AI Agent Tool Platform – Concept & Requirements Document

1. Overview

This document defines the concept, scope, and high-level requirements for an AI Agent Tool Platform where multiple specialized AI agents coexist, collaborate, and share data with each other.

The platform supports both voice-based and text-based AI agents, including a Call Agent capable of handling inbound and outbound calls, along with sales, support, CRM, marketing, and analytics agents.

The platform is inspired by tools like HubSpot, but goes beyond traditional CRM or single-agent setups. Here, multiple AI agents will be available, and each agent can communicate and trigger actions in other agents.

2. Vision & Goal

Vision

To build a centralized AI Agent ecosystem where businesses can manage, deploy, and orchestrate multiple AI agents that work together like a digital team.

Goals

- Provide a single platform to host multiple AI agents
- Enable agent-to-agent communication
- Reduce manual work by automating workflows across departments
- Allow businesses to scale operations using AI-driven collaboration

3. Target Users

- Startups & SMEs
- Enterprise teams (Sales, Support, Operations, Marketing)
- SaaS platforms needing embedded AI agents
- Internal business teams using automation

4. Types of AI Agents (Initial Scope)

4.1 Sales Agent

- Lead qualification
- Follow-up messages (email / chat)
- Sales insights & recommendations

5.2 Support / Call Agent

- AI voice-based inbound & outbound calling
- Automated call handling
- Call transcription & intent detection
- Escalation to human agents
- FAQ & knowledge base handling
- Call summary shared with other agents (Sales, CRM, Analytics)

5.3 CRM / Data Agent

- Central customer data management
- Contact, deal, and activity tracking
- Sync data across agents

5.4 Content & Marketing Agent

- Email, SMS, push notification content
- Social media content planning

5.5 Analytics & Insight Agent

- Performance tracking
- KPI dashboards
- AI-driven insights & predictions

6. Agent-to-Agent Communication

6.2 Example Triggers

- "Lead Created" → Sales Agent → CRM Agent
- "Call Completed" → Support Agent → Analytics Agent
- "Campaign Sent" → Marketing Agent → Reporting Agent

7. Platform Core Modules

7.1 Agent Management

- Create / enable / disable agents
- Assign roles & permissions

7.2 Workflow

- Visual workflow (drag & drop)
- Multi-step automation

7.3 Dashboard & Monitoring

- Agent activity logs
- Performance metrics
- Error & failure tracking

8. User Roles & Access

- **Admin**: Full control over agents & workflows
- **Manager**: View insights, configure workflows
- **Agent Operator**: Monitor and interact with AI agents
- **Viewer**: Read-only access

9. Integrations

- CRM systems
- Email & SMS gateways
- WhatsApp / Messenger
- Payment gateways
- Third-party SaaS tools

10. Security & Compliance

- Role-based access control (RBAC)
- Data encryption
- Audit logs

12. MVP Scope

For MVP, the platform will include:

- Agent Management Module
- Core agents (Sales, Call Agent, CRM, Analytics etc)
- Basic agent-to-agent communication
- Simple workflow builder
- Admin dashboard

13. Future Enhancements

- AI agent marketplace
- Self-learning agents
- Agent performance optimization
- Voice-to-agent orchestration
- Industry-specific templates

14. Summary

This AI Agent Tool Platform is designed to act as a digital workforce hub, where multiple AI agents collaborate seamlessly. Unlike HubSpot's tool-centric approach, this system focuses on agent-centric automation, making it more flexible, scalable, and intelligent for modern businesses.