

Checklist - Intake criteria for a Copilot Agent

Functional Requirements

- ✓ Clearly define the primary purpose of the Agent
- ✓ Identify specific tasks or problems the Agent will address
- ✓ Define the Happy Flow (standard user interaction path)
- ✓ Identify Other Flows (alternative interactions)
- ✓ Outline Error Handling procedures

Knowledge Sources

- ✓ Identify Data Location (where is the data stored?)
- ✓ Specify Data Type (structured/unstructured)
- ✓ Determine the Platform (SharePoint, Azure, AWS, etc.)
- ✓ Define Data Format (DOCX, JSON, BLOB, etc.)
- ✓ Assess Data Quality:

Are there ambiguities in questions or answers?

Is there duplicate data that needs to be cleaned?

- ✓ Ensure the development knowledge base includes 20% of the production data

Large Language Model Expectations

- ✓ Define Generative Capabilities:

Should answers include references to sources?

Should responses contain quotes or be paraphrased?

- ✓ Define Question Interpretation:

Should questions be used exactly as asked?

Is prompt engineering allowed?

Technical Requirements

- ✓ Identify Third-Party Connections (Mainframe, ServiceNow, APIs, etc.)
- ✓ Define Security Measures:

Is the knowledge source restricted or generally available?

Are UAC or RBAC implemented?

Feedback Mechanism

- ✓ Determine if user feedback is required
- ✓ Define how feedback will be stored and processed

Test Information

- ✓ Validate test scenarios with business input
- ✓ Ensure test interactions match expected user communication styles
- ✓ Define the Test Data Set:

20% of the initial training data set

2 days' worth of production scenarios

If 2,000 weekly interactions, test set should have 400 scenarios

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