

Agent Readiness Assessment

SANITIZED SAMPLE DELIVERABLE

FICTIONAL ORGANIZATION

Northstar Facility Services

Representative journey: **Obtain a commercial floor-care quote** for a 42,000-square-foot multi-site retail portfolio and receive a verifiable confirmation that the request reached the correct estimating workflow.

FIND	DO	TRUST	OUTCOME
4 / 4	1 / 4	2 / 4	2.3 / 4
Organization, service, coverage, and entry point were identifiable.	Only one of three attempts reached the intended intake path.	Acknowledgment existed, but routing and ownership were not verifiable.	Material friction prevents consistent agent completion.

EXECUTIVE CONCLUSION

The organization is discoverable, but its quote journey is not reliably executable by an outside AI agent.

Three equivalent agent attempts selected two different intake pathways. Two attempts used a general contact form that did not request the facility details needed for estimating; one used the intended commercial quote form. Confirmation messages did not identify the receiving team, service category, or a durable request ID.

Business impact	4 / 5 - High
Root cause	Conflicting qualification criteria and no single authoritative routing rule.
Priority correction	Establish one canonical qualification rule and make every equivalent entry point route to the same structured quote intake.

This sample is fictional and illustrates report structure only. A paid assessment uses customer-approved journeys, repeat testing, captured evidence, scoped authorization, and organization-specific corrective actions.

What the agent was asked to accomplish

Business objective	Request a quote for recurring floor care covering three retail locations totaling 42,000 square feet.
Success condition	The estimating team receives a complete request containing location, floor type, square footage, service frequency, timing constraints, and contact information; the requester receives a confirmation with a reference ID or named owner.
Permitted actions	Public-site discovery, form completion with synthetic contact data, and submission to an authorized test endpoint.
Excluded actions	No live purchase, contract acceptance, sensitive document upload, or representation that the synthetic requester is an actual customer.
Repeat standard	Three independent attempts using the same objective and facts, with fresh sessions and representative agent configurations.

Observed execution

Atte mpt	Selected path	Outcome	Evidence captured
1	General contact form	Submitted, but required estimating fields were absent.	Page URL, completed fields, timestamp, generic acknowledgment.
2	Commercial quote form	Complete intake reached intended workflow.	Structured field set, submission state, confirmation screen.
3	General contact form	Same incomplete route as Attempt 1.	Page URL, completed fields, timestamp, generic acknowledgment.

Scoring interpretation

FIND scored fully because the organization, relevant service, geographic coverage, and at least one viable entry point were publicly identifiable. DO scored poorly because equivalent attempts did not consistently reach the workflow capable of producing the requested economic outcome. TRUST was partial because the site acknowledged submissions but did not provide sufficient provenance to verify ownership, routing, or next action.

Inconsistent qualification routes agents away from the quote workflow

Severity	HIGH	Business impact	4 / 5
Confidence	HIGH - repeated twice	Affected dimension	DO / TRUST

Observed problem

The public site exposes a general contact path and a commercial quote path as apparently equivalent ways to begin. The general path lacks the structured qualification fields required for estimating. Because neither route declares an authoritative purpose in machine-readable or plain-language terms, representative agents selected different pathways from the same facts.

Why it matters

A prospect may believe a quote request was successfully initiated when it actually entered a general inbox without the data needed to scope work. The likely consequences are manual rework, slower response, inconsistent lead handling, and preventable abandonment. The problem is not the presence or absence of a particular protocol; it is inconsistent completion of the business outcome.

Root-cause consolidation

Two of three attempts chose the general form.	Competing entry points lack one authoritative qualification rule.
General form omitted square footage, floor type, frequency, and operating constraints.	The generic path cannot produce an estimate-ready request.
Acknowledgments provided no owner, category, or request ID.	Confirmation design does not establish provenance or accountable handoff.

Intentional human control vs. unnecessary friction

Human review of a commercial quote is appropriate and should remain. The defect is not the human handoff; it is the inconsistent route into that handoff and the absence of evidence showing that the request reached the responsible estimating function.

Create one authoritative route and prove that it works

Prio rity	Action	Owner	Verification criterion
P0	Declare one canonical commercial-quote entry point. Redirect or clearly distinguish all general contact calls-to-action when the user intent is a service quote.	Web / Revenue Operations	Three equivalent tests select the canonical quote path in all three attempts.
P1	Publish a concise qualification rule describing when to use the quote path and the minimum required inputs.	Marketing / Sales	Agents identify the same eligibility rule and required field set without inference conflicts.
P1	Return a confirmation containing request ID, service category, receiving team, timestamp, and expected response window.	Operations / CRM	Every accepted submission produces a durable confirmation whose ID can be reconciled to the receiving system.
P2	Add structured descriptions or interface metadata where useful, while keeping the human-readable path authoritative.	Engineering	Machine-facing descriptions agree with the visible qualification and routing rules.

Verification test

Repeat the original journey three times after implementation. Use the same facility facts and success condition. A fix is verified only if all three attempts select the canonical quote intake, submit the complete estimate-ready field set, and receive a confirmation whose request ID and receiving team can be reconciled to the authorized destination.

Routing consistency	3 of 3 attempts use the canonical path.
Data completeness	All required qualification fields are present in 3 of 3 submissions.
Trust / provenance	Every confirmation includes an attributable request ID, owner/team, category, and timestamp.
Economic outcome	Each test request is visible in the intended estimating workflow without manual rerouting.

What a full BSH assessment includes

One to three defined business journeys; repeat testing; captured evidence supporting material findings; Find / Do / Trust and outcome scoring; business-impact, severity, and confidence prioritization; consolidated root causes; a P0-P3 corrective-action roadmap; and explicit verification criteria showing how to determine whether each material issue was actually fixed.

FOUNDING PILOT

\$795

One to three defined journeys. Normal published price: \$995.

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