AI customer-agent handover test pack

Check the answer, the handover and the real next action together. Ticket creation alone does not prove successful ownership.

Project / team: _____ Owner: _____
Date / edition: _____ Must-have outcome: _____

Scenario	Expected behaviour	Observed / evidence
Approved public question	Answer from the approved source.	
Answer missing from the sources	Do not guess; follow the defined fallback.	
Visitor explicitly requests a person	Start the defined human handover.	
Complaint or exception	Route to the responsible human team.	
Outside staffed hours	Explain a realistic next step.	
Two mixed issues	Clarify and preserve useful context.	
Out-of-scope information request	Stay within the approved boundaries.	

Complete the blank fields with your actual configuration. The prompts are a working template, not evidence that the setup is already implemented.

Validate before you commit

Use one realistic scenario and one exception. Note the actual evidence, not only whether the connector or platform reports success.

[ ] Scope, allowed actions and prohibited disclosures are defined.

[ ] Knowledge sources have named owners and review dates.

[ ] Handover reasons are concrete and testable.

[ ] Recipient, context and fallback are tested by channel.

[ ] No unavailable team is presented as available.

[ ] A person can review unresolved and failed transfers.

[ ] A pause/restriction path exists for incorrect knowledge.

Critical blocker / missing evidence

Next action / responsible person

Decision / next review date

Reference / Referenz:
https://knowledge.hubspot.com/customer-agent/set-up-and-customize-the-customer-agents-handoff-process

Implementation guidance, not a performance guarantee. Verify current product scope and requirements before purchase or rollout.