



Suhas Bhairav

AI Chatbot Guardrails and Fallback Setup Manual

**Clear guardrails and fallback setups for
customer-support bots.**

A practical, non-technical manual to automate routine support and smoothly escalate complex queries.

Suhas Bhairav

suhasbhairav.com

Guardrails and Scope

Define what the customer-support bot can answer, escalation rules, and how data/privacy are protected. Specify required data sources and tools: KB, product docs, CRM, ticketing system, and bot platform.

Key move Document ownership and approval before enabling pilots.

PRACTICAL CHECKLIST

- 01** Identify approved knowledge sources (KB, policies, FAQs).
- 02** Define escalation criteria (unanswerable, policy exceptions, sentiment risk).
- 03** Set predictable fallback behavior (offer human handoff, partial answers).
- 04** Establish data governance (privacy, minimization, retention).
- 05** Clarify ownership (bot owner, KB owner, QA gatekeeper).
- 06** Implement logging and audit trails for all automated replies.
- 07** Metrics to watch: containment rate, escalation rate, CSAT.

Suhas Bhairav AI Resource

A practical, non-technical manual to automate routine support and smoothly escalate complex queries.

What to Automate vs. What to Human-Review

Clarify automation boundaries for common support scenarios. Ensure only approved content is delivered to customers.

Key move Schedule regular KB reviews to close gaps.

PRACTICAL CHECKLIST

- 01** Automate responses only from approved KB, policies, and FAQs.
- 02** Auto-answer well-covered intents; flag gaps for human review.
- 03** Verify user identity only per policy; avoid unnecessary data collection.
- 04** Automatically escalate unanswerable or policy-exception queries to humans.
- 05** Do not auto-fulfill transactions requiring sensitive data; route to agent.
- 06** Tools required: approved KB, CRM, ticketing system, bot platform, QA sandbox.
- 07** Log each automated reply with KB source and timestamp for audit.

Suhas Bhairav AI Resource

A practical, non-technical manual to automate routine support and smoothly escalate complex queries.

Deployment, Governance, and Metrics

Outline a phased rollout with weekly increments. Define governance, approvals, and success metrics.

Key move Assign clear owners for bot, KB, and QA.

PRACTICAL CHECKLIST

- 01** Week 1: map support journeys and enumerate approved KB sources.
- 02** Week 2: enforce prompt constraints to limit responses to KB.
- 03** Week 3: configure escalation rules and human handoff workflow.
- 04** Week 4: run internal QA with scripted scenarios; adjust guardrails.
- 05** Week 5: pilot with a small customer segment; monitor bot failures.
- 06** Week 6: review metrics, update KB, and adjust thresholds.
- 07** Establish a change-control process for guardrail updates.

Suhas Bhairav AI Resource

A practical, non-technical manual to automate routine support and smoothly escalate complex queries.

ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

WEBSITE

suhasbhairav.com

EMAIL

suhasbhairav@gmail.com