AI AGENT · PRACTICAL WORKSHEET

A worksheet for your first AI agent task

Which recurring mission would you like an AI agent to take on? Start with a concrete event: a tender arrives, then several steps must follow through to your decision. Once access and rules have been agreed with SAY Digital, the agent can follow this work across your tools without you restarting each step in a chat. This worksheet helps you define the trigger, useful information, expected result and human approvals.

Your answers stay in your browser. Describe your needs with anonymised examples, without sensitive data or passwords.

Download your worksheet before closing or refreshing the page: your answers are not saved automatically.

Example: from an incoming tender to the decision to bid

A new tender arrives in the dedicated inbox. In this example, the agent identifies the deadline and requirements, then checks them against your company's expertise and available capacity. It gathers relevant project references from the authorised folders.

Using this information, it prepares a recommendation for the business owner: bid or do not bid, with reasons, points to check and sources. The business owner makes the go/no-go decision.

Drafting the response starts only after a human go-ahead. No document or message is sent without approval. Each new tender can start the same connected chain: work followed across your tools and decisions, not a one-off question in a chat. The fields below help you define this process with SAY Digital.

1. The task to delegate

What work would you like to delegate? Example: follow each incoming tender from receipt to a recommendation for the business owner, then prepare a response only after their go-ahead.

Follow incoming tenders through to the business owner's go/no-go decision; draft a response only after their go-ahead.

2. When the work is needed

What event starts the work, and when is the result needed? Example: a tender arrives in the dedicated inbox; the recommendation is due before the internal decision date.

Whenever a tender arrives in the dedicated inbox; recommendation before our internal decision date, allowing for the submission deadline.

3. Documents to use

Which information should be checked? Example: tender documents and appendices, company expertise and available capacity, and approved references from past projects.

Current tender documents and appendices; company expertise, available capacity and approved project references.

4. The result you need

What do you want to receive? Example: a sourced recommendation covering the deadline, requirements, company fit and references; after a go-ahead, a draft response.

A bid/no-bid recommendation with sources and points to check; after a human go-ahead, a draft response for approval.

5. Tools involved

Where does information arrive, and where should progress be tracked? Example: a dedicated tender inbox, shared folders and a tracking sheet to agree with SAY Digital.

Dedicated inbox, shared expertise and reference folders, and tender tracker; access to be agreed with SAY Digital.

6. What the agent may do

Which actions are allowed? Example: read authorised documents, gather references and prepare the recommendation; start drafting only after a go-ahead.

Read authorised sources and prepare the recommendation; draft after a human go-ahead. Do not change originals or send anything without approval.

7. Who checks the result

Who knows the work and checks it? Example: the sales manager checks requirements, available capacity and references before the business owner makes the decision.

The sales manager checks the analysis and references; the business owner makes the go/no-go decision.

8. When approval is needed

Which decisions must a person make? Example: the business owner gives the go-ahead before any response is drafted; the final version and every send require approval.

Wait for the business owner's go-ahead before drafting; obtain approval for the final version and every send. A no-go stops preparation.

9. When to ask for help

When should the agent ask for help? Example: a missing appendix, an unclear requirement or unconfirmed capacity; flag the issue to the manager rather than invent an answer.

Flag missing documents, unclear requirements, uncertain capacity or tight deadlines; ask the manager to decide.

10. How to judge the result

What would make the work useful? Example: clear deadline and requirements, checked capacity, relevant references and sources, a clear recommendation and respected human decisions.

Sourced analysis, clear deadline, relevant references and flagged uncertainties; no draft before a go-ahead, nothing sent without approval.

Not sure about every answer? Note what still needs to be clarified. Download your worksheet and keep it for your conversation with SAY Digital.

From your worksheet to a clearly defined task

WHAT COMES NEXT STARTS WITH YOU

We can't wait to see what we will build together.

An experience that makes an impact.
A project that moves your business forward.

Talk to an expert

SAY Digital I/O

Go Big Online

Using Top Digital Talents

Design, development and AI, brought together around your project.

Solutions

- All solutions
- Design Sprint
- Websites
- E-commerce
- Business applications
- Mobile applications
- AI & automation

Expertise

- Build a team
- UI/UX Design
- Design & experience
- Strategy & product
- Web & e-commerce
- Applications & software
- AI & automation

Trustpilot

Read client reviews

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Infrastructure & support

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Client area

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Cloud & operations

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Our approach

The team

How it works

Our work

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