Launch checklist for your first zlicx agent

Take one agent from idea to its first real calls. Fill it in with two people: the person who owns this kind of call today, and the person who sets the agent up. It's a working aid, not legal advice.

AGENT	CALL OWNER	SET UP BY	FIRST CALLS ON

1 Pick the call

> One agent, one job, one language. A narrow agent is easier to test and easier to trust.

- [ ] Name the call, for example COD confirmation, lead call-back or fee reminder.
- [ ] Write the one outcome that means the call worked, and where that outcome should land: your OMS, CRM or a sheet.
- [ ] Note today's number for that outcome, so the pilot has something to beat.
- [ ] Write what the agent may do, and what it must never do or promise.
- [ ] Choose the language: Hindi, Tamil, English or Indian English. A second language means a second agent.

2 Build the agent

> The opening line sets the tone. Callers relax when they know who is calling and why.

- [ ] Open with your business name, the reason for the call, and that they are speaking with an AI agent.
- [ ] Choose the speech, language-model and voice options, then test them on real phrases your callers use, accents included.
- [ ] Add only the actions this call needs. Store API keys as zlicx credentials, never in the instructions.
- [ ] Tell the agent to confirm an action only after the action reports success.
- [ ] Keep the knowledge base small, give it one owner, and remove documents that contradict each other.
- [ ] Add post-call fields for the outcome and for any callback the caller asked for.

3 Connect the number

> Test from the networks your customers actually use, not just the office line.

- [ ] Choose a rented Plivo or Vobiz number, or bring your own SIP trunk.
- [ ] On your own trunk, add your carrier's signalling IPs. An empty list means no inbound calls get through.
- [ ] Call in from a mobile on a different operator, and check the audio both ways.
- [ ] For outbound calls in India, confirm the number type and registration with your carrier.

4 Plan the handover

> zlicx doesn't transfer live calls to a person yet. Every handover is a callback, so someone has to own it.

- [ ] Write the exact words the agent says when it can't help.
- [ ] Send each post-call result somewhere your team already looks.
- [ ] Name who owns callbacks on each shift, and how quickly they call back.
- [ ] Switch your webhook endpoint off once, on purpose, and check what happens to the result.

5 Follow India's calling rules

> zlicx keeps calls to Indian numbers within 9am to 9pm. The rest of compliance stays with you.

- [ ] Set the agent's calling hours inside that window.
- [ ] Load your do-not-call list, and make sure "don't call me again" adds the number to it.
- [ ] Record where each contact agreed to be called.
- [ ] Scrub your list against the national DND registry. zlicx doesn't check the registry today.
- [ ] Have someone responsible review the call against current TRAI rules.

6 Decide what you keep

> Keep only what you'll use. Less stored data means less to protect.

- [ ] List what the calls may contain, including details callers offer without being asked.
- [ ] Decide whether to keep recordings, and set this agent's retention days.
- [ ] Turn on zero-PII retention if you don't need transcripts afterwards.
- [ ] List every provider that will process the call's audio or text.
- [ ] Have someone responsible review the call against the DPDP Act and any rules for your sector.

7 Try to break it

> Your customers will find the gaps. Find them first.

- [ ] Run the cases in the delivery call test kit, or your own version of them.
- [ ] Make an action fail on purpose, and listen to how the agent recovers.
- [ ] Ask the agent to ignore its instructions.
- [ ] Hand the phone to someone who hasn't seen the script, and give them a goal.

8 Go live small

> A small first run is cheap to fix. A large one is expensive to apologise for.

- [ ] Cap the first run by numbers, hours or batch size.
- [ ] Write down what makes you pause the agent at once, and who is allowed to do it.
- [ ] Listen to a sample of calls every day.
- [ ] Estimate spend with the call cost worksheet, and top up the wallet to match.
- [ ] Set the date you'll decide to expand, change or stop.

Sign-off

CALL OWNER	DATE

SET UP BY	DATE