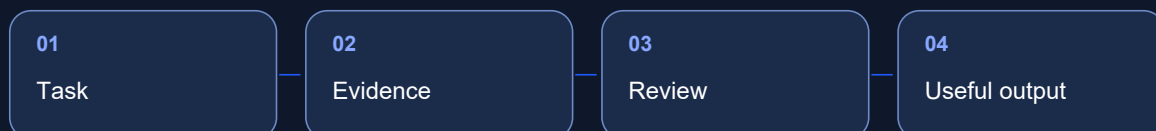


How do you brief an AI agent to research a prospect?

A practical guide to a sales-research harness: the task, evidence, tools, review points and stop rules. Includes a reusable text brief.

PIPELINE & AI



A practical worksheet for the next account, campaign or conversation.

The problem

An assistant produces a fluent account summary, but nobody can tell which claims came from current sources or what the next action should be.

What it costs the team

Unsupported research passes into outreach and the CRM, creating work for the seller and an awkward first conversation for the buyer.

What you will have at the end

A reusable account-research brief with acceptance checks and a simple pilot plan.

01 / THE METHOD

What does an AI sales agent need besides a prompt?

Give it a defined research job, permitted sources and tools, a place to keep evidence and an output you can inspect. Specify what it may prepare and what needs approval. For sales research, require a source for each factual claim and preserve unknowns instead of filling them with plausible text.

1. Define one job

Start with “research these named accounts and prepare a sourced note” rather than “run sales”. Specify the offer, target sector and exact output. A fixed research workflow may be sufficient when the steps are known.

2. Supply the context

Give the assistant the campaign brief, existing account record and approved product facts. Keep customer data and credentials within the tools and permissions your organisation has approved. State what is missing.

3. Choose sources and tools

List the sources it can read and the checks each supports. A register supports a filing fact; the company website supports its own stated services. Require the source URL, date checked and relevant evidence for each factual row.

4. Make the harness explicit

The harness is the surrounding system that supplies tools, task state, stored evidence and review controls. It can keep a completed note, show a failed lookup and stop for a missing permission. It does not make weak evidence true.

5. Set review and stop rules

Separate preparing a draft from sending it or changing the CRM. Specify allowed actions, approval points and what to do when sources disagree. Set a time or cost limit for a pilot and require unresolved questions in the output.

6. Check a small pilot

Review each factual claim against its source and compare the proposed next step with the account brief. Count missing citations, wrong-company matches and unsupported inferences separately. Expand the workflow only after the specific errors are addressed.

02 / PUT IT TO WORK

Reusable task-brief opening

“Research the named company for our client-onboarding offer to independent accountancy practices. Return company identity, current services, likely process owner, verified facts with URLs and dates, unknowns, and one question to investigate. Separate facts from hypotheses. Prepare a draft note for review. Do not send a message or alter a record.” The downloadable text file includes the full fields to adapt.

Questions to work through

Task	What exact output should the assistant produce?
Evidence	Which source supports each factual claim?
Action	What can it prepare, and what needs review?
Completion	Which checks establish that this particular job is finished?

Before you use it

- Each factual claim has a relevant source.
- Disagreement and unknowns are retained.
- The output stays within the specified task.
- The reviewer can identify what to do next.

These examples are illustrative. They are not customer results or recommended performance benchmarks.

03 / YOUR WORKSHEET

Apply it to your next piece of work

Use the editable worksheet in this download, or write your answers here. Keep facts, decisions and unresolved questions visible.

Offer, sector and named account identifiers

Research question and output columns

Approved context and sources

Available tools and allowed actions

Evidence format and unknowns

Approval and stop rules

Pilot reviewer and error categories

Time or cost limit and review date

Sources and further reading

[Anthropic: building effective agents](#). Distinguishes predefined workflows from agents that choose their next steps and tools.

[Companies House company search](#). Check company identity, status, officers and filings against the original record.

Use the same work in Adapt

Keep the company context and the next step together as the team moves from research into a conversation.

[See the Adapt agents and Vela workflow](#)