SAP

Business AI
Agent Design Workshop

Facilitation Guide

Beta Release V1

AppHaus

Agenda

1 **Introduction and Overview**
The Business AI Agent Design Workshop in Context

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

3 **Running the Workshop**
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4 **Next Steps**
Follow-up exercises and activities to make the agent real
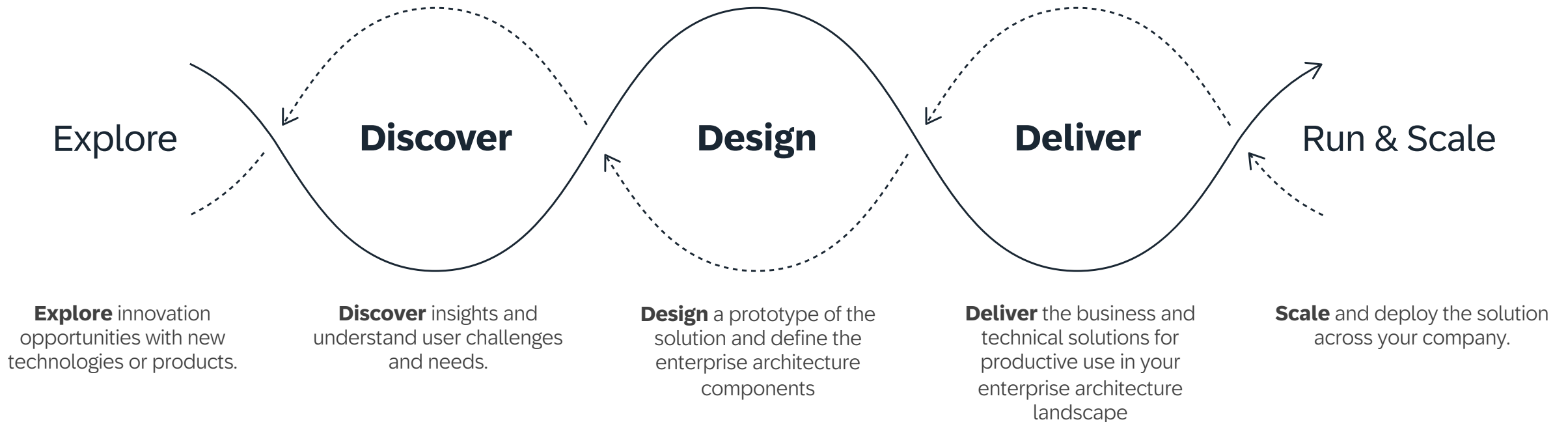
1

Introduction and Overview

The Business AI Agent Design Workshop in Context

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 consists of five iterative phases:

Explore   **Discover**   **Design**   **Deliver**   Run & Scale

Explore innovation opportunities with new technologies or products.

Discover insights and understand user challenges and needs.

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

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

Scale and deploy the solution across your company.

Applying Human-Centered Innovation to Business AI

The SAP AppHaus offers three 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** and the **Business AI Agent Design Workshop**. These formats take place during the 'Explore' , 'Discover' and 'Design' phases of the HCAI.

Business AI **Explore Workshop**

Explore   **Discover**   **Design**   **Deliver**   Run & Scale

Business AI **Design Workshop**

Business AI **Agent Design Workshop**
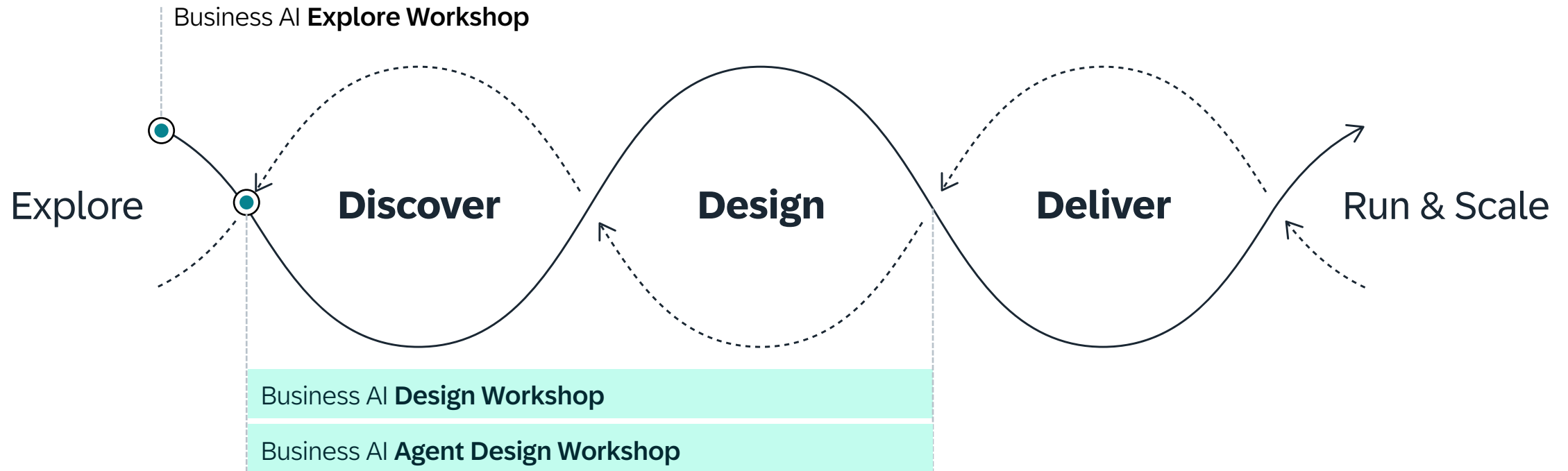
Selecting an AppHaus Business AI Workshop Format

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. Here are 3 different situations that can guide your decision.

Your customer or team wants to **learn what AI can do** for their business and **explore innovative use cases for AI** in different areas.

⬇

Business AI
Explore Workshop

Your customer or team has already an **AI use case idea** or wants to improve the experience of an **existing process or solution** with AI capabilities.
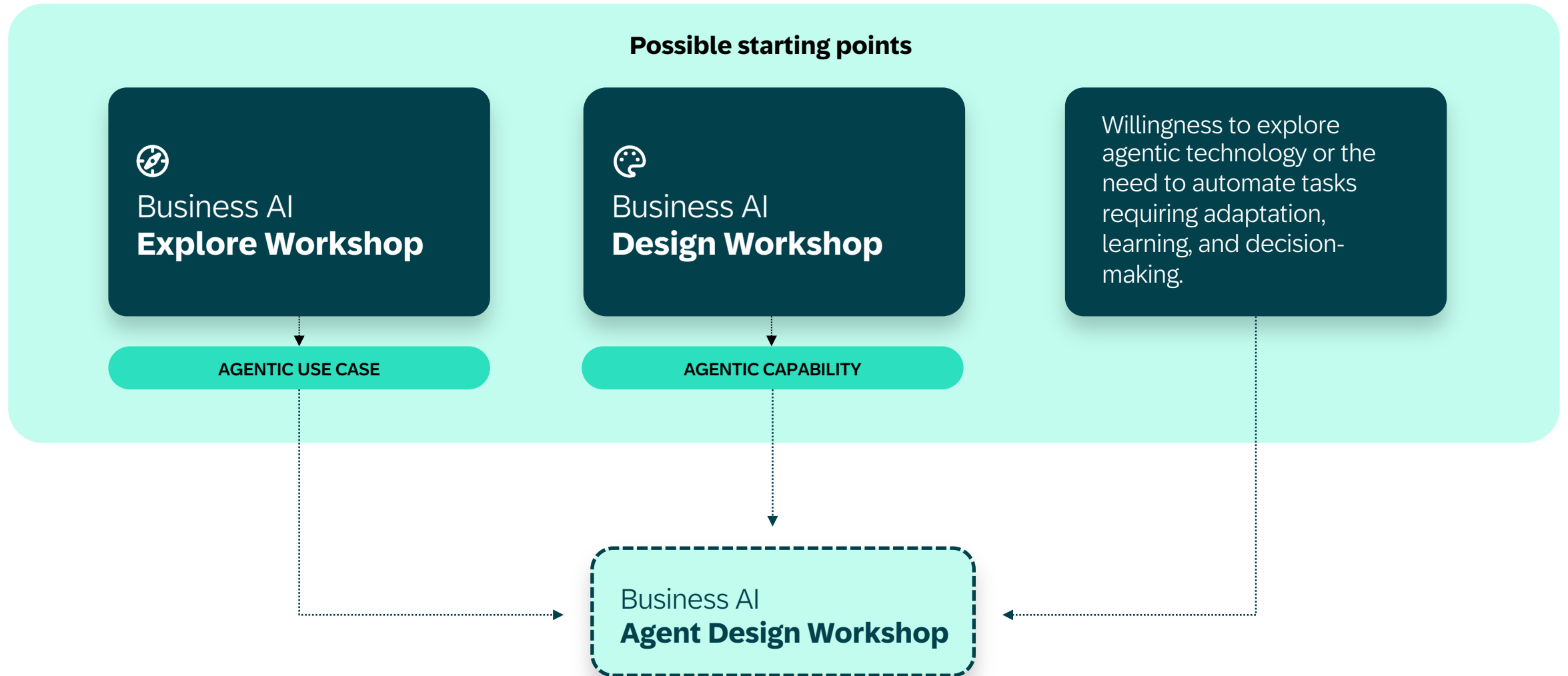
⬇

Business AI
Design Workshop

Your customer or team seeks to **automate business tasks** that require **adaptation, learning, and decision-making**.

⬇

Business AI
Agent Design Workshop

Starting Points for an Agent Design Workshop

Possible starting points

Business AI
Explore Workshop

Business AI
Design Workshop

Willingness to explore agentic technology or the need to automate tasks requiring adaptation, learning, and decision-making.

AGENTIC USE CASE

AGENTIC CAPABILITY

Business AI
Agent Design Workshop

When do we have an agentic use case?

Agentic AI refers to AI agents that utilize Large Language Models (LLMs) to interpret language, engage in conversations, and perform tasks. These LLM agents can can react to, reason about, and learn from data, enabling them to make decisions, take initiative, and adjust their actions to achieve goals in dynamic circumstances. This autonomy and flexibility makes them ideal for scenarios where it's impractical to define a clear sequence of steps or decision criteria. While workflows and process engines efficiently automate routine tasks with predictable steps and outcomes, LLM agents thrive in dynamic **situations requiring adaptation, learning, and decision-making**. Below are some enterprise use cases for LLM agents:

Customer Support
LLM agents can handle FAQs, troubleshoot issues and escalate complex inquiries to the appropriate human teams.
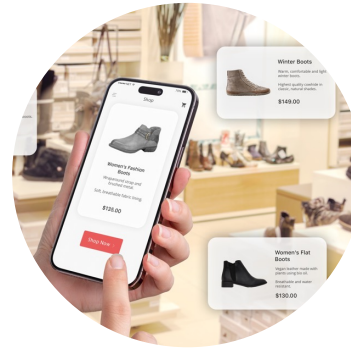
Sales
LLM agents can qualify leads by engaging potential customers in conversations, assessing needs, gathering information, and automating personalized follow-ups with recommendations or product details.

Knowledge Base Management
LLM agents can analyze knowledge bases and service tickets to identify gaps and automatically suggest and draft new articles.

Sources: https://www.atomicwork.com/blog/ai-agent-use-cases, https://botpress.com/blog/llm-agents, https://sap-my.sharepoint.com/:w:/p/sebastian_baechle/EViwsCsMNINCpro8ie9TMl0BIZE8a4o3OltyCMXAOz_uyw?e=GEXYdJ

Understanding AI Agents

An AI agent refers to a system or program that is capable of **autonomously performing tasks** on behalf of a user **or another system by designing its workflow** and **utilizing available tools**." (IBM)

Source: https://www.ibm.com/think/topics/ai-agents

Agents can...

- **Create a plan** based on a given goal
- **Access tools** and external knowledge
- Decide based on **reasoning**
- **Execute actions**
- **Learn** from human input and past interactions
- Collaborate with **other agents**

Business AI
Agent Design Workshop

A creative and collaborative approach to design an AI agent that works for you.

Duration:
Full Workshop: 5 – 6h on-site or 2 x 3h day virtual
Teaser Workshop: 1h (on-site / virtual)

✉ **apphaus@sap.com**

Why
should you care?

This creative and structured approach helps you define the agent's role and abilities, so it can support or automate your tasks for better efficiency.

What
is the outcome?

Define the tasks and objectives your agent will tackle, then design interaction flows, between you and the agent, to efficiently accomplish them.

Who
should participate?

Potential end-users of the future digital assistant, IT and domain experts (3 - 8 people).

Activities

1. **Identify the agent's focus**
Define what you'd like to accomplish with an ai agent and the challenges you currently face in achieving those goals.

2. **Identify the agent's tasks**
Using the metaphor of "hiring an specialist," decide which tasks to handle yourself and which to delegate to the AI assistant.

3. **Describe the agent's job**
Write a "job description" outlining what the assistant needs to know and do.

4. **Design interaction flows**
Create step-by-step interaction flows for each task, including required data.

2

Preparing the Workshop

Necessary material for the session

Preparation Checklist – Part 1

FOR COACH

☐ **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.

☐ **Ensure the right audience**
To run the workshop successfully, you will need potential end-users of the future AI agent, IT and domain experts. Ensure you get the right people.

☐ **Ensure the right experts**
It is recommended to have AI experts in the workshop with experience on agentic technology. This can help to clarify limitations of the technology early on.

☐ **Clarify the number of participants**
The more participants, the more time you will need for share-outs. Ensure you have breakout teams of no more than 6 participants.

Goal
Get ready to run the workshop.

Material
★ [Mural Board](#)
★ [Material for print](#)
★ Whiteboards or similar surfaces
★ Post-its, pens, voting dots

Tips
★ Start preparing for the workshop at least 1 week in advance to have everything ready.
★ Prepare a simplified agenda on a flipchart for on-site sessions.

Preparation Checklist – Part 2

FOR COACH

☐ **Ensure participants have access to the Mural board or look for alternatives**
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 agenda for the workshop**
Check the workshop agenda (.xls) and adapt it according to the number of participants and time available. The more participants, the more time you will need for the share-outs.

☐ **Prepare the material and prework**
Print the material as specified in the "Material for print" section. Draw the autonomy spectrum for the warm-up exercise and the Next Steps Matrix once on whiteboards or similar surfaces. Draw also one Heatmap per breakout team. Have enough post-its, pens and voting dots for the exercises and make sure you have enough whiteboards.

☐ **Check the space and equipment**
If your workshop is on-site, make sure you have enough room to accommodate all breakout teams and equipment to present the necessary slides.

Goal
Get ready to run the workshop.

Material
★ Mural Board
★ Material for print
★ Whiteboards or similar surfaces
★ Post-its, pens, voting dots

Tips
★ Start preparing for the workshop at least 1 week in advance to have everything ready.
★ Prepare a simplified agenda on a flipchart for on-site sessions.

Possible adaptations

★ **Save time by preparing personas in advance**
Hold a preliminary session with participants to explain the persona exercise and assign them the task of completing a persona profile for each main user group before the workshop. During the workshop, plan 15 – 30 minutes for participants to present the personas and gather feedback from the audience. In this way you can skip the section **"Identify the Agent's Focus"** and save 30 to 45 minutes time.

★ **Run a 1-hour teaser workshop for events or as part of another workshop**
Use the Job Profile exercise to help participants describe their idea for an AI agent. Use the Special Qualities card deck to inspire participants to come up with up to 5 tasks for the agent.

FOR COACH

Goal
Get ready to run the workshop.

Material

★ Mural Board

★ Material for print

★ Whiteboards or similar surfaces

★ Post-its, pens, voting dots

Tips

★ Start preparing for the workshop at least 1 week in advance to have everything ready.

★ Prepare a simplified agenda on a flipchart for on-site sessions.

Material for print
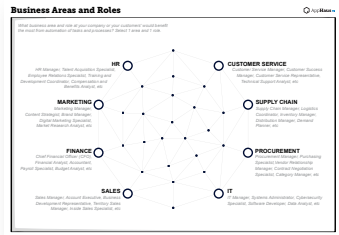
Business Areas and Roles

1 x breakout team
(size DIN A4,
black and white)

Mini Persona Template

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

Tasks Collection Template

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

Special Qualities Card Set

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

Special Capabilities Card Set

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

Job Profile

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

Interaction Flow Template

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

Coach Agenda

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

Material for virtual sessions

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

3

Running the Workshop

Step by step exercises and coach instructions

Business AI Agent Design Workshop On-Site Agenda (6 hours 15 min) *

09:00	30 min	**Getting started**
09:30	60 min	**Identify the Agent's Focus**
10:30	10 min	**Coffee Break**
10:40	15 min	**Introduction to the Super-Specialist**
10:55	60 min	**Identify the Agent's Tasks**
11:55	65 min	**Lunch**
13:00	45 min	**Describe the Agent's Job****
13:45	60 min	**Define the Interaction with the agent**
14:45	30 min	**Next Steps**
15:15	-	**END**

* This is a suggested agenda for a full workshop, modify if needed / **Possible as a "Teaser Workshop" to be run during events or as part of other workshops

PART 0

Getting Started

On-Site / Virtual Session

Welcome participants to the session and introduce the theme of autonomy in AI 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 in this guide for support.

0. Getting started

20 - 30 min   **All together**

STEPS

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

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).

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.

Warm up

⏳ **15 min** 👥 **All together**

STEPS

How much autonomy should AI solutions have?

- Write your name and role on a post-it and position it on your preferred area of the agency spectrum. Present yourself to the team and explain your answer (15 min).

🔥 **WARM-UP**

How much autonomy should AI solutions have?

Tool

Assistant

Teammate

Regulatory organism

No Autonomy ←————————————————————→ **Full Autonomy**

Paul, Department Lead

Sarah, Program Manager

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

PART 1

Identify the Agent's Focus

On-Site / Virtual Session

> Identify the the agent's main purpose and focus.

CORE ACTIVITIES

1. **Define the target-user**
Participants describe the 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.

2. **Select the main objective**
Participants agree on the main objective for which an agent's support could be most beneficial.

1. Identify the Agent's Focus

⏳ **5 - 10 min**   👥 **In teams of 6 or less**

STEPS

A **Select the business area and role** – 5 - 10 min
Prepare this step by identifying the primary target user role(s) for the agentic solution before the workshop. If a [Business AI Explore workshop](#) was conducted earlier, use the information from the [Use Case Brief](#). Otherwise, conduct a brief [Stakeholder Map exercise](#) with participants in advance.
If you have several roles to focus on, distribute them, so you have a team of 4 – 6 people focusing on one role each.
In case of large events with multiple companies or similar set-ups where the main user roles are not discussed in advance, participants can use the Business Areas and Roles sheet to discuss and select a relevant role to focus on.

Goal
Agree on the business area and role(s) for the agentic solution.

Outcome
The business role(s) to support with an agentic solution.

Material
★ [Business Areas and Roles template](#)

★ Pens

Tips
★ You can skip this step if you have a clear use case with identified main user roles in advance.

1. Identify the Agent's Focus

30 - 50 min   **In teams of 6 or less**

STEPS

B **Define the target-user** – 30 - 50 min
In this exercise, participants describe the end user(s) who might use the agentic solution by creating personas. This helps clarify user needs and identify the best use cases for the solution.
Under the section "Main goals and objectives" of the Mini Persona template participants should define at least four key objectives the persona aims to achieve in their role or within a specific scenario. Focus on broader goals rather than specific tasks. For example, in the context of customer service, an objective could be "ensure quick resolution of customer inquiries" rather than "answer FAQs."
Under the "Challenges" section, ask participants to write down challenges that prevent the persona from achieving the stated objectives. They should think about challenges for all the objectives.
Finally, ask participants to select the primary objective the agentic solution should support from the list of "Main goals and objectives." Encourage them to consider which objective is currently the hardest to achieve based on the challenges affecting it or which would benefit most from automation.

Goal
Understand what target users need to accomplish in the context of the use case and select key objectives to design agents for.

Outcome
A target-user description and the selection of one main objective to design an agent for.

Material
★ Mini Persona template
★ Pens, whiteboard

Tips
★ If participants write tasks instead of objectives, prompt them to consider why the task is needed and what it aims to achieve.

★ Save time by assigning this exercise as homework for participants to complete before the workshop. Review and refine the personas during the session.

Select the business area and role

⏳ **5 - 10 min** 👥 **In teams of 6 or less**

STEPS

What business area and role(s) would benefit the most from automation of tasks and processes?

- Discuss as a team what business area and role(s) could benefit the most from automation of tasks and processes and mark your selection on the sheet provided. If there is a use case or target role defined in advance, you can skip this step. (5-10 min)

Business Areas and Roles

◇ AppHaus

What business area and role at your company or your customers' would benefit the most from automation of tasks and processes? Select 1 area and 1 role.

HR
HR Manager, Talent Acquisition Specialist, Employee Relations Specialist, Training and Development Coordinator, Compensation and Benefits Analyst, etc

CUSTOMER SERVICE
Customer Service Manager, Customer Success Manager, Customer Service Representative, Technical Support Analyst, etc

MARKETING
Marketing Manager, Content Strategist, Brand Manager, Digital Marketing Specialist, Market Research Analyst, etc

SUPPLY CHAIN
Supply Chain Manager, Logistics Coordinator, Inventory Manager, Distribution Manager, Demand Planner, etc

FINANCE
Chief Financial Officer (CFO), Financial Analyst, Accountant, Payroll Specialist, Budget Analyst, etc

PROCUREMENT
Procurement Manager, Purchasing Specialist,Vendor Relationship Manager, Contract Negotiation Specialist, Category Manager, etc

SALES
Sales Manager, Account Executive, Business Development Representative, Territory Sales Manager, Inside Sales Specialist, etc

IT
IT Manager, Systems Administrator, Cybersecurity Specialist, Software Developer, Data Analyst, etc

Define the target-user

⏳ 30 - 50 min   👥👥 In teams of 6 or less

STEPS

What does the selected business user need to achieve and what challenges get in the way?

- Describe an employee in the selected role using the mini persona template. Make sure to include at least 4 objectives the persona needs to achieve in the context of your topic / scenario or role (25 - 40 min).

- Discuss which objectives would benefit most from automation, using the challenges as a guide. Consider: which objectives face the most challenges, and which of those challenges could be addressed by automating tasks? Finally, select the objective that the agentic solution should support. (5 - 10 min)

Mini Persona – Example   ◇ App**Haus**

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?

- **Ensure quick and accurate resolution of customer inquiries to maintain high satisfaction ratings.**

- Reduce time spent on repetitive tasks to focus on solving complex customer issues and providing personalized service.

- 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 for special cases 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

PART 2

Identify the Agent's Tasks

On-Site / Virtual Session

Using the metaphor of 'hiring a super-specialist,' participants choose which tasks to keep and which to delegate to the specialist.

1. **Write down tasks**
   Participants write down tasks needed to achieve the objective, noting which to delegate to the super-specialist, collaborate on, or handle themselves.

2. **Select tasks**
   Participants select the key tasks where the super-specialist's help would be most valuable.

2. Identify the Agent's Tasks

⏳ **25 - 35 min**   👥 **In teams of 6 or less**

STEPS

Ⓐ **Introduce the metaphor** – 10 - 15 min
Use the provided slides to introduce the metaphor of "hiring a super-specialist" with special qualities. Explain these qualities as they are described in the Special Qualities Card Set and guide participants to explore them further using the provided cards. Although the specialist will ultimately be a digital AI agent, allow participants the freedom to decide how 'human' it should feel. Keep the nature of the specialist open, letting participants define it as they progress through the exercises.

Ⓑ **Write down tasks** – 15 - 20 min
Participants will 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. Tasks the persona would prefer to handle without assistance from the super-specialist
2. Tasks the persona would like to perform with the super-specialist's support
3. Tasks the persona would like to delegate almost entirely to the super-specialist, requiring minimal intervention from the persona.

Ask participants to use a different color of post-it for each category and place them in the corresponding section of the Task Collection Template. For the second and third categories, encourage participants to consider the super-specialist's unique qualities and maximize their potential.

Goal
Ideate tasks that could be automated or supported by an AI agent.

Outcome
A variety of task ideas.

Material
★ Tasks Collection template
★ Special Qualities Card Set
★ Pens, post-its

Tips
★ If the participants are not the end users, they should put themselves in the shoes of the persona for the remaining exercises.

★ It is recommended that participants use a different post-it color for each task category to differentiate the task types in the next exercises. If this is not possible, simply identify the types by their number (1 – 3)

2. Identify the Agent's Tasks

⧗ **25 - 40 min**   👥 **In teams of 6 or less**

STEPS

c **Identify tasks for the specialist** – 25 - 40 min
Prepare this exercise by drawing the 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 improvement in efficiency and quality of results (y axis) versus the level of autonomy expected from the specialist to carry them out (x 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 x 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 3 - 5 tasks where the super-specialist's intervention would have the greatest impact on efficiency and quality. The number of tasks selected depends on the time available and number of participants. Select 5 if you are running the 6 hours version and you have a team of 6 participants.
This exercise helps participants visualize which tasks would yield the highest value if supported by an AI agent.

Goal
Identify what tasks should be automated or supported by the AI agent.

Outcome
Top three to five tasks an AI agent should support with.

Material
★ Pens, post-its and whiteboard

Tips
★ Don't create task groups; keep tasks distinct and granular and only merge duplicates or combine very similar tasks together.
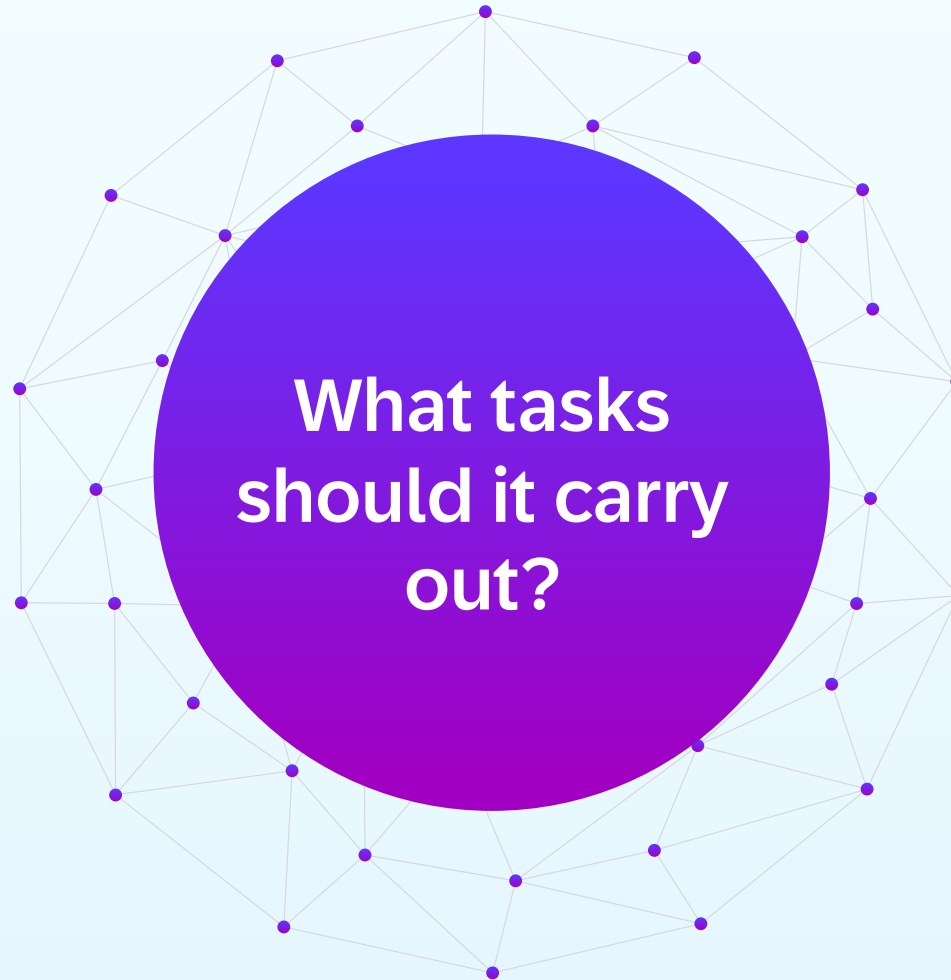
Imagine hiring a super-specialist to work alongside you, helping you achieve your objectives.

This isn't just any employee—it's a next-generation teammate with special qualities.

Imagine hiring a **super-specialist** that …

Figures out solutions on its own

Makes well-informed rational decisions

Reasons transparently

Interacts with its environment

What tasks should it carry out?

Acts with Hyper-Efficiency

Remembers Flawlessly

Interacts across mediums

Adapts Intelligently

Imagine hiring a super-specialist that …

AUTONOMOUS PROBLEM-SOLVING

Imagine hiring a super-specialist that…

Figures Out Solutions on Its Own

Breaks down high-level requests into clear, actionable step-by-step plans, minimizing the need for initial detailed input and adapting autonomously based on insights to deliver optimal results.

What tasks could it carry out?

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RATIONAL DECISION-MAKING

Imagine hiring a super-specialist that…

Makes Well-Informed Rational Decisions

Combines quick data analysis, reasoning, planning, and access to applications to identify the best way to solve a problem or reach a goal.

What tasks could it carry out?

AppHaus — SAP

TRANSPARENT REASONING

Imagine hiring a super-specialist that…

Reasons Transparently

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

What tasks could it carry out?

AppHaus — SAP

INTEGRATED AWARENESS

Imagine hiring a super-specialist that…

Interacts with Its Environment

Unlocks additional capabilities by collaborating with humans, systems, and other superspecialists to achieve integrated solutions.

What tasks could it carry out?

AppHaus — SAP

HYPER-EFFICIENT EXECUTION

Imagine hiring a super-specialist that…

Acts with Hyper Efficiency

Executes repetitive and time-consuming work autonomously with speed, precision and quality, while allowing you to stay in control of key decisions.

What tasks could it carry out?

AppHaus — SAP

FLAWLESS MEMORY

Imagine hiring a super-specialist that…

Remembers Flawlessly

Remembers and recalls detailed information from past interactions to provide continuity and context in current ones.

What tasks could it carry out?

AppHaus — SAP

ADAPTIVE INTELLIGENCE

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

What tasks could it carry out?

AppHaus — SAP

MULTIMODAL INTERACTIVITY

Imagine hiring a super-specialist that…

Interacts Across Mediums

Seamlessly interacts across text, voice, and visual formats to suit your needs, making communication smooth and intuitive.

What tasks could it carry out?

AppHaus — SAP

SUPER-SPECIALIST

Special 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?

AppHaus — SAP

Imagine hiring a super-specialist that ...

Special Quality ←

RATIONAL DECISION-MAKING

Imagine hiring a super-specialist that...

Makes Well-Informed Rational Decisions

Combines quick data analysis, reasoning, planning, and access to applications to identify the best way to solve a problem or reach a goal.

What tasks could it carry out?

Question for ideation ←

AppHaus   SAP

RATIONAL DECISION-MAKING
EXAMPLE SCENARIO

TASKS REQUIRING SOLUTION PROPOSALS BASED ON INFORMATION ANALYSIS

Fixing Customer Inquiry Delays
The superspecialist identifies delays caused by misrouted support tickets. By analyzing support logs, ticket categorizations, and routing workflows, it pinpoints the problem and updates the system's routing rules autonomously, ensuring inquiries reach the right agent faster.

→ **Type of task that could profit from the quality**

→ **Example task that leverages the special quality**

Brainstorm tasks

⏳ **15 - 20 min**   👥 **In teams of 6 or less**

STEPS

What tasks are needed to achieve the selected objective?

- Write the selected objective in the Tasks Collection Template

- 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 and use a different color for each type:
  - tasks that the persona would like to do without assistance from the super-specialist.
  - tasks that the persona would like to do with the super-specialist support
  - tasks that the persona would like to delegate to the super-specialist, maintaining only minimal oversight.

- Get inspiration for the last 2 types by selecting a special quality and writing down tasks that could leverage it.

Tasks Collection Template – Example

⬡ AppHaus

Objective: *Ensure quick and accurate resolution of customer inquiries to maintain high satisfaction ratings.*

What tasks are needed to achieve the selected objective?
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 I'd rather do on my own
What tasks could the persona do without assistance from the super-specialist?
(write 3 -4 tasks)

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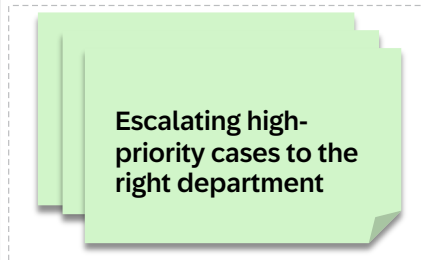
Example: Escalating high-priority cases to the right department.

2. Tasks I'd like to do with the super-specialist's support
What tasks could the super-specialist support to achieve more effective and faster results?
(write 3 -4 tasks)

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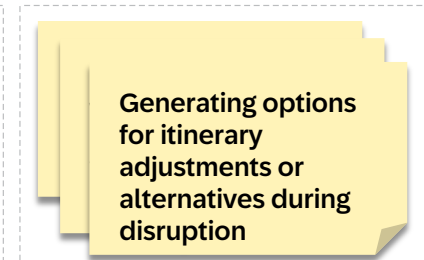
Example: Generating options for travel itinerary adjustments or alternatives during disruption

3. Tasks I'd like to delegate to the super-specialist
What tasks could be delegated to the super-specialist with minimal intervention required from the persona?
(write 3 -4 tasks)

Generating and sending follow-up emails to confirm resolved inquiries
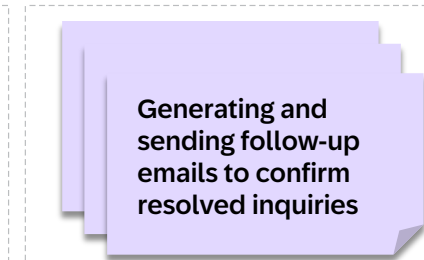
Example: Generating and sending confirmation e-mails for resolved inquiries.

Are you leveraging enough of the Special Qualities?
Check the corresponding card for more information on each quality

Autonomous Problem Solving	Rational Decision-Making	Transparent Reasoning	Multimodal Interactivity
Integrated Awareness	Hyper-Efficient Execution	Flawless Memory	Adaptive Intelligence

---

Identify tasks for the super-specialist
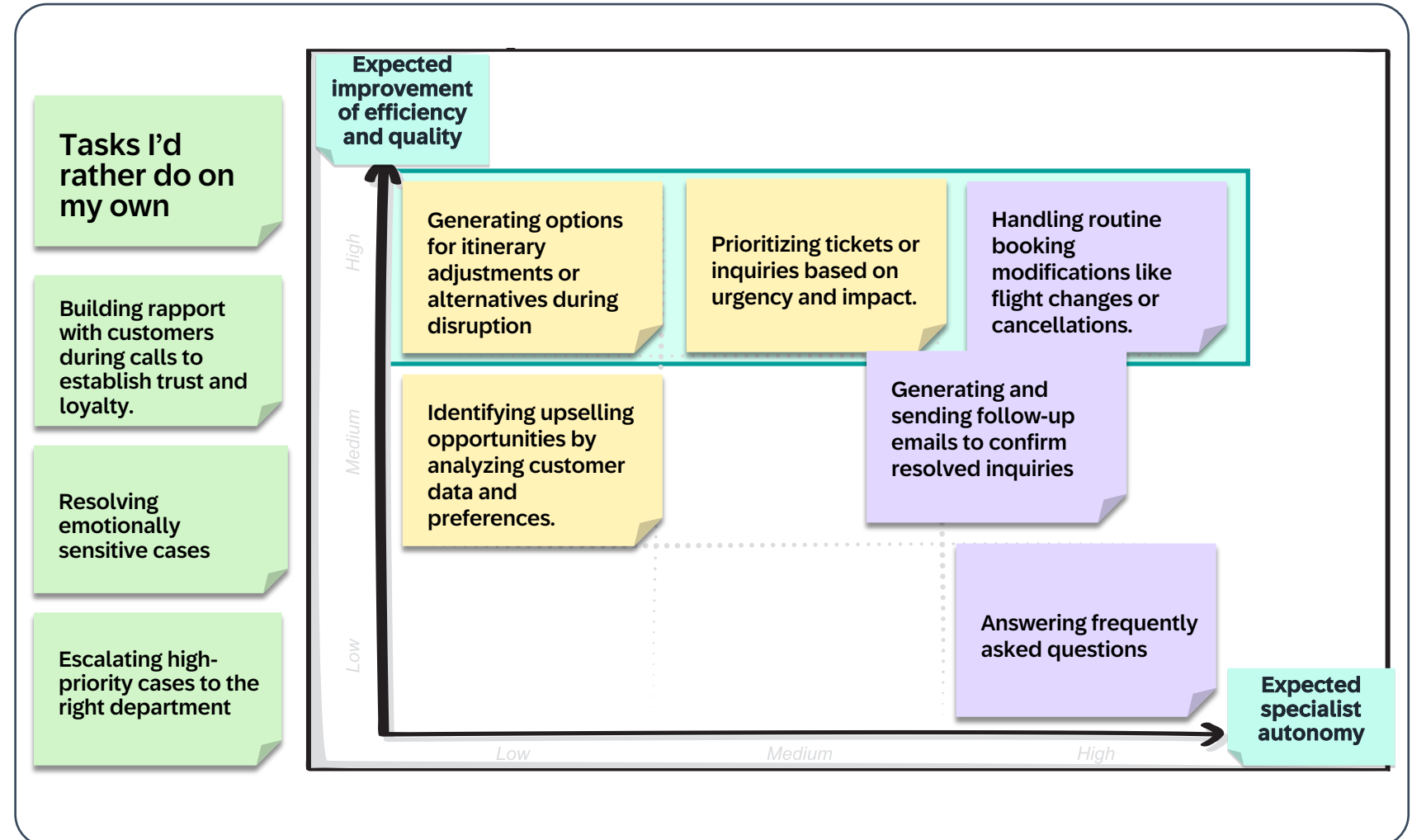
⏳ **25 - 40 min**   👥 **In teams of 6 or less**

STEPS

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

- Share your tasks with the team. Place the tasks from the first tye outside the heatmap. Place the tasks that require intervention from the specialist on the heatmap based on the dimensions shown. (3 - 5 min for each participant). Think: **how much would the specialist's intervention improve the efficiency and quality of results?** Discard duplicates as you share and check if any tasks should be combined. (20 - 30 min)

- Select the top 3 - 5 tasks where the intervention of the specialist could impact the efficiency and quality the most. (5 - 10 min)

Tasks I'd rather do on my own

Building rapport with customers during calls to establish trust and loyalty.

Resolving emotionally sensitive cases

Escalating high-priority cases to the right department

Expected improvement of efficiency and quality

High

Generating options for itinerary adjustments or alternatives during disruption

Prioritizing tickets or inquiries based on urgency and impact.

Handling routine booking modifications like flight changes or cancellations.

Medium

Identifying upselling opportunities by analyzing customer data and preferences.

Generating and sending follow-up emails to confirm resolved inquiries

Low

Answering frequently asked questions

Expected specialist autonomy

Low   Medium   High

PART 3

Describe the Agent's Job

On-Site / Virtual Session

Fill out a job description to hire the super-specialist, outlining what it will need to do and how.

CORE ACTIVITIES

1. **Fill-out the job profile**
   As a team, participants create a job profile to hire a supper-specialist, outlining key details such as the job title, main responsibilities, required skills and competencies, essential knowledge, and preferred working style.

3. Describe the Agent's Job

30 - 45 min   **In teams of 6 or less**

STEPS

(A) **Fill out the job profile** – 30 - 45 min
Guide participants as they collaboratively fill out the job profile, starting with the Job Title and Main Responsibility sections, and leaving Job Assessment and Trust & Control for the end. This profile will be a helpful reference when configuring your agent, as most sections align with its configuration details.

- **Job title:** Give the super-specialist a name that reflects its primary function. This can be a straightforward role like "Customer Service Specialist" or something more creative and engaging, such as "Travel Genius".

- **Main responsibility / expertise:** Define the primary goal or purpose of the agent based on the objective and tasks. Keep it concise to maintain focus. Example: "Optimize customer service efficiency by providing accurate, timely support and enhancing the customer experience through automated and data-driven solutions."

- **Tasks:** Place selected tasks here. Differentiate between those tasks the specialist will collaborate with the user on and those that will be delegated to the specialist. You can use color coding or a mark on the post-its as needed.

- **Working style and attitude:** Describe the agent's behavior, tone of voice, and interaction style, including what should be avoided. Example: "Use examples to facilitate understanding" or "Be concrete when providing ideas".

Goal
Create a job profile to define the super-specialist's role, responsibilities, skills, knowledge, and the level of control desired over its tasks.

Outcome
Description of the super-specialist to be hired (agent to be configured)

Material
★ Job Profile Template
★ Special Capabilities Card Set
★ Pens

Tips
★ While the specialist will ultimately be a digital AI agent, this exercise encourages participants to envision it as an employee they'd hire. Allow flexibility in how 'human' it should feel and act. Keep the specialist's nature open, letting participants define it as they progress through the exercise.

3. Describe the Agent's Job

STEPS (continued)

- **Skills and knowledge:** Describe the tools, capabilities, and foundational knowledge the specialist needs to fulfil tasks effectively. Include both skills the agent should excel at and the knowledge or data it must access, whether pre-loaded or acquired over time. Example: "Skilled at analyzing performance data using tools like Excel, Power BI." or "Knowledge about travel restrictions and rules." Encourage participants to use the super-specialist capability cards to come-up with ideas for this section.

- **Trust and control:** Indicate the desired level of control over task execution. Select between "Full Control" (user oversees every step), Medium Control (users intervene in few steps, for example, to provide information or feedback) to "Low or no Control" (minimal oversight, users only check the result), adding explanations explaining what needs to be controlled in each case if necessary. This information is useful when creating the interaction flow, however, if you have limited time you can skip this part.

- **Job expectations:** Define what participants consider a poor, acceptable, and excellent outcome from the agent for the different tasks, with examples for each. This will help to evaluate the agent's results later in the project.

FOR COACH

⏳ **30 - 45 min**   👥 **In teams of 6 or less**

Goal
Create a job profile to define the super-specialist's role, responsibilities, skills, knowledge, and the level of control desired over its tasks.

Outcome
Description of the super-specialist to be hired (agent to be configured)

Material
★ Job Profile Template
★ Special Capabilities Card Set
★ Pens

Tips
★ While the specialist will ultimately be a digital AI agent, this exercise encourages participants to envision it as an employee they'd hire. Allow flexibility in how 'human' it should feel and act. Keep the specialist's nature open, letting participants define it as they progress through the exercise.

Create a job profile

⏳ **30 - 45 min**   👥 **In teams of 6 or less**

STEPS

What super-specialist do you need to hire to carry out the tasks successfully and how will you evaluate it?

- Now that you have identified the tasks or activities you need help with, it's time to create a job posting to hire the specialist. Complete both parts of the job profile as a team. (40 min)

- Use the super-specialist capability cards to come-up with ideas for the Skills and knowledge area.

Super Specialist Job Profile (Evaluation) – Example ◇ AppHaus

Trust and Control
How much control do you want to have over the execution of the tasks and why?
For each task, select between full control, medium control, low or no control and explain what needs to be controled if necessary

	Need for control
	Ensure suggested options align with customer preferences and policies.
	Verify recommendations are relevant and customer-focused if needed.
	Fully automated. Responses are straightforward and predefined.
	Ensure booking changes comply with customer input and company policies.
	Fully automated. emails are standardized.

...ould be a terrible job, an acceptable job and an awesome job.

	Awesome Job
...ons, but occasionally ...ties.	Offers precise and useful itinerary options instantly.
... moderate accuracy	Consistently identifies high-value upsell opportunities tailored to customer preferences.
...correctly but ...plex questions.	Answers FAQs flawlessly, with proactive and insightful suggestions.

Super Specialist Job Profile (Job Description) – Example ◇ AppHaus

Job Description
What is the main role of the super specialist?

Job Title:
Customer Service Specialist

Main Responsibility / Expertise:
Optimize customer service efficiency by providing accurate, timely support and enhancing the customer experience through automated and data-driven solutions.

Tasks
What will the super specialist do as part of its job?
- Generate itinerary adjustment options during travel disruptions.
- Identify upselling opportunities by analyzing customer data and travel preferences.
- Answer frequently asked questions (travel policies, bookings, and general inquiries)
- Handle routine booking modifications such as flight changes or cancellations.
- Generate and send follow-up emails to confirm resolved inquiries.

Working Style and Attitude
How should the super specialist behave?

SHOULD:
- Be responsive, proactive, and solution-focused.
- Have friendly and welcoming tone, but straightforward
- Communicate decisions transparently to build trust.
- Collaborate effectively with the human agent by sharing insights and updates.
- Adapt easily to customer preferences and evolving requirements.

What should the super specialist avoid doing?

SHOULD NOT:
- Make assumptions without verifying key details.
- Overstep human oversight in high-stakes or emotionally sensitive situations.
- Overload the customer with unnecessary information or options.

Skills and Knowledge
What should the super specialist be good at or able to do? What does it need to know or learn about?

- Expert in using travel booking systems (modifying bookings, lookig for availability data, checking policy compliance, generating custom itineraries, identify upsell opportunities)
- Knowledge about:
  - Airline and hotel industry rules, such as baggage allowances, visa requirements, or travel restrictions
  - Current travel policies, including airline rebooking, cancellation rules, and refund eligibility.
  - Real-time flight and hotel availability
  - Customer history, including past bookings, preferences, and feedback
- Learn customer behavior patterns to suggest upsell opportunities.
- Able to analyze and synthesize vast amounts of travel data quickly.
- Predict customer needs and tailor responses accordingly.

See example: https://apphaus.sap.com/wp-content/uploads/2024/12/Specialist-Job-Profile_EXAMPLE_A3.pdf

Skills and knowledge: What capabilities are relevant for you?

The super-specialist could...

Analyze Information in Seconds

It could process and analyze vast amounts of information instantly to uncover patterns, trends, or actionable insights.

What information needs to be analyzed? What insights should be uncovered?

AppHaus — SAP

The super-specialist could...

Retrieve Knowledge Instantly

It could store, organize, and instantly retrieve information from documents, websites and other applications, acting as a dynamic knowledge base.

What should your specialist be knowledgeable about? What sources does it need?

AppHaus — SAP

The super-specialist could...

Generate Creative Output

It could create unlimited creative output instantly on demand, such as novel ideas, stunning designs, or compelling content tailored to specific goals.

What creative outputs need to be generated? What formats or styles are required?

AppHaus — SAP

The super-specialist could...

Guide Proactively

It could anticipate user needs offering well-reasoned, personalized suggestions or support based on data and goals before being explicitly asked.

What needs should be anticipated? What kind of guidance could be valuable?

AppHaus — SAP

The super-specialist could...

Predict Outcomes

It could use historical and real-time data to anticipate future trends, behaviors, or potential outcomes.

What outcomes need to be predicted? What data influences the predictions?

AppHaus — SAP

The super-specialist could...

Calculate Instantly

It could perform any mathematical calculation with unmatched precision and speed, solving complex equations or analyzing data effortlessly.

What calculations are needed and why?

AppHaus — SAP

The super-specialist could...

Execute Code Seamlessly

It could run and evaluates JavaScript code with precision, enabling dynamic interactions, automations, or real-time computations.

What types of code should it handle?

AppHaus — SAP

The super-specialist could...

Interact with Systems

It could integrate with databases, APIs, and proprietary systems, seamlessly accessing and interacting with the data you need.

What systems should it integrate with? What data interactions are needed?

AppHaus — SAP

SUPER-SPECIALIST

Special Capabilities

Explore, select and define the extraordinary capabilities that will enable your super-specialist to execute the assigned tasks with precision and efficiency.

What capabilities are relevant for you?

AppHaus — SAP

Skills and knowledge: What capabilities are relevant for you?

Special Capability ←

The super-specialist could...

Generate Creative Output

It could create unlimited creative output instantly on demand, such as novel ideas, stunning designs, or compelling content tailored to specific goals.

Question for thought ←

What creative outputs need to be generated? What formats or styles are required?

AppHaus — SAP

GENERATE CREATIVE OUTPUT
EXAMPLE SCENARIO

→ **Example scenario where the capability is used.**

Generating Campaign Ideas
A content creator requests ideas for a social media campaign. The superspecialist generates catchy slogans and visual concepts aligned with the brand's tone and goals.

PART 4

Define the Interaction with the agent

On-Site / Virtual Session

Describe how the user interacts with the hired super-specialist to get the selected tasks done.

CORE ACTIVITIES

1. **Check for task combinations**
   As a team, participants identify tasks that could occur in sequence and group them as part of the same flow.

2. **Distribute the task flows**
   If possible, divide the team in pairs so each pair work on a task flow simultaneously.

3. **Define the interaction flows**
   Participants create a step-by-step flow showing how the end-user interacts with the super-specialist to complete the selected tasks.

4. **Share-out**
   Participants share the interaction flows with the entire team.

4. Define the Interaction with the agent

5 min　　**In teams of 6 or less**

STEPS

(A) **Form groups of related tasks** – 5 min

This section brings together all previous exercises. Using insights from the persona and job profile, participants create interaction flows that illustrate how the user interacts with the AI agent to complete a task, including user instructions, agent tools, and questions from the agent.

First, ask participants to review the tasks assigned to the specialist in the job profile, grouping those that should occur in sequence or that depend on each other and therefore could be covered in one interaction flow. For example, for a Learning and Development Consultant, 'Create a learning path that fits my needs' could be grouped with 'Assign most visited courses to my learning path,' showing how the agent assigns courses based on user preferences and company needs to ultimately create a learning path that helps the end-user.

Once tasks are grouped, divide participants into small teams of up to three to work on different flows simultaneously. If the team is already small, allocate sufficient time to complete all flows (at least 20 minutes per flow).

Goal
Determine the number and scope of necessary interaction flows.

Outcome
Agreement on the grouping and number of tasks to use for the interaction flows.

Material
★ Pens, post-its and whiteboard

Coach Instructions

4. Define the Interaction with the agent

STEPS

B **Map the interaction step-by-step** – 20 - 55 min

Using the Interaction Flow template, participants describe step-by-step how a task is completed with the help of the super-specialist. Participants should start with the Trigger, then continue to the Moment of Success and then move to the Steps and describe each step from trigger to moment of success, including actions, instructions, and responses from both the user and the specialist, and consider the specialist's behavior described in the job profile.

For each step, participants should indicate if it's a persona or a super-specialist step, and for each persona step think: can this action be covered or supported by the super-specialist or is this a "human in the loop" step? Review the Trust and Control section of the Job Profile to confirm if all the envisioned control actions from the persona are included. It's important for participants to consider when the persona should be involved and why. However, it's perfectly fine if a flow consists mostly of super-specialist steps, especially if the agent operates in the background without requiring user initiation.

Point participants to the possible actions for both actors at the bottom of the template for inspiration. For each step, participants should check the tools and data — resources the specialist accesses to support with the tasks. Derive this information from the 'Skills and knowledge' sections of the job profile.

If time allows, check which special qualities are being leveraged and think if you can improve the flow by leveraging more of them.

Finally, have participants share the flows with the entire team to get feedback.

FOR COACH

⏳ **55 min**   👥 **In teams of 6 or less**

Goal
Define the interaction with the agent to complete the tasks, step by step.

Outcome
An interaction flow per task, indicating interaction steps, tools and data needed by the agent.

Material
★ [Interaction Flow Template](#)
★ Pens, post-its and whiteboard

Tips

Use these guiding questions to create the flows:
★ **Trigger:** What action initiates the interaction with the super-specialist and from which system?
★ **Moment of success:** What does a successful task completion look like? What does the user achieve with the specialist's help, and how?
★ **Steps:** What instructions does the user give the specialist? What should the specialist ask or do in response? What does the user need to review or confirm?
★ **Tools and Data:** What tools and information does the specialist need to complete the steps?

Interacting with the Super-Specialist

⌛ 45 - 60 min   👥 In teams of 6 or less

STEPS

How does the persona interact with the super-specialist to get the tasks done?

- Decide which tasks should be combined in one flow. Distribute the flows for simultaneous work. (5 min)

- Describe step-by-step how the persona interacts with the specialist. Start with the Trigger, continue with the Moment of Success and finally complete the Steps. Check the possible actions for both actors at the bottom of the template for inspiration. For each persona step think: can this action be covered or supported by the super-specialist or is this a "human in the loop" step? Once the flow is complete, check which special qualities you are leveraging and if you could leverage more. (35 min)

- Share the flows with the team (max 5 min per flow)

See example: https://apphaus.sap.com/wp-content/uploads/2024/12/InteractionFlow_EXAMPLE_A3.pdf

Task Flow – guiding questions

Use these guiding questions to create the flows:

- **Trigger:** What action initiates the interaction with the super-specialist and from which system?

- **Moment of success:** What does successful task completion look like? What does the user achieve with the specialist's help, and how?

- **Steps:** What instructions does the user give the specialist? What should the specialist ask or do in response? What does the user need to review or confirm?

- **Tools and Data:** What tools and information does the specialist need to complete the steps?

4

Next Steps

Follow-up exercises and activities to make the agent real

PART 5

Next Steps

On-Site / Virtual Session

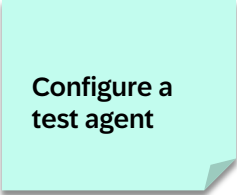Define follow-up activities and action items.

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.

Possible follow-up activities

ACTION ITEMS				
WHAT	Solution Concept Diagram	Configure a test agent	Vision Storyboard (Pitch)	
WHEN				
WHO				

Next Step Matrix

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.

How to convert the workshop output into an agent?

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.

Although you can configure an agent using many different tools (e.g. Microsoft Copilot, Chat GPT, etc), the following pages use the SAP Project Agent Builder (Lab Preview), an SAP tool where you can test your agent.

Agent

system prompt

tools

Business AI Agent Design Workshop
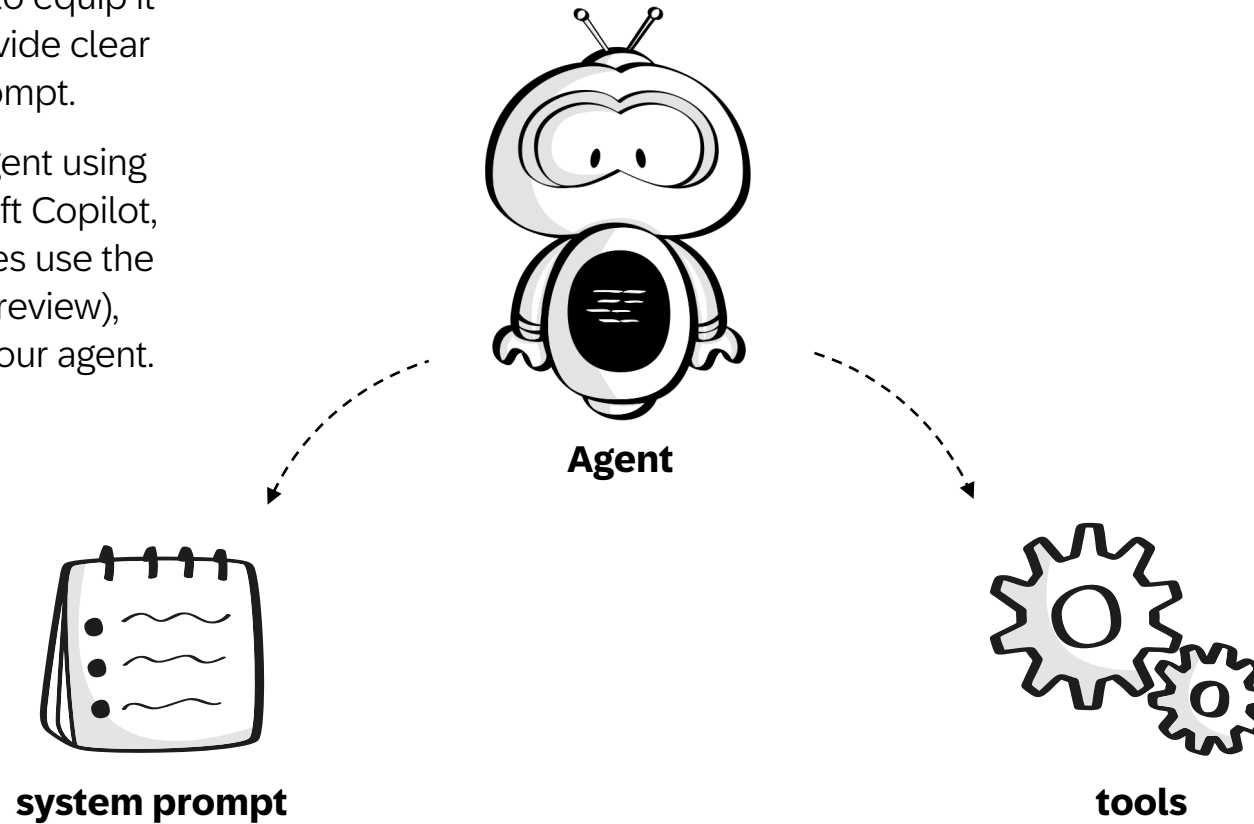
From workshop to agent configuration

Job title ⟶

Main Responsibility / Expertise ⟶

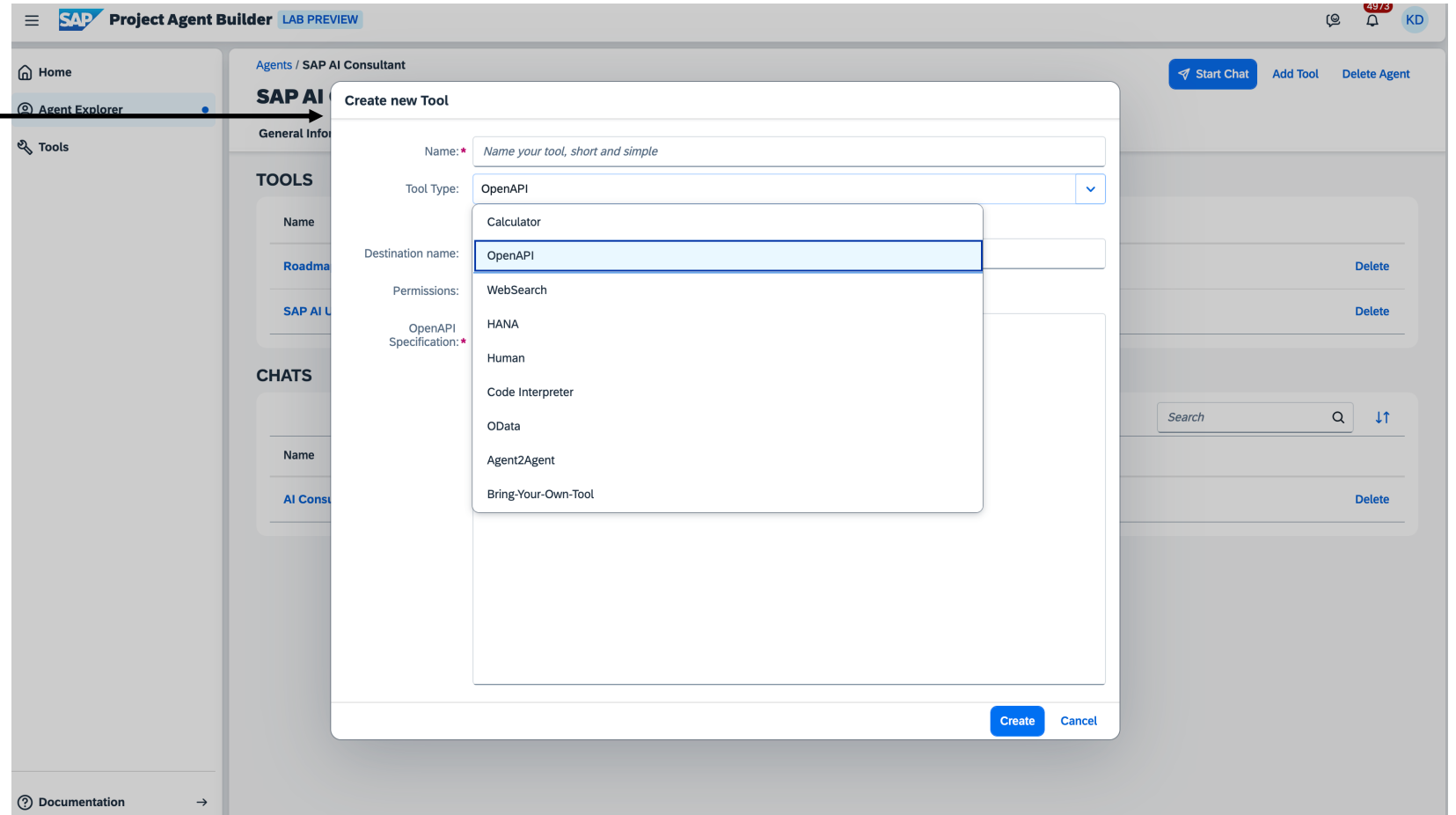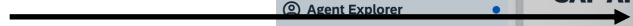Tasks + Working style and attitude + Knowledge + Interaction flow ⟶

Business AI Agent Design Workshop

From workshop to agent configuration

Skills and Knowledge / Tools & Data

Agent system prompt template

The system prompt is a foundational instruction set that defines the behavior, tone, and scope of tasks the agent should perform. It ensures it aligns with user expectations and goals. A well-crafted system prompt is essential for configuring the agent effectively, as it establishes clear boundaries, priorities, and operational guidelines.

This ensures the agent consistently delivers accurate, relevant, and context-aware support while staying on task. Here is a structure you can use to create the system prompt using the information from the Job Profile and Interaction Flows. Test and iterate your prompt until it yields the most optimal results.

Background

You are a [role / name] **with in-depth knowledge / experience in / focusing on** [main knowledge needed].
Your goal is / you are an expert in [main responsibilities / expertise]
You characterize yourself by [working style and attitude]

Task execution and use of tools

- **First,** [first step in the flow].
Then / Next [second step in the flow]...

- **Use the** [tool / resource] to....

- **Make sure to** [important considerations]

- **When** [doing task], consider...

Final Answer

Finally [last step / deliverable in flow].

Agent system prompt template example

Background

Introduce the agent and assign it an expertise.

(1) You are a [Customer Service Specialist]
(2) with in-depth knowledge of [airline and hotel industry rules and requirements and current travel policies].

(3) You are an expert in [providing accurate and timely support on travel-related inquiries, optimizing the the customer service efficiency and experience]

(4) You characterize yourself by [being responsive, proactive, and solution-focused. You have friendly and welcoming tone, but are straightforward and communicate decisions transparently to build trust. You sharing insights and updates often and Adapt easily to customer preferences and evolving requirements.

Super Specialist Job Profile (Job Description) – Example — AppHaus

Job Description
What is the main role of the super specialist?

Job Title:
(1) Customer Service Specialist

Main Responsibility / Expertise:
(3) Optimize customer service efficiency by providing accurate, timely support and enhancing the customer experience through automated and data-driven solutions.

Tasks
What will the super specialist do as part of its job?
- Generate itinerary adjustment options during travel disruptions.
- Identify upselling opportunities by analyzing customer data and travel preferences.
- Answer frequently asked questions (travel policies, bookings, and general inquiries)
- Handle routine booking modifications such as flight changes or cancellations.
- Generate and send follow-up emails to confirm resolved inquiries.

Working Style and Attitude
How should the super specialist behave?

(4) Should:
- Be responsive, proactive, and solution-focused.
- Have friendly and welcoming tone, but straightforward
- Communicate decisions transparently to build trust.
- Collaborate effectively with the human agent by sharing insights and updates.
- Adapt easily to customer preferences and evolving requirements.

What should the super specialist avoid doing?

Should not:
- make assumptions without verifying key details.
- overstep human oversight in high-stakes or emotionally sensitive situations.
- overload the customer with unnecessary information or options.

Skills and Knowledge
What should the super specialist be good at or able to do? What does it need to know or learn about?

- Expert in using travel booking systems (modifying bookings, lookig for availability data, checking policy compliance, generating custom itineraries, identify upsell opportunities)
- Knowledge about:
(2) - airline and hotel industry rules, such as baggage allowances, visa requirements, or travel restrictions
  - Current travel policies, including airline rebooking, cancellation rules, and refund eligibility.
  - Real-time flight and hotel availability
  - Customer history, including past bookings, preferences, and feedback
- Learn customer behavior patterns to suggest upsell opportunities.
- Able to analyze and synthesize vast amounts of travel data quickly.
- Predict customer needs and tailor responses accordingly.

Agent system prompt template

Task execution and use of tools

Indicate what tools the agent should when and how. If you need to stick very closely to the flow you defined, indicate the steps by using words like: first, as second step, then..., once... , after..., etc

(5)
- Use the booking system tool to search for available flights or hotels
- Always check against your knowledge about airline policies and rebooking fees to determine the price changes when rebooking
- (etc)

Interaction Flow – *Example* ◇ App**Haus**⌐

Tasks: *Generate itinerary adjustment options during travel disruptions.*

Trigger	Steps	Tools & Data	Moment(s) of Success
What situation triggers the interaction with the super-specialist or its use and how is the interaction initiated?	*What does the user do or say? / What does the super-specialist do or say? Indicate whether it's a human or a super-specialist step.*	*What data / systems does the super-specialist need to access in this step?*	*What does the successful task completion look like? What does the user achieve with the specialist's help?*
A customer calls Alex reporting a flight cancellation and requesting rebooking options. Alex initiates the interaction with the specialist by opening the travel agency's internal chat interface.	**1** Inputs the flight cancellation details (flight number, date, and customer preferences) into the super-specialist interface.	Flight cancellation details. Customer preferences (e.g., preferred airlines, timeframes, seat class).	Alex provides the customer with two or three viable rebooking options within minutes, maintaining the customer's satisfaction and trust.
	2 Queries airline databases to find available flights matching the criteria.	Airline booking systems and real-time availability databases.	
	3 Provides 2-3 flight options based on customer preferences and system availability.	Rules for rebooking (e.g. airline policies on rebooking fees).	
	4 Alex evaluates the options provided, ensuring they align with the customer's needs.	Customer's travel history and preferences from CRM.	The customer receives a confirmation within minutes with the updated booking.
	5 Shares the options with the customer and confirms their choice.		
	6 Executes the selected rebooking, sends a confirmation email to the customer, and updates the booking system.	Airline systems for booking execution. Email templates for rebooking confirmations.	

Possible super-specialist actions: Analyze information, Retrieve knowledge, Generate creative output, Provide guidance proactively, Predict outcomes , Perform calculations, Execute / evaluate code, Interact with systems

Possible human actions: Give instructions, Review results, Make a decision, Interact with another person / system

Agent system prompt template

Final Answer

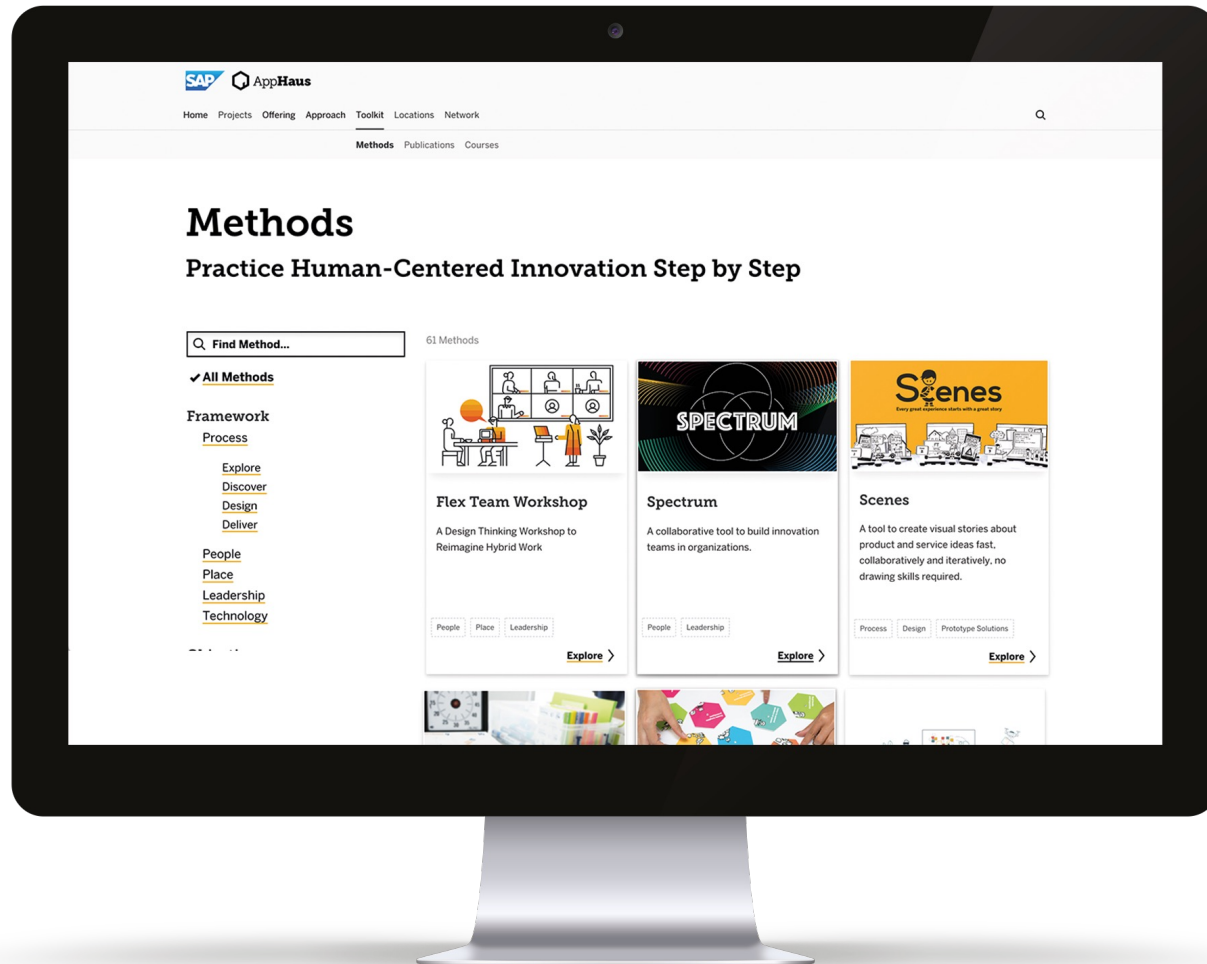Indicate any considerations needed for the agent's final output in an interaction

(6) • When providing your final answer to the customer, ensure that it includes all the alternative options provided

Interaction Flow – *Example* ⬡ App**Haus**

Tasks: *Generate itinerary adjustment options during travel disruptions.*

Trigger	Steps	Tools & Data	Moment(s) of Success
What situation triggers the interaction with the super-specialist or its use and how is the interaction initiated?	*What does the user do or say? / What does the super-specialist do or say? Indicate whether it's a human or a super-specialist step.*	*What data / systems does the super-specialist need to access in this step?*	*What does the successful task completion look like? What does the user achieve with the specialist's help?*
A CUSTOMER CALLS ALEX REPORTING A FLIGHT CANCELLATION AND REQUESTING REBOOKING OPTIONS. ALEX INITIATES THE INTERACTION WITH THE SPECIALIST BY OPENING THE TRAVEL AGENCY'S INTERNAL CHAT INTERFACE.	**1** INPUTS THE FLIGHT CANCELLATION DETAILS (FLIGHT NUMBER, DATE, AND CUSTOMER PREFERENCES) INTO THE SUPER-SPECIALIST INTERFACE.	FLIGHT CANCELLATION DETAILS. CUSTOMER PREFERENCES (E.G., PREFERRED AIRLINES, TIMEFRAMES, SEAT CLASS).	ALEX PROVIDES THE CUSTOMER WITH TWO OR THREE VIABLE REBOOKING OPTIONS WITHIN MINUTES, MAINTAINING THE CUSTOMER'S SATISFACTION AND TRUST.
	2 QUERIES AIRLINE DATABASES TO FIND AVAILABLE FLIGHTS MATCHING THE CRITERIA.	AIRLINE BOOKING SYSTEMS AND REAL-TIME AVAILABILITY DATABASES.	
	3 PROVIDES 2-3 FLIGHT OPTIONS BASED ON CUSTOMER PREFERENCES AND SYSTEM AVAILABILITY.	RULES FOR REBOOKING (E.G., AIRLINE POLICIES ON REBOOKING FEES).	
	4 ALEX EVALUATES THE OPTIONS PROVIDED, ENSURING THEY ALIGN WITH THE CUSTOMER'S NEEDS.	CUSTOMER'S TRAVEL HISTORY AND PREFERENCES FROM CRM.	THE CUSTOMER RECEIVES A CONFIRMATION WITHIN MINUTES WITH THE UPDATED BOOKING.
	5 SHARES THE OPTIONS WITH THE CUSTOMER AND CONFIRMS THEIR CHOICE.		
	(6) EXECUTES THE SELECTED REBOOKING, SENDS A CONFIRMATION EMAIL TO THE CUSTOMER, AND UPDATES THE BOOKING SYSTEM.	AIRLINE SYSTEMS FOR BOOKING EXECUTION. EMAIL TEMPLATES FOR REBOOKING CONFIRMATIONS.	

Possible super-specialist actions:	Possible human actions:
Analyze information, Retrieve knowledge, Generate creative output, Provide guidance proactively, Predict outcomes , Perform calculations, Execute / evaluate code, Interact with systems	Give instructions, Review results, Make a decision, Interact with another person / system

Other Business AI workshop formats in the Innovation Toolkit

Business AI Explore Workshop

https://apphaus.sap.com/resource/business-ai-explore-workshop

Business AI Design Workshop

https://apphaus.sap.com/resource/business-ai-discover-and-design-workshop

Business AI Agent Design Workshop
Coming Soon

Contact
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https://apphaus.sap.com/toolkit/methods