AI voice agent board pack template

One page for the board each month: five KPIs, forecast vs actual, and the warning signs of a white elephant.

1. What we are buying (tick one, agreed before go-live)

- [ ] A lower bill
- [ ] More capacity for the same team
- [ ] Better service

Target and date: _____ Owner: _____

2. The five KPIs that surface a white elephant

KPI	Forecast	Actual	Note
Total cost vs forecast Warning: AI share rising, total cost flat			
Ring-backs in 7 days Warning: climbing as the AI takes more calls			
Freed hours, and where Warning: nobody can say where they went			
Fixed without chasing Warning: slipping while the AI number rises			
Overtime and hiring Warning: overtime up after go-live			

3. Questions before anyone signs off the business case

- [ ] Which are we buying: a lower bill, more capacity or better service?
- [ ] Whose budget line gets smaller, by how much, and by when?
- [ ] How does freed time become cash: leavers not replaced, fewer contractor hours, a smaller contract?
- [ ] What does the forecast assume about callers who ring back?
- [ ] What does it cost all in: fees, set-up, integration and the people who run it?
- [ ] What happens to the case if call volume goes up?
- [ ] How long is the contract, and what does it take to switch it off?
- [ ] Who reports the results, and did they also champion the project?

4. The white elephant check (every six months)

- [ ] Has the bill moved the way the business case said it would?
- [ ] If we were deciding today, would we buy it again?
- [ ] If not, what would it cost to change course, and who decides?