Business Requirements Document (BRD)

Product Name: Agent Assist Platform
Target Users:

- Customer Care Agents
- Call Center Managers / Supervisors
- QA & Operations Teams

Version: 1.0

The purpose of this document is to define the business and functional requirements for an AI-powered Agent Assist Platform that enhances live customer interactions by providing real-time guidance, insights, and automation for agents, while enabling managers to monitor performance, quality, and outcomes through actionable dashboards.

Objectives

- Improve First Call Resolution (FCR)
- Reduce Average Handle Time (AHT)
- Increase Customer Satisfaction (CSAT / NPS)
- Improve Agent Productivity and Quality
- Enable real-time coaching and post-call insights
- Enable structured upselling and revenue opportunities
- Provide operational transparency for managers
- Enable scalable, configurable enterprise deployments

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2. Product Overview

The Agent Assist Platform is a modular, enterprise-grade system that integrates with existing call center infrastructure (CRM, telephony systems such as Cisco, Avaya, Genesys, etc.) and provides:

- Real-time call intelligence for agents
- AI-driven intent, sentiment, and guidance during live calls
- SOP, Knowledge, and Governance-driven decision support
- Post-call summaries and automation
- Upsell opportunity identification and tracking

- Manager dashboards for performance, QA, compliance, and insights

The platform must be fully white-label capable and designed for multi-tenant enterprise use.

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3. Agent Experience – Business & Functional Requirements

3.1 Deployment & Configuration

The Agent Assist solution must support multiple deployment modes:

A. Embedded Inside Existing CRM

- Opens automatically when a call lands
- Can be rendered as:
    - A new screen, or
    - A floating widget within the CRM
- *Dependency on Client Environment:*
    - This mode will require collaboration with the client's IT and CRM teams.
    - Integration feasibility, UI placement, and behavior depend on:
        - CRM capabilities
        - Security policies
        - Access to telephony and UI layers
    - Timelines and scope may vary by client.

B. Separate Hosted Application

- Available as a standalone web application (separate URL)
- Can be used by agents without CRM embedding

3.2 Core Capabilities for Agents

3.2.1 Knowledge Management System

The platform must provide a **Knowledge Management System** where clients can upload and manage:

- SOP documents
- Process manuals
- Knowledge base content
- QA frameworks
- Governance & Guardrails

Capabilities:

- Version control
- Mapping by:
    - Client
    - Process
    - Queue / Campaign
    - Language

All uploaded content is ingested into the platform's knowledge layer and made available for:

- Live guidance
- Post-call analysis
- Compliance validation
- Upsell logic
- QA scoring

Clients are not exposed to technical ingestion workflows.

The system guarantees that:

- Updated knowledge becomes active after processing
- Clients are notified when content is live
- Agents always interact with the latest approved version

Agents can:

- View relevant SOP steps
- Ask questions via Real-Time Agent Chat Assistant
- Receive contextual answers based on:
    - Call context
    - SOP
    - Knowledge base
    - Governance rules

3.2.2 Live Call Intelligence

- The platform integrates with customer telephony systems (Cisco, Avaya, Genesys, etc.)
- Real-time access to live audio streams

Within **3–5 seconds** of call start:

- Detect call intent
- Display intent to the agent
- Display **live sentiment indicators** for both:
    - Customer
    - Agent

Latency SLAs:

- Intent detection update: ≤3–5 seconds
- Sentiment refresh: ≤5 seconds
- Guidance refresh: ≤5 seconds after signal change

Based on intent and sentiment:

- Show relevant SOP flow
- Suggest:
    - Questions to ask
    - Next best actions
    - Decision paths
    - Upsell opportunities
- Guidance adapts dynamically as:
    - Intent changes
    - Sentiment evolves
    - Risk increases
    - Upsell signals appear

3.2.3 Real-Time Features During Call

Important UX Rules

- Live transcription will **not** be shown to the agent during the call.
- The live call UI must remain:
    - Minimal
    - Non-distracting
    - Action-oriented

During a live call, the agent sees only:

- Current intent
- Live sentiment (Customer & Agent)
- SOP-driven call flow
- Next-best-action guidance
- Compliance indicators
- Upsell prompts
- Real-Time Agent Chat Assistant

Agent Chat Assistant (Live Call)

- Available during the call
- Context-aware using:
    - Live call signals
    - SOPs
    - Knowledge base

    - Governance & guardrails

Agent can:

- Ask questions in natural language
- Ask "What should I say now?"
- Clarify SOP steps
- Get compliance-safe phrasing
- Get help on objections or upsell moments

Assistant must:

- Respond within live-call SLAs
- Be concise and actionable
- Never violate SOP or Governance rules

Post-Call Artifacts

After call ends:

- Full transcript generated
- Structured summary created
- Data stored per retention policy
- Agent can view:
    - Summary
    - Key moments
    - Ticket draft (if enabled)

3.3 Repeat-Caller Context

When a call is from an existing customer:

- Show:
    - Last call summary
    - Previous resolution
- Must appear within first few seconds

3.4 Real-Time Coaching & Guidance

- Smart interruption prompts:
    - "Slow down", "Empathize", etc.
- Dynamic SOP-driven call flow
- Compliance guidance from Governance & Guardrails
- Upsell / cross-sell prompts

- Multi-language support:
    - Real-time transcription
    - Intent and sentiment in multiple languages
    - Optional translation

Upsell tracking:

- Opportunity existed
- Prompt shown
- Agent action
- Outcome

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4. Manager Experience – Dashboards

All dashboards must support:

- Date filters
- Agent filters
- Queue/process filters
- Export

4.1 Overview Dashboard

- Total sessions
- Overall sentiment (Agent & Customer)
- CSAT (AI insights + NPS integration)
- Language distribution
- Intent trends
- Agent-wise distribution
- Leaderboard (QA metrics)
- SOP Adherence Score
- Compliance Breach Rate
- Upsell Opportunity Rate
- Upsell Conversion Rate

4.2 Agent Performance

- Calls handled
- Average sentiment
- QA scores
- SOP adherence
- Compliance events
- Upsell attempts vs success

- Trends & drill-down

4.3 Sessions

- Filterable list of calls
- Each session:
    - Start, End, Duration
    - Score
    - Resolution

Session Tabs

- Overview – summary, intent, highlights, ticket
- Sentiment – timeline, scores, key moments
- Performance – QA metrics
- Insights – coaching, gaps, upsell

4.4 Advanced Intelligence

- Root-cause clustering
- Automated insights:
    - Top failure reasons
    - SOP gaps
    - Training needs

4.5 Live Call Monitoring & Intervention

Managers and Supervisors can have access to a Live Call Monitoring View that provides real-time visibility into all active calls on the floor.

For every ongoing call, the manager can see:

- Agent name
- Call duration
- Current detected intent
- Live customer sentiment
- Live agent sentiment
- Risk indicators (e.g., frustration, churn, escalation)
- Compliance risk flags
- Upsell opportunity signals

The system must automatically highlight calls that:

- Show deteriorating customer sentiment
- Indicate escalation or churn risk
- Have repeated compliance risks
- Are stuck or deviating from SOP

This enables managers to:

- Proactively identify calls that need attention
- Decide whether supervisor intervention is required
- Coach agents in real time
- Prevent call failures before they happen

This view acts as a real-time floor command center for supervisors.

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5. Platform & Non-Functional Requirements

- High performance, low latency
- Enterprise security (Role based access control, encryption, audit logs)
- White-labeling
- Plug-in framework:
    - CRM systems
    - Ticketing tools
    - Analytics platforms
- APIs & webhooks
- The platform must support configurable data retention policies per client

Data & Storage Management

- Special handling for PII and sensitive data:
    - Masking
    - Encryption
    - Access control
- Clients must define:
    - Whether call recordings are stored by them or by Shunya
    - If stored by Shunya:
        - Retention duration
        - Auto-deletion policy
- The system must enforce:
    - Time-based deletion
    - Secure purging
    - Audit trail of data lifecycle events

Raw Data Access

- Clients must be able to access **read-only raw data** (sessions, transcripts, signals)
- Access is governed by:
    - Time-to-live (TTL) defined by Shunya
    - Client policy
- Data access is logged and auditable

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6. UX Addendum for Agent screen

Personas

- **Agent:** High-pressure, needs instant clarity
- **Manager:** Analytical, needs trends and drill-down

Principles

- No distraction during live calls
- One-glance intelligence
- Zero-click for critical info
- Progressive disclosure
- Real-time first

Core Screens

Agent

- Live Call
- Post-Call
- SOP / KB
- Chat

Manager

- Overview
- Agent Performance
- Sessions
- Session Detail
- Live Call Monitoring

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7. Acceptance & Behavior Layer

This layer defines how the system behaves across the call lifecycle, performance expectations, and failure handling.

Call Lifecycle

On Call Start

- Agent Assist UI opens automatically

- Within ≤ 5 seconds:
    - Intent is detected and displayed
    - Repeat-caller context (if available) is shown

During Call

- Intent updates dynamically
- Sentiment (Customer & Agent) updates in near real-time
- SOP-driven guidance adapts as the call evolves
- Next-best-action prompts appear contextually
- Compliance indicators remain visible
- Upsell prompts appear only when valid per SOP and guardrails
- Agent Chat Assistant is available throughout the call

Live call behavior must remain:

- Non-intrusive
- Focused on decision support
- Free from raw transcription display

On Call End

- Summary is generated within ≤ 15 seconds
  (Configurable per client)
- Transcript is finalized and displayed
- Ticket draft is prepared (if enabled)
- Session becomes visible in Manager dashboards

7.2 Failure Handling

- **Telephony failure** → Switch to fallback mode
- **Missing SOP / Knowledge** → Show clear messaging
- **Low-confidence intent** → Display "Unclear"
- **AI degraded state** →
    - Disable live prompts
    - Continue recording
    - Preserve post-call artifacts

The system must never block the agent from continuing the call.

7.3 Transcription Persistence

- Every call generates a transcript
- Transcription is **post-call only** for agent visibility
- System must:
    - Retry on failure
    - Mark sessions as Partial / Unavailable where needed

- Transcripts are stored based on client retention policy

7.4 Role-Based Access

- Agent:
  - Live guidance
  - Post-call summary
  - Transcript post call (if enabled)

- Manager:
  - All dashboards
  - Session details
  - Live call monitoring

All access is governed by enterprise RBAC and audit logs.

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8. Client Onboarding – Self-Serve Portal

The platform must include a Self-Serve Client Onboarding Portal that allows enterprise customers to independently register, configure, and manage their setup while maintaining enterprise-grade controls, auditability, and system integrity.

This portal acts as the single control plane for all client-side configuration across:

- Organization profile
- Knowledge & SOP content
- QA and evaluation frameworks
- Governance & guardrails
- Intent taxonomy
- Feature enablement
- Dashboard configuration
- Automation & triggers
- Data and retention policies

Access to this portal is restricted to Client Admins only.

There are no sub-roles (Editor / Viewer).
Every user with access is a **Client Admin** with full configuration authority.

All actions in this portal must be:

- Fully audit-logged with:
  - Who performed the action
  - What was changed
  - Timestamp
  - Previous vs new value
- Version-controlled and reversible where applicable

- Reflected as configuration changes in the tenant

Each client organization operates as a fully isolated tenant.

8.1 Registration & Organization Setup

A new client must be able to:

1. Register via the portal
2. Create their organization profile, including:
    - Company name
    - Industry
    - Primary contact
    - Regions / languages
    - Telephony / CRM environment

This becomes the root tenant configuration for the client.

8.2 Document & Knowledge Onboarding

Client Admins can upload and manage:

- SOP documents
- Process documents
- Knowledge base content
- QA parameter documents, including:
    - Communication skill SOP
    - Process SOP
    - Resolution framework
    - Upselling framework
- Governance & Guardrails documents

Capabilities:

- Upload in common formats (PDF, DOC, DOCX, TXT, etc.)
- Tag by:
    - Process
    - Queue / campaign
    - Language
- Version control
- Replace / update existing documents

System Behavior:

- Every upload or update:
    - Is logged
    - Triggers data ingestion
    - Is marked as "Processing"
- The system must:

    - Ingest the new content
    - Apply it across agent guidance, chat, compliance, QA, and intelligence
- Once processing is complete:
    - The client is notified
    - The content becomes active in production

Client Admins can:

- Re-upload
- Add new documents
- Deprecate old content
- View history of changes

8.3 Intent Configuration Workflow

During onboarding, the client must specify whether:

- They already have an intent list, or
- They do not have one and want Shunya to create it

If the Client Has an Intent List

- Client Admin uploads:
    - Intent taxonomy
    - Definitions
    - Mappings (if available)

The system:

- Logs the upload
- Ingests the intent structure
- Prepares it for use across:
    - Live detection
    - Dashboards
    - SOP mapping

If the Client Does Not Have an Intent List

- Client Admin selects: **"I do not have an intent list"**
- Shunya prepares a proposed intent taxonomy
- The draft intent list is shared in the portal
- Client Admin can:
    - Review
    - Edit
    - Approve

Only after **explicit approval**:

- Intents are activated
- Mapped to SOPs

- Used in live calls and dashboards

All stages are audit-logged.

8.4 Feature Selection & Enablement

From the portal, Client Admins can select:

Agent Assist Features

- Call Transcription (Post-call)
- Live Intent Detection
- Live Sentiment (Customer & Agent)
- Next-Best-Action Suggestions
- Real-Time Agent Chat Assistant
- Pre-filled Ticket Creation
- Compliance Monitoring
- Upsell / Cross-sell Nudges
- Translation (Multilingual)
- Triggers through Webhooks

Manager & Supervisor Features

- Overview Dashboard
- Agent Performance Dashboard
- Sessions & Session Detail
- Advanced Intelligence
- Live Call Monitoring & Intervention
- Live Call Analysis for Every Agent

The system must:

- Allow feature-level toggling
- Reflect changes only after ingestion & validation
- Dynamically adjust UI per enabled features

8.5 Dashboard Field Configuration

Client Admins can:

- View the complete list of available analytics fields
- Pick and choose:
    - What appears in Manager dashboards
    - What appears in session views
    - What is available for export

Changes:

- Are audit-logged
- Trigger configuration updates
- Take effect after processing
- Notify the client once live

8.6 Automation, Triggers & Webhooks

Clients can configure whether they want:

- External system triggers based on:
  - SOP steps
  - Agent actions
  - Call outcomes
  - Upsell success or failure
  - Compliance events

For each trigger:

- Client Admin defines:
  - Event type
  - Target system
  - Webhook endpoint
  - Whether agent acceptance is required before firing

Behavior:

- If acceptance is required:
  - Agent is prompted
  - Trigger fires only after confirmation
- If not required:
  - Trigger fires automatically

All trigger executions are:

- Logged
- Traceable per session

8.7 Data & Retention Policy Configuration

Client Admins must specify:

- Whether call recordings are:
  - Stored by the client, or
  - Stored by Shunya

If stored by Shunya:

- Retention duration
- Auto-deletion policy

The system must:

- Enforce time-based deletion
- Support secure purging
- Log all data lifecycle events

8.8 Ongoing Management

Client Admins can at any time:

- Add or update documents
- Add new SOPs or processes
- Modify intents
- Change feature selection
- Adjust dashboards
- Update triggers
- Modify retention policies

For every change:

- System shows “Processing” state
- Data is ingested and applied
- Client is notified when complete
- All actions are audit-logged

This ensures:

- Continuous evolution without deployment cycles
- Full client ownership with enterprise safety
- Zero configuration drift
- Complete traceability