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AI agent briefing checklist

Define the business rules, then test the connected implementation.

- [ ] **Define the trigger and inputs**

  Specify the observable event that starts the workflow, the exact information available, and which inputs may be missing.

- [ ] **Specify the output and action**

  Name the required format and result. State whether the agent drafts, schedules, sends, or changes a record.

- [ ] **Define exceptions and escalation**

  Record agreed exception handling and an explicit stop for unresolved cases. Name who receives each case.

- [ ] **Review with real cases**

  Observe the person doing the work. Capture trigger, information, decision, output, and exceptions; seek rare consequential cases separately.

- [ ] **Agree acceptance results**

  Write expected results for normal inputs, missing fields, duplicate matches, unavailable tools, and permission-dependent actions. Ask an unfamiliar colleague to follow the brief.

- [ ] **Check approval and recovery**

  Name who may approve and what confirms success. Define recovery after a failed connection; test actual access and actions before granting live sending or write permission.

Source article

https://yardwork.dev/en/blog/how-to-brief-an-ai-agent