GREYBATH / OPERATIONS CHECKLIST

WhatsApp AI: first-pilot checklist

Audit real questions. Automate stable answers. Keep judgement with people.

Business	Pilot owner	Review date

GREEN	AMBER	RED
Stable, approved information	Current or customer-specific data	Judgement or commitments
Hours, public catalogue, fixed MOQ. Use only an owned, reviewed answer.	Stock, dispatch, invoice or dealer rate. Needs a reliable authorised source.	Negotiated prices, credit, complaints. Keep the decision with authorised staff.

1 Run a five-step message audit

1. Sample 50-200 recent questions in a controlled location; remove unnecessary identifiers.
2. Group recurring intents: catalogue, quotations, stock, dispatch, accounts and complaints.
3. Verify the approved answer source; separate public information from live or restricted data.
4. Name the answer owner, review date, handover owner and realistic response window.
5. Classify each intent Green, Amber or Red before choosing the technology.

2 Record two candidate enquiries

Question / intent	Zone	Approved source	Owner	Review date

3 Start only when these controls are ready

- [ ] One stable Green enquiry chosen
- [ ] Source and review date approved
- [ ] Human handover tested
- [ ] Eligibility and languages checked
- [ ] Privacy and message effects reviewed
- [ ] Off switch and sample review ready

4 Measure outcomes, not replies sent

Review all exceptions plus a random sample of apparently successful conversations. Record counts and denominators; investigate stale answers and missed handovers.

Correct / audited conversations	Handovers / AI-started chats	Stale-answer incidents

Account check: availability, languages and controls vary. Verify current in-app guidance. UPI was announced; do not rely on it until the actual account supports the required flow.

Do not enter customer names, phone numbers, order references, credentials or sensitive records in this worksheet. Use anonymised enquiry categories. This is an operating checklist, not a compliance determination.

Full guide, sources and account-specific cautions:

https://www.greybath.com/blog/whatsapp-business-ai-india-sme-automation

Prepared 16 October 2026 | GreyBath Technology | Free worksheet - no signup