# AI Phone Go-live Test Pack

Twelve calls to check an AI receptionist before launch or after a change.

A phone demo can sound convincing while a message is lost, a booking fails or a transfer reaches nobody. This pack helps a business owner and their provider check the conversation and the result in the destination system.

Use it for a new receptionist, a changed prompt, a new voice or a different booking connection. Adapt the expected behaviour to your own service. This is a practical test worksheet, not a certification.

## Set up a safe test

| Write down | Your answer |
|---|---|
| Business and test owner | _____ |
| Provider and version being tested | _____ |
| Test number and agreed test window | _____ |
| Where messages and bookings should appear | _____ |
| Who can restore the previous setup | _____ |

Use invented names, a calendar set aside for testing, and phone numbers and inboxes your business controls. Tell the people answering test transfers what to expect. Keep real customer information out of the test log. If a test would create a real booking, message or charge, have the provider isolate it first.

## For each test

1. Make the call and note its time or call reference.

2. Listen to the recording where recording is permitted. A transcript cannot prove pronunciation, interruptions or silence.

3. Open the destination record or inbox. Check what actually arrived.

4. Mark PASS, FIX or NOT TESTED. Record a reason for any test that does not apply.

Repeat failed tests after a fix. Then repeat an ordinary successful call to check the fix did not break it. Try different wording on the repeat.

# Check the conversation and capture

## Tests 1 to 4

### 1. An ordinary enquiry

Say: "Hello, what services do you offer and when are you open?"

Pass when: the business name, services and hours match the approved business information. The first words are audible, and the response makes sense.

Proof to keep: call reference and the information source used for the comparison.

### 2. A question it cannot answer

Ask about a service, price or policy that is deliberately absent from the approved information.

Pass when: it acknowledges the limit and offers the agreed next step. It does not invent a price, promise a discount or claim that someone approved an exception.

Proof to keep: the unsupported question and the actual answer.

### 3. A corrected callback number

Request a callback, then give a different business-owned test number from the one you called on. Correct a digit once if needed.

Pass when: the saved callback number is the one you supplied. It does not guess a number or silently use the incoming caller ID instead.

Proof to keep: the final saved record, with the test number checked against your source.

### 4. A caller who leaves early

Give the minimum details agreed for a message, say you must go and end the call before the normal closing questions.

Pass when: the agreed minimum information reaches the correct destination even though the conversation ended early. Details that were never provided remain unknown.

Proof to keep: the received message and its delivery time.

For every test, write the result in the companion log. "I have passed that on" is speech; the received record is the proof.

# Check bookings and handovers

## Tests 5 to 8

### 5. A corrected name and a second request

Give an invented name, correct it, then add a second request after the first has been acknowledged.

Pass when: the final record uses the corrected name and includes both requests accurately. It does not repeat the original action or send duplicate notifications just because the conversation continued.

Proof to keep: the final record and number of notifications received.

### 6. An unavailable booking

In the test calendar, ask for a slot that is already occupied. Choose another allowed slot if one is offered.

Pass when: it checks availability, respects the agreed booking rules and confirms only a booking that exists. The occupied slot stays untouched.

Proof to keep: the calendar entry, date, time, timezone and confirmation. If booking is outside your scope, record that fact and verify it does not offer to book.

### 7. A transfer that is answered

Ask for a transfer that your business allows. Have a team member answer on the agreed test destination.

Pass when: the right phone rings, the receiver gets any agreed introduction, and both people can hear each other. The caller does not have to start again because context vanished.

Proof to keep: confirmation from both ends and the call reference.

### 8. A transfer nobody answers

Repeat the permitted transfer while the test receiver deliberately does not answer.

Pass when: the call returns to the agreed fallback or message route. It does not ring indefinitely, drop silently or say someone answered when they did not.

Proof to keep: observed ring duration, fallback behaviour and any received message.

If transfers are disabled, tests 7 and 8 check that the receptionist follows the approved message route without promising a transfer.

# Check the difficult paths

## Tests 9 to 12

### 9. An after-hours enquiry

Call outside the defined transfer or service hours, or ask the provider to use an isolated test schedule.

Pass when: it follows the after-hours rule and makes no promise of immediate attendance or transfer unless that service actually operates then.

Proof to keep: test time, timezone, configured hours and received result.

### 10. A connection that fails

Ask the provider to simulate an unavailable calendar or message service in an isolated test environment. Do not break a production connection to run this test.

Pass when: the receptionist gives the agreed fallback and does not say a booking or message succeeded. The failure reaches the person responsible for handling it.

Proof to keep: the simulated failure, the caller's answer and the internal alert or recovery record.

### 11. A pause, interruption and spoken address

Pause naturally halfway through a sentence, interrupt one answer, and ask it to say a business website or email address used in your script.

Pass when: turn-taking lets you finish, it handles the interruption and the address is intelligible. Listen for clipped greetings, repeated questions and long unexplained silence.

Proof to keep: recording timestamps and measured delays. Agree acceptable response times for your callers before grading.

### 12. The complete post-call result

Make one normal message call. Check each promised destination: inbox, CRM, calendar or portal, as applicable.

Pass when: the right person receives the correct information within your agreed delivery window, once. Call references match, and any expected recording opens for an authorised user.

Proof to keep: the call reference, destination record reference and delivery time. Note any missing or duplicate result.

An untested failure path stays NOT TESTED. It does not become a pass because the ordinary call worked.

# Keep a usable evidence log

## Record the result, not an impression

Use the companion CSV in Google Sheets, Microsoft Excel or another spreadsheet. Make one row per attempt. Keep the first failed attempt when you add a retest.

| Field | What to record |
|---|---|
| Test and attempt | For example, Test 8, attempt 2 |
| Time and version | Local time, timezone and version tested |
| Call reference | The provider's reference or your own unique label |
| Expected result | The agreed behaviour before the call |
| Observed result | What the caller heard and what the system did |
| Destination proof | A record reference or restricted evidence location |
| Result | PASS, FIX, NOT TESTED, or NOT APPLICABLE with a reason |
| Owner and retest | Who will fix it and when it will be checked again |

## Example: a failed transfer

| Field | Example only |
|---|---|
| Test | 8, attempt 1 |
| Expected | If unanswered, offer a message |
| Observed | Receiver did not answer; call ended |
| Proof | Test call T-008, recording at 00:42 |
| Result | FIX |
| Next action | Provider checks fallback; repeat Test 8, then Test 7 |

Store evidence where only the test team can access it. Use references in this worksheet rather than copying personal information or private recordings into a shared document.

## Fault description

What happened: _____

What should have happened: _____

Who owns the fix: _____

Retest date and result: _____

# Decide whether to launch

## Go, hold or limit the pilot

| Decision | Use when |
|---|---|
| GO | Required tests pass, evidence exists and someone owns monitoring |
| HOLD | A required result is wrong, missing or untested |
| LIMITED PILOT | The owner explicitly excludes an unready feature and tests the reduced service |

Hold the affected feature if it invents business facts, stores the wrong contact details, confirms an action that did not happen, leaks information or loses a caller during a failed transfer. Correct the cause and retest before relying on it.

## Handover sheet

| Record | Your answer |
|---|---|
| Approved service and excluded features | _____ |
| Version and launch time | _____ |
| Test evidence location | _____ |
| Person watching initial calls | _____ |
| Who receives failed-action alerts | _____ |
| Working fallback number or process | _____ |
| Who can restore the previous setup | _____ |
| When the first review happens | _____ |

After launch, review a small agreed set of real calls and confirm the downstream results. Re-run the relevant tests whenever the prompt, model, routing, opening hours or connected system changes.

Decision: GO / HOLD / LIMITED PILOT

Owner: _____ Date: _____

## Need help with your phone workflow?

Bring the completed test log to Yes AI. We can discuss the failing steps, the systems involved and the work needed to improve them.

Contact: https://yesai.au/contact/

Consultation options: https://yesai.au/order/consultation/



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