BIZTHRIVERS / FREE AGENCY RESOURCE

Test the conversation.

Use controlled test calls. These scenarios are an original worksheet, not an automatic agent audit.

01 Greeting and purpose

The agent explains its role, understands the request and moves to the next approved step.

Result: Untested / Needs work / Passed Evidence / owner: _____

02 Known service question

The answer agrees with that source without adding unapproved claims or offers.

Result: Untested / Needs work / Passed Evidence / owner: _____

03 Unknown question

The agent acknowledges the gap and uses the agreed human or callback path instead of inventing an answer.

Result: Untested / Needs work / Passed Evidence / owner: _____

04 Unclear request

The agent asks a useful clarification and follows the clarified intent.

Result: Untested / Needs work / Passed Evidence / owner: _____

05 Incorrect detail and correction

The final readback and stored test record reflect the corrected detail.

Result: Untested / Needs work / Passed Evidence / owner: _____

06 Interruption or background noise

The agent recovers without losing the intended next step or repeating an inappropriate action.

Result: Untested / Needs work / Passed Evidence / owner: _____

Before release

Agent / version: _____ Tested by: _____
Fixes / owner: _____ Review date: _____

Human Call Transfer needs an actual phone test in HighLevel. Web Call cannot verify it. Check the resource page for current official references and the editable log.

Test the action and handoff.

Use controlled test calls. These scenarios are an original worksheet, not an automatic agent audit.

07 Available appointment

A booking is created only for the agreed calendar and slot; confirmation matches the observed appointment.

Result: Untested / Needs work / Passed Evidence / owner: _____

08 Unavailable appointment

The agent offers a valid alternative or handoff and does not claim the unavailable time was booked.

Result: Untested / Needs work / Passed Evidence / owner: _____

09 Request a human — phone test

The approved human-transfer path works. A successful web conversation does not prove phone transfer.

Result: Untested / Needs work / Passed Evidence / owner: _____

10 No human available — phone test

The caller receives the agreed fallback or callback step, rather than an endless or abandoned transfer.

Result: Untested / Needs work / Passed Evidence / owner: _____

11 Failed action or integration

The agent avoids claiming success, records the exception and gives it an operating owner.

Result: Untested / Needs work / Passed Evidence / owner: _____

12 Post-call record and routing

The stored outcome and handoff match the call; unintended follow-up is identified and fixed.

Result: Untested / Needs work / Passed Evidence / owner: _____

Before release

Agent / version: _____ Tested by: _____
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