First agent launch checklist

For the person who owns the call type and the person who will set it up. Work through it for one agent at a time. It's a planning aid, not legal advice.

Agent: _____ Owner: _____ Target start date: _____

1. Choose one job

[ ] Name one call type, such as COD confirmation or delivery follow-up.

[ ] Write the single result that counts as success, and the system that should hold it.

[ ] Write today's figure for that result, so you have something to compare with.

[ ] List what the agent may do, and list what it must never do.

[ ] Choose the one language this agent will use.

2. Set up the agent

[ ] Open with the business name, the reason for calling, and that the caller is speaking with an AI.

[ ] Pick speech, language and voice models, and test them with your callers' real phrases.

[ ] Add only the tools this job needs. Keep API keys in zlicx secrets.

[ ] Add a rule that the agent reports an action as done only after the tool succeeds.

[ ] Load a small knowledge base with one owner, and remove documents that disagree.

[ ] Add post-call fields for the outcome and for any callback needed.

3. Connect the phone line

[ ] Decide between a rented number and your own SIP trunk.

[ ] For a trunk, add your carrier's source IPs. An empty list accepts no inbound calls.

[ ] Call from a mobile on another network, and check the audio in both directions.

[ ] For outbound in India, confirm the correct number type and registration with your carrier.

4. Plan the handoff

[ ] Remember that live transfer to a person isn't available yet. Plan a callback instead.

[ ] Write the exact words the agent says when it can't help.

[ ] Send the post-call result to a place your team watches.

[ ] Name who owns callbacks on each shift, and set a target time.

[ ] Turn the webhook endpoint off once, and see what happens to the request.

5. Check outbound rules

[ ] Set calling hours for the agent. Indian numbers are held to 9am to 9pm.

[ ] Load your do-not-call list, and set a route for "don't call me again".

[ ] Record where contacts agreed to be called.

[ ] Scrub against the national DND registry yourself. zlicx doesn't check it today.

[ ] Have someone responsible review the call against TRAI rules.

6. Check privacy

[ ] List what the calls may contain, including what callers might volunteer.

[ ] Decide whether to store recordings. Set retention days for this agent.

[ ] Consider zero-PII retention if you don't need transcripts afterwards.

[ ] List each provider that will process call audio or text.

[ ] Have someone responsible review the DPDP Act and any sector rules.

7. Test by breaking it

[ ] Run your test list from the delivery call test kit, or your own version of it.

[ ] Make a tool fail, and listen to what the agent says.

[ ] Ask it to ignore its instructions.

[ ] Have someone who doesn't know the script try to reach a goal.

8. Start small

[ ] Limit the first run by number, hours or batch size.

[ ] Write what makes you pause at once, and who has the authority to do it.

[ ] Read a sample of calls each day.

[ ] Estimate spend with the call cost worksheet, and top up the wallet to match.

[ ] Pick the date you'll decide to expand, change or stop.