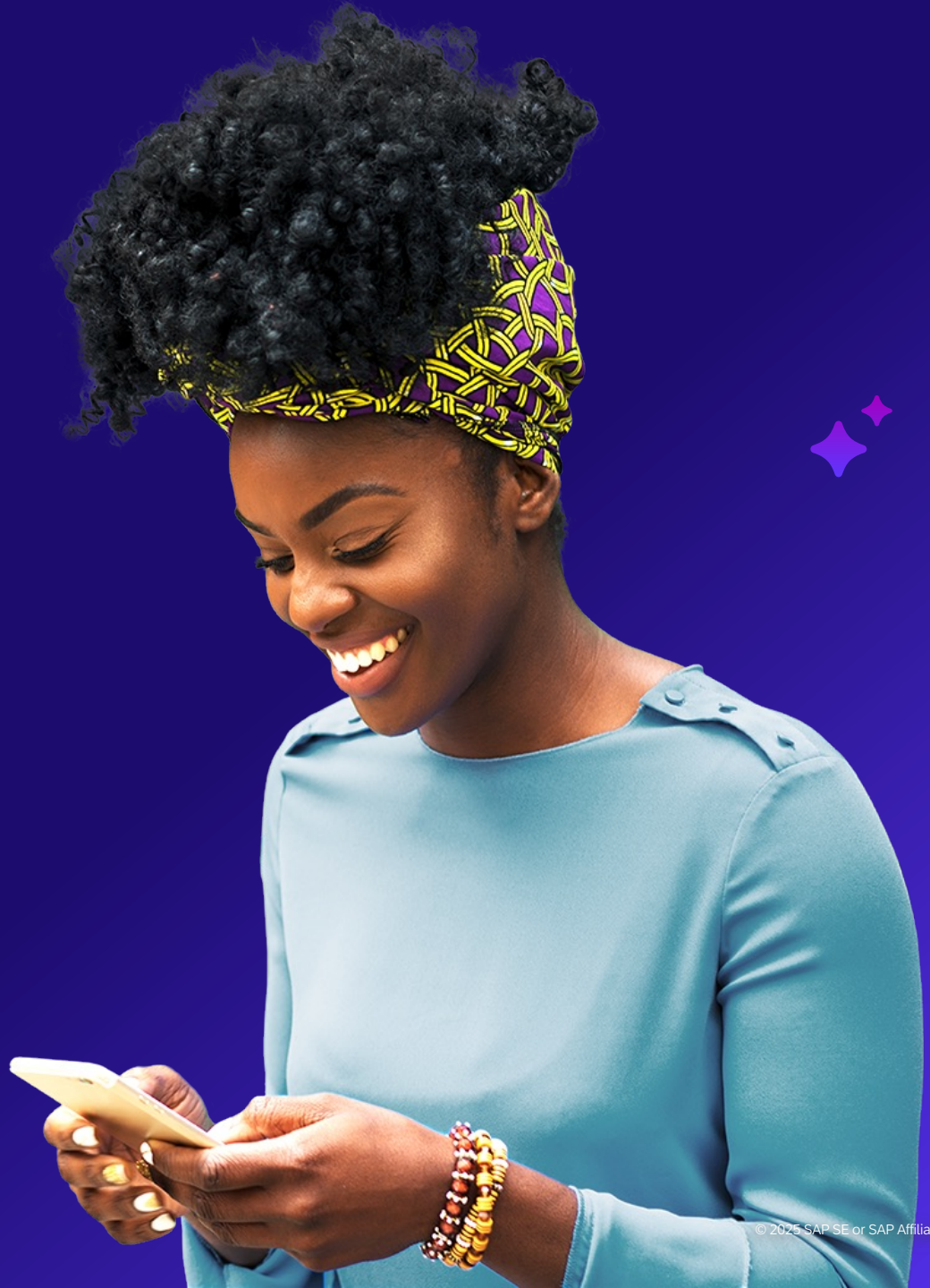
Joule Agent Design Workshop

Facilitation Guide



V1

Dec 2025

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Table of contents

1 **Introduction and overview**
The Joule Agent Design Workshop in Context

2 **Preparing the Workshop**
Necessary material for the session

3 **Running the Workshop**
Step by step exercises and coach instructions

4 **Adaptations and Follow-up Activities**
Next steps to start implementation

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1

Introduction and Overview

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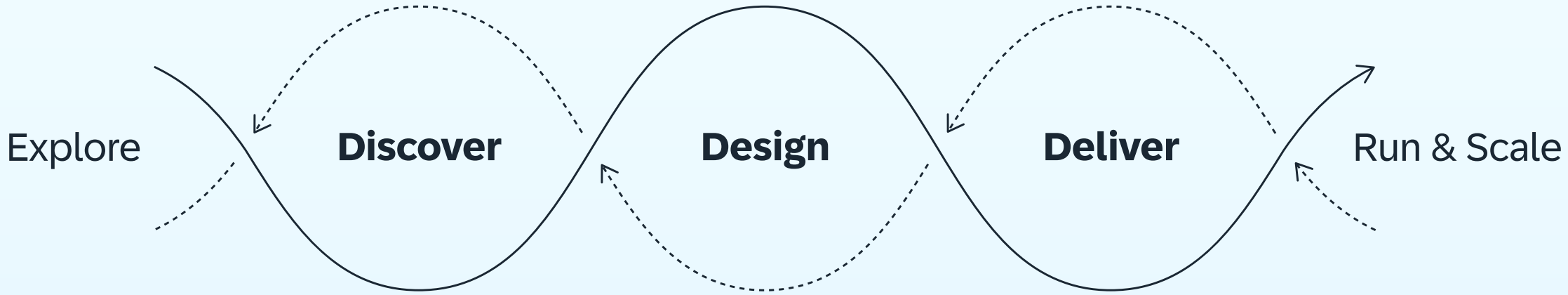
A Human-Centered Approach

to Run Innovation Projects

The SAP's Human-Centered Approach to Innovation (HCAI) is an end-to-end process for developing innovations that focuses on addressing businesses and user needs to generate value.

It supports the entire innovation lifecycle: from generating novel business ideas to developing and delivering high-value solutions. This process **consist of five phases:**



Explore innovation opportunities that will support your strategic business goals.

Discover the needs and challenges of customers and target users.

Design a prototype of the solution and define the enterprise architecture components.

Deliver both business and technical solutions for productive use in your enterprise architecture landscape.

Run and scale your solution and deploy across the company.

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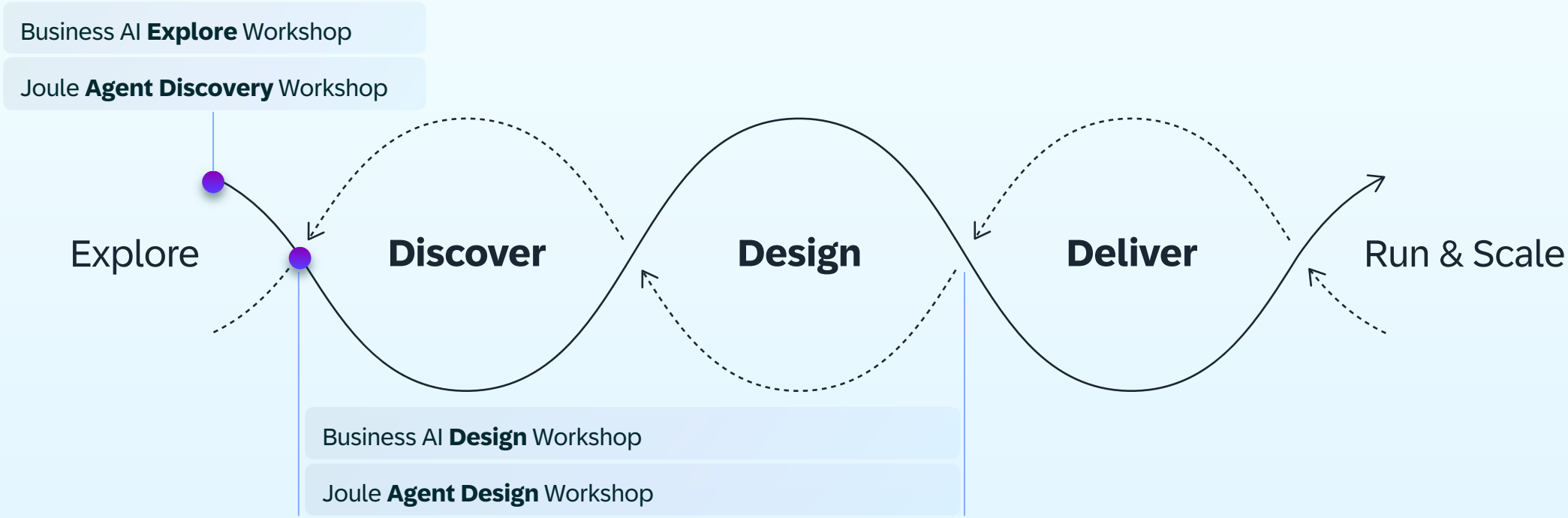
Applying Human-Centered Innovation

to SAP Business AI

The SAP AppHaus offers four different human-centered workshop formats to help companies identify and define meaningful use cases for Artificial Intelligence that focus on business and user needs:

the Business AI Explore Workshop, the Business AI Design Workshop, the Joule Agent Design Workshop, and the Joule Agent Discovery Workshop. These formats take place during the 'Explore' , 'Discover' and 'Design' phases of the HCAI.



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AI Workshop Formats

from SAP AppHaus

Business AI Explore Workshop

Understand the possibilities of AI and Identify AI use cases with business impact.

Business AI Design Workshop

Define a solution concept to address the pain points of an existing business process using AI capabilities.

Joule Agent Discovery Workshop

Understand the power of agents and identify agentic use cases to drive productivity.

Joule Agent Design Workshop

Design an AI agent that works for you.

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Selecting an AI Workshop Format

from SAP AppHaus

The selection of the right workshop format for your case will depend on the phase in which you are in the project and the needs of your customer or team. These are the different situations that can guide your decision.

Business AI Explore Workshop

You want to learn what AI can do and **explore innovative AI solution ideas**.

Joule Agent Discovery Workshop

You want to **automate or streamline an activity or process** and are not sure if an agent can help.

Business AI Design Workshop

You **have an AI solution idea** or want to **improve the experience of an existing solution with AI**.

Joule Agent Design Workshop

You **have an agentic use case idea** and want to **define the agent capabilities in detail.**

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Joule Agent Design Workshop

A creative and collaborative approach to design an agent-driven solution that works for you.

Duration:
5 - 6h on-site or 2 x 3h day virtual

Goals:

- Define what the agent should focus on.
- Describe the objectives, tasks and instructions to configure the agent.

[Method Website]

Who
should participate?

Business department leads with process knowledge, IT and domain experts.

Why
should you care?

AI agents need a clear purpose. In this workshop you define the role and abilities of your agentic solution, so it can automate tasks for better efficiency.

What
is the outcome?

A clear description of your automation solution, ready to be used as a blueprint for configuration, including tasks, objectives, and workflow.

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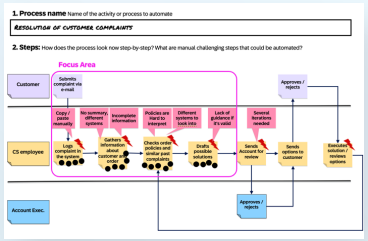
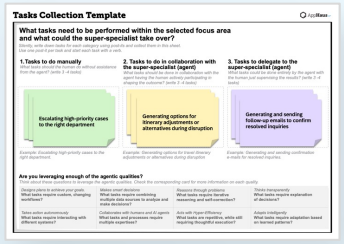
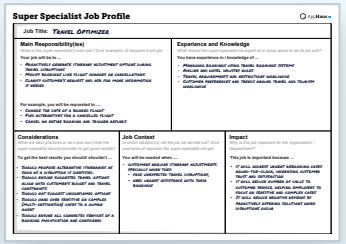
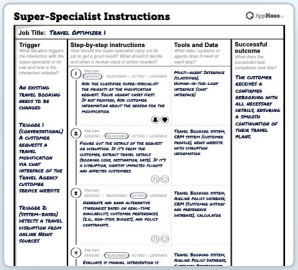
Workshop Structure Overview

In 4 steps









1

Define
the focus area

2

Identify
tasks to delegate

3

Describe
the super-specialist's job

4

Instruct
the super-specialist

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Activities

1. **Define the focus area**
   Map the current process and identify challenging steps that could benefit from automation.

2. **Identify tasks to delegate**
   Using the metaphor of “hiring a super-specialists” decide which tasks to handle yourself and which to delegate to the super-specialists.

3. **Describe the super-specialist job**
   Write a "job description" outlining what the super specialist(s) need to know and do.

4. **Instruct the super-specialist**
   Define the instructions or workflow for the tasks, including decision steps, required data and human-in-the-loop steps.

2

Preparing the Workshop

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Preparation Checklist

Start preparation two weeks in advance

- ☐ **Understand the format**
  Go through the instructions in this guide and make sure you understand the flow of the exercises. You can also reference the MURAL board aimed at virtual sessions to see how the exercises are set up.

- ☐ **Clarify the reasons for the workshop request**
  Talk to the customer or colleague requesting the workshop and make sure that their expectations can be covered with this format. Review section 1 in this guide to decide which workshop format fits best.

- ☐ **Identify a Use Case**
  Make you have a well-defined and understood use-case in advance, covering: What is the activity or process that needs the agentic automation?, Which role or teams will benefit and use the automated solution?, What specific targets or issues is the solution meant to address?, Is the use case a good fit for agentic AI? Use the Automation Scenario template and the Agentic Use Case template to document these details or run a Joule Agent Discovery workshop in advance.

- ☐ **Ensure the right participants**
  Ensure you have a mix of business experts or end-users who know the process and its challenges, and technical experts who understand the feasibility of implementation. It is recommended to have AI experts with experience on agentic technology.

- ☐ **Clarify the number of participants and agree on team distribution**
  Ensure you have breakout teams of no more than 6 participants and that each team focuses on one use case.

- ☐ **Ensure participants have access to the Mural board or look for alternatives**
  If your workshop is virtual, check before the session if participants can access Mural. You can set up a preparation session where you run through the Warm-up exercise to test this.

- ☐ **Adapt the workshop agenda**
  Adapt the agenda (.xls) based on participant count and available time. More participants mean longer share-outs. If you have multiple teams, include time at the end for a team share-out so each group can present their results. Prepare a simplified agenda on a flipchart for on-site sessions.

- ☐ **Prepare the material and supplies**
  Print the material as specified in the Material for Print section. Prepare one Task Collection Template per participant with post-its, and ensure your post-its are colored differently for each task category. Check the Visual Preparation page for how to prepare the exercises in the space. Make sure you have a timer with alarm, post-its, and one marker pen per participant

- ☐ **Check the space and equipment**
  If your workshop is on-site, ensure you have a large, flexible room that can accommodate all breakout teams. Each team needs a table and enough vertical space (a whiteboard, wall, or window) to do the as-is process and tasks exercise. You will also need a monitor to present the necessary instruction slides.

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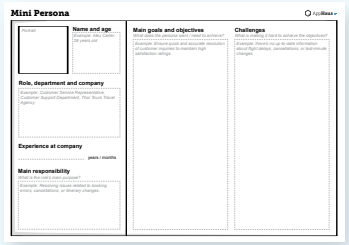
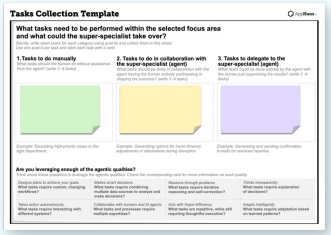
Material for Print

for on-site workshops



Mini Persona Template **(optional)**

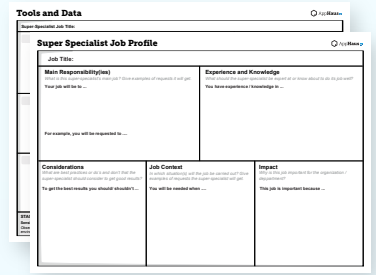
1 x breakout team
(size DIN A3,
black and white)



Tasks Collection Template

+ empty colored post-its

1 x participant
(size DIN A3,
black and white)



Job Profile and Tools and Data

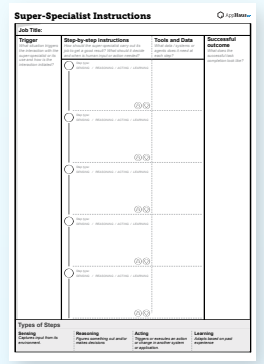
1 x breakout team
(size A3, black and white)

Agentic Qualities Card Set

1 set x participant
(size DIN A6, 250 gsm.,
back and forth, color)

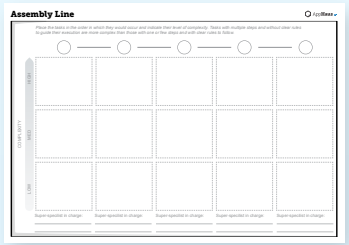
Tools Card Set

1 set x breakout team
(size DIN A6, 250 gsm.,
back and forth, color)



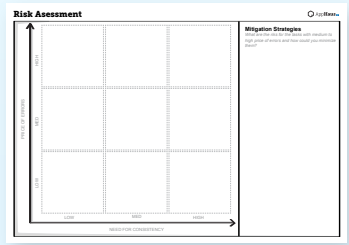
Instructions Template

3 - 8 x breakout team
(size A3, black and white)



Assembly Line

1 x breakout team
(size DIN A3,
black and white)



Risk Assessment

1 x participant
(size DIN A3,
black and white)

Coach Agenda

1 agenda x coach
(size A4, black and white)

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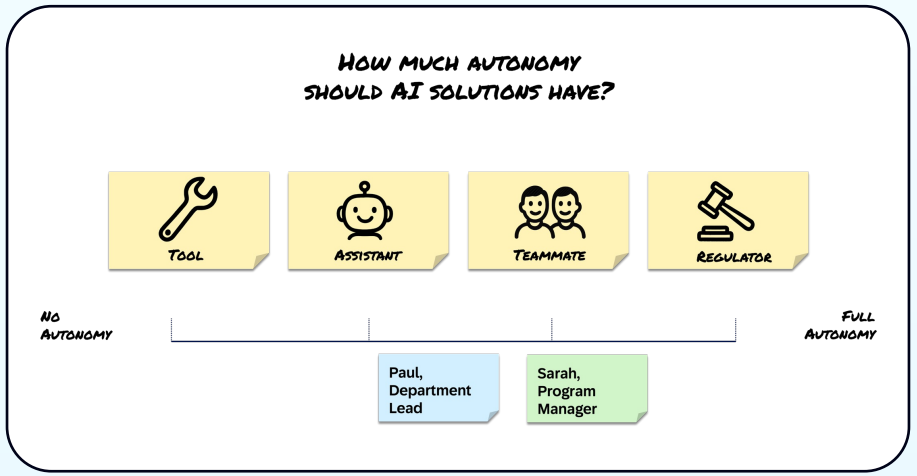
Visual Preparation

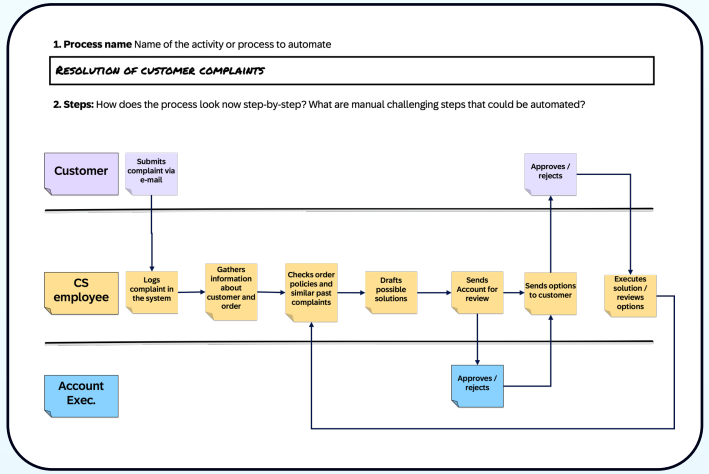
for on-site workshops

Exercises to prepare on whiteboards or vertical surfaces



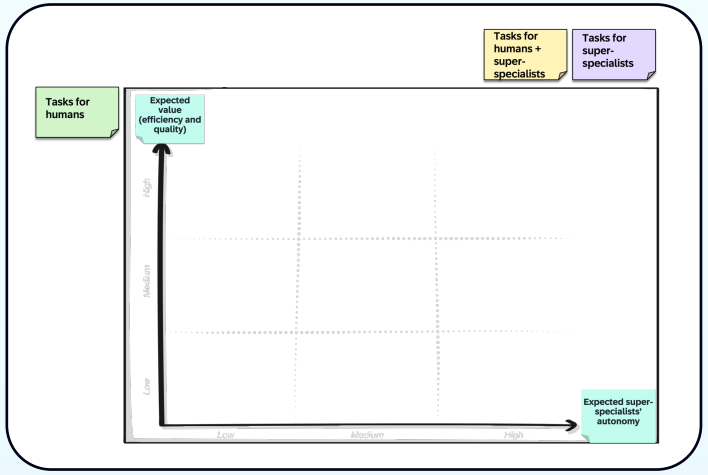
Autonomy Spectrum (Warm-up Exercise)

Draw the icons on large post-its.



As-is process (1 x breakout team)

Prepare a vertical surface with the name of the process to automate, the main roles identified and the high-level steps. Take this information from the pre-filled "Agentic Use Case template" if you did a Joule Agent Discovery workshop before or have a session with the customer before the workshop to create it



Task Heatmap (1 x breakout team)

Prepare the Task Heatmap with the 2 dimensions and the different levels low medium high per dimension

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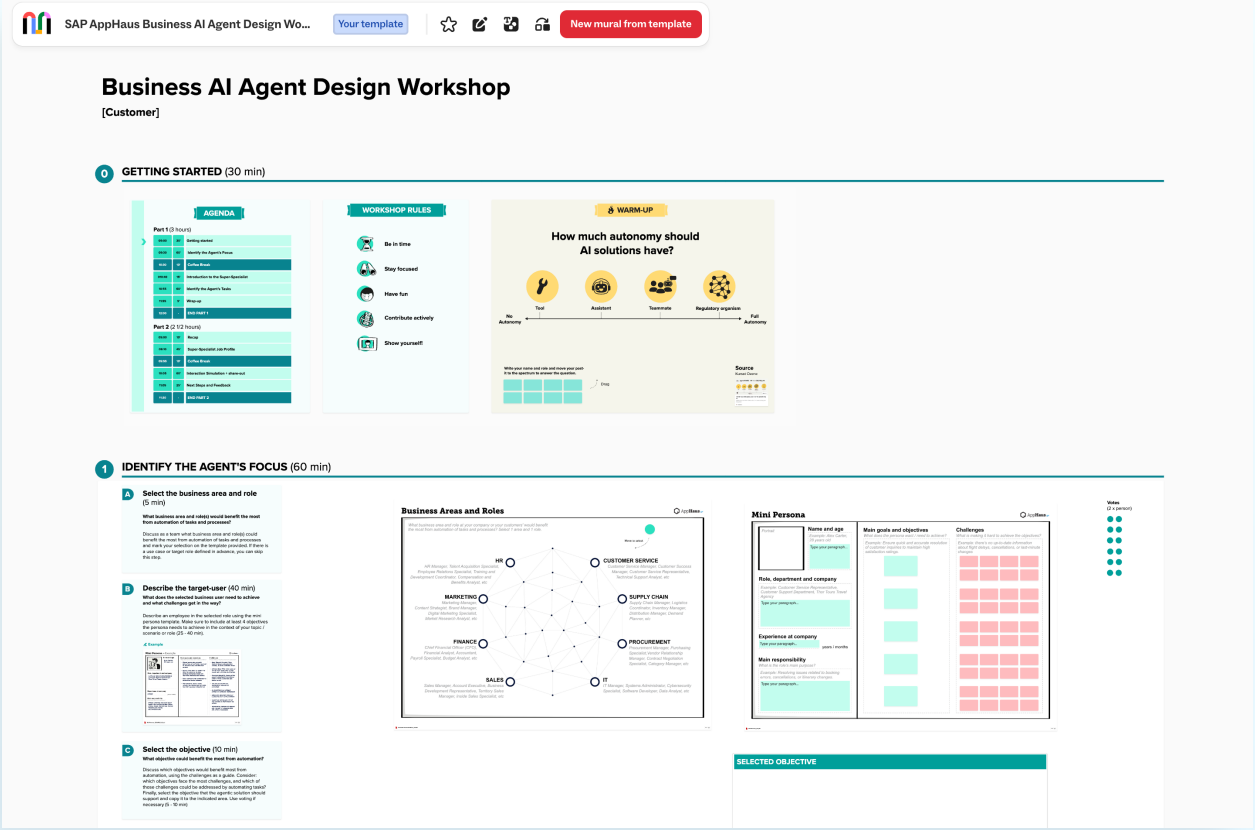
Material for virtual sessions

for on-site workshops

You will need to create a Mural account to access this template if you don't have one yet.

Full workshop
https://app.mural.co/template/d616f93d-c4ba-4703-8c5a-24e81c0b9014/7875ad0e-9076-4a1f-a1cb-ac2c814b652d



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3

Running the Workshop

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Workshop Agenda*

Agent AI Design Workshop

Time	Duration	Agenda Item
09:00 – 09:30	30 min	Getting Started
09:30 – 10:30	60 min	Define the Focus Area
10:30 – 10:40	*10 min*	*Coffee Break*
10:40 – 12:30	110 min	Identify Tasks to Delegate
12:30 – 13:30	*60 min*	*Lunch*
13:30 – 14:30	60 min	Describe the Super Specialist's Job
14:30 – 15:30	60 min	Instruct the super-specialist(s)
15:30 – 15:45	*15 min*	*Coffee Break*
15:45 – 16:25	40 min	Bring it all together
16:25 – 16:45	20 min	Next Steps
16:45 – PM	*–*	*End*

* This is a suggested agenda, modify if needed.

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FOR COACH

PART 0

Getting Started

Collaborative activity with discussion

Welcome participants to the session and introduce the theme of autonomy and agentic systems.

CORE ACTIVITIES

1. **Welcome and agenda**
   Welcome the participants, introduce the agenda and purpose of the session

2. **Introductory Warm-up**
   Ask participants to write their name and role on a post-it. Then, have them answer the question, “How much autonomy should AI solutions have?” by placing their post-it on a spectrum ranging from No Autonomy to Full Autonomy.

3. **Introduction to agentic technology**
   Provide a brief explanation of agentic technology. Include examples if available to illustrate its potential. Refer to the introductory slides provided for support.

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Coach Instructions

0. Getting started

FOR COACH

20 - 30 min All together

STEPS

A **Welcome and agenda** – 5 min
Welcome the participants, introduce the agenda and purpose of the session.

B **Warm-up** – 15 min
Ask participants to write their name and role on a post-it. Then, have them answer the question, “How much autonomy should AI solutions have?” by placing their post-it on a spectrum ranging from No Autonomy to Full Autonomy (see exercise sheet on next page).

C **Introduction to agentic technology** (optional) – 10 min
Provide a brief explanation of agentic technology. Include examples if available to illustrate its potential. Refer to the introductory slides provided in this guide for support.

Goal

Set the right expectations and create a friendly atmosphere where participants feel safe to express themselves. Introduce the topic of Agentic AI with a warm-up exercise.

Outcome

Participants are aware of each other’s roles and understand the flow of the workshop.

Material

- Post-its, pens

Tips

- Draw the autonomy spectrum on a whiteboard or similar surface before the workshop.
- Keep explanations brief (2 min per person)

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Warm-up

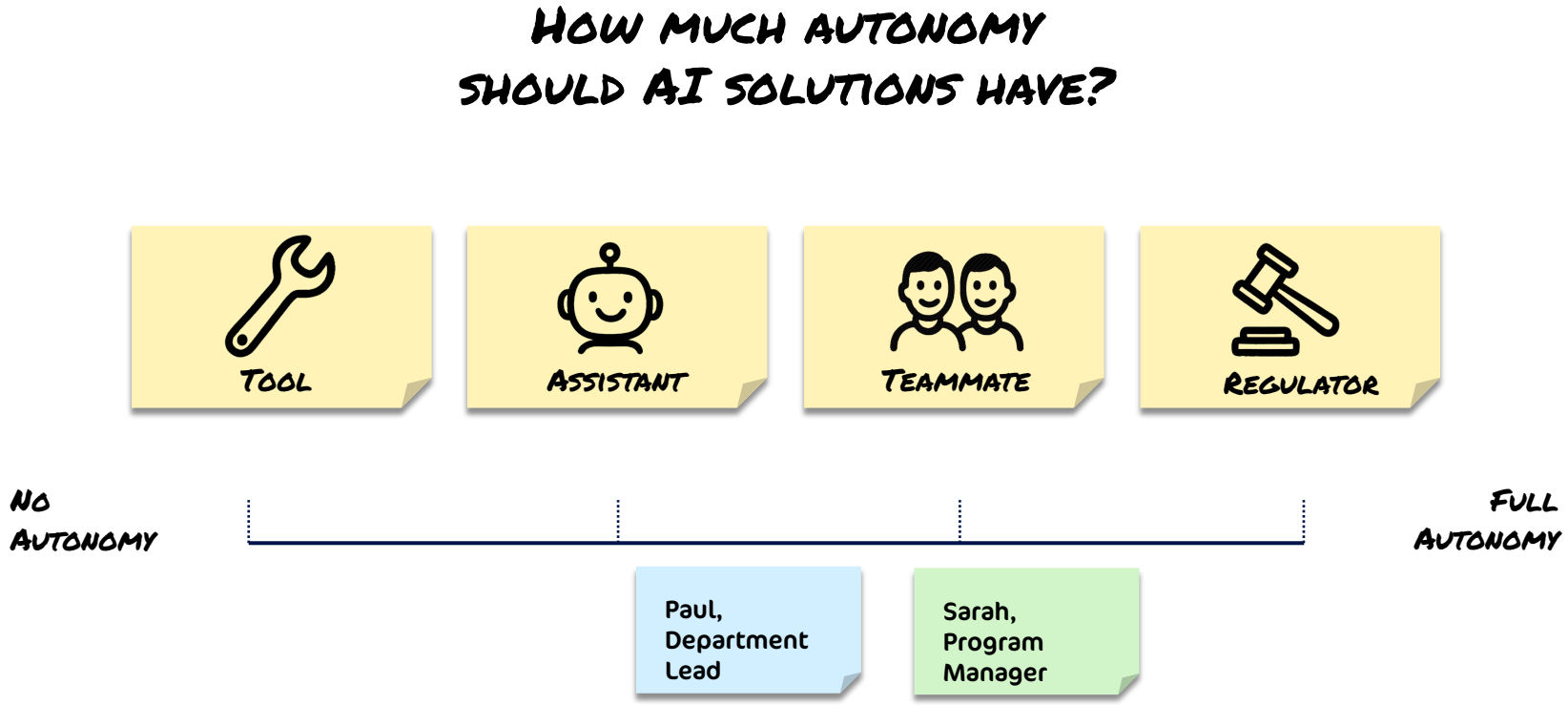
Discuss your expectations on AI Autonomy

15 min | All Together

In an ideal world: how much autonomy should AI solutions have?

- Write your name and role on a post-it.
- Position the post-it where you think the answer should be.
- Present yourself to the team and explain your position on the autonomy spectrum.

Based on article by: Kursat Ozenc
https://culturescapes.substack.com/p/tell-me-your-ai-metaphor-and-i-tell?r=64rms&utm_campaign=post&utm_medium=web&triedRedirect=true



To be drawn on a whiteboard

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FOR COACH

PART 1

Define the Focus Area

Collaborative activities with discussion

Understand the current situation and identify challenging steps or responsibilities that could benefit from automation.

CORE ACTIVITIES

1. **Review and complete the as-is process**
   Participants review the as-is process prepared in advance and complete it by indicating the steps that are repetitive, time-consuming, or prone to errors. Select those areas where automation would provide the highest as focus for improvement.

2. **Describe the main target-user(s) (optional)**
   Participants describe the main target user(s) of the agentic solution, including objectives they need to achieve as part of their role and challenges that are making it hard to achieve the objectives.

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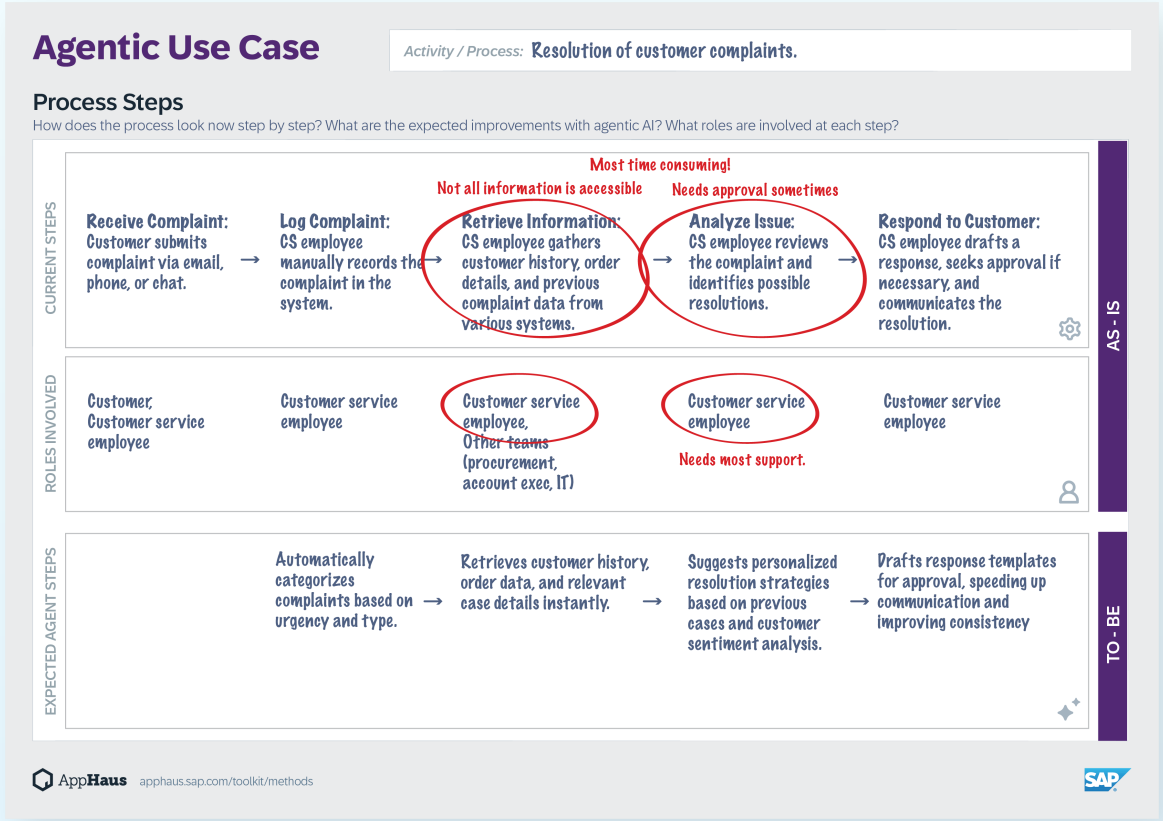
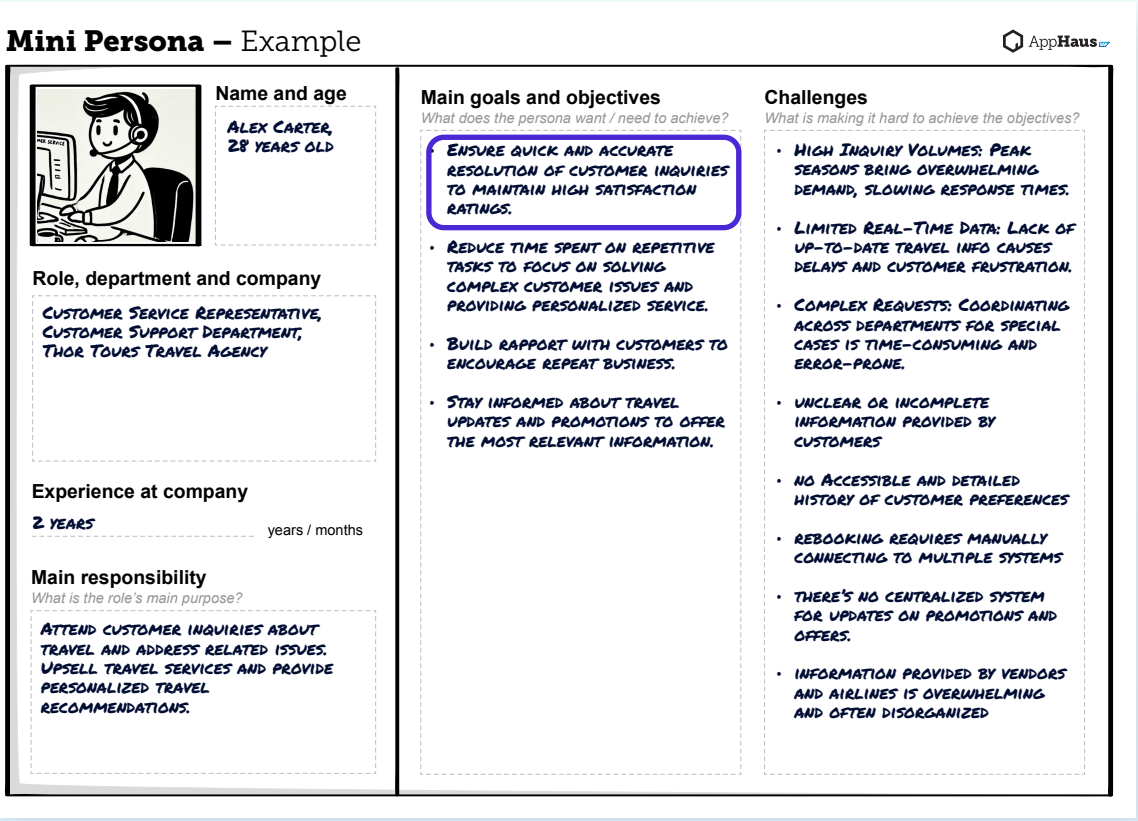
Starting Points

Two starting points to find the agent's focus



Process perspective: recreate the content of this template in advance on a whiteboard or vertical surface without including the marked challenges or the automation steps.



User group perspective: Identify one or more key roles to focus on in advance.

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Coach Instructions

1. Define the Focus Area

60 min In Teams

STEPS

A **Preparation** – Before the workshop
Recreate the "As-Is Process" resulting from the Joule Agent Discovery Workshop on a large whiteboard or similar surface. Arrange the steps horizontally with a separate lane for each role or department involved. Do not pre-fill any challenges or pain points; the participants need to identify these themselves.

B **Starting point 1: Validate and complete the as-is process** – 30 min
Have the participants review the process you've laid out. Ask them to validate or correct the steps. Next, have them mark the steps that are repetitive, time-consuming, or prone to errors, using red sticky notes to explain why. Once the challenges are mapped out, give each participant a few votes to select the top 3-5 challenging steps they feel an automated solution could best support. This selection helps to narrow down the scope early on and will become the focus area for the design of the automated system.

C **Starting point 2: Describe the target-user group (optional)** – 30 min
This approach is best if you don't have a predefined process and are exploring how to support a specific role in the organization with automation. Identify one or more key roles to focus on in advance. Have participants fill out a "Mini Persona" template to describe each target user group. Ask them to list at least four key objectives the persona needs to achieve within the scenario. Next, have them identify the challenges that prevent the persona from achieving these objectives. Finally, the team votes on the one or two objectives that would benefit most from automation using the challenges as guidance. These objectives will define the focus for the system.

Goal
Identify the parts of the process that would benefit the most from the automated solution.

Outcome
Top 3 – 4 areas of the process / aspects to improve with an automated system.

Material
- Post-its, pens
- Mini Persona Template

Tips
- When writing the reasons for a challenging step, ensure participants are specific. For example, instead of writing "time-consuming" as the why, they should describe what makes the step time-consuming, like: "Information is in multiple systems and not all data is accessible".
- In the “Mini persona” guide participants to write goals as objectives, not tasks.
- Combine persona and as-is process for deeper insights.

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1.1

Validate the selected automation scenario

30 min In Teams

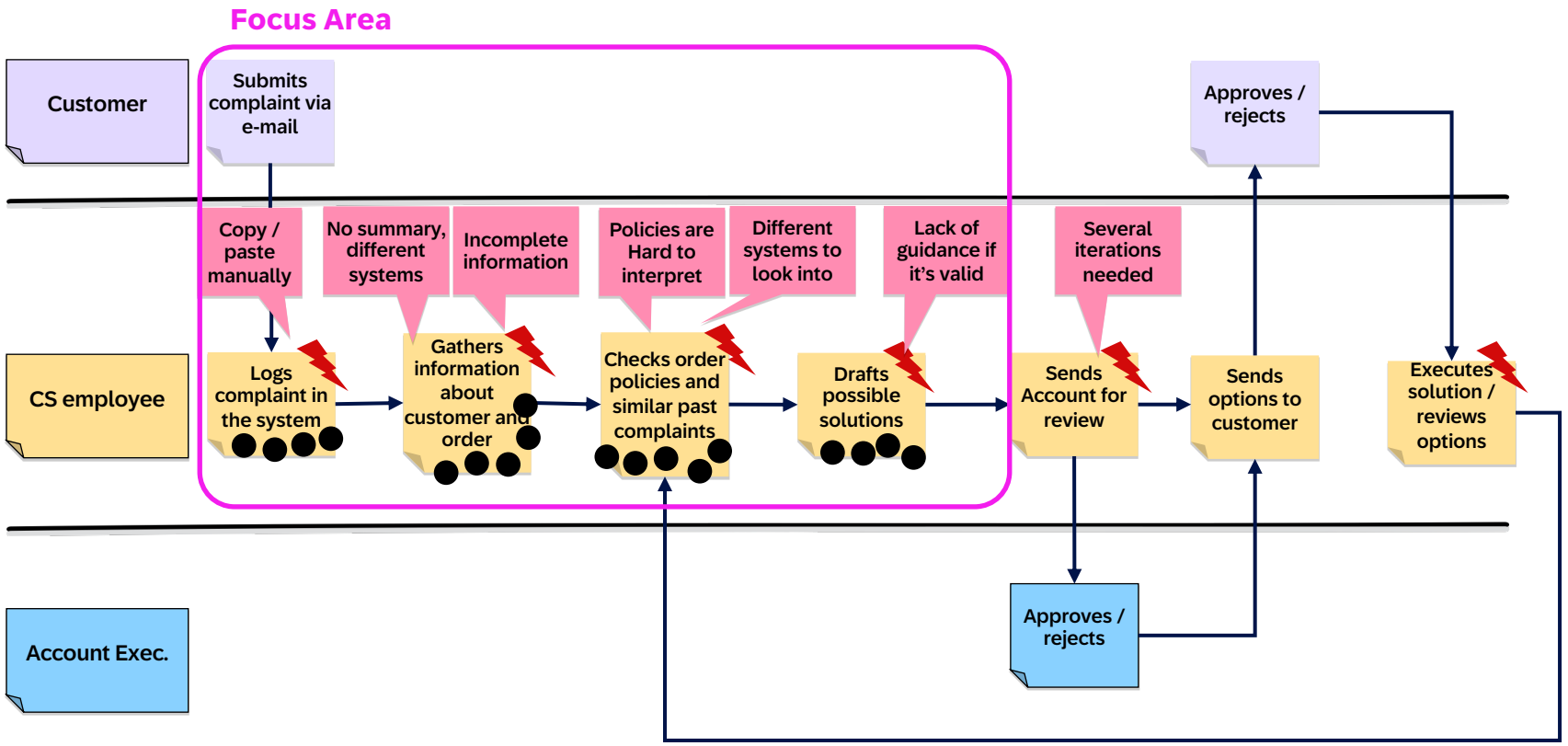
How does the activity work now, and what are manual, time-consuming steps that could benefit the most from automation?

- Explain the **as-is process** step by step, indicating the roles involved.
- Ask participants if steps should be added or removed and adjust the process accordingly.
- Mark challenging, manual steps which are repetitive, time consuming, prone to errors and indicate why they are challenging.
- Vote for the top 3 – 5 steps that should be supported by an automated solution.

1. Process name Name of the activity or process to automate

RESOLUTION OF CUSTOMER COMPLAINTS

2. Steps: How does the process look now step-by-step? What are manual challenging steps that could be automated?



To be drawn on a whiteboard

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Optional

1.2

Describe
the target
user group

30 min In Teams

What does the business user doing the manual work need to achieve and what challenges get in the way?

- Describe an employee in the selected role. Include at least 4 objectives they to achieve in the context of the role or scenario and challenges to achieve them.
- Which objectives require manual, repetitive, time-consuming activities? Discuss which objectives could benefit most from automation. Use the challenges as a guide.
- Select 1 - 2 objectives to support with automation and indicate the challenges affecting them. Compare the challenges to the ones in the process view.

Mini Persona – Example

AppHaus

Name and age

Alex Carter, 28 years old

Role, department and company

Customer Service Representative, Customer Support Department, Thor Tours Travel Agency

Experience at company

2 years years / months

Main responsibility

What is the role's main purpose?

Attend customer inquiries about travel and address related issues. Upsell travel services and provide personalized travel recommendations.

Main goals and objectives

What does the persona want / need to achieve?

Focus Area

- Ensure quick and accurate resolution of customer inquiries.
- Reduce time spent on repetitive tasks.
- Build rapport with customers to encourage repeat business.
- Stay informed about travel updates and promotions to offer the most relevant information.

Challenges

What is making it hard to achieve the objectives?

- High Inquiry Volumes: Peak seasons bring overwhelming demand, slowing response times.
- Limited Real-Time Data: Lack of up-to-date travel info causes delays and customer frustration.
- Complex Requests: Coordinating across departments is time-consuming and error-prone.
- Unclear or incomplete information provided by customers
- No Accessible and detailed history of customer preferences
- Rebooking requires manually connecting to multiple systems
- There's no centralized system for updates on promotions and offers.
- Information provided by vendors and airlines is overwhelming and often disorganized

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PART 2

Identify Tasks to Delegate

Silent, individual brainstorming activity mixed with team discussion activities

Using the metaphor of 'hiring super-specialists', decide which tasks to handle yourself and which to delegate to the super-specialists.

CORE ACTIVITIES

1. **Write down tasks**
   Participants write down tasks within the focus areas, noting which to delegate to the super-specialists, collaborate on, or handle themselves.
2. **Select tasks for the automated system**
   Participants select the key tasks where the super-specialists' help would be most valuable.
3. **Divide responsibilities (optional)**
   Participants determine which super specialist are needed based on the complexity and diversity of the selected tasks.
4. **Asess risk and consistency (optional)**
   Participants decide how risky it is to leave the tasks in the "hands" of an autonomous system and how much consistency tasks need.

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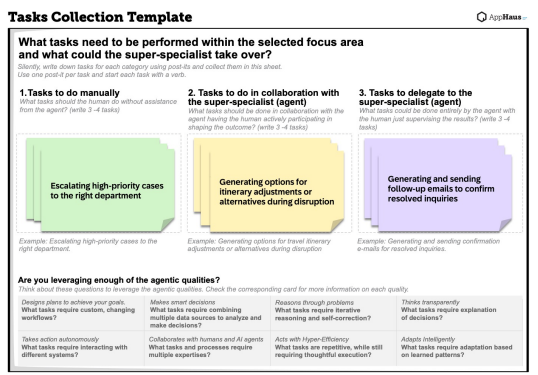
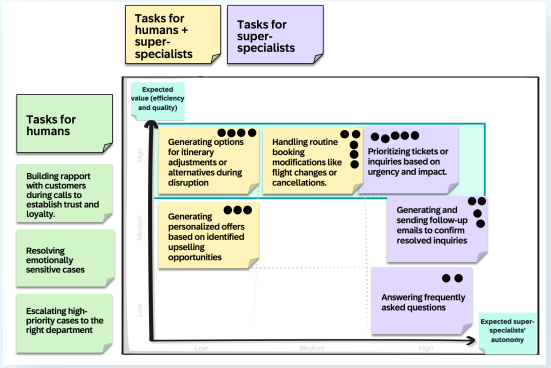
Identify Tasks to Delegate

Part 1

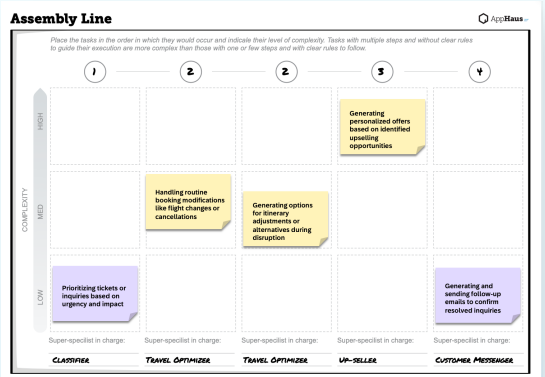


Brainstorm Tasks

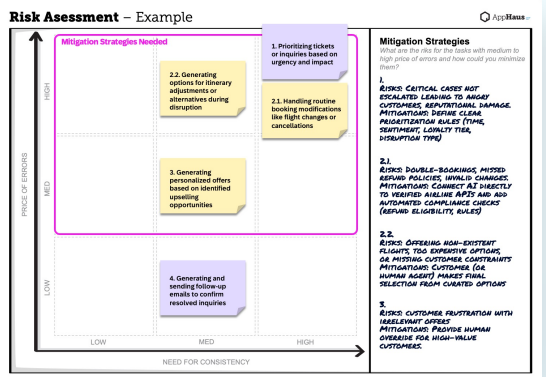


Share, Prioritize and Select

Part 2 (optional)



Divide Responsibilities



Asess risk and consistency

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Coach Instructions

2. Identify Tasks to Delegate – Part 1

FOR COACH

70 min In Teams

STEPS

A **Introduce the metaphor** – 10 - 15 min

Use the provided slides to introduce the metaphor of “hiring a super-specialist” with agentic qualities. Explain these qualities as they are described in the Agentic Qualities Card Set and guide participants to explore them further using the provided cards.

B **Write down tasks** – 15 - 20 min

Participants silently write down three types of tasks, listing 3-4 tasks for each type (one task per post-it). Ensure every task begins with a verb:

1. What tasks should continue to be done manually by a human?
2. What tasks should be done in collaboration with the automated system having the human actively participating in shaping the outcome?
3. What tasks should be delegated to the automated system keeping minimal human intervention (just supervising the results)?

Ask participants to use a different color of post-it for each category. For the second and third categories, encourage participants to leverage the questions in the super-specialist’s agentic qualities cards. These questions are mentioned at the bottom of the template as well.

If time allows, you can run two brainstorming rounds: one where participants simply write down tasks and a second one where they explicitly use the cards. Ask them to pick the three most helpful agentic qualities for their scenario and write additional tasks that could leverage them or refine tasks they already wrote. Reserve 10 minutes for each brainstorming round.

Goal

Ideate tasks and select those that could be automated or supported by the automated system.

Outcome

Top 5 - 8 tasks the automated system should support with.

Material

- Post-its, pens
- Tasks Collection template + post-its of different colors (1 x task category)
- Agentic Qualities Card Set

Tips

- Prepare the Task Collection Template in advance by placing 4 to 5 empty post-its of the right color on each category.
- Make sure every task starts with a verb and that participants write one task per post-it.
- Tasks should be specific and concrete. It helps to think about the outcome as result from the task (e.g. “create a consolidated report of the analyzed interviews” instead of “analyze interviews”.

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Coach Instructions

2. Identify Tasks to Delegate – Part 1

70 min In Teams

FOR COACH

STEPS

C **Share and select tasks for the specialist** – 30 - 40 min

Prepare this exercise by drawing the Task heatmap on a whiteboard or similar surface. Have participants present their tasks. They should place tasks that don't require the super-specialist's intervention outside the heatmap. For tasks requiring the specialist's support or involvement, ask participants to position them on the heatmap based on the expected value (vertical axis) versus the expected level of autonomy from the specialist to carry them out (horizontal axis).

As participants share their tasks, help them discard duplicates and combine very similar tasks. Sometimes, the same task might be positioned on different extremes of the horizontal axis (expected specialist autonomy). In this case, do not discard duplicate tasks as this indicates differing opinions on the level of automation for the same task. If the task is selected later, ask participants to decide whether they prefer the more or the less automated version.

Finally, participants should select the top 5 - 8 tasks where the super-specialist's intervention would have the greatest impact on efficiency and quality. This exercise helps participants visualize which tasks would yield the highest value if supported by an AI agent.

This exercise helps teams visually identify the highest-value tasks that are perfect for automation: those in the upper right quadrant; and the highest value tasks that will require more interaction between human and system: those on the upper left quadrant.

Tips

- Don't create large task groups, keep tasks distinct and granular and only merge duplicates or combine very similar tasks together.
- Guide participants to avoid generic tasks. They should refine their ideas or group them with more specific ones.
- If there is time, participants can first share all their tasks outside the heatmap, under the corresponding category, and only after the tasks are grouped and duplicates are discarded move them to the heatmap.

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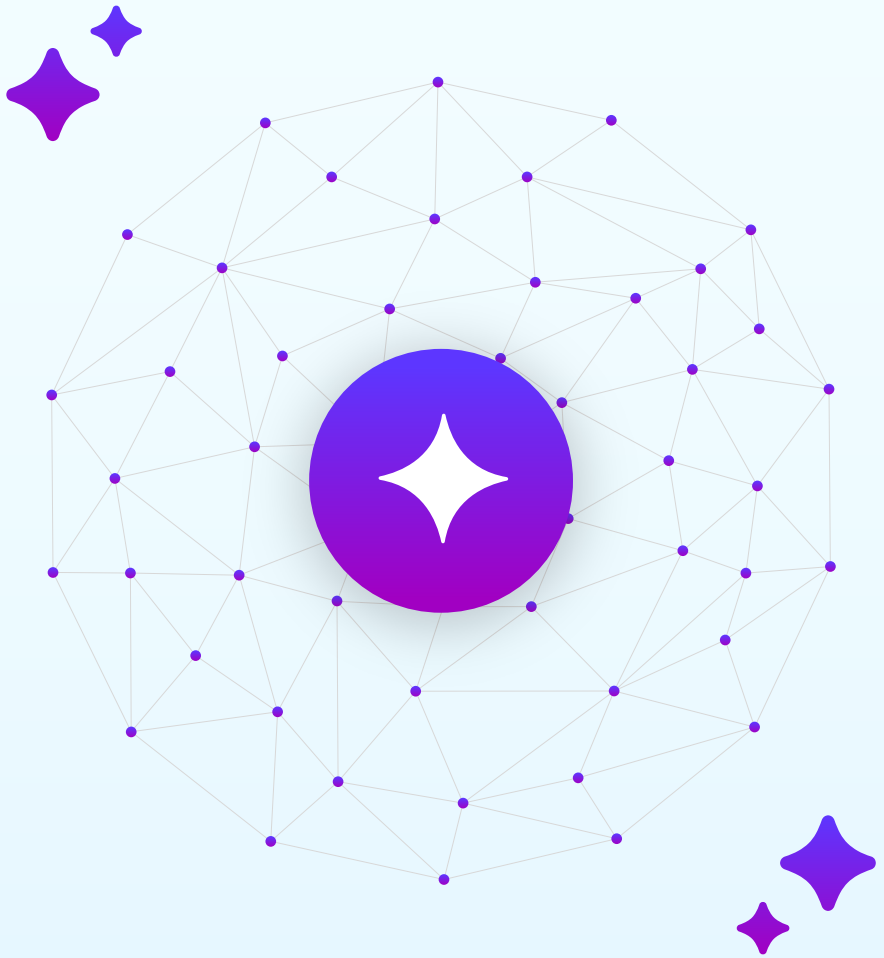
Imagine hiring super-specialists to work alongside you, helping you achieve your objectives.

These aren’t just any employees. They are next-generation co-workers with special qualities.



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Imagine hiring a super-specialist that ...

Imagine hiring a super-specialist that...

Designs plans to achieve your goals

Identifies the steps needed to complete a task, adapting dynamically to unexpected changes, rather than rigidly following predefined instructions.

Imagine hiring a super-specialist that...

Makes smart decisions

Analyzes multiple data points, applies reasoning, and accesses diverse information sources to identify the best way to solve a problem or reach a goal.

Imagine hiring a super-specialist that...

Reasons through problems

Thinks step by step, evaluates different approaches, and self-corrects when issues arise, ensuring it reaches the best solution.

Imagine hiring a super-specialist that...

Thinks transparently

Builds trust and confidence by clearly explaining its decisions and actions in real-time, so you always understand how and why it works.

Imagine hiring a super-specialist that...

Takes action autonomously

Connects with software, databases, and automated processes to retrieve, update, and synchronize information across multiple platforms without human intervention.

Imagine hiring a super-specialist that...

Collaborates with humans and AI

Shares information, delegates tasks, and communicates with people and AI agents to ensure smooth and efficient decision-making.

Imagine hiring a super-specialist that...

Acts with hyper-efficiency

Executes high-volume, time-consuming work with speed, accuracy, and quality, even when requiring reasoning and decision-making.

Imagine hiring a super-specialist that...

Adapts intelligently

Improves and adapts to context, preferences, and evolving needs by learning from interactions, feedback, and environmental changes.

SUPER-SPECIALIST

Agentic Qualities

Imagine hiring a super-specialist with extraordinary qualities designed to make your work seamless. From solving problems autonomously to adapting intelligently and collaborating effortlessly across systems, this specialist delivers precision, efficiency, and insight.

What tasks could it take over or support you with?

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Imagine hiring a super-specialist that ...

Agentic Quality ←

Description ←

Imagine hiring a super-specialist that...

Designs plans to achieve your goals

Identifies the steps needed to complete a task, adapting dynamically to unexpected changes, rather than rigidly following predefined instructions.

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DESIGNS PLANS TO ACHIEVE YOUR GOALS

What tasks require custom, changing workflows?

→ Ideation question.

Example scenario:
A customer urgently requests to delay their flight. The superspecialist *builds a custom workflow to update the booking*: verifying flight eligibility, finding available options, and calculating fare differences. It asks clarifying questions, such as “Do you have a seating preference for the new flight?” ensuring all details are covered without requiring the customer to overexplain.

→ Example leveraging the agentic quality

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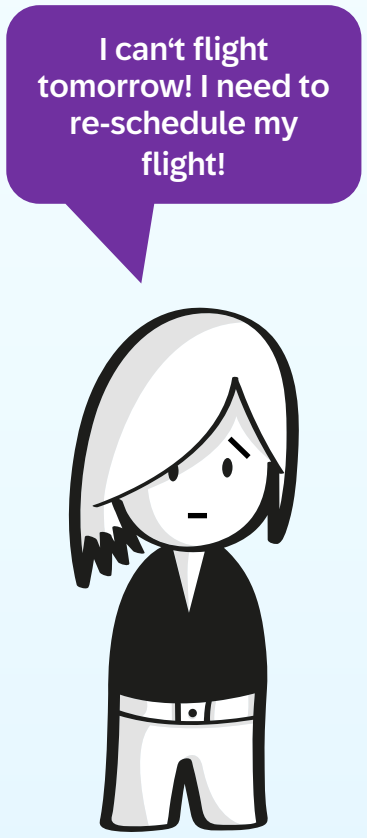
Imagine hiring
a super-specialist that ...

Designs a plan to achieve **a goal**



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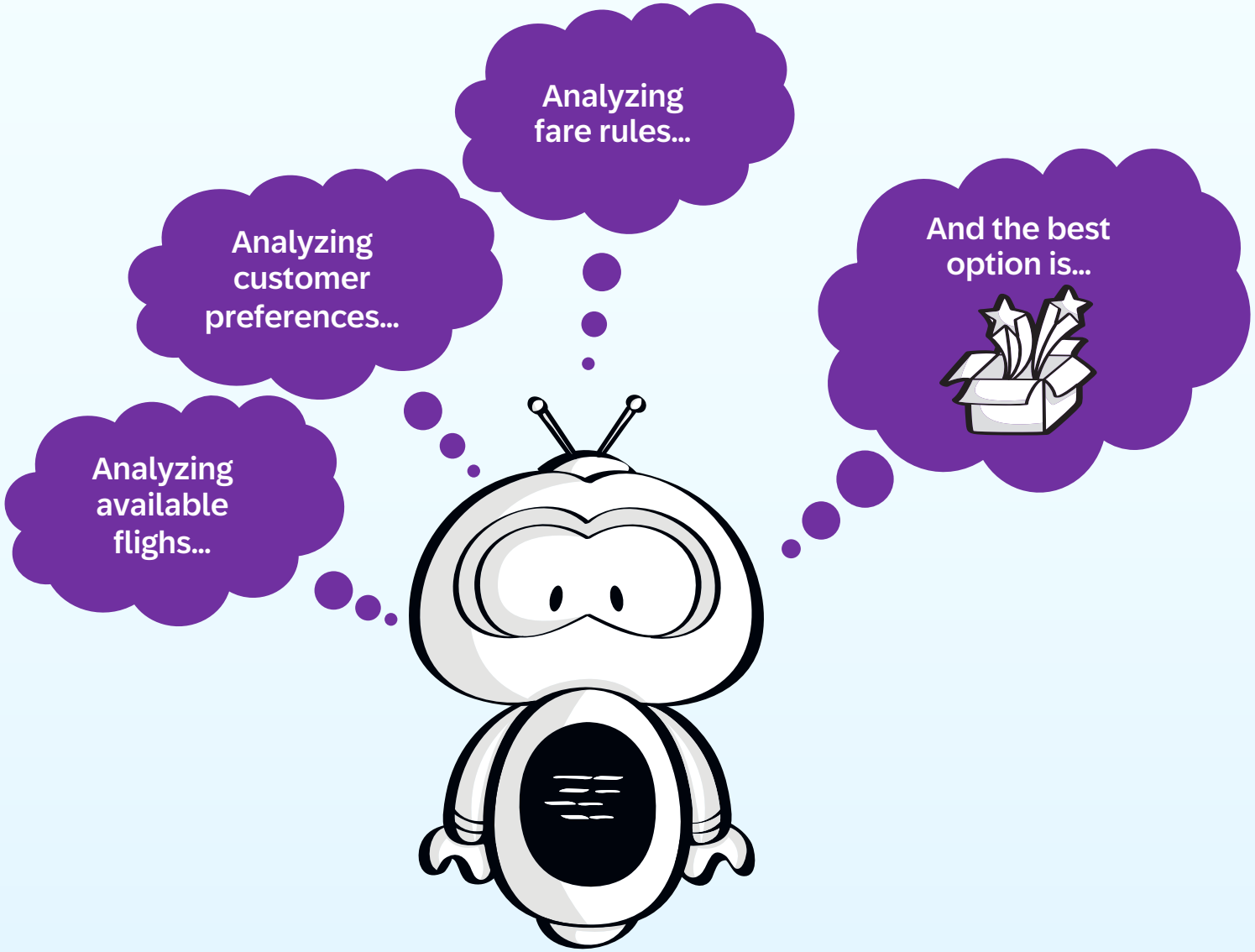
Imagine hiring
a super-specialist that ...

Makes **smart** decisions



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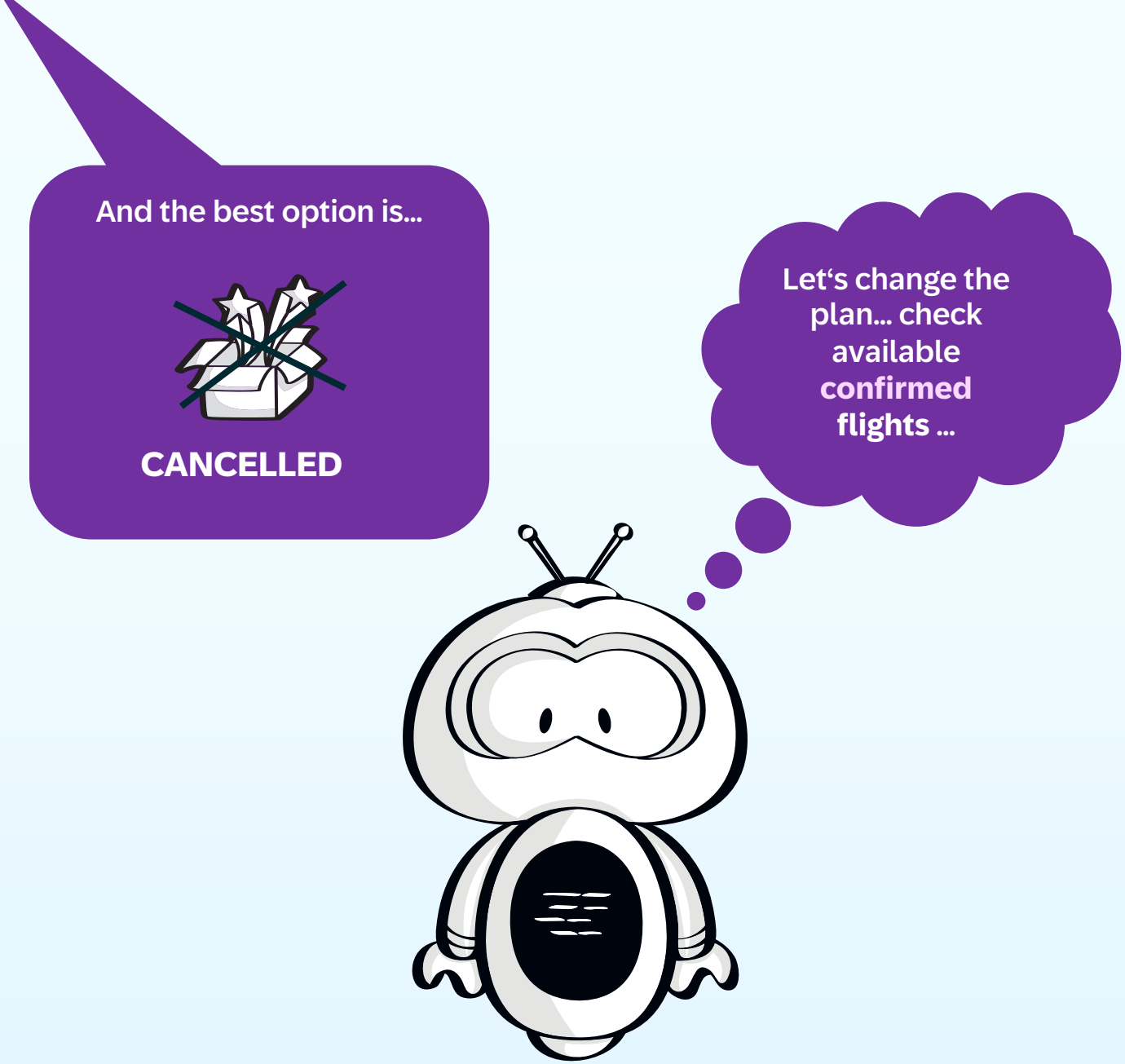
Imagine hiring
a super-specialist that ...

Reasons through problems



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Imagine hiring
a super-specialist that ...

Thinks **transparently**.

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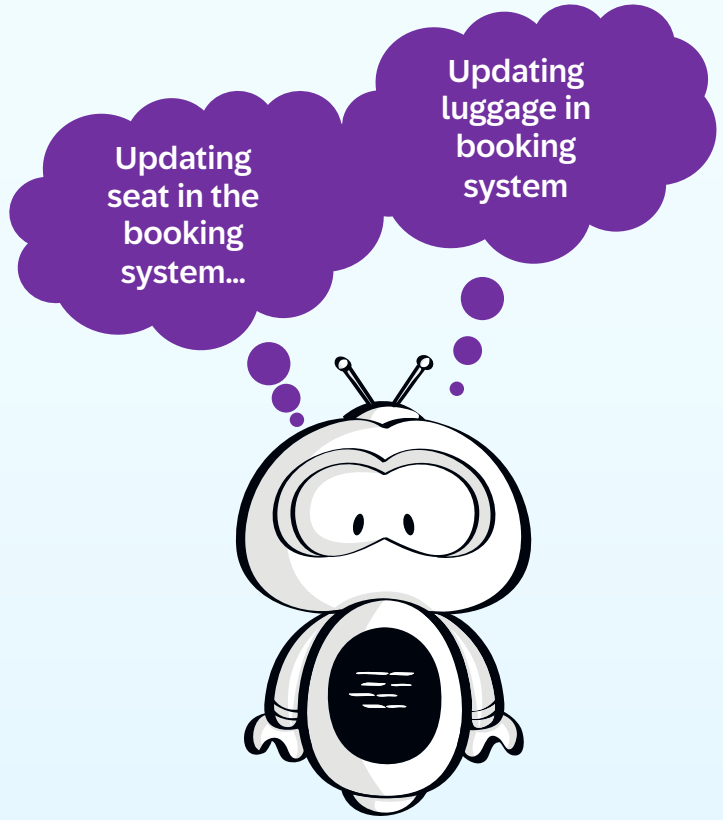
Imagine hiring
a super-specialist that ...

Takes action **autonomously.**



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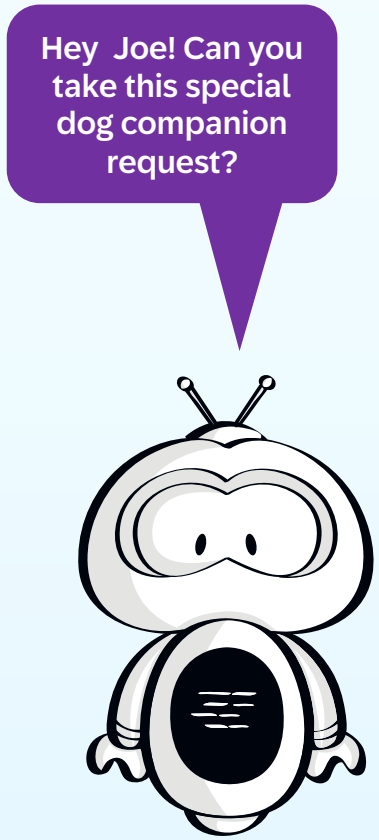
Imagine hiring
a super-specialist that ...

collaborates with humans and AI.



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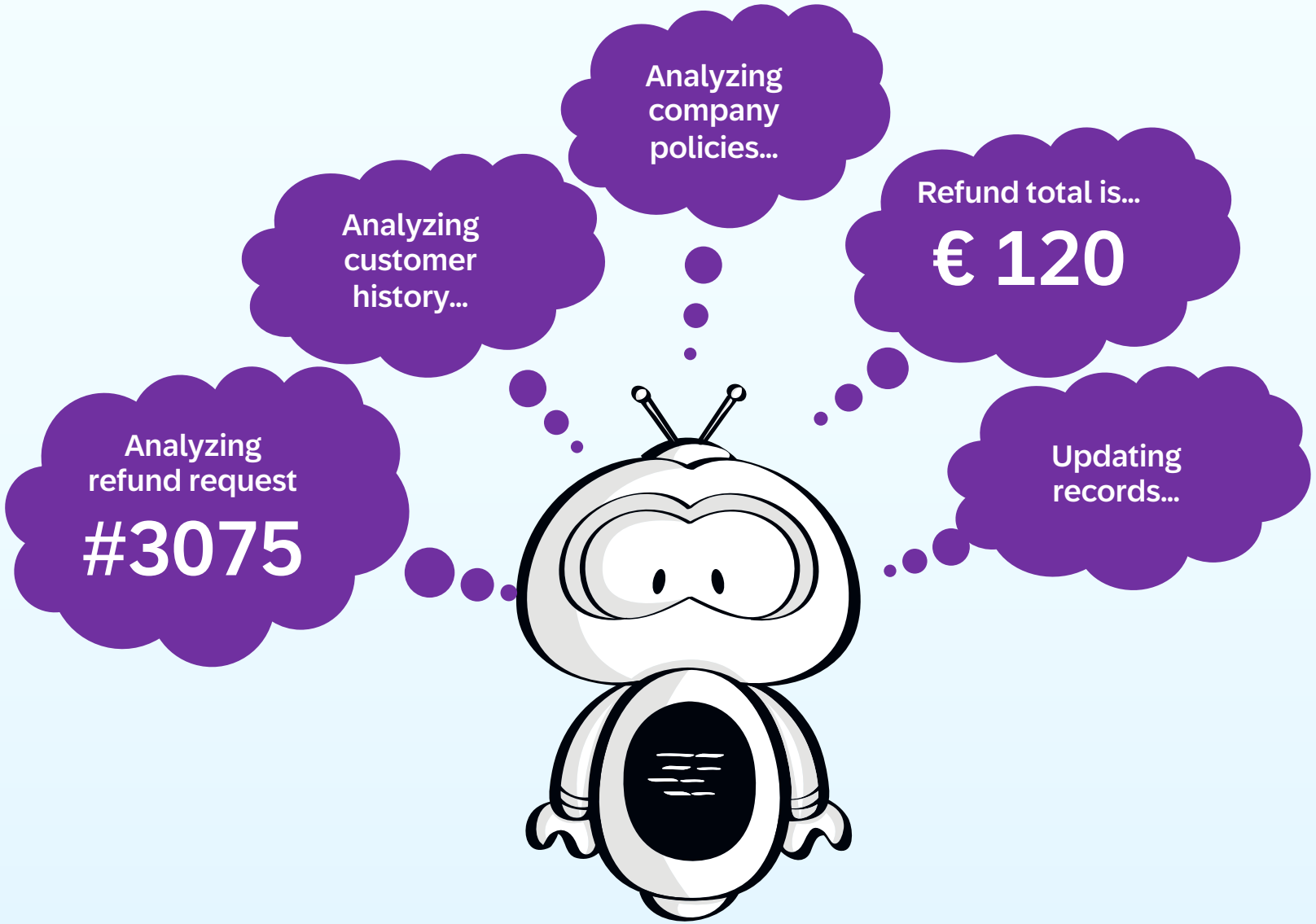
Imagine hiring
a super-specialist that ...

Acts with **hyper-efficiency**



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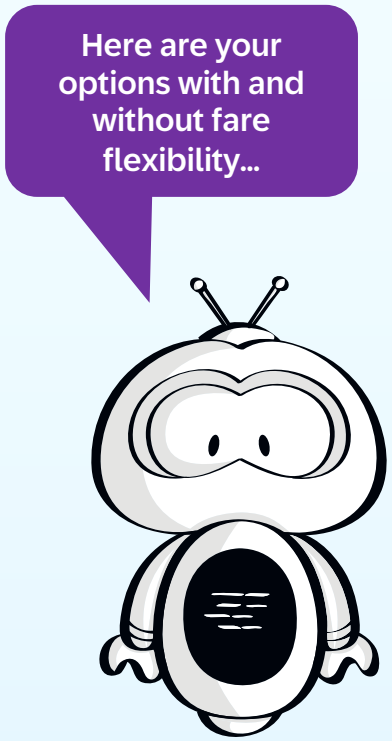
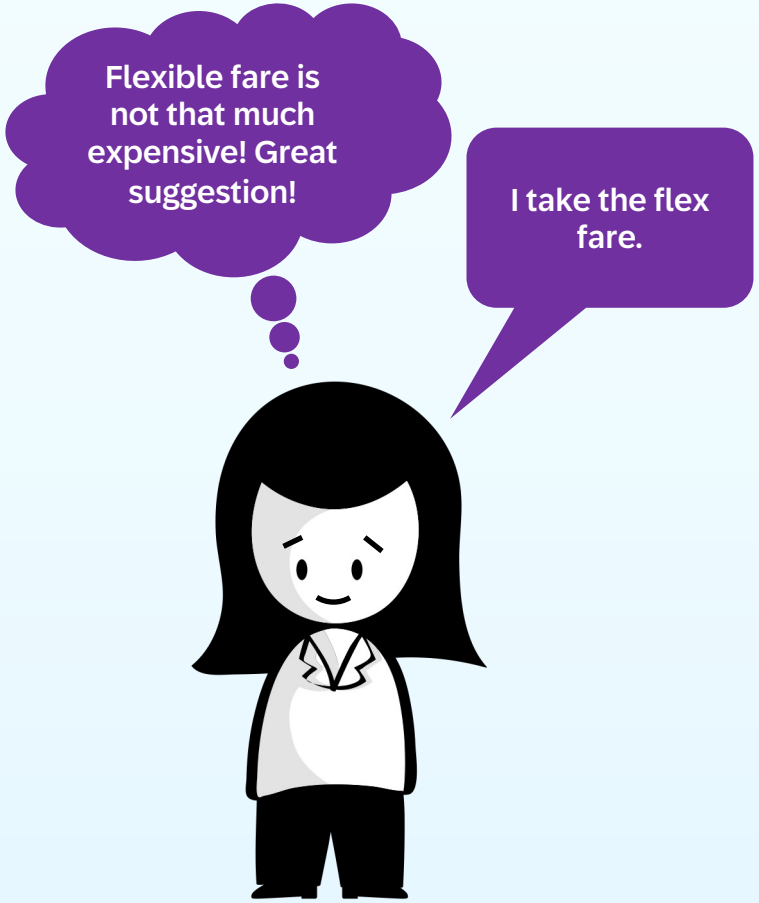
Imagine hiring
a super-specialist that ...

Adapts **intelligently**.





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2.1

Brainstorm
tasks to delegate and to do manually

10 - 20 min In Teams

What tasks need to be performed within the selected focus area? What should the super-specialist be responsible for?

- Round 1: Silently, write down 3 -4 tasks for each category (one task per post-it). Ensure every task begins with a verb and use a different color for each type (10 min).
- Round 2 (optional): Select the top 3 most useful agentic qualities for your case and enhance your tasks with agentic qualities or write down new tasks that could leverage them. (10 min)

Tasks Collection Template

AppHaus

What tasks need to be performed within the selected focus area and what could the super-specialist take over?

Silently, write down tasks for each category using post-its and collect them in this sheet.
Use one post-it per task and start each task with a verb.

1. Tasks to do manually
What tasks should the human do without assistance from the agent? (write 3 -4 tasks)

BUILDING RAPPORT WITH CUSTOMERS DURING CALLS TO ESTABLISH TRUST AND LOYALTY.

Example: Escalating high-priority cases to the right department.

2. Tasks to do in collaboration with the super-specialist (agent)
What tasks should be done in collaboration with the agent having the human actively participating in shaping the outcome? (write 3 -4 tasks)

PRIORITIZING TICKETS OR INQUIRIES BASED ON URGENCY AND IMPACT.

Example: Generating options for travel itinerary adjustments or alternatives during disruption

3. Tasks to delegate to the super-specialist (agent)
What tasks could be done entirely by the agent with the human just supervising the results? (write 3 -4 tasks)

ANSWERING FREQUENTLY ASKED QUESTIONS

Example: Generating and sending confirmation e-mails for resolved inquiries.

Are you leveraging enough of the agentic qualities?

Think about these questions to leverage the agentic qualities. Check the corresponding card for more information on each quality.

Designs plans to achieve your goals. **What tasks require custom, changing workflows?**	*Makes smart decisions* **What tasks require combining multiple data sources to analyze and make decisions?**	*Reasons through problems* **What tasks require iterative reasoning and self-correction?**	*Thinks transparently* **What tasks require explanation of decisions?**
Takes action autonomously **What tasks require interacting with different systems?**	*Collaborates with humans and AI agents* **What tasks and processes require multiple expertises?**	*Acts with Hyper-Efficiency* **What tasks are repetitive, while still requiring thoughtful execution?**	*Adapts Intelligently* **What tasks require adaptation based on learned patterns?**

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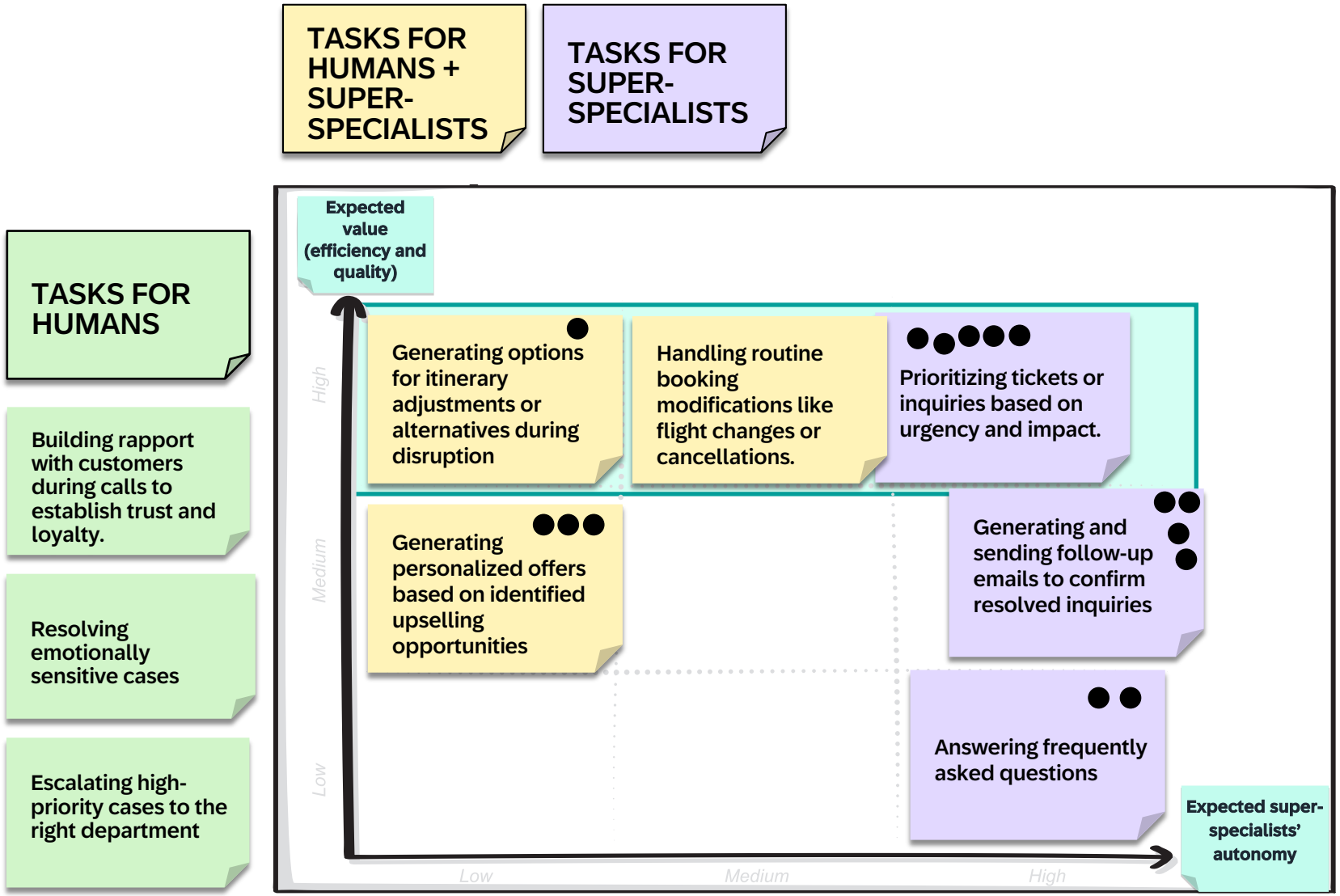
2.2

Share
and identify tasks for the super-specialists

30 - 40 min In Teams

What tasks should the supper-specialists carry out or support with?

- All participants share the “tasks for humans” first and place them outside the heatmap.
- All participants share the remaining tasks and place them on the heatmap based on the dimensions shown. Think: how much value would the specialist’s intervention bring by supporting with the tasks?
- Discard duplicates as you share and group very similar tasks together. Don’t form large groups.
- Select or vote for the top 5 – 8 tasks from the heatmap with the highest value.



To be drawn on a whiteboard

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Coach Instructions

2. Identify Tasks to Delegate – Part 2

FOR COACH

40 min In Teams

STEPS

A **Divide super-specialists' responsibilities** – 20 min

Participants will place the selected task post-its on the Assembly Line template in the order they would happen and indicate the sequence number at the top. Think of this as an automated assembly line, where each task gets carried out at a station by the responsible super-specialist, and each station triggers the next. If tasks happen at the same time, give them the same number. Use small post-its or pieces of paper so they fit on the quadrants of the template or alternatively draw this exercise on a whiteboard.

For each task, participants decide the level of complexity (low, medium, or high). A task is more complex if it has multiple steps, requires reasoning, or involves analyzing data before acting. This decision is based on a relative evaluation, so compare tasks against each other.

Next, define the super-specialists so that they are as specialized as possible. Ask participants to give each super-specialist a name that reflects its expertise. Don't worry about the names too much right now, they can be adjusted at a later stage.

Goal

Define specialized agent roles, identify automation risks and required consistency for the selected tasks.

Outcome

Identification of different agents for the automated system, risk mitigations and identification of deterministic aspects.

Material

- Small post-its, pens
- Assembly Line template
- Risk Assessment template

Tips

- Avoid combining two or more highly complex tasks in one super-specialist
- It's more likely that one same specialists handles multiple tasks if they happen one after the other in the process.

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Coach Instructions

2. Identify Tasks to Delegate – Part 2

FOR COACH

40 min In Teams

STEPS

B **Assess and mitigate risks** – 20 min

Participants should position the selected tasks on the Risk Assessment Matrix. They can use the same task post-its from the previous exercise. This chart has two axes: "Price of Errors" and "Need for Consistency". The vertical axis is the "Price of Errors": the severity of the consequences if something goes wrong. Can errors be easily fixed, or are they irreversible? The horizontal axis is the "Need for Consistency": how standardized and reliable the output needs to be given the same input. Tasks where the output always needs to follow a certain format or be the same have a high need for consistency.

The position of a task on this dimension will help participants decide which parts should be more deterministic and which can be more autonomous. An automated system can have both.

Finally, for any task with a medium or high price of errors, participants should write down mitigation strategies to reduce risk.

Check the combinations that you can have in this matrix in the Risk Assessment Cheat-sheet.

Tips

- Human intervention such as approval and confirmation steps, as well as the addition of specific rules are some of the mitigation strategies that can be applied.

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2.3

Divide
super-specialists' responsibilities

20 min In Teams

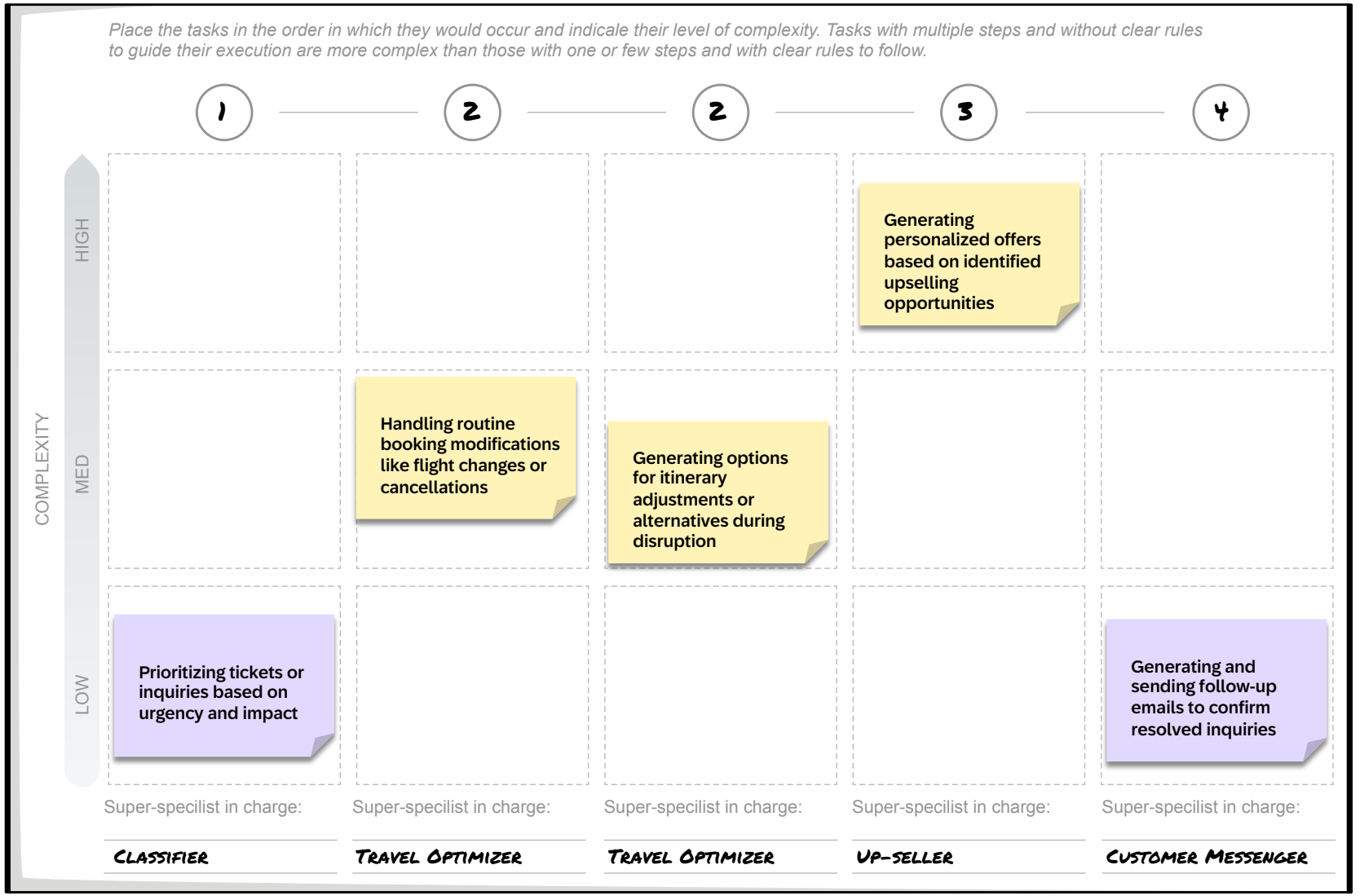
What super-specialist roles or experts should be hired for the selected tasks?

- Write down the selected tasks in small post-its or sheets. Place them in the order in which they should happen and number them. Tasks that can happen in parallel receive the same number.
- Indicate the level of complexity of each task. Does the task require reasoning, analyzing data and/or performing an action after analyzing?
- Define what type of expert should be in charge of each task and give it a name. You can assign multiple tasks to one expert.

Assembly Line

AppHaus

Place the tasks in the order in which they would occur and indicate their level of complexity. Tasks with multiple steps and without clear rules to guide their execution are more complex than those with one or few steps and with clear rules to follow.



Optional

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Optional

2.4

Assess
and mitigate
risks

20 min In Teams

How risky it is to leave the tasks in the "hands" of the automated system and how should risks be mitigated?

- Place the selected tasks in the Risk Assessment matrix based on Price of Errors and Need for Consistency. Think: how strong are the consequences if something goes wrong with this task? Can errors be amended and undone or are they irreversible? Tasks with high price of errors and high need for consistency will benefit more from a deterministic solution approach.
- For tasks with medium or high price of errors, write down possible risks and mitigation strategies: what should be done to avoid or reduce errors

Risk Asessment – Example

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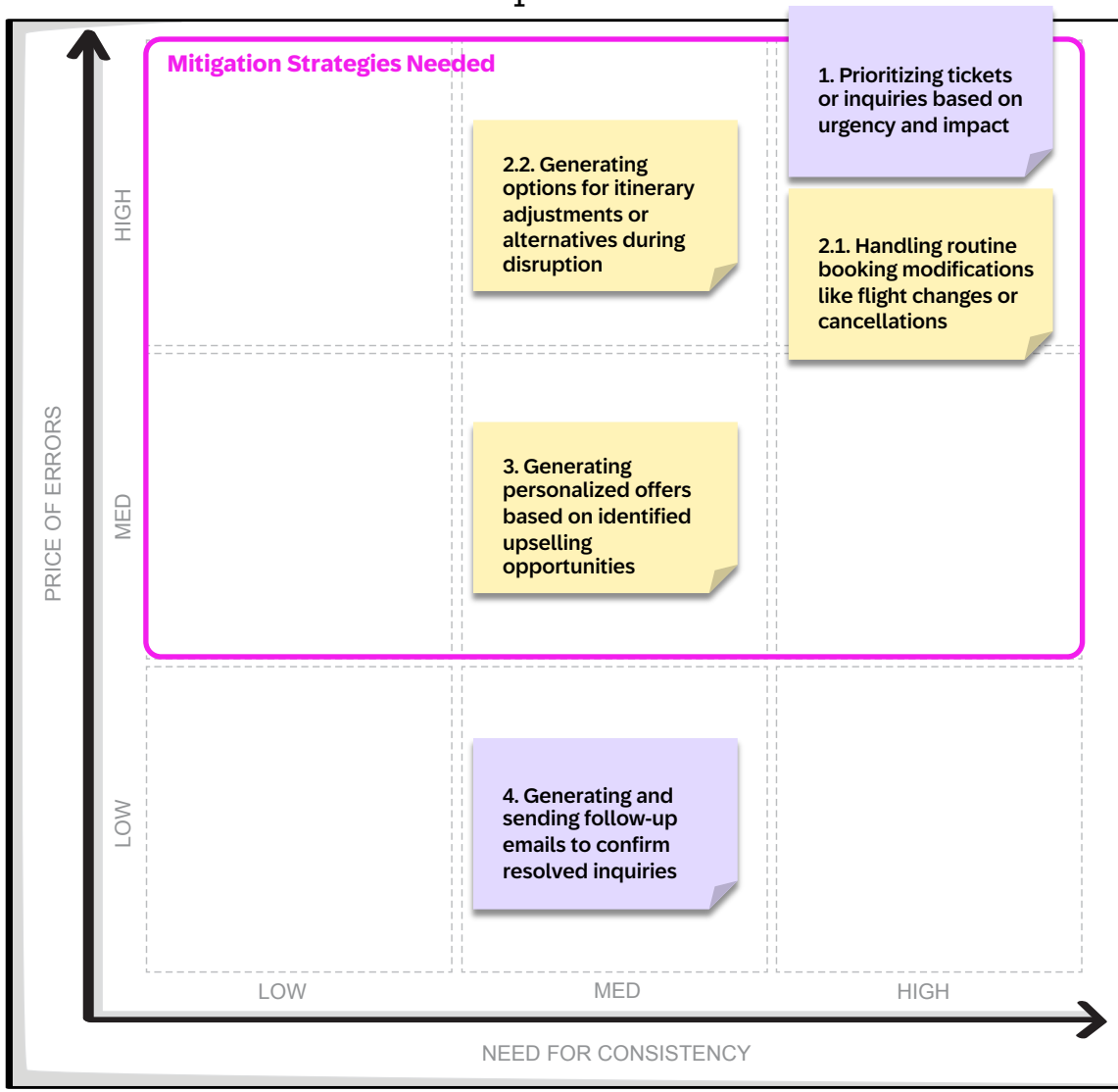

Mitigation Strategies

What are the riks for the tasks with medium to high price of errors and how could you minimize them?

1.
RISKS: CRITICAL CASES NOT ESCALATED LEADING TO ANGRY CUSTOMERS, REPUTATIONAL DAMAGE.
MITIGATIONS: DEFINE CLEAR PRIORITIZATION RULES (TIME, SENTIMENT, LOYALTY TIER, DISRUPTION TYPE)

2.1.
RISKS: DOUBLE-BOOKINGS, MISSED REFUND POLICIES, INVALID CHANGES.
MITIGATIONS: CONNECT AI DIRECTLY TO VERIFIED AIRLINE APIS AND ADD AUTOMATED COMPLIANCE CHECKS (REFUND ELIGIBILITY, RULES)

2.2.
RISKS: OFFERING NON-EXISTENT FLIGHTS, TOO EXPENSIVE OPTIONS, OR MISSING CUSTOMER CONSTRAINTS
MITIGATIONS: CUSTOMER (OR HUMAN AGENT) MAKES FINAL SELECTION FROM CURATED OPTIONS

3.
RISKS: CUSTOMER FRUSTRATION WITH IRRELEVANT OFFERS
MITIGATIONS: PROVIDE HUMAN OVERRIDE FOR HIGH-VALUE CUSTOMERS.

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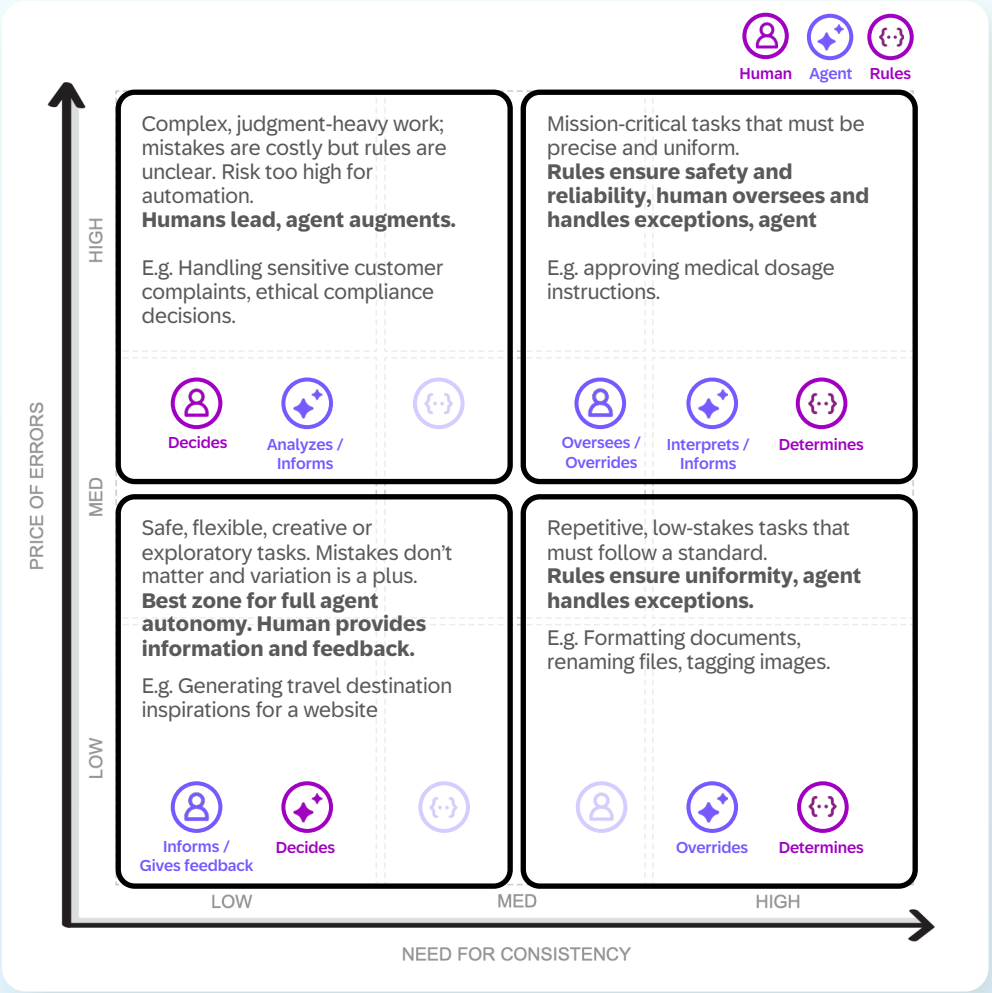
Risk Assessment Cheat-sheet

What roles do rules, agentic technology and humans play at different levels of risk and consistency?

HIGH PRICE OF ERRORS + LOW NEED FOR CONSISTENCY
Non-deterministic, high-risk tasks
Agent provides options and information, human decides and executes.

LOW PRICE OF ERRORS + LOW NEED FOR CONSISTENCY
Non-deterministic, low risk tasks
Agent makes decisions and executes, human supervises and provides feedback to improve



HIGH PRICE OF ERRORS + HIGH NEED FOR CONSISTENCY
Rule dependent, high-risk tasks
Human overrides, Agent informs

LOW PRICE OF ERRORS + HIGH NEED FOR CONSISTENCY
Rule dependent, low-risk tasks
Agent handles exceptions, human can supervise / provides feedback to improve the system from time to time.

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FOR COACH

PART 3

Describe the super-specialist job

Collaborative activities with discussion

Describe the job the super-specialist should do, outlining main responsibilities, knowledge and tools.

CORE ACTIVITIES

1. **Fill-out the job profile**
   Participants create a job profile to hire the supper-specialists, outlining key details such as the job title, main responsibilities, expertise, knowledge, considerations and job context.

2. **Fill-out the tools and data template**
   Participants indicate what tools and data the super-specialist needs to perform its responsibilities successfully.

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Coach Instructions

3. Describe the super-specialist job

FOR COACH

60 min In Teams

STEPS

A Fill out the job profile – 30 min

Guide participants as they collaboratively fill out the job profile:

- **Job Title:** start by adding the agent's professional name at the top of the template. It should be short and reflect the agent's main function. If they completed the Assembly Line exercise, they can reuse or refine the name (e.g., "Travel Optimizer").
- **Main Responsibilities:** define what the agent is accountable for, based on tasks identified earlier in the workshop. They should clearly formulate tasks, add key details, and include any additional responsibilities needed to make those tasks happen.
- **Examples Requests:** list 3–4 example requests the super-specialist might receive. These make the tasks concrete and can be phrased as user prompts if the agent is conversational.
- **Experience and Knowledge:** specify what the specialist must know to perform well: relevant documentation, system or tool knowledge, and any essential skills.
- **Considerations:** This section captures implicit rules, workarounds, and lessons learned: things the agent should do or avoid to achieve great results but that may not appear in formal documentation.
- **Job Context:** describe the situation in which the agent's job is needed. This clarifies when the agent should become active: the trigger for its work.
- **Impact**. finally, participants articulate the value the agent brings. Why does this job matter? What happens if it isn't done, or is done poorly? This highlights the importance of getting it right.

Goal

creating a full job description for their super-specialists, including their roles, responsibilities, and the tools they need to access to perform the tasks effectively.

Outcome

A comprehensive description of at least one super-specialist identified, including its job and the tools it needs.

Material

- Pens
- Job Profile and Tools and Data template
- Tool Cards

Tips

- If your team identified multiple super-specialists, split into smaller groups of two or three, with each group focusing on one or two specialists.
- Avoid explaining the entire template at once. Guide participants to fill section by section.
- Knowledge listed in the "Knowledge and Experience" section should be accessible to the agent in some form: documents, databases, or a knowledge base.

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Coach Instructions

3. Describe the super-specialist job

FOR COACH

60 min In Teams

STEPS

B **Fill out the tools and data** – 30 min

To guide this discussion, you'll use the Tools and data template and the Tool cards, which provide detailed explanations and examples for different tool types.

Participants start by writing the name of the super-specialist at the top of the template. Then, they select the tools their specialist will need to perform its designated responsibilities.

If participants need more information about a tool type, they can check the corresponding tool card.

Each tool card includes the name of the tool and a description of what it does on the front, and on the back, a discussion question for the participants, plus an example scenario that illustrates the use of the tool.

In the template, the same discussion question is present below the name of each tool. Participants should answer this question to detail out how the selected tool should be used.

Tips

- Think of tools as additional superpowers you can give to your agent: they allow it to capture information from the environment and execute actions.
- If during the Assembly Line exercise your team identified different agents that interact with the one you are describing, they should select the Multi-Agent Interface tool. Here, participants should describe which other agents should interact with the agent being described and what needs to be communicated between them.
- If the tasks were identified as having a high price of errors during the risk assessment, or if the expected autonomy was low, a Human-in-the-Loop Interface tool is most likely needed. Participants should detail the specific situations where human involvement is required.

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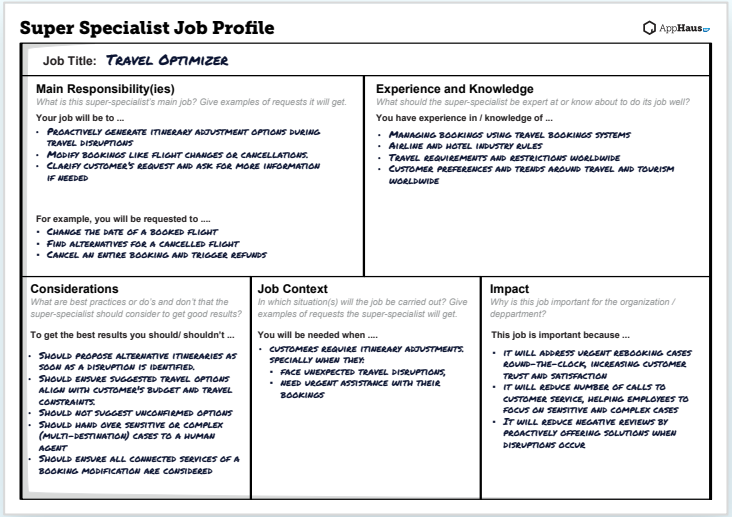
Describing the agent's job



Super Specialist Job Profile

AppHaus

Job Title: TRAVEL OPTIMIZER

Main Responsibility(ies)

What is this super-specialist's main job? Give examples of requests it will get.

Your job will be to ...

- PROACTIVELY GENERATE ITINERARY ADJUSTMENT OPTIONS DURING TRAVEL DISRUPTIONS
- MODIFY BOOKINGS LIKE FLIGHT CHANGES OR CANCELLATIONS.
- CLARIFY CUSTOMER'S REQUEST AND ASK FOR MORE INFORMATION IF NEEDED

For example, you will be requested to ....

- CHANGE THE DATE OF A BOOKED FLIGHT
- FIND ALTERNATIVES FOR A CANCELLED FLIGHT
- CANCEL AN ENTIRE BOOKING AND TRIGGER REFUNDS

Experience and Knowledge

What should the super-specialist be expert at or know about to do its job well?

You have experience in / knowledge of ...

- MANAGING BOOKINGS USING TRAVEL BOOKINGS SYSTEMS
- AIRLINE AND HOTEL INDUSTRY RULES
- TRAVEL REQUIREMENTS AND RESTRICTIONS WORLDWIDE
- CUSTOMER PREFERENCES AND TRENDS AROUND TRAVEL AND TOURISM WORLDWIDE

Considerations

What are best practices or do's and don't that the super-specialist should consider to get good results?

To get the best results you should/ shouldn't ...

- SHOULD PROPOSE ALTERNATIVE ITINERARIES AS SOON AS A DISRUPTION IS IDENTIFIED.
- SHOULD ENSURE SUGGESTED TRAVEL OPTIONS ALIGN WITH CUSTOMER'S BUDGET AND TRAVEL CONSTRAINTS.
- SHOULD NOT SUGGEST UNCONFIRMED OPTIONS
- SHOULD HAND OVER SENSITIVE OR COMPLEX (MULTI-DESTINATION) CASES TO A HUMAN AGENT
- SHOULD ENSURE ALL CONNECTED SERVICES OF A BOOKING MODIFICATION ARE CONSIDERED

Job Context

In which situation(s) will the job be carried out? Give examples of requests the super-specialist will get.

You will be needed when ....

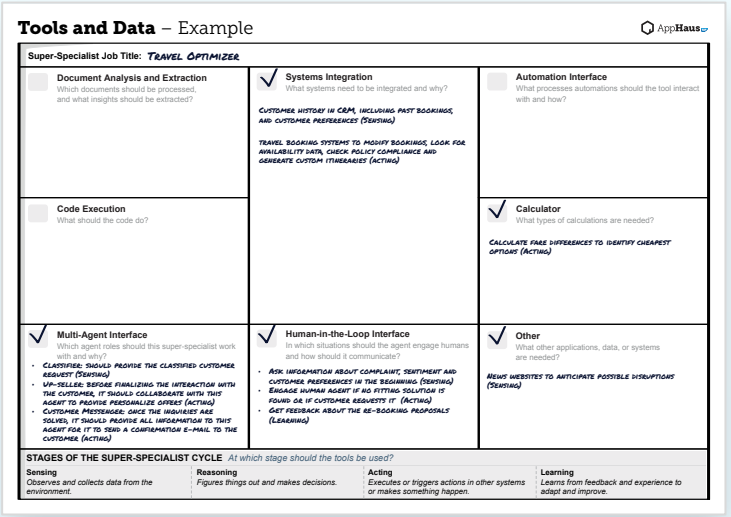
- CUSTOMERS REQUIRE ITINERARY ADJUSTMENTS, SPECIALLY WHEN THEY:
  - FACE UNEXPECTED TRAVEL DISRUPTIONS,
  - NEED URGENT ASSISTANCE WITH THEIR BOOKINGS

Impact

Why is this job important for the organization / deppartment?

This job is important because ...

- IT WILL ADDRESS URGENT REBOOKING CASES ROUND-THE-CLOCK, INCREASING CUSTOMER TRUST AND SATISFACTION
- IT WILL REDUCE NUMBER OF CALLS TO CUSTOMER SERVICE, HELPING EMPLOYEES TO FOCUS ON SENSITIVE AND COMPLEX CASES
- IT WILL REDUCE NEGATIVE REVIEWS BY PROACTIVELY OFFERING SOLUTIONS WHEN DISRUPTIONS OCCUR



Tools and Data – Example

AppHaus

Super-Specialist Job Title: TRAVEL OPTIMIZER

Document Analysis and Extraction
Which documents should be processed, and what insights should be extracted?

Systems Integration
What systems need to be integrated and why?

CUSTOMER HISTORY IN CRM, INCLUDING PAST BOOKINGS, AND CUSTOMER PREFERENCES (SENSING)

TRAVEL BOOKING SYSTEMS TO MODIFY BOOKINGS, LOOK FOR AVAILABILITY DATA, CHECK POLICY COMPLIANCE AND GENERATE CUSTOM ITINERARIES (ACTING)

Automation Interface
What processes automations should the tool interact with and how?

Code Execution
What should the code do?

Calculator
What types of calculations are needed?

CALCULATE FARE DIFFERENCES TO IDENTIFY CHEAPEST OPTIONS (ACTING)

Multi-Agent Interface
Which agent roles should this super-specialist work with and why?

- CLASSIFIER: SHOULD PROVIDE THE CLASSIFIED CUSTOMER REQUEST (SENSING)
- UPSELLER: BEFORE FINALIZING THE INTERACTION WITH THE CUSTOMER, IT SHOULD COLLABORATE WITH THIS AGENT TO PROVIDE PERSONALIZE OFFERS (ACTING)
- CUSTOMER MESSENGER: ONCE THE INQUIRIES ARE SOLVED, IT SHOULD PROVIDE ALL INFORMATION TO THIS AGENT FOR IT TO SEND A CONFIRMATION E-MAIL TO THE CUSTOMER (ACTING)

Human-in-the-Loop Interface
In which situations should the agent engage humans and how should it communicate?

- ASK INFORMATION ABOUT COMPLAINT, SENTIMENT AND CUSTOMER PREFERENCES IN THE BEGINNING (SENSING)
- ENGAGE HUMAN AGENT IF NO FITTING SOLUTION IS FOUND OR IF CUSTOMER REQUESTS IT (ACTING)
- GET FEEDBACK ABOUT THE RE-BOOKING PROPOSALS (LEARNING)

Other
What other applications, data, or systems are needed?

NEWS WEBSITES TO ANTICIPATE POSSIBLE DISRUPTIONS (SENSING)

STAGES OF THE SUPER-SPECIALIST CYCLE *At which stage should the tools be used?*

Sensing	Reasoning	Acting	Learning
Observes and collects data from the environment.	*Figures things out and makes decisions.*	*Executes or triggers actions in other systems or makes something happen.*	*Learns from feedback and experience to adapt and improve.*

Job Profile

What is the super specialist supposed to do?

Tools and Data

What tools does the super-specialist need to perform the tasks successfully?

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3.1

Describe
the super-specialist job profile

30 min In Pairs

What super-specialist do you need to hire to carry out the tasks successfully?

- Create the job postings to hire the the identified super-specialists.
- Complete a job profile for each super-specialist. Start by writing the Job Title and the ”Main Responsibilities” identified in the previous exercise.

.

- If you have multiple super-specialists, divide the team in pairs or smaller groups to work simultaneously.

Super Specialist Job Profile

AppHaus

Job Title: TRAVEL OPTIMIZER

Main Responsibility(ies)
What is this super-specialist's main job? Give examples of requests it will get.

Your job will be to ...

- PROACTIVELY GENERATE ITINERARY ADJUSTMENT OPTIONS DURING TRAVEL DISRUPTIONS
- MODIFY BOOKINGS LIKE FLIGHT CHANGES OR CANCELLATIONS.
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For example, you will be requested to ....

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- FIND ALTERNATIVES FOR A CANCELLED FLIGHT
- CANCEL AN ENTIRE BOOKING AND TRIGGER REFUNDS

Experience and Knowledge
What should the super-specialist be expert at or know about to do its job well?

You have experience in / knowledge of ...

- MANAGING BOOKINGS USING TRAVEL BOOKINGS SYSTEMS
- AIRLINE AND HOTEL INDUSTRY RULES
- TRAVEL REQUIREMENTS AND RESTRICTIONS WORLDWIDE
- CUSTOMER PREFERENCES AND TRENDS AROUND TRAVEL AND TOURISM WORLDWIDE

Considerations
What are best practices or do's and don't that the super-specialist should consider to get good results?

To get the best results you should/ shouldn't ...

- SHOULD PROPOSE ALTERNATIVE ITINERARIES AS SOON AS A DISRUPTION IS IDENTIFIED.
- SHOULD ENSURE SUGGESTED TRAVEL OPTIONS ALIGN WITH CUSTOMER'S BUDGET AND TRAVEL CONSTRAINTS.
- SHOULD NOT SUGGEST UNCONFIRMED OPTIONS
- SHOULD HAND OVER SENSITIVE OR COMPLEX (MULTI-DESTINATION) CASES TO A HUMAN AGENT
- SHOULD ENSURE ALL CONNECTED SERVICES OF A BOOKING MODIFICATION ARE CONSIDERED

Job Context
In which situation(s) will the job be carried out? Give examples of requests the super-specialist will get.

You will be needed when ....

- CUSTOMERS REQUIRE ITINERARY ADJUSTMENTS. SPECIALLY WHEN THEY:
  - FACE UNEXPECTED TRAVEL DISRUPTIONS,
  - NEED URGENT ASSISTANCE WITH THEIR BOOKINGS

Impact
Why is this job important for the organization / deppartment?

This job is important because ...

- IT WILL ADDRESS URGENT REBOOKING CASES ROUND-THE-CLOCK, INCREASING CUSTOMER TRUST AND SATISFACTION
- IT WILL REDUCE NUMBER OF CALLS TO CUSTOMER SERVICE, HELPING EMPLOYEES TO FOCUS ON SENSITIVE AND COMPLEX CASES
- IT WILL REDUCE NEGATIVE REVIEWS BY PROACTIVELY OFFERING SOLUTIONS WHEN DISRUPTIONS OCCUR

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Job Profile

Main Responsibilities. Selected tasks, including request or question examples

What should or should not be done to get good results? Think about what could go wrong if you don't tell a newbie about it.

Super Specialist Job Profile

AppHaus

Job Title: Travel Optimizer

Main Responsibility(ies)

What is this super-specialist's main job? Give examples of requests it will get.

Your job will be to ...

- Proactively generate itinerary adjustment options during travel disruptions
- Modify bookings like flight changes or cancellations.
- Clarify customer's request and ask for more information if needed

For example, you will be requested to ....

- Change the date of a booked flight
- Find alternatives for a cancelled flight
- Cancel an entire booking and trigger refunds

Experience and Knowledge

What should the super-specialist be expert at or know about to do its job well?

You have experience in / knowledge of ...

- Managing bookings using travel bookings systems
- Airline and hotel industry rules
- Travel requirements and restrictions worldwide
- Customer preferences and trends around travel and tourism worldwide

Considerations

What are best practices or do's and don't that the super-specialist should consider to get good results?

To get the best results you should/ shouldn't ...

- Should propose alternative itineraries as soon as a disruption is identified.
- Should ensure suggested travel options align with customer's budget and travel constraints.
- Should not suggest unconfirmed options
- Should hand over sensitive or complex (multi-destination) cases to a human agent
- Should ensure all connected services of a booking modification are considered

Job Context

In which situation(s) will the job be carried out? Give examples of requests the super-specialist will get.

You will be needed when ....

- customers require itinerary adjustments. specially when they:
  - face unexpected travel disruptions,
  - need urgent assistance with their bookings

Impact

Why is this job important for the organization / deppartment?

This job is important because ...

- it will address urgent rebooking cases round-the-clock, increasing customer trust and satisfaction
- it will reduce number of calls to customer service, helping employees to focus on sensitive and complex cases
- It will reduce negative reviews by proactively offering solutions when disruptions occur

Experience and knowledge. Think about what knowledge should this super-specialist should have to achieve good results.

Why is this Job important? LLMs perform better if you tell them why a certain result is important.

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3.2

Describe
the super-specialist tools and data

30 min In Pairs

What tools and data does the super-specialist need to perform its responsibilities?

- Select the types of tools that the super specialist needs. Check the Tool cards for more information about each tool type.
- Detail out each selected tool type by answering the question under its name.

Tools and Data

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Super-Specialist Job Title: *Travel Optimizer*

☑ **Document Analysis and Extraction** Which documents should be processed, and what insights should be extracted? *International travel policy document* *Visa regulations document*	☑ **Systems Integration** What systems need to be integrated and why? *Customer history in CRM, including past bookings, and customer preferences (Sensing)* *Travel booking systems to modify bookings, look for availability data, check policy compliance and generate custom itineraries (Acting)*	☐ **Automation Interface** What processes automations should the tool interact with and how?
☐ **Code Execution** What should the code do?		☑ **Calculator** What types of calculations are needed? *Calculate fare differences to identify cheapest options (Acting)*
☑ **Multi-Agent Interface** Which agent roles should this super-specialist work with and why? • *Classifier: should provide the classified customer request (Sensing)* • *Up-seller: Before finalizing the interaction with the customer, it should collaborate with this agent to provide personalize offers (Acting)* • *Customer Messenger: once the inquiries are solved, it should provide all information to this agent for it to send a confirmation e-mail to the customer (Acting)*	☑ **Human-in-the-Loop Interface** In which situations should the agent engage humans and how should it communicate? • *Ask information about complaint, sentiment and customer preferences in the beginning (Sensing)* • *Engage human agent if no fitting solution is found or if customer requests it (Acting)* • *Get feedback about the re-booking proposals (Learning)*	☑ **Other** What other applications, data, or systems are needed? *News websites to anticipate possible disruptions (Sensing)*

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Tools and Data

Tools and Data

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Super-Specialist Job Title: *Travel Optimizer*

Document Analysis and Extraction
Which documents should be processed, and what insights should be extracted?

- International travel policy document
- Visa regulations document

Systems Integration
What systems need to be integrated and why?

- Customer history in CRM, including past bookings, and customer preferences (Sensing)
- Travel booking systems to modify bookings, look for availability data, check policy compliance and generate custom itineraries (Acting)

Automation Interface
What processes automations should the tool interact with and how?

Code Execution
What should the code do?

Calculator
What types of calculations are needed?

- Calculate fare differences to identify cheapest options (Acting)

Multi-Agent Interface
Which agent roles should this super-specialist work with and why?

- Classifier: should provide the classified customer request (Sensing)
- Up-seller: before finalizing the interaction with the customer, it should collaborate with this agent to provide personalize offers (Acting)
- Customer Messenger: once the inquiries are solved, it should provide all information to this agent for it to send a confirmation e-mail to the customer (Acting)

Human-in-the-Loop Interface
In which situations should the agent engage humans and how should it communicate?

- Ask information about complaint, sentiment and customer preferences in the beginning (sensing)
- Engage human agent if no fitting solution is found or if customer requests it (Acting)
- Get feedback about the re-booking proposals (Learning)

Other
What other applications, data, or systems are needed?

- News websites to anticipate possible disruptions (Sensing)

→ **What tool is needed, for what and when?**
Look at the Tool Cards for more information about each tool

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Super-Specialist Tools

SUPER-SPECIALIST TOOL

Document Analysis and Extraction

With this tool, the super specialist can process and understand the content of entire documents, extracting relevant information to answer specific queries.

SUPER-SPECIALIST TOOL

Systems Integration

This tool allows the super-specialist to connect with internal and external systems and services through APIs, automated events, exchanging files or batches of data. It makes it possible to get or send information automatically and keep data up to date.

SUPER-SPECIALIST TOOL

Automation Interface

With this tool, the super-specialist can interact with existing process automation workflows to streamline and automate repetitive tasks.

SUPER-SPECIALIST TOOL

Code Execution

This tool enables the super-specialist to run and evaluate simple JavaScript code in a secure environment, allowing for dynamic computations and logic execution.

SUPER-SPECIALIST TOOL

Calculator

This tool enables the super-specialist to carry out mathematical computations, from basic arithmetic to complex formulas, ensuring accurate data processing.

SUPER-SPECIALIST TOOL

Multi-Agent Interface

This tool enables the super-specialist to communicate and coordinate with other AI agents, allowing for the distribution and delegation of tasks to enhance efficiency and tackle complex challenges.

SUPER-SPECIALIST TOOL

Human-in-the-Loop Interface

This tool allows the super-specialist to engage with human users to gather necessary information, clarify requirements, or seek approval, ensuring that tasks are completed accurately and align with human expectations.

SUPER-SPECIALIST TOOL

Web Search

This tool allows the super-specialist to access and retrieve up-to-date information from the internet, enabling informed decision-making based on the latest data.

SUPER-SPECIALIST

Tools

What does the super specialist need to know or learn about to get the job done effectively? What systems should it be able to interact with? What other agents should it collaborate with? Explore and define the tools that matter most in your context, and how should they work to get the expected results.

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Super-Specialist Tools

Tool Type ←

SUPER-SPECIALIST TOOL

Document Analysis and Extraction

Description ←

With this tool, the super specialist can process and understand the content of entire documents, extracting relevant information to answer specific queries.

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DOCUMENT ANALYSIS AND EXTRACTION

→ Ideation question.

Which documents should be processed, and what insights should be extracted?

→ Example leveraging the agentic quality

Example scenario

Customer Agreement Review

When a customer uploads a long contract, the super-specialist *uses a Document Analyzer to identify key clauses* (like deadlines and obligations) and highlight areas that may need attention before approval.

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FOR COACH

PART 4

Instruct the super-specialist(s)

Collaborative activities with discussion

Describe how the super-specialist should proceed to get the selected tasks done.

CORE ACTIVITIES

1. **Define the task instructions**
   Participants create step-by-step instructions for each super-specialist to complete the selected tasks successfully.

2. **Share-out**
   Participants share the instructions of the different super-specialists within their breakout team.

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Coach Instructions

4. Instruct the super-specialists

FOR COACH

60 min In Teams

STEPS

A **Instruct the super specialist** – 60 min

Participants brief their agent as if onboarding a new team member: What instructions ensure it performs its job well? This activity combines all previous exercises (Task Selection, Assembly Line, Risk Assessment, Job Profile, and Tools & Data) to create clear, step-by-step operating instructions.

Using the Super-Specialist Instructions template, participants work through four sections: Trigger, Successful Outcome, Step-by-Step Instructions, and Tools & Data. Start by adding the super-specialist's job title at the top.

1. Trigger: Describe what activates the super-specialist and where it happens (chat request, system signal, automated detection, etc.). Agents can have multiple triggers if they handle various responsibilities. The Job Context section in the Job Profile can help define this.
2. Successful Outcome: Define what "done well" looks like. Beginning with the end in mind keeps the instructions focused and aligned with the agent's purpose.

Goal

Create clear instructions for agent tasks, including human involvement and tool usage.

Outcome

A set of step-by-step instructions that can be used as the basis to configure the agent in an agent builder tool.

Material

- Pens
- Instructions template

Tips

- Keep your teams in the small groups or pairs you formed for the Job Description exercise, with each group focusing on the super-specialist they've already started to define.
- Instructions are not a rigid, if-this-then-that flowchart. That's for a deterministic, rule-based system. Agentic systems are different; they can reason and adapt. Participants should define the outcome of each step, not specify every single action.

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Coach Instructions

4. Instruct the super-specialists

60 min In Teams

STEPS

A

3. Step-by-Step Instructions + Tools & Data: This is the core of the template. Participants organize the considerations, tools, and knowledge from previous exercises into a logical sequence of steps. For each step, they label the type:
    - Sensing: Capturing input (e.g., user prompt, news alert).
    - Reasoning: Understanding, deciding, or planning (e.g., interpreting a customer request).
    - Acting: Executing an action (e.g., making a booking, sending an update).
    - Learning: Improving based on experience or feedback.

Participants also note the tools and data used in each step and where human or other-agent involvement is required, based on the Risk Assessment and Assembly Line outputs.

Tips

- If the super-specialist is doing two different tasks that happen in different situations and have very different outcomes, do this exercise for each task. In and indicate the specific task being described in addition to the job title.
- It's generally a good practice to start your flow with a Sensing step and end with a Learning one.

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Super-Specialist Instructions

Super-Specialist Instructions

AppHaus

Job Title: Travel Optimizer 1

Trigger	Step-by-step instructions	Tools and Data	Successful outcome
What situation triggers the interaction with the super-specialist or its use and how is the interaction initiated?	*How should the super-specialist carry out its job to get a good result? What should it decide and when is human input or action needed?*	*What data / systems or agents does it need at each step?*	*What does the successful task completion look like?*
An existing travel booking needs to be changed Trigger 1 (conversational) A customer requests a travel modification via chat interface of the Travel Agency customer service website Trigger 2: (system-based) detects a travel disruption from online news	1 Step type: (SENSING) / REASONING / ACTING / LEARNING Ask the classifier super-specialist the priority of the modification request. Solve urgent cases first. If not provided, ask customer information about the reason for the modification. 2 Step type: SENSING / (REASONING) / ACTING / LEARNING Figure out the details of the request or disruption. If it's from the customer, extract travel details (booking code, destination, date). If it's a disruption, identify impacted flights and affected customers. 3 Step type: SENSING / REASONING / (ACTING) / LEARNING Generate and rank alternative itineraries based on real-time availability, customer preferences, (e.g., non-stop, budget), and policy constraints.	Multi-agent Interface (classifier), Human-in-the-loop interface (chat interface) Travel Booking system, CRM system (customer profile), news website with disruption information Travel Booking system, Airline policy database, CRM (Customer history and preference database), calculator	The customer receives a confirmed rebooking with all necessary details, ensuring a smooth continuation of their travel plans.

→ **Standard Operating Procedure (SOP) / Task instructions**
Imagine you hired the super-specialist and now you are telling it how to do a task. What does it need to decide and in which order? When should it consult a human?

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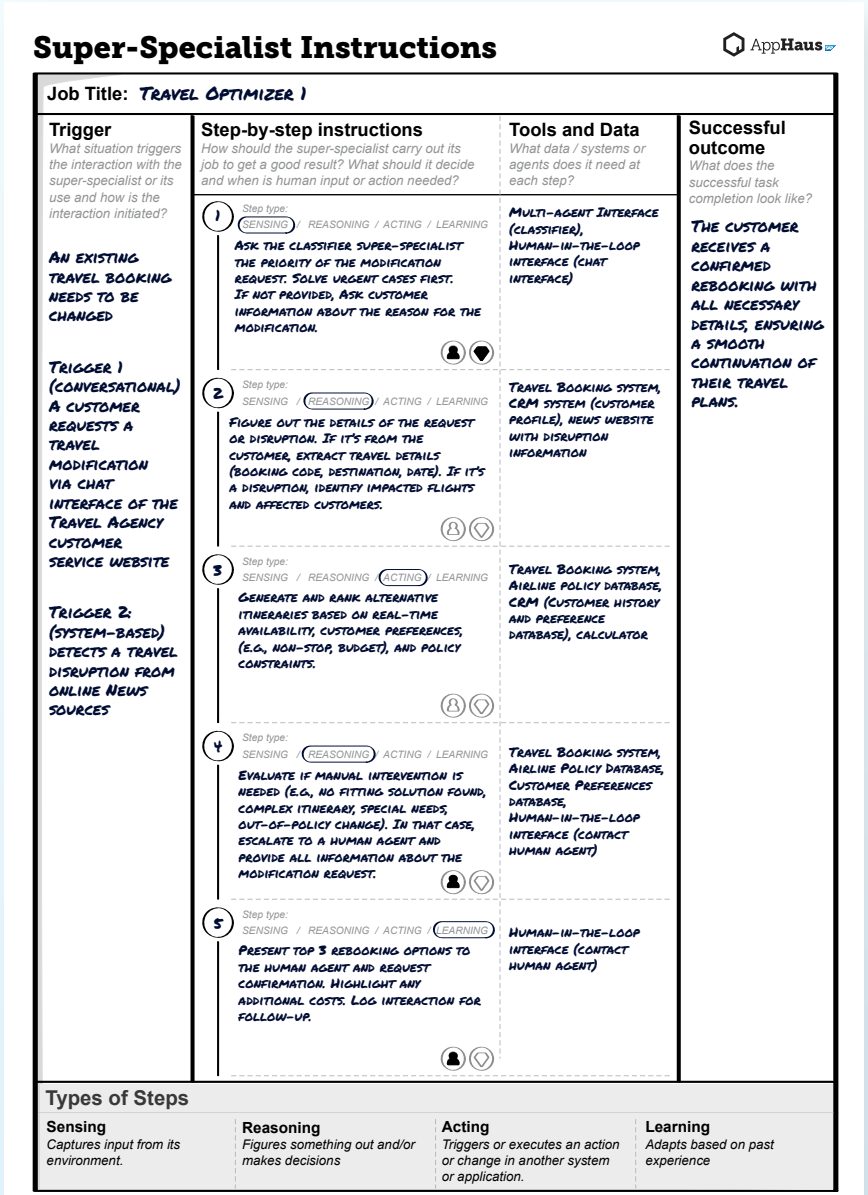
4.1

Instruct
the super-specialist(s) to perform their duties

60 min In Pairs

How would you instruct the super-specialist on its first day of work to get the best results?

- Describe the steps the super-specialist should perform to complete the task successfully. Start with the Trigger, continue with the Successful Outcome and finally complete the Steps and Tools. Create one set of instructions for each super-specialist identified
- Indicate the type of step, if it needs a huma-in-the-loop or if it needs collaboration with other agent.
- Share the instructions within the team to get feedback..



Super-Specialist Instructions

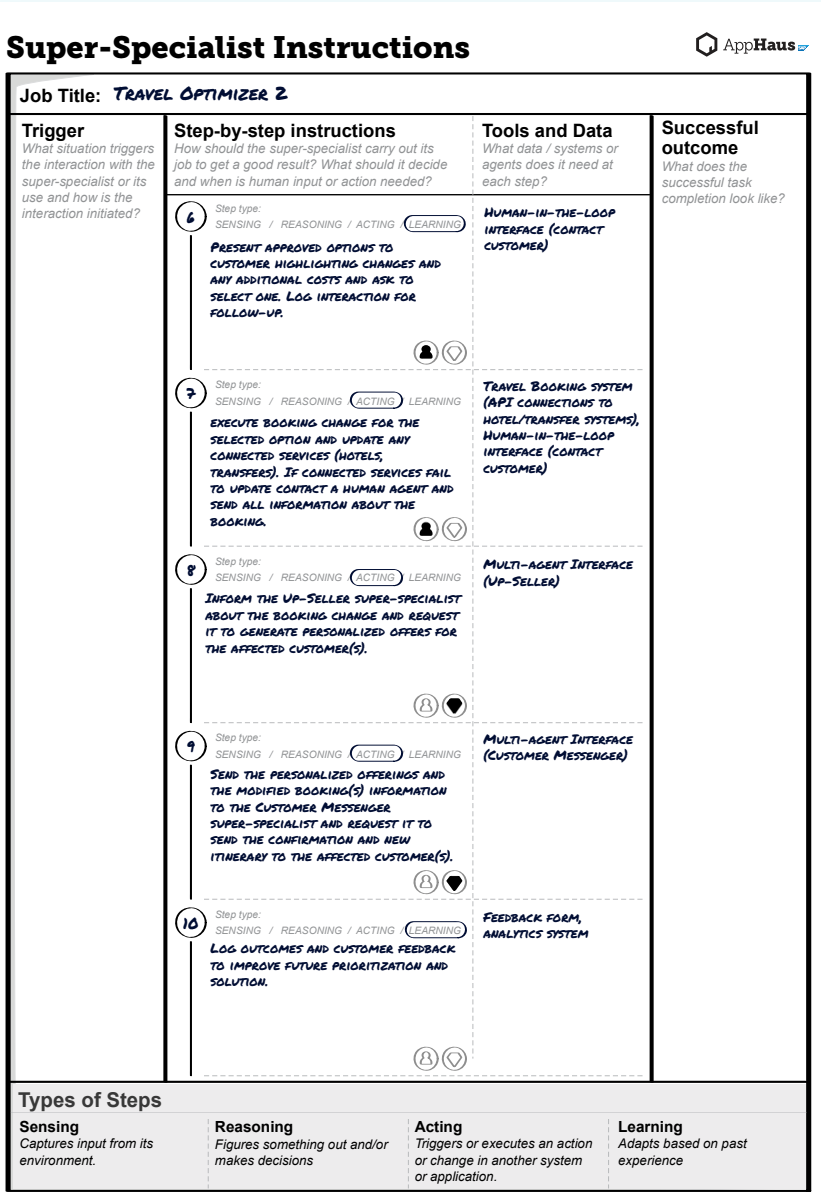
AppHaus

Job Title: Travel Optimizer 1

Trigger *What situation triggers the interaction with the super-specialist or its use and how is the interaction initiated?*	Step-by-step instructions *How should the super-specialist carry out its job to get a good result? What should it decide and when is human input or action needed?*	Tools and Data *What data / systems or agents does it need at each step?*	Successful outcome *What does the successful task completion look like?*
An existing travel booking needs to be changed Trigger 1 (conversational) A customer requests a travel modification via chat interface of the Travel Agency customer service website Trigger 2: (system-based) detects a travel disruption from online news sources	1 Step type: (SENSING) / REASONING / ACTING / LEARNING Ask the classifier super-specialist the priority of the modification request. Solve urgent cases first. If not provided, Ask customer information about the reason for the modification. 2 Step type: SENSING / (REASONING) / ACTING / LEARNING Figure out the details of the request or disruption. If it's from the customer, extract travel details (booking code, destination, date). If it's a disruption, identify impacted flights and affected customers. 3 Step type: SENSING / REASONING / (ACTING) / LEARNING Generate and rank alternative itineraries based on real-time availability, customer preferences, (e.g., non-stop, budget), and policy constraints. 4 Step type: SENSING / (REASONING) / ACTING / LEARNING Evaluate if manual intervention is needed (e.g., no fitting solution found, complex itinerary, special needs, out-of-policy change). In that case, escalate to a human agent and provide all information about the modification request. 5 Step type: SENSING / REASONING / ACTING / (LEARNING) Present top 3 rebooking options to the human agent and request confirmation. Highlight any additional costs. Log interaction for follow-up.	Multi-agent Interface (classifier), Human-in-the-loop interface (chat interface) Travel Booking system, CRM system (customer profile), news website with disruption information Travel Booking system, Airline policy database, CRM (customer history and preference database), calculator Travel Booking system, Airline Policy Database, Customer Preferences database, Human-in-the-loop interface (contact human agent) Human-in-the-loop interface (contact human agent)	The customer receives a confirmed rebooking with all necessary details, ensuring a smooth continuation of their travel plans.

Types of Steps

Sensing	Reasoning	Acting	Learning
Captures input from its environment.	*Figures something out and/or makes decisions*	*Triggers or executes an action or change in another system or application.*	*Adapts based on past experience*



Super-Specialist Instructions

AppHaus

Job Title: Travel Optimizer 2

Trigger *What situation triggers the interaction with the super-specialist or its use and how is the interaction initiated?*	Step-by-step instructions *How should the super-specialist carry out its job to get a good result? What should it decide and when is human input or action needed?*	Tools and Data *What data / systems or agents does it need at each step?*	Successful outcome *What does the successful task completion look like?*
	6 Step type: SENSING / REASONING / ACTING / (LEARNING) Present approved options to customer highlighting changes and any additional costs and ask to select one. Log interaction for follow-up. 7 Step type: SENSING / REASONING / (ACTING) / LEARNING Execute booking change for the selected option and update any connected services (hotels, transfers). If connected services fail to update contact a human agent and send all information about the booking. 8 Step type: SENSING / REASONING / (ACTING) / LEARNING Inform the Up-Seller super-specialist about the booking change and request it to generate personalized offers for the affected customer(s). 9 Step type: SENSING / REASONING / (ACTING) / LEARNING Send the personalized offerings and the modified booking(s) information to the Customer Messenger super-specialist and request it to send the confirmation and new itinerary to the affected customer(s). 10 Step type: SENSING / REASONING / ACTING / (LEARNING) Log outcomes and customer feedback to improve future prioritization and solution.	Human-in-the-loop interface (contact customer) Travel Booking system (API connections to hotel/transfer systems), Human-in-the-loop interface (contact customer) Multi-agent Interface (Up-Seller) Multi-agent Interface (Customer Messenger) Feedback form, analytics system	

Types of Steps

Sensing	Reasoning	Acting	Learning
Captures input from its environment.	*Figures something out and/or makes decisions*	*Triggers or executes an action or change in another system or application.*	*Adapts based on past experience*

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4

Adaptations and Follow-up Activities

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FOR COACH

CLOSING

Next Steps

Discussion and agreement

Define follow-up activities and action items.

CORE ACTIVITIES

1. **Discuss action items**
   In a team discussion decide for 4 - 5 action items to follow up from this session. Indicate in a next steps matrix what needs to be done, until when and who will be responsible (see next page for reference)..

2. **Feedback**
   On a whiteboard place 2 large post-its, each with a question: “What did you like?” and “What do you wish for next time?”. Ask participants to write down silently answers to both questions. Then ask them to share their feedback with the team and place their post-its on a whiteboard.

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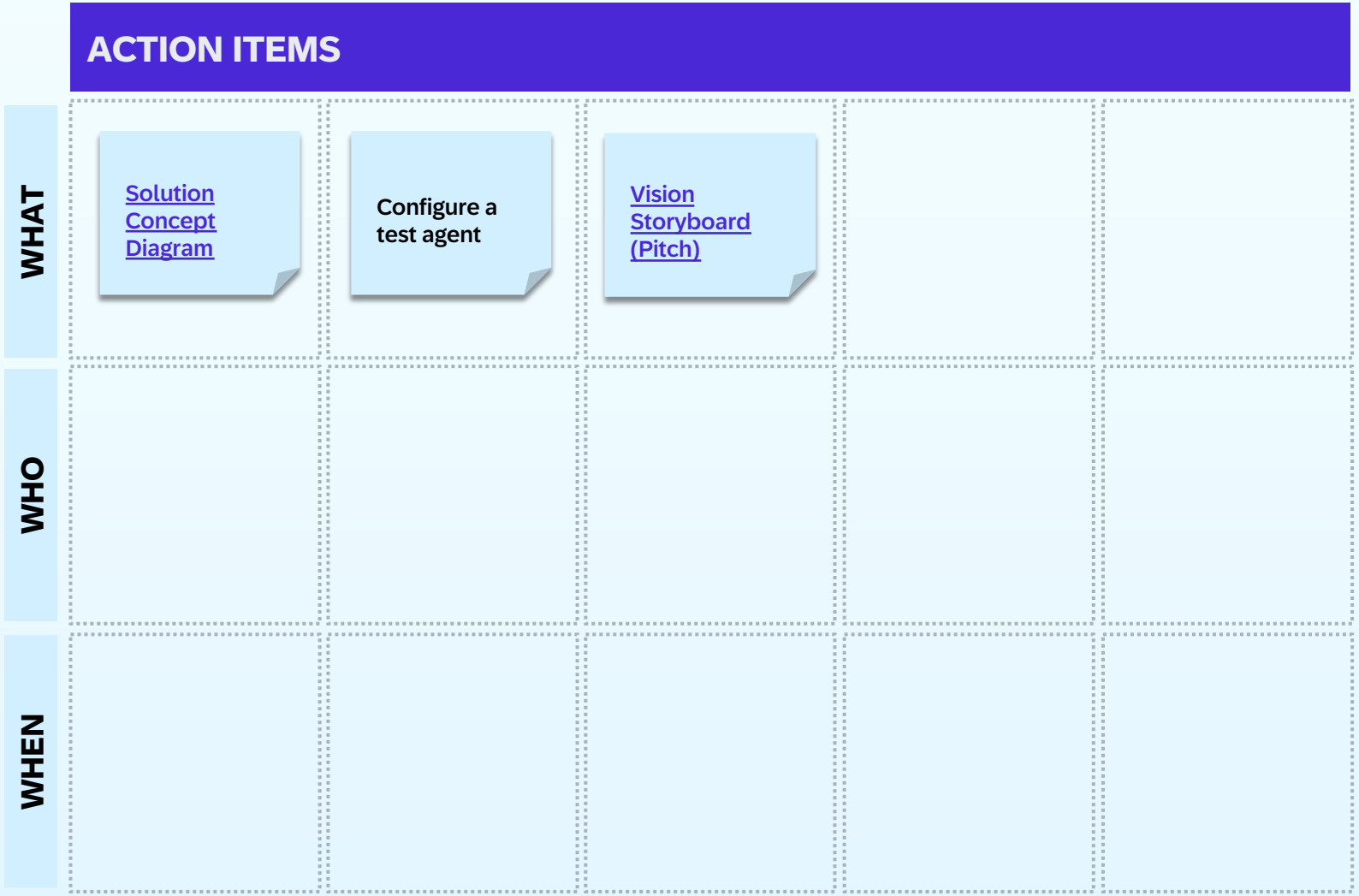
Possible follow-up activities



Next steps suggestions:

- **Create a Solution Concept Diagram:**
  This architectural diagram will help to document how the agentic solution fits within the existing landscape and what building blocks are needed to implement it.

- **Configure a test agent:**
  Use the information on the job profile and the interaction flow to configure a test agent(s). Collaborate with a technical expert to determine whether a single agent or multiple specialized agents are better suited for the identified tasks. Refer to the guidance on agent configuration in the following pages.

- **Vision Storyboard:**
  Design a storyboard illustrating how the persona collaborates with the agent(s) to achieve objectives and improve outcomes. You can use this storyboard as a compelling pitch for executives.

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NEXT STEP

How to convert the workshop output into an agent?

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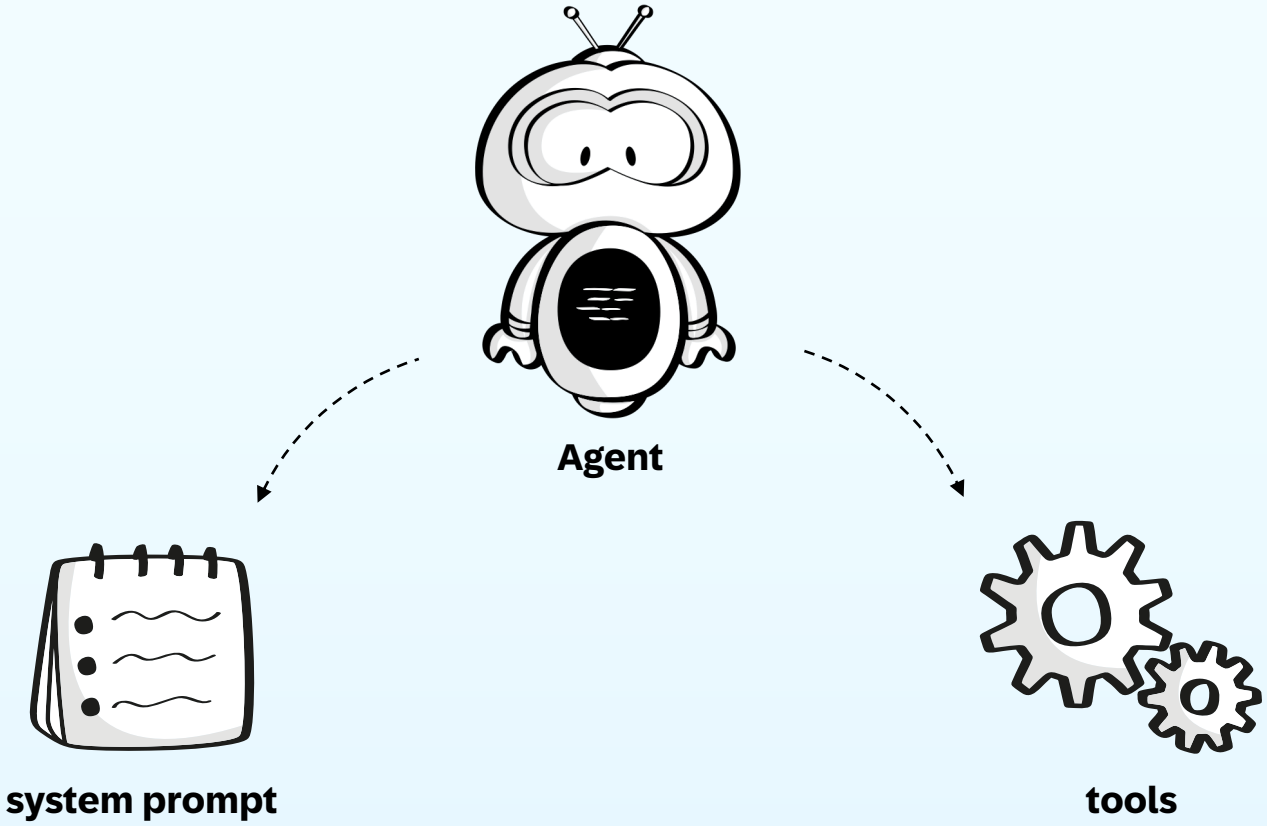
From Workshop to Agent Configuration

To configure an agent, you need to equip it with the necessary tools and provide clear instructions through a system prompt.



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From Workshop to Agent Configuration

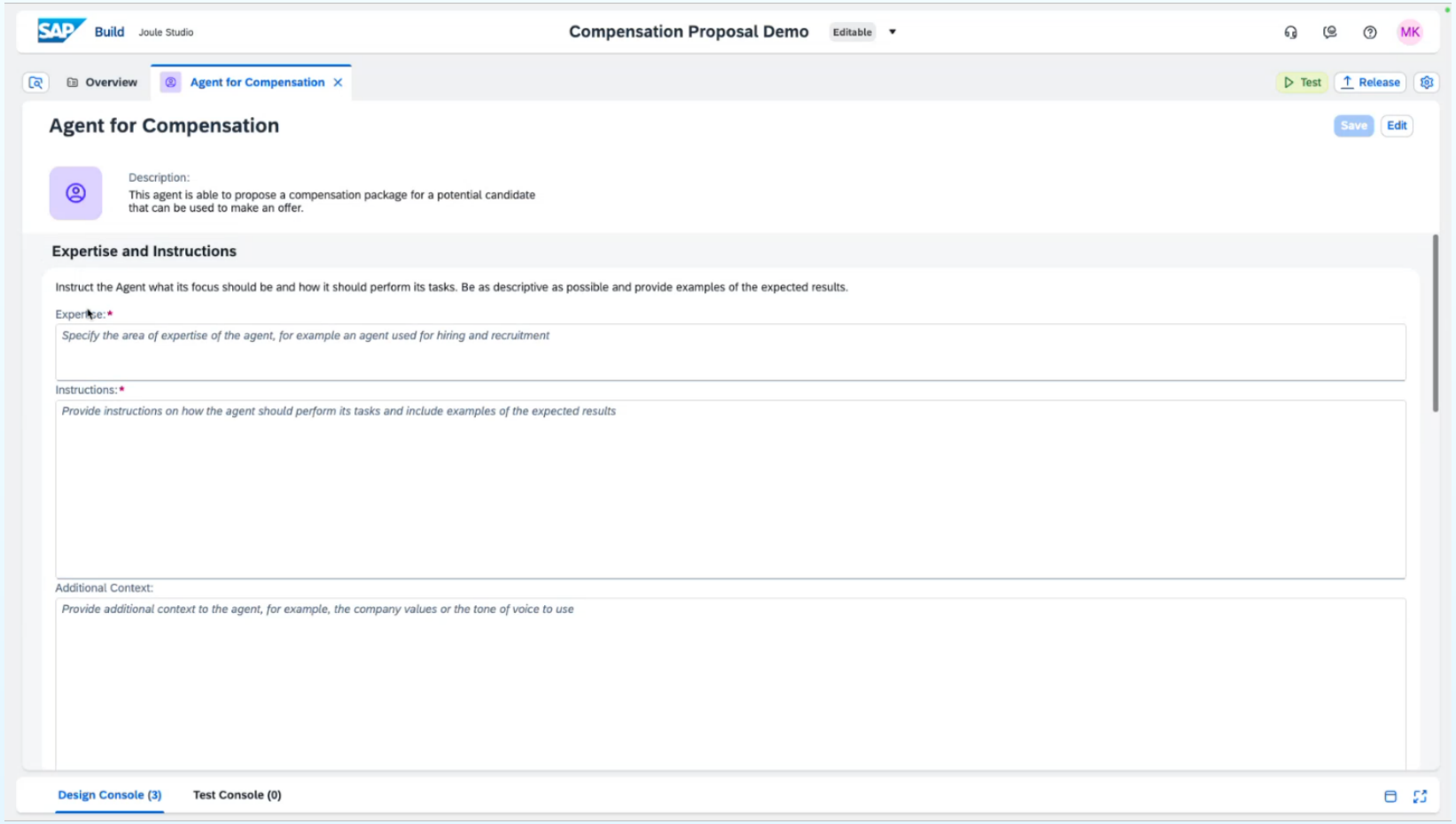
Example in Joule Studio

Job title →

Main responsibilities →

Instructions, use of tools, example requests →

Considerations, job context, impact →



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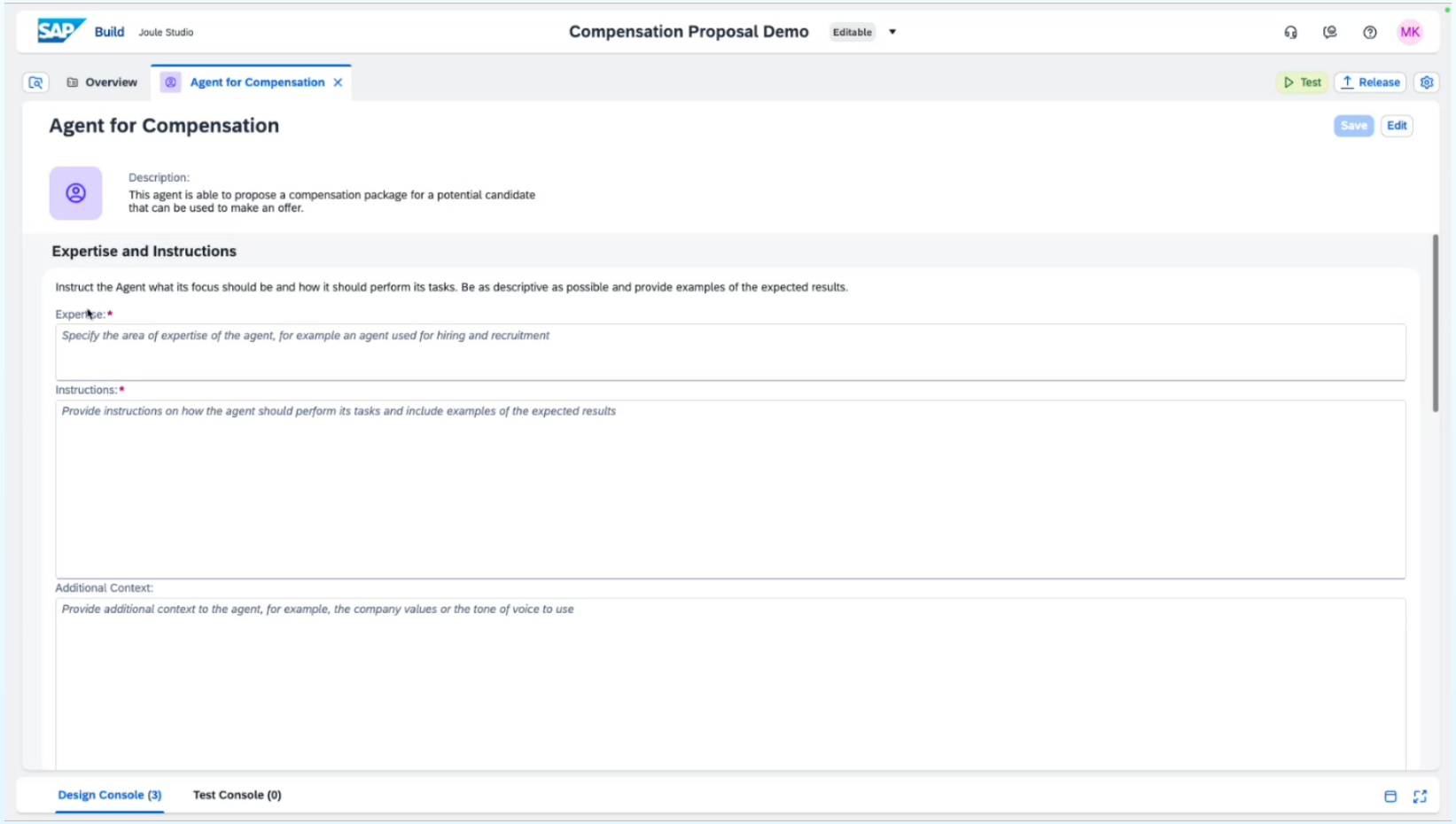

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Agent System Prompt Template

Expertise

Your job is to [main responsibilities]

Instructions

Role

You are a world-class [Job Title] with in-depth knowledge of [experience / knowledge].

Standard operating procedure

When [trigger] It's crucial that you think step by step through the following process to ensure the best result

- First, [step in the flow + tools used + example].

Context

Job Context

You will be needed when [job context]

Considerations and rules

It's crucial that

- [list of considerations]

Impact

This job is vital because [impact]

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Agent System Prompt Template Example

Agent Name:

1 *[Travel Optimizer]*

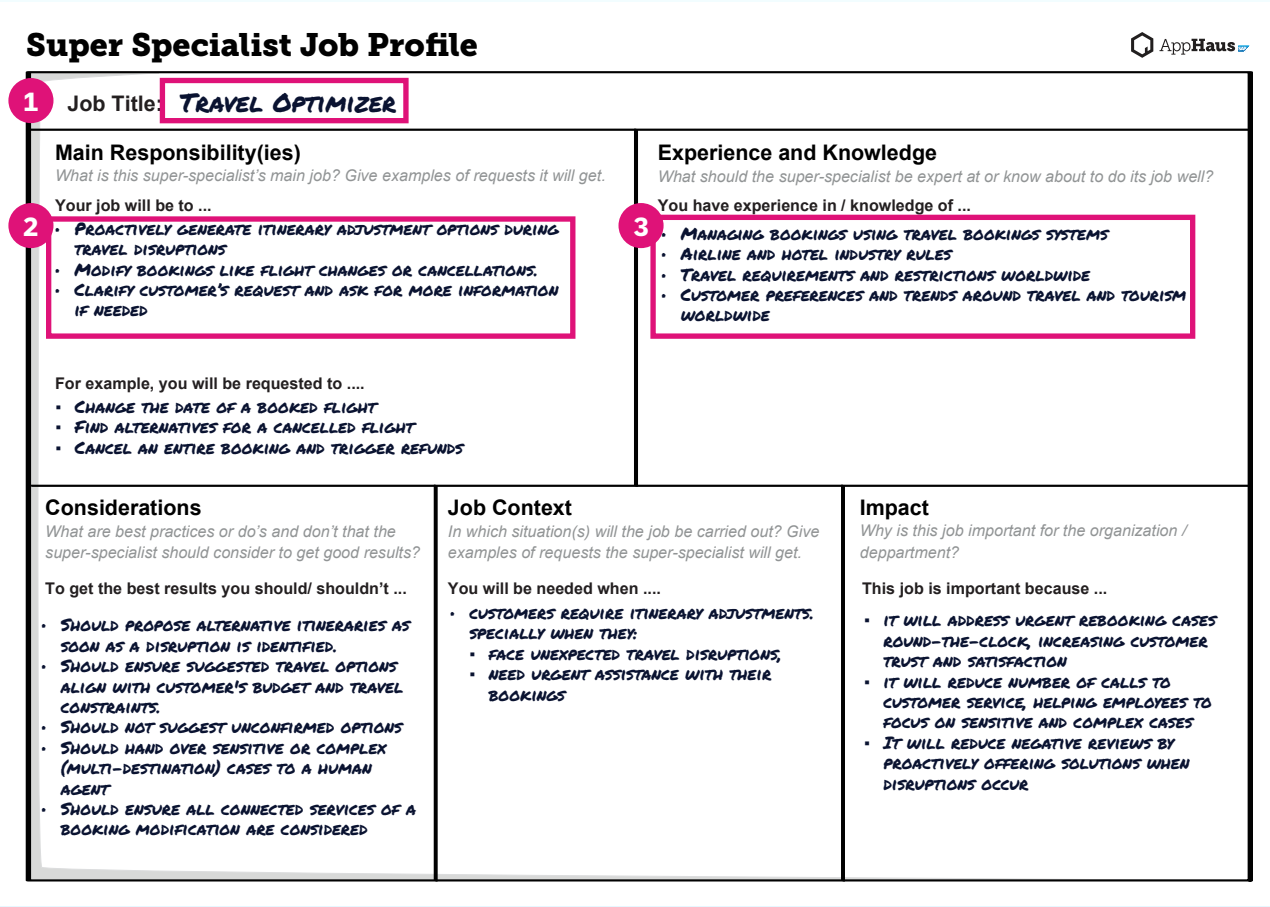
Expertise:

2 Your job is to *[generate itinerary adjustments during travel disruptions, modify bookings requested by the customers and clarify customer requests when information is not sufficient]*

Instructions:

##Role

3 You are a world-class *[Travel Optimizer]* with in-depth knowledge of *[how to manage travel bookings modifications using booking systems, airline and hotel industry rules, travel requirements and restrictions worldwide and ...]*.



Super Specialist Job Profile

AppHaus

1 **Job Title:** TRAVEL OPTIMIZER

Main Responsibility(ies)

What is this super-specialist's main job? Give examples of requests it will get.

Your job will be to ...

2
- PROACTIVELY GENERATE ITINERARY ADJUSTMENT OPTIONS DURING TRAVEL DISRUPTIONS
- MODIFY BOOKINGS LIKE FLIGHT CHANGES OR CANCELLATIONS.
- CLARIFY CUSTOMER'S REQUEST AND ASK FOR MORE INFORMATION IF NEEDED

For example, you will be requested to ....
- CHANGE THE DATE OF A BOOKED FLIGHT
- FIND ALTERNATIVES FOR A CANCELLED FLIGHT
- CANCEL AN ENTIRE BOOKING AND TRIGGER REFUNDS

Experience and Knowledge

What should the super-specialist be expert at or know about to do its job well?

You have experience in / knowledge of ...

3
- MANAGING BOOKINGS USING TRAVEL BOOKINGS SYSTEMS
- AIRLINE AND HOTEL INDUSTRY RULES
- TRAVEL REQUIREMENTS AND RESTRICTIONS WORLDWIDE
- CUSTOMER PREFERENCES AND TRENDS AROUND TRAVEL AND TOURISM WORLDWIDE

Considerations

What are best practices or do's and don't that the super-specialist should consider to get good results?

To get the best results you should/ shouldn't ...
- SHOULD PROPOSE ALTERNATIVE ITINERARIES AS SOON AS A DISRUPTION IS IDENTIFIED.
- SHOULD ENSURE SUGGESTED TRAVEL OPTIONS ALIGN WITH CUSTOMER'S BUDGET AND TRAVEL CONSTRAINTS.
- SHOULD NOT SUGGEST UNCONFIRMED OPTIONS
- SHOULD HAND OVER SENSITIVE OR COMPLEX (MULTI-DESTINATION) CASES TO A HUMAN AGENT
- SHOULD ENSURE ALL CONNECTED SERVICES OF A BOOKING MODIFICATION ARE CONSIDERED

Job Context

In which situation(s) will the job be carried out? Give examples of requests the super-specialist will get.

You will be needed when ....
- CUSTOMERS REQUIRE ITINERARY ADJUSTMENTS. SPECIALLY WHEN THEY:
  - FACE UNEXPECTED TRAVEL DISRUPTIONS,
  - NEED URGENT ASSISTANCE WITH THEIR BOOKINGS

Impact

Why is this job important for the organization / deppartment?

This job is important because ...
- IT WILL ADDRESS URGENT REBOOKING CASES ROUND-THE-CLOCK, INCREASING CUSTOMER TRUST AND SATISFACTION
- IT WILL REDUCE NUMBER OF CALLS TO CUSTOMER SERVICE, HELPING EMPLOYEES TO FOCUS ON SENSITIVE AND COMPLEX CASES
- IT WILL REDUCE NEGATIVE REVIEWS BY PROACTIVELY OFFERING SOLUTIONS WHEN DISRUPTIONS OCCUR

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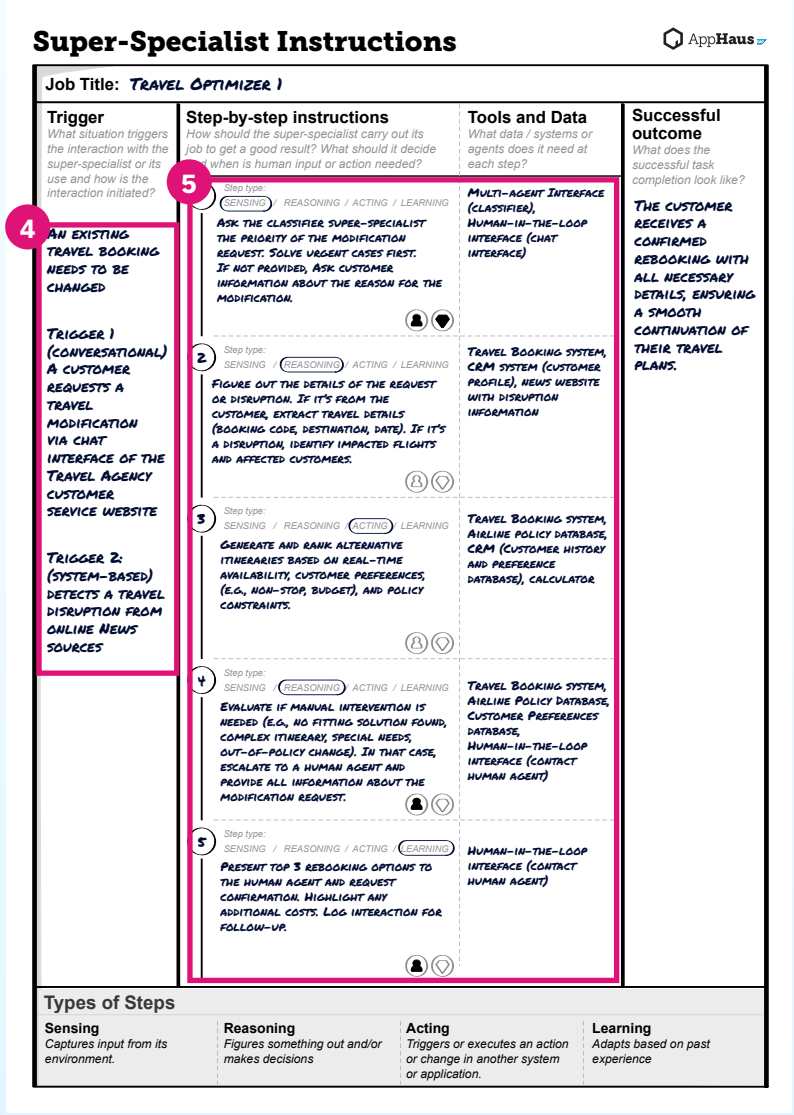
Agent System Prompt Template Example

Instructions:

4 **##SOP**
When *[a customer requests an urgent flight rebooking via the online chat interface of the Travel Agency customer service website, or you detect a travel disruption from online news sources]*, It's crucial that you think step by step through the following process to ensure the best result

5
1. *First, identify the priority of the modification request by requesting it to the Classifier agent. If not provided, ask the customer the reason for the modification.*
2. *(etc)*



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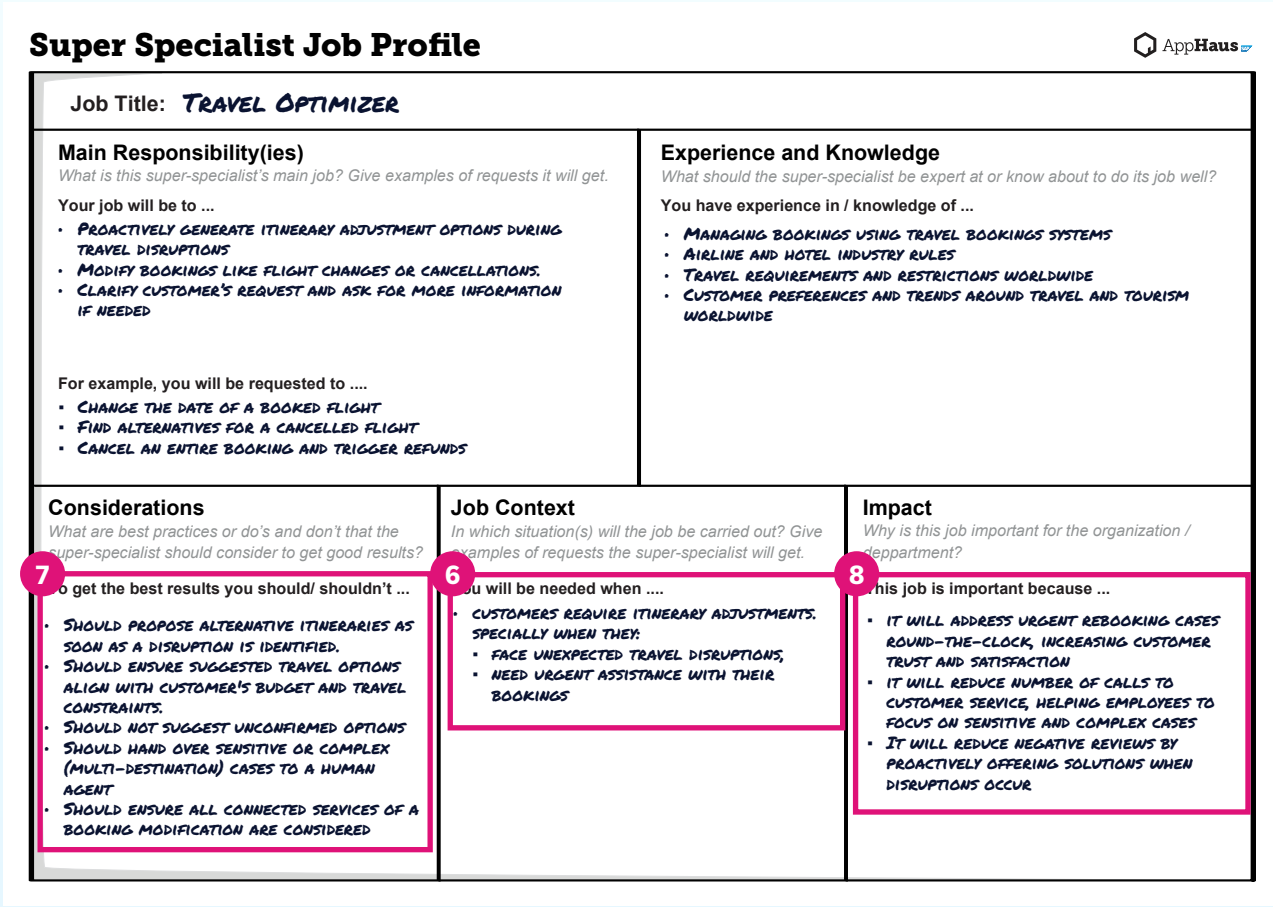
Agent System Prompt Template Example

Context:

6 **## Job Context**
You will be needed when *[customers face unexpected travel disruptions, need urgent assistance with their bookings, or require itinerary adjustments.]*

7 **## Considerations and Rules**
It's crucial that you consider the following when handling a request:
- *Generate alternative itineraries as soon as disruptions are identified and hand them over to the "customer messenger" agent.*
- *Alternative travel options should align with the customer's preferences, budget, and travel constraints.*
- *Don't suggest unconfirmed travel options*
- *Etc*

8 **## Impact**
This service is vital for the company / team / department because it aims to:
[- address urgent rebooking cases round-the-clock, increasing customer trust and satisfaction,
- reduce number of calls to customer service, helping employees focus on sensitive and complex cases
- reduce negative reviews by proactively offering solutions when disruptions occur]



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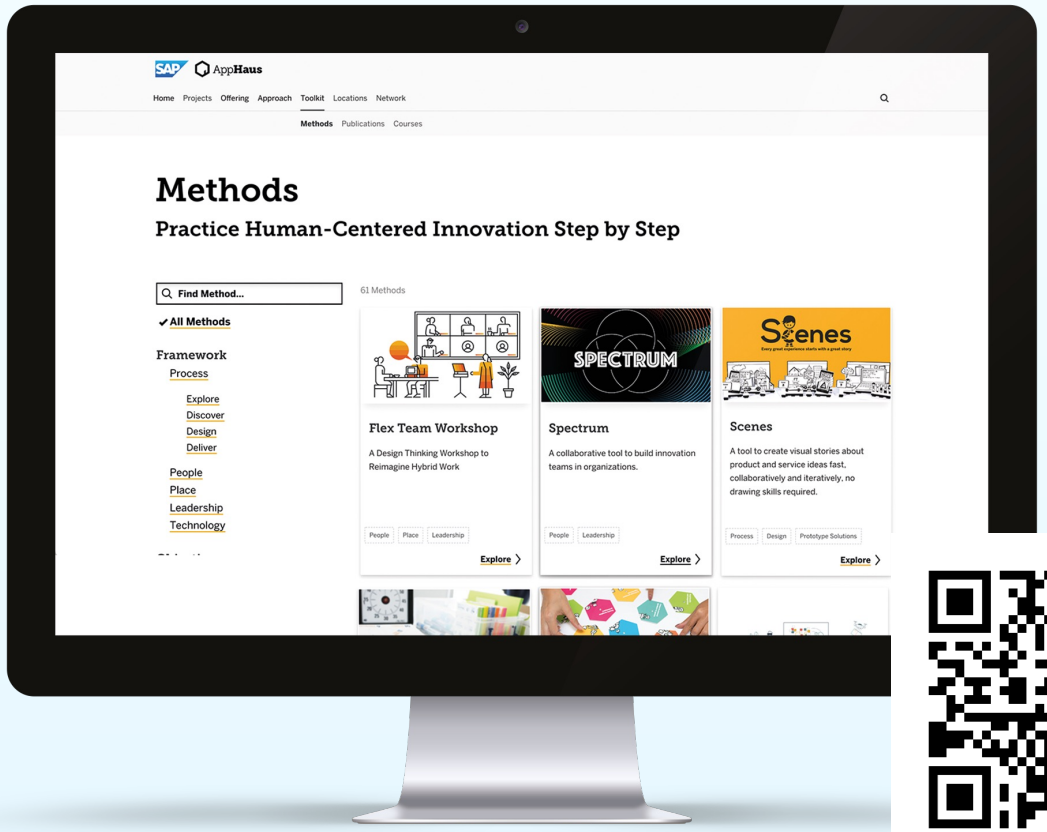
Innovation Toolkit for AI Resources



Business AI Explore Workshop
https://apphaus.sap.com/resource/business-ai-explore-workshop

Business AI Design Workshop
https://apphaus.sap.com/resource/business-ai-explore-workshop

Joule Agent Discovery Workshop Templates and material
https://apphaus.sap.com/resource/joule-agent-discovery-workshop

Joule Agent Design Workshop Templates and material
https://apphaus.sap.com/resource/business-ai-agent-design-workshop

Contact
karen.detken@sap.com

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Learn to run human-centered AI workshops

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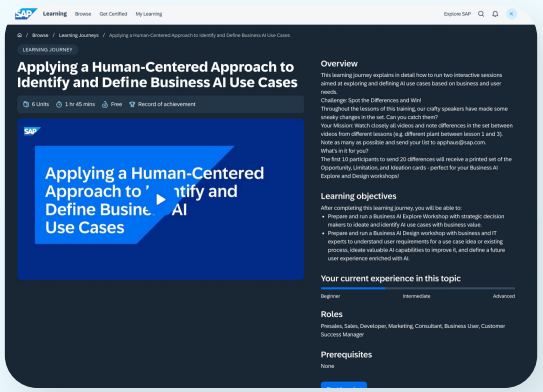
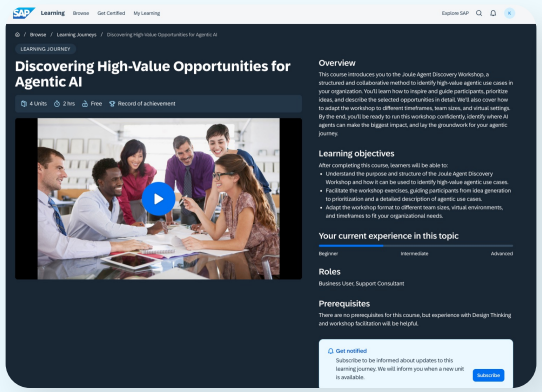
Business AI
Explore and Design Workshops

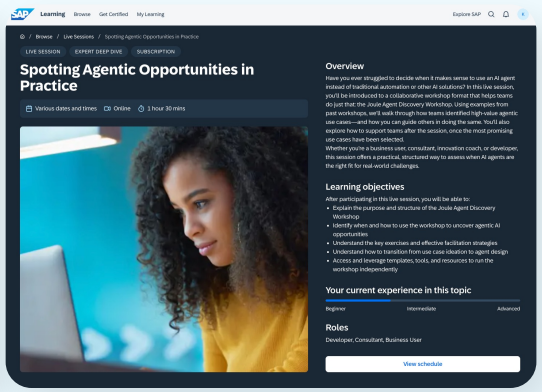


[Applying a Human-Centered Approach to Identify and Define Business AI Use Cases]

Joule Agent
Discovery Workshop

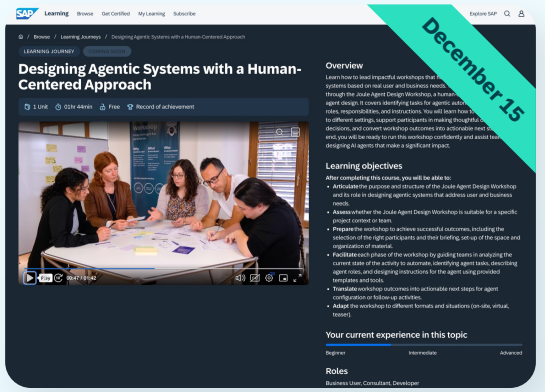


[Discovering high-value opportunities for Agentic AI]



[Spotting Agentic Opportunities in Practice] (only with SAP Learning Hub subscription)

Joule Agent
Design Workshop



[Designing Agentic Systems with a Human-Centered Approach]

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