

Agentic AI Readiness Checklist for Contact Centers in 2026



Customer Data & Knowledge Foundation

- Is your customer interaction data (calls, chats, emails, transcripts) centralized and accessible for AI-driven workflows?
- Are customer profiles, order history, and support interactions unified across CRM and operational systems?
- Are knowledge bases (policies, promotions, returns, FAQs) structured, searchable, and regularly updated?



Cloud Contact Center Architecture

- Is your contact center platform cloud-based and capable of scaling elastically during peak demand?
- Can your contact center integrate with AI services and enterprise tools via APIs or middleware?
- Are voice, chat, messaging, and email workflows aligned within a unified routing and queue management architecture?



Human-AI Collaboration Readiness

- Are agents trained to work alongside AI assistants and trust AI-generated summaries or recommendations?
- Are workflows documented so AI can assist with resolution steps, escalation paths, and policy guidance?
- Are decision boundaries defined for AI-assisted actions (e.g., refunds, credits, escalations)?



AI Governance & Organization Controls

- Are policies in place to control AI access to enterprise systems without exposing credentials or sensitive data?
- Are AI actions logged, auditable, and governed with escalation and fallback mechanisms?
- Are privacy, compliance, and data protection requirements defined for AI-assisted customer interactions?



Operational Strategy & Business Impact

- Have you identified Tier-1 inquiries suitable for AI-first handling (order status, returns, FAQs)?
- Are KPIs defined to measure AI impact (first-contact resolution, handle time, CSAT, cost per contact)?
- Is there a phased rollout plan from pilot to full-scale AI orchestration across channels?

How to Use this Checklist?



0-5 "Yes"

You're in the **Discovery Phase** on consolidating data, modernizing your contact center platform, and documenting workflows.



6-10 "Yes"

You're **Agent-Ready**. Start a pilot with AI orchestration for Tier-1 inquiries and AI-assisted agent workflows.



11-15 "Yes"

You're **Agent-First**. You're ready to deploy Agentic AI across channels and build a scalable AI-powered contact center.