Strategy board for the use of AI agents (chat, phone, WhatsApp) with YOUNEA

1 Define objectives

What tasks should the AI take on?
(e.g. customer service, appointment management)

What problems should it solve?

What expectations do you have of AI?

2 Analyse customer communication

Which communication channels do you use?
(WhatsApp, e-mail, web chat, telephone)

Should the AI use predefined answers?

Can you provide us with sample chat histories for better customisation?

3 Building a knowledge base

Is there an FAQ list that the AI should answer?

What product or price information is important?

Should the AI provide documents or instructions?

Who will keep the content up to date?

6 Automate appointment management

Should the AI book appointments for you?

Is a Google calendar integration sufficient or do you need another solution?

Should it remind you of appointments or manage changes?

5 Set up telephone AI

Which number is used? (landline or mobile)

How should the AI greet your customers?

Should it answer calls or just forward them?

4 WhatsApp integration

Are you using your current number or do you need a new one?

Should previous chats be analysed to train the AI?

Does the AI respond automatically or does it just forward enquiries?

7 Define language style & tonality

How should the AI communicate? (Friendly, formal, casual)

Are there terms that it should use or avoid at all costs?

Should it behave differently depending on the communication channel?

8 Plan accessibility & availability

Should the AI be available around the clock or only at certain times?

How should it respond outside of business hours?

Are there emergency contacts to whom difficult enquiries should be forwarded?

9 Define proactive communication

Should the AI inform customers about offers or news?

Do you want it to send personalised messages?

Are there specific occasions when you want the AI to become active?
(birthdays, special promotions)