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AI Channel Routing Deployment Checklist

AI INNER CIRCLE • WEEKLY INTELLIGENCE

- ☐ 1. Audit current messaging channels (SMS, Email, Chat, Social).
- ☐ 2. Identify key customer segments and tag them in HighLevel.
- ☐ 3. Design unique bot scripts for each channel and segment.
- ☐ 4. Assign bots to channels using HighLevel's Channel Management tool.
- ☐ 5. Set up routing rules by contact tags and account numbers.
- ☐ 6. Test each bot's behavior in live and sandbox environments.
- ☐ 7. Document initial routing logic for team reference.
- ☐ 8. Monitor bot engagement and response accuracy weekly.
- ☐ 9. Gather feedback from end-users and refine scripts.
- ☐ 10. Report engagement and conversion metrics to stakeholders.