



DELPHI ADVISORY FIRM
STRATEGY AND SYSTEMS FOR THE AI ERA

The Employee AI Agent Map

A practical map for giving every employee a role-specific AI agent connected to the Company Brain.

Every employee needs an AI Agent. Every agent needs the Company Brain.



The Employee AI Agent Map

Use this lead magnet to identify the first employee agents your company should deploy, what each one should know, and where approval gates belong.

The big idea

A blank AI tool waits for an employee to figure out what to ask.

A role-specific AI Agent already understands:

- The employee's responsibilities.
- The department's workflows.
- The company's approved knowledge.
- The tools and documents the role uses.
- The rules for what can be drafted, recommended, escalated, or executed.

The goal is not to replace people. The goal is to give every person a trained assistant that helps them move faster, make fewer mistakes, and work from the same source of truth.

The Delphi AI Workforce Model

Company Brain	Approved knowledge: offers, SOPs, policies, customer history, brand voice, workflows, escalation rules.
Employee AI Agents	Role-specific assistants trained around each employee's job and permission level.
Department Agents	Shared agents for sales, support, operations, marketing, HR, finance, leadership, and admin.
The Forum	Agent-to-agent collaboration layer for routing, cross-department coordination, and context sharing.
Approval Gates	Rules for what agents may read, draft, recommend, send, update, or escalate.

1. Company Brain

The approved knowledge layer: offers, pricing, SOPs, policies, customer history, brand voice, workflows, and escalation rules.

2. Employee AI Agents

Role-specific assistants that help employees with daily work, using only the knowledge and permissions appropriate for their role.

3. Department Agents

Shared agents for sales, support, operations, marketing, HR, finance, leadership, and other teams.

4. The Forum

A future agent-to-agent collaboration layer where agents can route requests, share context, and coordinate across departments with human oversight.

5. Approval Gates

Clear rules that define what agents may read, draft, recommend, send, update, or escalate.

Agent Map by Department

1. Sales Agent

Primary job: Help salespeople prepare, follow up, qualify, document, and move opportunities forward.

What it should know:

- Offers, packages, pricing ranges, and quoting rules.
- Ideal customer profile and disqualification criteria.
- Sales process, CRM stages, and pipeline definitions.
- Objection handling and approved proof points.
- Past conversations, call notes, proposals, and next steps.

Quick-win workflows:

- Draft personalized follow-up emails after calls.
- Summarize discovery calls and update next-step notes.
- Prepare call briefs before meetings.
- Suggest questions based on the prospect's industry and pain.
- Flag stalled opportunities and recommend recovery actions.

Approval gates:

- Custom pricing requires manager approval.
- Contract language requires human review.
- Sensitive claims, guarantees, or legal statements stay draft-only.
- CRM updates can be read-only or approval-required until trust is established.

2. Customer Support Agent

Primary job: Help support teams answer faster, stay consistent, and escalate the right issues.

What it should know:

- FAQs, support policies, refund rules, shipping/service timelines, and escalation paths.
- Approved response language by topic.
- Customer history and open tickets.
- Known issues, edge cases, and service recovery rules.

Quick-win workflows:

- Draft customer replies from approved knowledge.
- Summarize ticket history before handoff.
- Identify repeat issues and knowledge gaps.
- Escalate legal, billing, safety, or high-emotion cases.
- Turn resolved tickets into new FAQ entries for review.

Approval gates:

- Refunds, credits, cancellations, and exceptions require approval.
- Legal, medical, financial, or HR-sensitive topics escalate immediately.
- Public replies and high-risk customer messages stay draft-only.

3. Operations Agent

Primary job: Help operations teams document processes, manage exceptions, and keep work moving.

What it should know:

- Fulfillment steps, SOPs, checklists, owners, and timelines.
- Vendor rules, scheduling constraints, inventory/capacity details, and quality standards.
- Handoff rules between sales, admin, delivery, and support.
- Common bottlenecks and exception-handling procedures.

Quick-win workflows:

- Convert messy process notes into clean SOPs.
- Build checklists for recurring tasks.
- Summarize operational bottlenecks from messages, tickets, or meeting notes.
- Draft vendor/customer updates for review.
- Create daily or weekly operations briefs.

Approval gates:

- Vendor commitments, delivery promises, refunds, and schedule changes require human review.
- Workflow automation actions start as draft or approval-required.
- Final SOP changes require owner approval before publishing to the Company Brain.

4. Admin Agent

Primary job: Reduce administrative drag across scheduling, documents, inboxes, forms, and internal coordination.

What it should know:

- Calendar rules, meeting preferences, internal contacts, recurring admin tasks, document templates, and approval chains.
- Standard email language and response policies.
- Filing conventions and document locations.
- Which tasks are low-risk versus approval-required.

Quick-win workflows:

- Draft meeting agendas and recap notes.
- Prepare internal reminders and follow-ups.
- Organize documents into the right folders.
- Turn forms or emails into task lists.
- Draft routine admin emails for review.

Approval gates:

- Sending external messages requires review until explicitly approved.
- Calendar changes, billing items, and record updates follow permission rules.
- Anything involving confidential employee/customer data stays governed by policy.

5. Marketing Agent

Primary job: Help marketing teams turn company knowledge into campaigns, content, research, and creative briefs.

What it should know:

- Brand voice, offers, ICPs, proof points, case studies, testimonials, competitor notes, and content rules.
- Campaign calendar, channel strategy, and compliance boundaries.

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- Approved claims and words to avoid.
 - Best-performing hooks, angles, and landing page CTAs.

Quick-win workflows:

- Draft LinkedIn posts, email campaigns, blog outlines, and carousel scripts.
- Repurpose sales calls or FAQs into content ideas.
- Build campaign briefs for designers or video tools.
- Create customer research summaries.
- Score content against brand and compliance guidelines.

Approval gates:

- Public posts, paid ads, outbound campaigns, and claims require human approval.
- Regulated-industry claims require extra review.
- Brand voice updates must be approved before becoming source-of-truth.

6. HR and Training Agent

Primary job: Help HR and learning teams onboard employees, answer policy questions, and build AI confidence safely.

What it should know:

- Employee handbook, onboarding docs, training materials, role descriptions, policy boundaries, and escalation paths.
- Internal training curriculum and manager enablement materials.
- Approved language for sensitive employee topics.

Quick-win workflows:

- Draft onboarding plans by role.
- Create training checklists and quizzes.
- Answer policy questions from approved docs.
- Turn manager notes into coaching plans.
- Track recurring training gaps.

Approval gates:

- Employee relations, legal, compensation, disciplinary, and medical topics escalate to HR leadership.
- Policy interpretations should cite source docs and stay draft-only when uncertain.
- Employee data access must be tightly permissioned.

7. Finance and Billing Agent

Primary job: Help finance/admin teams prepare invoices, follow up on payments, summarize account history, and reduce manual billing work.

What it should know:

- Invoice templates, payment terms, billing contacts, account status, collections rules, pricing, discounts, and approval paths.
- Approved language for payment reminders.
- Accounting and CRM handoff rules.

Quick-win workflows:

- Draft invoice or payment reminder emails.
- Summarize overdue accounts for review.

- Create billing checklists.
- Prepare internal account notes.
- Flag exceptions that need manager approval.

Approval gates:

- Sending payment messages, changing invoices, applying credits, issuing refunds, and updating accounting records require approval.
- Financial advice or legal threats are disabled unless counsel-approved language exists.

8. Executive Agent

Primary job: Give leadership clearer visibility, faster decisions, and better operating leverage.

What it should know:

- Company goals, KPIs, department scorecards, meeting notes, strategic priorities, active risks, and decision rights.
- Current AI adoption data and agent usage patterns.
- Executive communication style and reporting cadence.

Quick-win workflows:

- Create weekly executive briefs.
- Summarize department updates and risks.
- Draft decision memos.
- Prepare meeting agendas.
- Identify cross-department bottlenecks.

Approval gates:

- Strategic decisions, personnel matters, public communications, financial commitments, and client-facing statements remain human-owned.
- The agent recommends and drafts. Leadership decides.

9. Lead Recovery Agent

Primary job: Recover old leads, missed opportunities, no-shows, and past customers without creating spam or brand risk.

What it should know:

- CRM contacts, inquiry history, quote status, lost-deal reasons, last touchpoint, eligibility rules, opt-out rules, and approved follow-up language.
- Offer ladder and current promotions.
- Compliance and consent boundaries by channel.

Quick-win workflows:

- Segment old leads by likelihood and reason for inactivity.
- Draft reactivation messages for review.
- Prioritize missed calls and abandoned inquiries.
- Prepare warm follow-up sequences.
- Summarize which campaigns created recoverable opportunities.

Approval gates:

- Outreach must respect consent, opt-outs, platform rules, and brand standards.
- Messages start owner-approved before any autopilot mode.

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- Sensitive categories require stricter review.

The Employee Agent Setup Sheet

Use this simple worksheet for each role before deploying an agent.

Role

Role name: _____

Department: _____

Manager/owner: _____

What this role does every week

1. _____
2. _____
3. _____
4. _____
5. _____

What the agent should know

- ☐ Role responsibilities.
- ☐ Department workflows.
- ☐ SOPs and checklists.
- ☐ Company policies.
- ☐ Offers, pricing, or service details relevant to the role.
- ☐ Frequently asked questions.
- ☐ Tool access map.
- ☐ Approved response language.
- ☐ Escalation rules.
- ☐ Examples of good work.

What the agent can help with first

- ☐ Drafting messages.
- ☐ Summarizing calls, tickets, or notes.
- ☐ Preparing checklists.
- ☐ Searching approved knowledge.
- ☐ Creating first drafts of documents.
- ☐ Suggesting next steps.
- ☐ Preparing meeting briefs.
- ☐ Identifying follow-up opportunities.

What must require approval

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- [] Sending customer-facing messages.
 - [] Updating CRM/customer records.
 - [] Publishing content.
 - [] Changing pricing, discounts, invoices, or refunds.
 - [] Making commitments to customers or vendors.
 - [] Handling legal, HR, medical, financial, or compliance-sensitive topics.
 - [] Accessing confidential data.
 - [] Taking actions outside the role's permissions.

30-Day Rollout Plan

Week 1: Map roles and risks

- Identify the first 10 to 25 employees or one pilot department.
- Choose the most repetitive workflows.
- Define sensitive data boundaries.
- Confirm approval gates.
- Create a basic Company Brain source list.

Week 2: Build starter agents

- Set up role-specific instructions.
- Add approved knowledge sources.
- Add starter prompts and workflow templates.
- Test the agents on real examples.
- Fix bad answers before launch.

Week 3: Train employees

- Teach context, delegation, correction, and review.
- Show each role three practical workflows.
- Give managers a coaching checklist.
- Collect questions and friction points.

Week 4: Review adoption and expand

- Review usage patterns.
- Identify top workflows.
- Identify missing Company Brain content.
- Choose the next department or deeper AI Brain buildout.
- Present executive recommendations.

AI Agent Readiness Score

Score each area from 1 to 5.

1 = not ready. 3 = partially ready. 5 = ready to deploy.

Area	Score
Company Brain source documents are organized	___ / 5
Roles and responsibilities are clear	___ / 5
Department workflows are documented	___ / 5
Approval gates are defined	___ / 5
Sensitive data rules are clear	___ / 5
Managers are ready to coach adoption	___ / 5
Employees have practical use cases	___ / 5
Leadership knows what success looks like	___ / 5

Total score: ___ / 40

What your score means

32 to 40: You may be ready for a role-specific Employee Agent pilot.

20 to 31: You likely need a focused Company Brain and approval-gate setup first.

Under 20: Start with an AI Workforce Readiness Audit before giving agents to the broader team.

Next step

If this map made you realize your employees need more than a blank AI chat box, Delphi Advisory Firm can help you build the first version of your AI workforce.

Start with:

The Employee AI Agent Pilot

A low-friction deployment that maps your first roles, builds starter agents, adds approval gates, trains the team, and produces a 30-day adoption review.

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Delphi Advisory Firm

Strategy and systems for the AI era.

The next step

If your employees are using a blank AI chat box, they are doing the hard part themselves.

Delphi Advisory Firm helps companies map the first employee agents, connect them to approved company knowledge, add approval gates, train the team, and review adoption after 30 days.

Request an Employee AI Agent Pilot

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