

30-Day Implementation Checklist

Step-by-Step Guide to Deploying Your First AI Employee

From: *Hire AI, Not People* by Shawn Kercher | Resource Guide

Overview

| Week | Focus | Hours/Week |
|------|------------------|------------|
| 1 | Map & Plan | 3-5 hours |
| 2 | Build | 5-8 hours |
| 3 | Test & Refine | 3-5 hours |
| 4 | Launch & Monitor | 2-3 hours |

Week 1: Map & Plan

Day 1-2: Operations Audit

Complete the 30-Minute Operations Audit (Chapter 3)

Record yourself talking through the 5 questions

Transcribe and analyze with AI

Identify your #1 time drain

Notes: _____

Day 3-4: Choose Your Target

Match your time drain to an AI Employee type

Define success criteria (what does “working” look like?)

Estimate current cost of this problem (time + money)

AI Employee type chosen: _____

Success looks like: _____

Day 5-7: Design the Blueprint

Complete Workflow Blueprint (Chapter 4)

Define trigger (what starts the workflow)

List all actions in sequence

Identify decision points (conditions)

Define handoff points to humans

Write the AI Employee Job Description

Blueprint complete: [] Yes [] Needs work

Week 2: Build

Day 8-9: Choose Your Path

Complete Buy/Build/Hire Framework

Make your decision

If BUY: Sign up for chosen tool(s)

If BUILD: Set up automation platform account

If HIRE: Book calls with agencies

Path chosen: _____

Day 10-12: Set Up Infrastructure

- Create accounts for required tools
- Connect integrations (CRM, calendar, etc.)
- Set up communication channel (SMS, chat, voice)
- Configure AI/LLM connection
- Test that tools can talk to each other

Tools set up: - [] _____ - []
_____ - []

Day 13-14: Build Core Workflow

- Create the trigger
- Build action sequence
- Add conditions/branching logic
- Set up escalation/handoff
- Configure notifications

Core workflow status: [] Working [] In progress [] Stuck

Week 3: Test & Refine

Day 15-16: Train Your AI Employee

- Complete Training Document Template

Upload knowledge base content

Write response templates

Define voice/tone guidelines

Set behavior rules

Configure autonomy levels

Training document complete: [] Yes [] In progress

Day 17-19: Test Thoroughly

Test happy path (everything goes perfectly)

Test edge cases (weird situations)

Test error handling (what breaks?)

Test escalation (does handoff work?)

Have someone else test (fresh eyes)

Issues found: 1. _____ 2.

_____ 3.

Day 20-21: Fix & Polish

Fix critical issues from testing

Improve awkward responses

Add missing knowledge base content

Refine escalation triggers

Document remaining improvements for later

Ready for launch: [] Yes [] Not yet

Week 4: Launch & Monitor

Day 22-23: Soft Launch

Launch to limited audience (one channel, low volume)

Monitor every conversation in real-time

Be ready to jump in if needed

Document what's working and what isn't

Soft launch status: _____

Day 24-26: Expand Gradually

Add additional channels (if applicable)

Increase volume/visibility

Continue monitoring closely

Make quick fixes as issues arise

Start tracking metrics

Channels live: - [] _____ - []

Day 27-28: Full Launch

Full visibility/volume

Normal monitoring (not real-time)

Escalation system tested and working

Team aware of new AI employee

Full launch date: _____

Day 29-30: Review & Document

Review all conversations from launch week

Calculate initial metrics vs. success criteria

Document lessons learned

Create improvement list for next iteration

Celebrate the win

Initial results: - Conversations handled: _____ - Escalation rate:
_____ % - Response time: _____ - Estimated time saved:
_____ hours

Post-Launch: The Feedback Loop

Weekly Review (First Month)

Review conversation logs

Identify questions AI couldn't answer

Update knowledge base

Refine responses that felt off

Track metrics

Monthly Review (Ongoing)

Calculate ROI (use ROI Calculator)

Compare to success criteria

Prioritize improvements

Consider expanding to next AI employee

Stuck? Common Problems & Solutions

| Problem | Solution |
|-----------------------------|---|
| Can't decide which workflow | Pick the most painful one, not the most complex |
| Tools won't connect | Check API keys, try Zapier as bridge |
| AI gives wrong answers | Knowledge base incomplete—add more content |
| Too many escalations | Boundaries too tight—expand AI autonomy |
| Customers confused | Voice/tone needs work—rewrite responses |
| No time to finish | Reduce scope—do less, but do it well |

Success Criteria Checkpoint

At Day 30, answer honestly:

AI employee is handling conversations without constant intervention

Escalation system works reliably

I'm saving measurable time

Customer experience is same or better than before



I know what to improve next

If 4-5 boxes checked: Success! Plan your next AI employee.

If 2-3 boxes checked: Good progress. Focus on gaps before expanding.

If 0-1 boxes checked: Pause and reassess. What's blocking you?

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