

AI AGENT DESIGN SHEET

Six lines to decide what the agent has to do before you pick the tool. One sheet per task: if you need two, that's two agents.

1 · THE AGENT IN SIX LINES

Task	<i>One task, written the way you'd put it to a colleague: "reply to availability enquiries", not "handle customers".</i>
Takes in	<i>Where the data comes from: inbox, WhatsApp, a folder of PDFs, a spreadsheet, your business software. Attach a real example from each source.</i>
Does	<i>The steps, in order: reads, recognises, looks up the data, prepares the result. And what it does when the data isn't there: stops and flags it.</i>
Approved by	<i>Who checks, and what. Anything that touches a customer, money or an outgoing message goes past a person before it leaves.</i>
Writes to	<i>Where it leaves the result: a draft in the inbox, a row in the sheet, a contact in the CRM. One place for each result.</i>
Measured by	<i>Today's number and the one the agent has to beat, agreed before you start: minutes per task, errors per hundred, response time.</i>

2 · WHAT THE TASK COSTS TODAY, DONE BY HAND

Times a month	<i>Last month's number, counted rather than guessed.</i>
Minutes each time	<i>From opening it to finishing, including looking up the data.</i>
What an hour of that person's time costs the business (euros)	<i>The full cost, not the take-home pay.</i>
Cost per month	<i>Times multiplied by minutes, divided by 60, multiplied by the hourly cost. It's the number to put next to the price of any agent.</i>
Cost over a year	<i>Twelve months of that cost, against set-up plus twelve months of the monthly fee.</i>

3 · DO IT YOURSELF OR HAVE IT BUILT: THREE QUESTIONS

Does it take data from one source and write to one place?	<i>Yes: you can try it yourself with the tools you already use (ChatGPT, Gemini, Claude, Copilot) or an automation such as n8n. No: it needs connections, and someone to build them.</i>
Does it touch a customer, money or an outgoing message?	<i>Yes: before you switch it on, you need a written approval step and a log of what it does.</i>
What does it do when it can't find the answer, or a source doesn't respond?	<i>If the answer isn't "it stops and flags it to a person", the agent hasn't been designed yet.</i>

Two answers out of three pointing to "have it built"? Send us the completed sheet: in fifteen minutes we'll tell you whether it's worth it and what it needs.

How to build an AI agent in five steps, with a worked example:

itria.io/en/come-creare-un-agente-ai

Free sheet, built by Itria. It's a design tool, not a quote or a contract.

Send it back completed with a couple of lines on WhatsApp to +39 350 574 3578 or an email to info@itria.io: in fifteen minutes we'll tell you whether it's worth it and what it needs. Itria's agents, each with its measurement: itria.io/en/servizi