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

Would you like this in a formatted document?