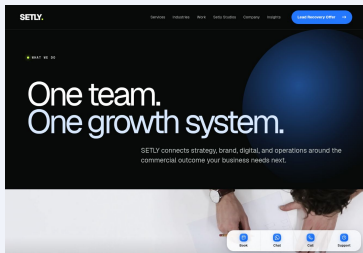


AI assistant launch checklist

Release a limited assistant with clear ownership.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Confirm its scope, approved knowledge and contact routes.
- 2 Complete normal, out-of-scope and failure tests.
- 3 Verify that external actions need the intended permissions and confirmations.
- 4 Assign monitoring, rollback and a person responsible for updates.

EXAMPLE - ILLUSTRATIVE

Begin with service questions and enquiry routing before enabling changes to customer records.

CHECK YOUR RESULT

Can the owner pause the assistant quickly if answers or actions go wrong?

AI assistant launch checklist

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Scope approved:**Knowledge reviewed:****Tests completed:****Action permissions:****Monitoring owner:****Disable route:****DONE WHEN**

Can the owner pause the assistant quickly if answers or actions go wrong?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.