

**Statement of Objectives (SOO)**  
**Office of Personnel Management (OPM)**  
**Enterprise AI Agent Capabilities**

**1. Background**

In response to elevated call volumes, the Call Center is seeking to integrate AI Agents to optimize its call processing procedures.

**2. Purpose**

The purpose of this acquisition is to obtain Artificial Intelligence (AI) Agent capabilities, including AI Agents, AI Voice Agents, Voice AI Agents, and AI Phone Agents, that answer incoming phone calls, sound natural and human-like, respond to customer questions when possible, and transfer calls to human representatives when required.

**3. Scope**

The Contractor shall provide enterprise-grade AI Agent solutions that support voice-based customer engagement, autonomous task execution, system access, cross-channel communications, analytics, operational controls, testing environments, and Federal security compliance.

**4. Functional Objectives**

**4.1 Conversational AI Agent Capabilities**

- [AI agent] The system shall have conversational AI agentic capability which allows it to securely authenticate and take action on the customers behalf by autonomously completing tasks. This involves securely accessing systems of record and autonomously completing complex workflows.
- [AI agent] The system shall have conversational AI agentic capability which includes answering questions based on sanctioned knowledge.
- [AI agent] The system shall have conversational AI agentic capability that allows it to seamlessly transfer conversations to human contact center agents if needed. The conversational AI agentic capability shall include cross-channel support (e.g., voice, email, self-service portal).
- [AI Agent] The system shall have audio to audio models for low latency.
- [AI Agent] The system shall have the ability to handle interruptions and background noise.
- [AI Agent] The system shall have the ability to control tone.

**4.2 Guardrails, Testing, and Scenario Management**

[AI Agent] The system shall have the ability to test and create guardrails for conversations and run scenarios.

#### **4.3 Operations Control and Governance**

[AI Agent] The system shall include a robust ability to control agent operations and processes at task level and at system level.

#### **4.4 Evaluation and Continuous Improvement**

[AI Agent] The system shall have the ability to evaluate the AI agent and run simulations to continually improve the accuracy of answers (feedback loop).

### **5. Security, Privacy, and Compliance Objectives**

[AI Agent general security requirements/guardrails/data privacy] The system's AI agentic capabilities shall be compliant with any applicable Federal IT security, privacy, and accessibility requirements.

### **6. Reporting and Analytics Objectives**

[AI Agent reporting capabilities] The system shall provide real-time analytics and dashboards that provide KPIs that measure the performance and effectiveness of the AI agentic capabilities (e.g., self-service resolution rate).

### **7. Desired Outcomes**

- Secure authentication and autonomous task completion.
- Natural-sounding voice-based customer engagement.
- Call escalation to human agents.
- Controlled and governed AI operations.
- Continuous performance improvement.
- Federal compliance with security, privacy, and accessibility mandates.
- Transparent reporting through dashboards and KPIs.