WhatsApp AI assistant setup checklist

Everything to have ready before an AI assistant answers customers on your business WhatsApp.

1. Purpose and account

- [ ] Purpose written in one sentence
- [ ] On the WhatsApp Business Platform, not the free app
- [ ] Meta-approved provider chosen
- [ ] Number decided: existing or new

2. Rules

- [ ] List of what it can answer
- [ ] List of what it must never answer
- [ ] Pricing exceptions go to a person
- [ ] Complaints go to a person
- [ ] It says it is an assistant

3. Knowledge

- [ ] Prices up to date
- [ ] Stock or availability connected
- [ ] Opening hours and locations
- [ ] Common questions with good answers
- [ ] Owner for keeping it current

4. Connections

- [ ] Calendar connected for bookings
- [ ] Conversations logged in the CRM
- [ ] Reminders set up
- [ ] Team notified on handover

5. Messaging rules

- [ ] Opt-in recorded for anyone messaged first
- [ ] Message templates approved where needed
- [ ] No marketing to people who have not opted in

6. Go-live

- [ ] Team tested it as difficult customers
- [ ] Conversations reviewed daily at first
- [ ] Easy way to reach a person
- [ ] Review date set

Full guide: **roleplan.ai/guides/whatsapp-ai-assistant-setup**. Want it built and run for you? Email **hello@roleplan.ai**.