silently go stale the next time a price or policy changes.
- ☐ **We've identified contradictions or gaps in our own documentation before the bot has to reconcile them.**
If two internal documents disagree, the bot will inherit that confusion.
- ☐ **There's a clear, assigned owner for keeping the bot's source content updated after launch.**
Content that's accurate on day one but never revisited becomes a liability within months.

SECTION 3

Testing & Quality Assurance

6 items

- ☐ **We've tested the bot with the real top 15–20 questions from Section 1, not just a handful of easy ones.**
Testing only obvious questions misses the edge cases that actually cause problems.
- ☐ **We've tested how it handles rude, off-topic, and nonsensical input.**
Real customers will send all three within the first week — better to see it happen in testing.
- ☐ **We've tested it with typos, slang, and non-native phrasing, not just clean grammatical sentences.**
Real customer messages are messier than the test questions a team writes for itself.
- ☐ **At least one person outside the project team has tried to break it before launch.**
People close to a project subconsciously test it gently; a fresh, skeptical tester finds different problems.
- ☐ **We've tested what happens with a multi-part or ambiguous question, not just single clear ones.**
Real questions often bundle two or three things into one message.
- ☐ **We've confirmed response time is acceptable under normal load, not just in a quiet test environment.**
A bot that feels instant alone can feel sluggish once real traffic and integrations are involved.

SECTION 4

Escalation & Human Handoff

5 items

- ☐ **There's a clear, easy way for a customer to reach a human at any point in the conversation.**
Trapping a frustrated customer in a bot loop with no way out is one of the fastest ways to lose trust.
- ☐ **The handoff to a human includes the conversation history, not a cold restart.**
Making a customer repeat themselves after asking for a human undoes any goodwill the bot built.
- ☐ **We've defined specific triggers for automatic escalation (complaints, refund requests, repeated confusion).**
Some situations should never be left to the bot to resolve alone, regardless of confidence.
- ☐ **A real person is actually available during the hours the bot directs customers to "talk to someone."**
Escalating to an unstaffed inbox is worse than not offering escalation at all.
- ☐ **We've set a limit on how many failed attempts trigger an automatic handoff.**
After two or three misunderstood messages, escalate automatically rather than let frustration build.

SECTION 5

Security & Privacy

5 items

- ☐ **The bot doesn't ask for or store more customer information than it actually needs.**
Minimize what's collected and retained, especially payment details and sensitive personal information.
- ☐ **Conversation logs are stored securely and access is limited to people who need it.**
Chat transcripts often contain personal information customers wouldn't expect to be widely visible.
- ☐ **We've reviewed the data-handling and retention policy of the platform or vendor we're using.**
Understand where conversation data is stored and for how long before launch, not after an incident.
- ☐ **The bot is disclosed as an AI system, not presented as a human agent.**
Increasingly expected by customers and required by law in a growing number of places.
- ☐ **There's a documented way to quickly disable the bot if something goes seriously wrong.**
A kill switch that isn't tested in advance often can't be found quickly when it's actually needed.

SECTION 6

Monitoring & Post-Launch

4 items

- ☐ **Someone is reviewing a sample of real conversations in the first week after launch.**
The fastest way to catch a problem is watching real usage closely right after launch, not waiting for a complaint.
- ☐ **We're tracking a small number of clear metrics (resolution rate, escalation rate, response time).**
Without a baseline, it's impossible to know later whether a change made things better or worse.
- ☐ **There's a simple process for customers or staff to flag a bad bot response.**
Direct feedback surfaces problems that metrics alone won't show.
- ☐ **A review of bot performance is scheduled for 30 days post-launch, not left indefinite.**
Early enthusiasm fades; a scheduled check-in ensures the bot actually gets revisited.

How The Nexa Solutions can help

We design, build, and test AI chatbots and agents for businesses that want this done right the first time — scoped tightly, tested thoroughly, and handed off cleanly to a human when needed. Visit thanexasolutions.com/contact to book a free consultation before (or after) your launch.