

Workspace Agent Requirements Doc: [Agent Name]

<p>Agent mission</p> <p><i>What does the agent do? What output does it produce?</i></p>	
<p>Scope and boundaries</p> <p><i>What are the specific tasks this agent should do, in order?</i></p>	
<p>Inputs and trusted context</p> <p><i>What information does this agent need to know to be successful?</i></p>	
<p>Tools and permissions</p> <p><i>What external systems should the agent have access to? What does it need read-only access vs write access?</i></p>	
<p>Output requirements</p> <p><i>What should the agent produce by the end of the workflow?</i></p>	
<p>Quality checklist</p> <p><i>What does a good output look like?</i></p>	
<p>Human-in-the-loop and escalations</p> <p><i>When should the agent stop and ask for assistance or review?</i></p>	

Workspace Agent Requirements Doc: Pre-Call Researcher

<p>Agent mission</p> <p>What does the agent do? What output does it produce?</p>	<p><i>The Pre-Call Researcher prepares a concise, accurate prep brief before a customer call. It gathers trusted internal and approved external context, verifies facts, flags customer-sensitive claims or gaps, and produces a review-ready one-page brief that helps the account owner walk into the meeting prepared.</i></p>
<p>Scope and boundaries</p> <p>What are the specific tasks this agent should do, in order?</p>	<p>1. Identify the upcoming customer meeting 2. Gather internal notes, support themes, account context, and do approved web research 3. Synthesize the most relevant account signals; flag assumptions, risks, and open questions; draft a concise prep brief 4. Slack the account team channel with the plan for the call</p> <p><i>Out of scope: sending messages, making commitments, or updating records without approval.</i></p>
<p>Inputs and trusted context</p> <p>What information does this agent need to know to be successful?</p>	<p><i>The agent needs the meeting invite, account and opportunity records, prior call notes, recent support themes, account plan or ICP, approved value narrative, relevant product or policy context, customer-sensitive-claim guidance, and annotated examples of strong prep briefs. It should know which sources are trusted and how recent each source needs to be.</i></p>
<p>Tools and permissions</p> <p>What external systems should the agent have access to? What does it need read-only access vs write access?</p>	<p>Read-only access: calendar, CRM/account records, prior meeting notes, support themes, approved messaging/value narrative, account plans, and web research.</p> <p>Write access: a prep brief in ChatGPT or a document, a message to a team Slack channel</p>
<p>Output requirements</p> <p>What should the agent produce by the end of the workflow?</p>	<p><i>Produce a one-page call-prep brief with the account snapshot, meeting goal, attendee context, recent account or support signals, likely customer priorities, relevant value narrative, open questions, risks, recommended talk tracks, and next-best preparation steps.</i></p>
<p>Quality checklist</p> <p>What does a good output look like?</p>	<p><i>A strong output is concise, source-grounded, and easy to review before a call. It distinguishes verified facts from assumptions, uses approved messaging, highlights the highest-priority risks and questions, names the source for important claims, and gives the human owner a clear confidence level and review checklist.</i></p>
<p>Human-in-the-loop and escalations</p> <p>When should the agent stop and ask for assistance or review?</p>	<p><i>Ask for human review when source data is missing, stale, or contradictory; when the brief includes customer-sensitive claims, pricing, legal, security, or commitment language; when the agent can't find the relevant slack channel</i></p>