Offboarding Checklist

AI Assistant

Thinking about canceling the AI Assistant? Here's a checklist to guide you through the transition. Each item may impact your patient experience, call volume, and office workflow, so we encourage you to review carefully before proceeding.

☐ **Prepare for Technical Support Needs:** If you transition away from AI, you may need technical assistance to update phone routing, remove integrations, or confirm settings within your existing systems. This may require coordination with your internal team or external vendors and could involve additional costs.

☐ **Update Phone Trees and Call Routing:** If your practice routes calls to your AI phone number, you must update your phone tree or call flow to remove the AI number and ensure calls are directed appropriately to your front office team or alternate destinations.

☐ **Remove the AI Website Widget:** Before turning off AI, remove the AI chat widget from your practice website and any other public-facing web pages. Leaving the widget active could create confusion or lead to missed patient inquiries.

☐ **Export AI-Related Data:** It is your responsibility to export any AI-related data you may need for future reference, such as call logs, conversation history, or insights generated by AI. This data will not be accessible after AI is turned off.

☐ **Prepare for Increased Phone Call Volume:** Without AI handling inbound calls and routine patient requests, your practice should expect an increase in phone calls. Plan accordingly to avoid longer hold times or missed calls that could impact the patient experience.

☐ **Ensure Staffing and Workflows Are Prepared:** Review front office staffing levels, schedules, and workflows to ensure your team is ready to manage increased call volume and patient requests that were previously handled by AI.

☐ **Review and Update Campaigns:** If AI was supporting outreach, reminders, or follow-ups, confirm that your campaigns are set up appropriately to continue patient communication without AI assistance. Missed or incomplete campaigns could result in reduced engagement or bookings.

- [ ] **Plan for Changes in Patient Experience:** Turning off AI may affect response times, scheduling efficiency, and overall patient convenience. Consider how these changes may be perceived by patients and whether additional communication or process adjustments are needed.

- [ ] **Anticipate Changes in Results:** Moving away from AI may impact metrics such as call handling efficiency, appointment volume, and staff workload. If you are switching to another solution, confirm that it can support the outcomes your practice achieved with the AI Assistant.

If you have questions or concerns about offboarding, please contact your Customer Success Manager for guidance and next steps.