

Simple Social AI Agent Blueprint

DEFINE - Let's clearly define what we are building.

What is it? The AI Agent Blueprint helps your organization and the Simple Social team define the AI Agent before development begins.

How to use it? Keep your answers simple and practical. You do not need to understand AI or provide technical instructions. We will use your responses to design the Agent, identify the knowledge it needs, establish boundaries, and prepare for development.

PURPOSE	AUDIENCE	JOB	KNOWLEDGE	BOUNDARIES	ESCALATION	OWNERSHIP	SUCCESS
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Basic Information

Your Name		Organization Name	
Department / Team		Email Address	
Today's Date		Working AI Agent Name	
Simple Social Project Lead			

Let's Start!

PURPOSE - Let's clearly define the why behind what we are building.

01	PURPOSE	Why should this AI Agent exist?
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Define the organizational need first. The Agent should address a real knowledge, communication, training, or process challenge - not exist simply because AI is available.

Component	What We Want to Know	Your Response
Problem / Opportunity	What takes too much time, creates confusion, makes information difficult to access, or could be better supported?	
Primary Purpose	In one or two sentences, what should this Agent exist to help accomplish?	
Why It Matters	Why is this important to your organization or the people you serve?	

02	AUDIENCE	Who are we building it for?
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Map audiences at a high level here. If groups have meaningfully different roles, knowledge, permissions, or communication needs, Simple Social may use a separate Audience Group Profile for each group.

Primary Audience Group: _____

Additional Audience Group(s): _____

Internal / External: _____ Estimated Users: _____

Audience Group	Primary Need	Different Knowledge?	Different Access?	Profile Needed?

Audience Group Profile: Use a separate profile when an audience has meaningfully different roles, goals, knowledge levels, communication expectations, access permissions, language, or accessibility needs. Not every Agent needs multiple profiles.

What is it? This table helps you and the Simple Social team understand the specific people your AI Agent will serve and assist.

How to use it? Complete one Audience Group Profile for each AI Agent or AI Collection. Use the information to tailor the AI Agent’s tone, language, level of detail, knowledge access, and communication style to that specific audience. You do not need to answer everything. The more information you give us, the better!

Audience Information	What We Want to Know	Why It Matters
Audience Group Name	What do we call this group?	Creates a clear audience profile.
Role / Responsibility	What are they responsible for?	Helps the AI understand their perspective and needs.
Job Titles / Levels	Executive, director, manager, coordinator, technician, assistant, frontline staff, etc.	Helps determine appropriate language, detail, and context.
Primary Goals	What are they trying to accomplish?	Helps the AI focus responses on useful outcomes.
Reasons for Using the AI	What will they typically come to the Agent for?	Helps anticipate common questions and interactions.

Knowledge Level	Beginner, intermediate, expert, or mixed?	Determines how much explanation, terminology, and background the AI should provide.
AI / Technology Comfort	Low, moderate, advanced?	Helps determine whether instructions should be simple or more technical.
Preferred Communication Style	Professional, conversational, instructional, technical, executive-level, etc.	Defines how the Agent should speak.
Typical Vocabulary	Industry terminology, acronyms, department language, technical terms, etc.	Helps the AI communicate naturally with that audience.
Information Needed	What information does this audience need most often?	Helps connect the Audience Group to the correct Knowledge Base Files.
Decision Authority	Are they seeking information, making recommendations, approving work, or making final decisions?	Helps establish appropriate boundaries and response depth.
Common Questions / Pain Points	What confuses them or takes them the most time?	Helps train the Agent around real needs instead of hypothetical ones.
Access Level	What information should this audience be allowed to access?	Important when different groups have different permissions or knowledge needs.
Location / Service Area	Department, branch, facility, city, region, etc., when relevant.	Helps contextualize information and services.
Language	English, Spanish, Portuguese, multilingual, etc.	Allows the Agent to communicate appropriately with the audience.
Accessibility / Communication Needs	Plain language, shorter answers, step-by-step instructions, accessible terminology, etc.	Helps make the Agent more inclusive and usable.
Age Range	Only when genuinely relevant to the use case.	Can help adapt explanations for youth, adults, seniors, students, etc.

Let's Fill it Out!

AUDIENCE - Let's clearly define for whom we are building the AI Agent!

Audience Information	What We Want to Know	Your Response
Audience Group Name	What do you call this group?	
Role / Responsibility	What are they responsible for?	
Job Titles / Levels	Executive, director, manager, coordinator, technician, assistant, frontline staff, etc.	
Primary Goals	What are they typically trying to accomplish?	
Reasons for Using the AI	What will they typically use the AI Agent for?	
Knowledge Level	Beginner, intermediate, expert, or mixed?	
AI / Technology Comfort	Low, moderate, advanced, or mixed?	
Preferred Communication Style	Professional, conversational, instructional, technical, executive-level, simple, etc.	
Typical Vocabulary	Are there industry terms, acronyms, department language, or technical terms they commonly use?	

Information Needed	What information will this audience need most often?	
Decision Authority	Are they seeking information, making recommendations, approving work, or making final decisions?	
Common Questions / Pain Points	What questions, challenges, or areas of confusion do they commonly have?	
Access Level	What information should this audience be allowed to access?	
Location / Service Area	Is a department, branch, facility, city, region, or other location relevant to this group?	
Language	What language(s) should the AI use with this audience?	
Accessibility / Communication Needs	Do they need plain language, short answers, step-by-step instructions, or other communication accommodations?	
Age Range	If relevant, what is the general age range of this audience?	

03	JOB	What should the Agent help people do?
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Focus on what a user should be able to accomplish when they open the Agent.

■ Find information	■ Understand information	■ Ask questions
■ Follow a process	■ Locate forms/resources	■ Learn / receive training
■ Prepare for something	■ Create / draft content	■ Receive guidance
■ Understand next steps	■ Other: _____	

Component	What We Want to Know	Your Response
Primary Job	Describe the Agent's primary job in your own words.	
Expected Requests	What are 5-10 questions or requests you expect people to bring to this Agent? These can later help form the Validation Test Question Bank.	1. 2. 3. 4. 5.

04	KNOWLEDGE	What does the Agent need to know?
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Identify categories and sources of knowledge. You do not need to upload everything yet. Simple Social will review the Blueprint first and prepare a customized Knowledge Collection Checklist.

Component	What We Want to Know	Your Response
Knowledge Categories	Policies; procedures/SOPs; forms; FAQs; training materials; manuals/guides; programs/services; reports; website content; organizational information; professional expertise; contacts; other.	
Where It Lives	PDFs/documents; website; Microsoft 365/SharePoint; Google Drive; internal systems; training materials; subject-matter experts; multiple locations; not sure.	
Knowledge Approver	Who can confirm that this information is current, accurate, and approved for use?	

Important: Do not send every organizational file at this stage. The approved Blueprint determines what knowledge should be requested during COLLECT.

05	BOUNDARIES	Where should the AI stop?
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Boundaries define what the Agent should not answer, do, decide, interpret, or access.

Component	What We Want to Know	Your Response
What It Should NOT Do	What activities, decisions, interpretations, or topics should remain outside the Agent's role?	
Topics to Redirect	Are there subjects the Agent should avoid or redirect?	
Human-Only Decisions	What decisions or approvals must always remain with an authorized person?	
Sensitive / Restricted Information	Does the use case involve sensitive or restricted information? If yes, describe only the category - do not include confidential information here.	■ No ■ Yes ■ Not sure Category:

06	ESCALATION	When should a human step in?
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A boundary tells the Agent where to stop. Escalation defines what should happen next.

Component	What We Want to Know	Your Response
Escalation Triggers	When should the Agent direct someone to a person instead of answering?	
Human / Department	Who or what should users be directed to? Include role, department, approved contact method, or resource.	
Immediate Review	Are there situations that require immediate human review?	
When Information Is Missing	What should happen when the Agent does not have enough approved information to answer?	■ Explain information is unavailable ■ Direct to person/department ■ Recommend approved resource ■ Other:

07	OWNERSHIP	Who is responsible for the Agent?
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Every Agent needs clear organizational ownership so its knowledge, access, and purpose remain current after launch.

Component	What We Want to Know	Your Response
Business Owner	Who is the primary organizational owner of this AI Agent? Name, role, and department.	
AI Agent Admin(s)	Who should have administrative access to manage the Agent and platform?	
Knowledge Approver(s)	Who is authorized to approve Knowledge Base updates?	
Primary Contact	Who should Simple Social contact when changes, questions, or approvals are needed?	

08	SUCCESS	How will we know it is helping?
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Start with the practical improvements that would make the Agent valuable.

■ Find information faster	■ Fewer repetitive questions
■ More consistent answers	■ Easier access to knowledge
■ Better user support	■ Faster onboarding/training
■ Better process understanding	■ Less dependence on individuals
■ More use of approved resources	■ Better user experience

Component	What We Want to Know	Your Response
Success Statement	Six months from now, what would make you say, 'This AI Agent is working'?	
Baseline	Is there anything you can measure today that could help establish a baseline?	■ Yes ■ No ■ Not sure If yes:

AI Agent Blueprint Summary

After reviewing the completed Blueprint, Simple Social will consolidate the information below into the approved definition of the Agent.

Purpose	
Audience	
Job	
Knowledge	
Boundaries	
Escalation	
Owner	
Success	

Blueprint Statement

“We are building _(AI Agent Name)_____, a specialized AI Knowledge Agent for _(Audience)_____, designed to help them to _(Job)_____ using approved knowledge, while staying within defined boundaries and directing users to an authorized person or resource when human support is needed.”

Blueprint Status	■ Draft ■ Client Review ■ Revisions Needed ■ Approved for Knowledge Collection
Client Approval	
Date	

WHAT HAPPENS NEXT? | COLLECT

Once your AI Agent Blueprint is approved, Simple Social will review the information provided and prepare a customized Knowledge Collection Checklist identifying the documents, resources, webpages, and organizational knowledge needed to begin building your Agent.