

Is your conversational AI actually delivering?

A quick self-check for teams running conversational AI in production or pilot.

Conversational AI is easy to launch and hard to get right. Most gaps don't show up on day one, but months in, once real customer interactions expose what the platform can and can't handle. This checklist covers the capabilities, common failure points, and process habits that separate an AI Agent that's actually working from one that's just live.

A few of these questions may sit outside any one person's view. It's worth pulling in your AI trainer, product owner, or IT before you go through it. Run through it honestly, then check to see where you stand.

A Core capabilities

Some gaps are baked into a platform itself, not how it's used. These are the capabilities worth checking for directly, since they're harder to add later without a real rebuild.

Can my conversational AI platform...

- ☐ Switch between topics mid-conversation without losing earlier context
- ☐ Handle support consistently across every channel, not separate tools for chat, voice and social
- ☐ Keep knowledge sources up-to-date automatically, without manual reloading
- ☐ Connect to backend systems, so it can take real action, not just answer questions
- ☐ Identify the top three drivers of customer frustration without digging through manual transcripts
- ☐ Mask or redact sensitive data types beyond a fixed default list

B Common failure signs

These don't typically show up in a demo. They appear weeks or months into real use, once volume and edge cases start exposing what the platform can't quite handle.

Does my current setup...

- ☐ Lose track of information customers gave, earlier in the same conversation
- ☐ Break down outside of scripted, predefined flows
- ☐ Escalate a large share of "automated" conversations to a human anyway
- ☐ Require extra headcount or overtime just to hit service targets at peak volume
- ☐ Leave you unsure how sensitive data is actually handled behind the scenes
- ☐ Eat into a meaningful share of the team's day on the same handful of repeat questions

C Process and ownership

Even the strongest platforms underperform without the right habits around them. Just as often, the gap isn't the technology, it's how it's run day to day.

Does my organization...

- | | |
|---|--|
| ☐ Have a clear, specific objective the AI is meant to achieve, not just to "have AI" | ☐ Assign clear ownership of ongoing training and tuning, not just the initial setup |
| ☐ Review KPIs on a regular cadence, not only at renewal time | ☐ Involve IT, marketing and customer service at the planning stage |
| ☐ Use a setup that can scale over time, without needing a full re-platform | ☐ Deliver an AI experience that feels intuitive to use, not just technically functional |

Score yourself

17–18: You're in good shape. Check back in six months.

12–16: Worth speaking with our experts to plug the last few gaps in your system.

8–11: Specific gaps our team sees often and can help resolve.

0–7: Time for a different approach. Let's talk.

Why we have a point of view on this

We've run enough deployments to know where they go right and where they stall.

650+

live AI Agents

180M+

automated conversations

The trusted leader in AI-powered customer experience solutions for regulated industries.

Full hybrid control, orchestrating traditional NLU and LLMs.

Trusted by Nordea, DNB, Sage, Trading 212, and more.

Recognized in Gartner's Magic Quadrant™ for Conversational AI Platforms.

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