FREE CHECKLIST

AGENT FIRST

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The Client Profile Setup Checklist

A knowledge base answers where a policy lives. A Client Profile answers what an agent is authorized to do **right now**, for this client, in this exact situation. Before configuring one for a pilot, gather real answers to the six items below from whoever already knows this client's rules best: a trainer, an ops lead, or the client directly.

1 Services or requests, and eligibility

What can an agent help with for this client, and what can't they. For each one, what makes a specific customer or situation eligible or not (a status, a date, a condition, a prior step already completed).

2 Authorization level for each policy area

For each rule that matters, can an agent act on their own, does something need to be verified first, is it flatly not allowed, or does it require a human's sign-off before anything happens.

3 Required language and disclosures

Exact wording that must be said out loud, any disclosure required by the client or by law, and anything an agent should never promise, imply, or commit to on their own.

4 Escalation and transfer rules

When a situation goes to a human instead of being resolved on the call, and specifically who: which person, department, or outside contact, not just "escalate."

5 Hours, contacts, and routing

Who an agent reaches for what, when each contact is actually reachable, and what should happen when a request comes in outside those hours.

6 What "not specified" should mean

When the real rules don't cover a situation, decide now what an agent should do: say so honestly and verify, rather than guess. This one decision protects every gap the other five items don't catch.

WHY THIS MATTERS

Each of the six items above becomes one part of that client's Client Profile: a real, structured record an agent can be checked against, not a folder to search mid-call. A profile with honest answers to all six is ready to run in a pilot.

HAVE THIS FILLED OUT?

Get in touch and I will walk it into a working Client Profile with you, and scope what a pilot would look like for your team. Write to info@myagentfirst.com, or visit myagentfirst.com.