

Agent JD Template

For: Function leads · Type: Worksheet

AGENT NAME

VERSION / DATE

PREPARED BY

Define what an AI agent is for, who owns it, and where its authority ends, so business, IT, and compliance agree before work begins.

How to use it

- 1

Choose one AI agent or use case, ideally one you plan to pilot or buy in the next quarter.
- 2

Fill it in together: the business owner, an IT lead, and someone from legal or compliance. Add medical affairs if the agent touches scientific content.
- 3

Complete every section before build or purchase begins. A field you can't fill is a gap to close first.
- 4

Revisit the JD at each re-certification, and whenever the agent's scope changes.

The example column shows a completed JD for an MSL pre-call prep agent.

1

Role and purpose

Field	Your answer	Example
Role supported Which human role is this agent built for?		Medical science liaison (MSL), oncology
Business purpose Why does it exist, in one sentence?		Give MSLs a complete, compliant brief before every HCP meeting, so prep time goes into the conversation itself.
Type Prompt tool / Copilot / Agent / Agentic AI system		Agent
Where it sits Upstream or downstream; Start now / Build next / Defer or constrain		Downstream; Start now

2 Responsibilities

What the agent owns, and the outcome each task should produce.

Task	Output	Frequency
Pull the HCP’s recent publications, trial involvement, and prior interaction notes	One-page HCP profile	Before every meeting
Summarize approved medical content relevant to the HCP’s interests	Talking points, with source references	Before every meeting

Explicitly out of scope: _____

e.g. Contacting HCPs; answering unsolicited questions; anything promotional.

3 Accountability

Role	Name	Example
Business owner Accountable for what the agent does		Head of Medical Affairs, Oncology
Technical owner Runs, maintains, and monitors it		Medical Affairs IT lead
Compliance reviewer Signs off on guardrails and content rules		Medical compliance manager
Escalation contact Who the agent, or its users, escalate to		Business owner, then Medical Director
Switch-off authority Who can revoke it, and how fast		Technical owner, within one hour; tested quarterly

4 Authority boundaries

Where the AI agent’s authority ends and a human steps in.

Acts on its own	Drafts for human approval	Stops and escalates
Retrieves and summarizes approved sources	The final brief, reviewed by the MSL before use	Any possible adverse event or product complaint in source notes
		Any request touching off-label use

5 Data and inputs

Field	Your answer	Example
Approved sources		Approved medical content library; CRM interaction notes; public publication databases
Barred sources		Promotional materials; unapproved slide decks; external web search
Sensitive data it touches HCP data, patient data, commercial IP		HCP contact and interaction history; no patient data
Where data is processed and stored		Inside the company environment; no data used to train external models

6 Guardrails

- ☐ Required disclaimers are defined and enforced in the system
- ☐ Claims and off-label rules apply at both agent and sub-agent level
- ☐ Adverse-event and complaint signals trigger an automatic hand-off to a human
- ☐ Outputs are retained in line with record-keeping policy, on the assumption they are discoverable

Field	Your answer	Example
Disclaimer text Shown on every output		"For scientific exchange only. Not for promotional use."
Adverse-event hand-off Where flagged signals go		Routed to the MSL and the pharmacovigilance team the same day
Record retention How long outputs are kept		In line with the medical affairs record-keeping policy

7 Connections and hand-offs

Connects to (system or agent)	What passes between them	What must carry through
CRM	Prior interaction notes in; meeting outcome logged back	HCP consent status; compliance flags

8 Success measures

Take the baseline before launch. Pick two or three measures, at least one beyond efficiency.

Measure	Baseline (today)	Target	How it's measured	Review date
Prep time per meeting	45 min	15 min	MSL time log, 4-week sample	Day 60
MSL rating of brief quality (1–5)	n/a	4+	Post-meeting pulse	Day 60
Adoption: share of meetings using the brief	0%	80%	System logs	Day 90

9 Testing and certification

Field	Your answer	Example
How performance is graded		Medical reviewer scores a sample of 20 briefs a month for accuracy and compliance
Pass threshold		95% accurate; zero compliance breaches
Re-certification		Every six months, and after any change to model, sources, or scope

Sign-off

Function	Name	Date
Business owner		
IT		
Legal / Compliance		
Medical (if applicable)		

Before you build: check the JD against the RAIL Score.

Each section feeds one component. A section left thin is the component most likely to score 1.

- Sections 1–2

→ Human Centricity
- Section 8

→ Value Creation
- Section 7

→ Orchestration
- Sections 3, 4, 6

→ Governance 
- Section 5

→ Security 
- Section 9

→ Testing & Certification

NEXT Take the Section 8 baseline readings before go-live. Once the pilot is running, complete the **Job Re-design Worksheet** for each role it touches.