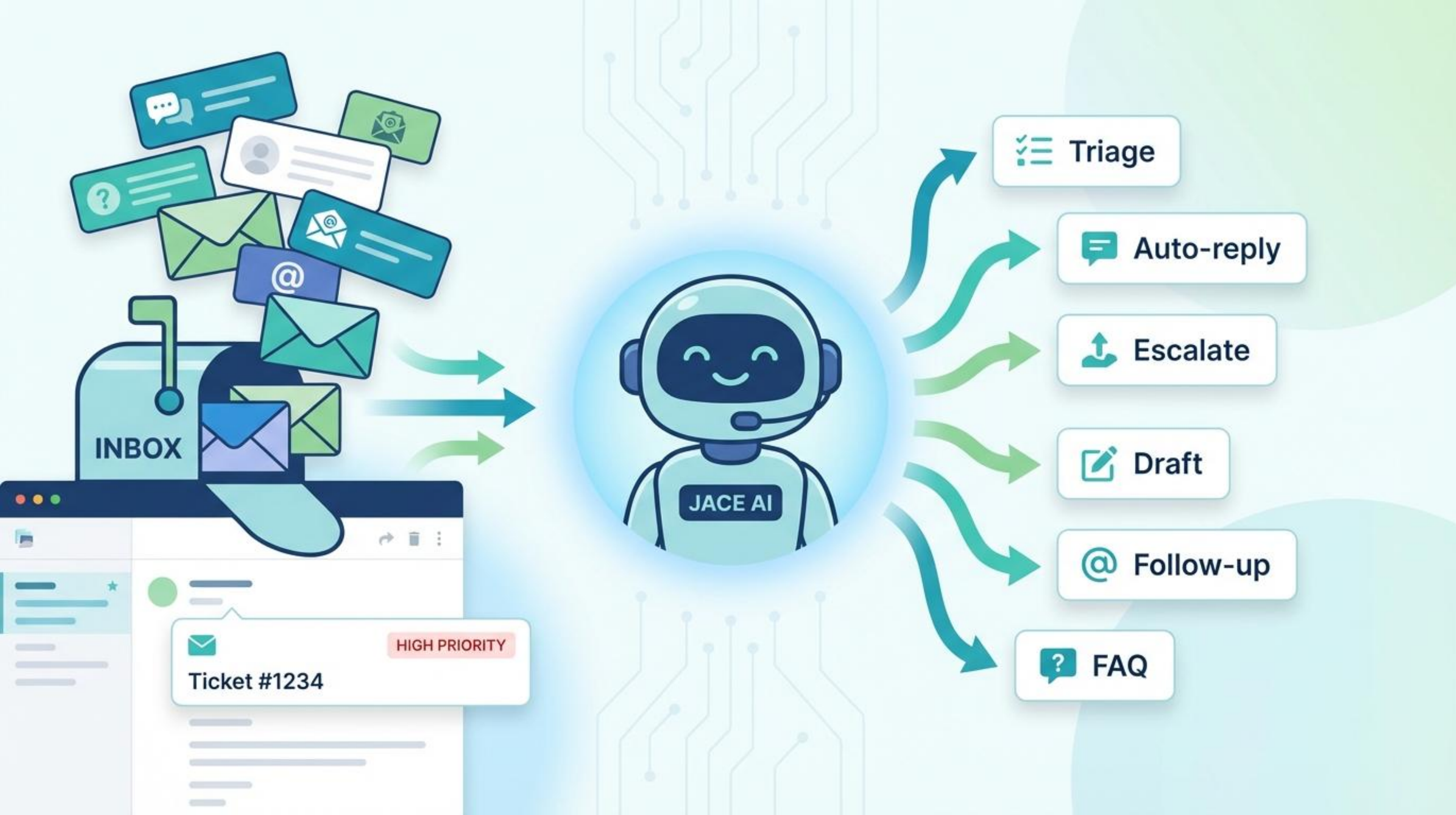

Rapid Launch Checklist — Jace AI for Support Mailboxes

Goal - Automate triage, acknowledgements, FAQs, and follow-ups while keeping agents in control.

Target time to deploy - 30–90 minutes (initial); 1 week of light tuning.

Remember the Jace AI tool can help do and guide you on how to do all the steps mentioned and much more. Simply open a chat with Jace window and ask it how to, or to guide you through how to do this step or these steps.

You will of course need to sign up to your FREE 7 day trial of the Jace AI. Scan the QR Code to sign up:

Checklist

Step 1 — Prep & permissions (5 mins)

- ☐ Confirm the support account owner and primary send-as address.
- ☐ Ensure the account has permissions to connect Google Drive / OneDrive and Calendar if needed.
- ☐ Identify stakeholders: Support lead, Engineering triage owner, Ops owner.

Step 2 — Connect your data (5–15 mins)

- ☐ Connect Google Drive / OneDrive / Notion in Settings → Integrations.
- ☐ Upload critical files: Pricing_Sheet.xlsx, Product_Specs.pdf, Top_FAQs.md, SLA_document.pdf.
- ☐ Give Jace the ground truth so it can look up answers instead of guessing.

Step 3 — Create core labels (immediate)

- ☐ Support: New
- ☐ Support: FAQ
- ☐ Support: Billing
- ☐ Support: Bug
- ☐ Support: Escalation
- ☐ Waiting
- ☐ Needs Reply
- ☐ To Do
- ☐ FYI

Step 4 — Add crisp label descriptions (10–20 mins)

- ☐ For each label, write a short description with explicit keywords, negative examples, and 2–3 positive examples (sample subject lines or phrases).
- ☐ Enable "Use AI to automatically apply this label" where appropriate.

Step 5 — Upload knowledge base excerpts (10–30 mins)

- ☐ Add top 10–20 FAQs with canonical answers to your KB or paste key excerpts into the FAQ label description.
- ☐ Include links to the source docs and canonical support articles.

Step 6 — Create response templates (10–20 mins)

- ☐ At minimum: Acknowledgement, FAQ answer, Follow-up, Escalation acknowledgement.
- ☐ Use clear placeholders: {{name}}, {{order_id}}, {{ticket_id}}, {{agent_name}}, {{KB_link}}.
- ☐ Keep templates short and modular for reliable autofill.

Step 7 — Configure auto-actions & flows (5–15 mins)

- ☐ Support: New → Auto-draft acknowledgement
- ☐ Support: FAQ → Auto-suggest reply (draft)
- ☐ Support: Bug → Auto-label Engineering: Triage and create semantic extract (attach summary)
- ☐ Waiting → Auto-create follow-up drafts after 48–72 hours
- ☐ Start with Draft-only actions (no auto-send) by default.

Step 8 — Safety, confidence thresholds, and escalation playbook (5–10 mins)

- ☐ Default to Drafts-only for 2–4 weeks.
- ☐ If enabling auto-send: restrict to low-risk FAQ replies and set classifier confidence threshold (e.g., 0.85+).
- ☐ Define escalation steps: who gets alerted, expected SLAs, and required ticket fields.
- ☐ Create an escalation template and include sensitive-data checks before auto-send.

Step 9 — Test end-to-end (15–30 mins)

- ☐ Simulate 8–12 sample emails covering FAQ, billing, bug, escalation, and edge cases.
- ☐ Verify label classification, draft quality, placeholder injection, and templates.
- ☐ Confirm drafts mirror your send-as signature and are saved to Drafts if sync enabled.

Step 10 — Launch pilot & one-week training loop (ongoing for 7 days)

- ☐ Run a small pilot (1–2 agents) for 7 days.
- ☐ Review and correct labels daily (10–20 min/day).
- ☐ Capture misclassifications and refine label descriptions, templates, and KB excerpts.

Step 11 — Metrics, monitoring & audit (ongoing)

- ☐ Track: first response time, % auto-drafted, % auto-sent, SLA compliance, agent time saved, false positive rate.
- ☐ Weekly review: adjust templates, KB content, confidence thresholds.
- ☐ Enable audit logs for auto-actions and retain a record of auto-sent messages for compliance.

Step 12 — Scale and continuous improvement

- ☐ After pilot, expand to wider team and add integrations (ticketing system, Slack alerts).
- ☐ Schedule monthly reviews of label accuracy and KB freshness.
- ☐ Onboard new agents with a short checklist and sample replies.

Quick tips & best practices

- Keep templates short. Short templates are easier to auto-fill reliably.
- Make label descriptions actionable and example-driven.
- Limit auto-send initially to low-risk content and high-confidence predictions.
- Keep humans in the loop for escalations, refunds, or sensitive data.
- Use the integration permissions and audit logs to manage privacy and compliance.

Troubleshooting

- If labels are misapplied: update label description, add negative examples, and retrain by correcting recent threads.
- If templates inject wrong placeholders: standardize placeholder names across templates.
- If KB lookups are returning stale info: update the source file in Drive/OneDrive and force a re-sync.

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