



QFIX WORKBOOK / SEPTEMBER 2026

One call. One accountable workflow.

A practical workbook for a first voice AI pilot.

For operations, customer experience and implementation teams.

Define the result before increasing the volume.



12 pages / one workflow / one review

Choose a flow the team can own.

Start with a repeatable request whose outcome is easy to describe. Avoid combining several departments, systems and exception policies in the first experiment.

Ask the receiving team which recurring request creates avoidable work today. Then identify the record they use to track it. A useful candidate has a known owner, stable rules and a result that can be checked.

High call volume is not enough. A common request may still be a poor first choice when its rules change every day or its responsible team is unclear.

- Name the request and the customer's intended result.
- Name the team that owns the next step.
- Write down what this pilot will not handle.

Complete this sentence: After this type of call, our team should be able to...

Describe a result, not an activity.

A completed call, a transcript and a created ticket are different events. Decide which one represents progress for the workflow being tested.

For an appointment flow, a useful result may be a confirmed time in the authorised calendar. For support intake, it may be a correctly categorised request in the owning queue. These are examples, not commitments about a particular integration.

Define the evidence before the conversation. The team should know where to check it and how to tell a correct record from a partial or failed action.

- System of record: where will the result exist?
- Required fields: what makes the result usable?
- Readback: how will the team verify it?

A fluent conversation is one part of the experience. It is not the whole operational result.

03 / INPUTS

Use the minimum useful context.

List the information needed to choose the next action. Separate details the caller provides from information that must be verified in a business system.

If the flow depends on a booking or case, decide how the correct record will be identified. A similar name is not a reliable match. If identity remains unclear, choose a clarification or handoff route.

Keep the first version small. Extra fields increase the number of ways a pilot can become inconsistent without necessarily improving the result.

- Required input: what is needed for this action?
- Authority: which system owns that fact?
- Missing input: ask, defer or hand over?

Do not turn the first pilot into a copy of the entire customer database.

04 / DECISION RULES

Make the boundaries visible.

Write the rules in plain language before translating them into a workflow. State which requests the flow can complete, which need one more question, and which must go to a person.

A caller asking to change an appointment may fit a routine rule. A request outside opening hours may need a different route. An exception with no approved rule must not quietly become an improvised promise.

Treat business hours, available capacity and the source of availability as separate inputs. The caller's preferred time is a request until the relevant checks and confirmation have completed.

- Continue when the request, identity and rule are clear.
- Clarify when a missing detail can be resolved safely.
- Hand over when the request exceeds the agreed scope.

A request is not a confirmation. A proposed action is not a completed action.

Send context, not just the call.

A handoff should reduce the work the receiving person has to repeat. Define the trigger, destination and minimum useful context. Include what the caller needs, what has already been checked and which action remains open.

Decide what happens if the receiving team is unavailable. A transfer attempt does not mean someone accepted responsibility. Keep an owner and a next step until the handoff is confirmed.

Use urgent, sensitive and out-of-scope cases in the design discussion. The receiving team should help choose the boundary instead of discovering it after launch.

- Trigger and receiving team.
- Request summary and checks already performed.
- Acceptance signal and an owned fallback.

The customer should not have to restart the story because the owner changed.

Separate reading from writing.

For each system, list what the flow needs to read and what it is allowed to change. These are different capabilities and should be tested separately.

A successful lookup does not prove a ticket can be created. A successful write does not prove the record reached the correct queue. Verify the identifier, required fields, destination and resulting state.

Keep integration claims specific. Qfix's public platform describes connections to existing operational systems; the exact actions available in a pilot depend on its configured connections, permissions and workflow rules.

- Read: identify and retrieve the correct record.
- Write: perform only the agreed change.
- Verify: reload the resulting record and its owner.

Access is a prerequisite. A verified workflow is the evidence.

Keep uncertain actions separate.

Plan for a system that responds slowly, rejects a request or returns an unclear result. The conversation should not announce success before the action can be verified.

When the result of a write is uncertain, inspect the existing record or provider receipt before trying again. Otherwise a recovery can create a second appointment, duplicate ticket or repeated message.

One uncertain case should remain visible to its owner. Clean, unrelated cases can follow their own rules; the entire operation need not be hidden behind a single generic error.

- Distinguish not attempted, failed and uncertain.
- Keep the exact record or operation reference.
- Assign a person and a dated reconciliation step.

An unknown result needs reconciliation, not an automatic second attempt.

Test the edges, not only the happy path.

Use synthetic inputs before exposing the workflow to real customer interactions. Define an expected result for every case and keep the observed evidence beside it.

A demonstration proves only what was actually exercised. Do not label an untested handoff or calendar write as ready because the conversation sounded correct.

Scenario	Expected evidence
Clear in-scope request	Correct action and record identifier
Missing or conflicting detail	Clarification; no premature commitment
No available appointment	Agreed alternative or owned follow-up
Sensitive / out-of-scope request	Correct human handoff and context
System timeout after write	Reconciliation; no duplicate action
Receiving team unavailable	Named fallback and next review time

Record what was tested, what failed and what is still unverified.

Count the outcome you defined.

Choose measures that match the pilot's purpose. Keep the population and observation period clear so that a rate can be interpreted. Do not mix all incoming calls with only eligible cases.

Review the conversation and the system action separately. A correct conversation can end with a failed integration; a created record can still contain unusable information.

Use a small set of measures to find the next repair, not to decorate a dashboard. No targets or example performance results are claimed in this workbook.

- Verified outcome rate = correct outcomes / eligible cases reviewed.
- Handoff acceptance = accepted handoffs / handoffs requiring acceptance.
- Open exceptions: owner, age and next action.
- Duplicate actions: inspect individually; do not hide them in a success total.

Always report the numerator, denominator, time window and unresolved cases.

Make one clear next decision.

Use this page in the pilot review with the people who own the workflow. Choose continue, repair or pause based on observed evidence. Expansion is a separate decision, not the default reward for a convincing demo.

Workflow and team owner

Expected result and source system

In-scope request / explicit exclusions

Handoff trigger / receiver / fallback

Verified outcomes and open exceptions

Change to test next / responsible person / date

Decision: CONTINUE / REPAIR / PAUSE

Keep one version of the decision and one owner for its next action.

[REFERENCE](#) / [NEXT STEP](#)

Bring the workflow to the conversation.

A useful pilot discussion starts with a concrete request, its current owner and the action expected after the call. Bring one example of the process, the exception that worries the team and the system where the result should be visible.

This workbook extends Qfix's existing five-decision pilot framework with practical worksheets. It is an editorial design aid, not evidence that a specific customer integration has been delivered. Technical acceptance and customer outcomes remain separate.

Qfix pilot framework

<https://www.qfix.ai/en/blog/voice-ai-pilot-checklist>

Platform and workflow scope

<https://www.qfix.ai/en/platform>

Connected operations

<https://www.qfix.ai/en/integrations>

Use cases

<https://www.qfix.ai/en/use-cases>

Start with one workflow. Review the evidence. Decide the next change.