

The Agent Blueprint Canvas™

Primary Goal



The ONE business problem it solves.

- Example: "Reduce initial response time from 4 hours to 2 minutes."

Key Activities



Actionable Tools: What can it physically do?

- Send an email, Update an Excel row, Search the web.

What comes out at the end? It's not always just a text reply.

Examples:

- A formatted PDF report?
- A JSON update to the CRM?
- A WhatsApp alert to the CEO?

Knowledge Base



What is in the agent's backpack?
What data can it read?

- Example: PDFs, CRM History, Company Website.

Identity



The heart of the agent. Why does it exist?

- Name: Give it a handle (e.g., "Hunter" - The Lead Finder).
- Persona: How does it present itself?
 - Example: Formal? Empathetic? Transactional? (Crucial for brand alignment).

Triggers



What wakes it up?

- Example: An incoming email? A set time (8:00 AM)? A manual click?

Accountability & Delivery



Who owns the agent's performance?
Who is the primary person responsible for it's success?
Continuous improvement: Who is in charge of constant monitoring and updates?

Authority & Guardrails



- Autonomy Level:
 - Run on Autopilot OR Human-in-the-loop (Requires approval)?
- Negative Constraints (Red Lines):
 - What is forbidden? (e.g., "Never give a quote with >10% discount").
- Escalation Protocol:
 - When does the agent "raise its hand" and transfer to a human?

Memory & Context

Memory & Context Body: How the agent manages information over time.

- Short-Term Memory:
 - What must be remembered within the current conversation? (Context window).
- Long-Term Memory:
 - What gets saved to the Database for next time?
 - Example: Client preferences, summary of previous calls, agreed terms.



Success Metrics (KPIs)

How do we know it's working?

- Efficiency Metrics (Speed):
 - Time saved per task.
 - Number of tickets resolved autonomously.
- Quality Metrics (Accuracy):
 - User satisfaction score (CSAT).
 - Hallucination Rate (Accuracy of answers).



Pillars
Empowering visionaries.

Designed For:

Designed by:

Date:

Version: