

HUMANS + AI IN FOLLOW-UP

The AI Agent Context Brief

Brief your AI agent the way you would brief your best rep: who the person is, why they came to you, what changed, and when to hand off.

Companion to the article [Your AI Agent Is Only as Good as the Context You Give It](#)

STEP 1 Fill in the brief for one segment

Start with one group, such as past customers from two or more years ago.

Segment	
Who they are	
Identity facts you have	
How they came to us	
Source and original reason	
What they bought or asked	
And when	
What has changed	
Events since last contact	
What we want next	
The one outcome to aim for	
What qualifies them	
When to hand off	
And to whom	

Blind vs. briefed

Same person, same channel, same AI.

Blind:

"Hi Dana, just checking in. Are you still interested?"

Briefed:

"Hi Dana, it's been about two years since we installed your furnace. Most systems that age are due for a check before winter. Want me to get you on the schedule?"

The difference: the first asks her to do the work. The second gives her a reason to answer.

STEP 2 Check which layers of context you have

LAYER	EXAMPLE	DO YOU HAVE IT?
Identity	Verified name, mobile, email, address	☐ Yes ☐ Partly ☐ No
History	Purchases, quotes, past conversations	☐ Yes ☐ Partly ☐ No
Reason	Why they first contacted you	☐ Yes ☐ Partly ☐ No
Change	Moved, new job, family, contract ending	☐ Yes ☐ Partly ☐ No
Your goal	Offer, qualifiers, the next step you want	☐ Yes ☐ Partly ☐ No

STEP 3 Write the guardrails

- ☐ Never quote prices, rates or terms it was not given
- ☐ Never give legal, tax or financial advice
- ☐ Only use channels you have consent for
- ☐ Respect quiet hours in the contact's time zone
- ☐ Hand off when someone asks for a person
- ☐ Hand off on any complaint or sensitive topic
- ☐ Identify as an AI assistant where required

Rules vary by state and country. Check consent and disclosure rules with your counsel. This is general guidance, not legal advice.

STEP 4 The handoff brief

What the agent passes to your rep. Nobody should have to repeat themselves.

Who

What they said

What they want

Agreed next step

Notes for the rep

STEP 5 Review the first 50 conversations

CHECK	CONVERSATIONS 1-10	11-25	26-50	FIX NEEDED
Facts were accurate				
Tone matched your brand				
Handoffs happened at the right moment				
Opt-outs and quiet hours were respected				

See an AI agent that starts with context

Hazel, the AI sales agent inside Agent Legend, reviews what we know about each contact before the first message goes out.

agentlegend.com/book-a-demo