SAMPLE CHECKUP

XP CHECKUP FOR AGENTFORCE · HARBOR & PINE HOME WARRANTY

The agent works. Nobody owns it.

Claims Assistant answers claim-status questions accurately and hands off to a person when asked. But no one at Harbor & Pine is accountable for what it does, three people can change it in production without review, and a verified customer may be able to reach another customer's visits.

4 to fix within 30 days

3 to fix this quarter

Agent Claims Assistant **Channel** Customer portal chat **Live since** 14 July 2026

Reviewed 10 November 2026

Sample. Harbor & Pine Home Warranty is a fictional company and the people named are invented. Findings 2, 3 and 4 are modeled on a real configuration export from a developer org; the rest show what the questionnaire contributes.

SUMMARY

The 7 findings in brief

Most urgent first. Each is set out in full further down, with its evidence, risk and fix.

1 **No accountable owner** — 30 DAYS
Each respondent named the other as the agent's owner.

2 **Production changes are unreviewed** — 30 DAYS
Eleven versions by three admins, none reviewed before going live.

3	**Visit actions are not tied to the verified customer** A verified customer may be able to see, book or cancel another customer's visit.	30 DAYS
4	**An instruction tells the agent to do something it has no action for** The agent is told to send an alert email it has no way to send.	30 DAYS
5	**No stop procedure** Nobody could describe how to switch the agent off.	THIS QUARTER
6	**Success is not defined** Three people measure the agent three different ways.	THIS QUARTER
7	**The agent answers from an outdated policy article** The agent still answers from the 2025 coverage guide.	THIS QUARTER

AT A GLANCE

What we looked at

Two questionnaires (service operations lead, Salesforce admin) and one configuration export. No customer records. Built by: Implementation partner, engagement ended at go-live.

11	3	0	6	14
versions since go-live	people who can edit it	changes reviewed	subagents	actions

OWNERSHIP MAP

Who holds each right over the agent

Six rights decide how an agent is run. Each should have one named holder.

RIGHT	TODAY	RECOMMENDED
Accountable for the agent's outcomes	NOBODY Nobody named	Service operations lead
Decide what the agent may handle	NOBODY Partner's original design, unchanged	Service operations lead

Edit subagents and instructions in production	TOO OPEN Three admins, no review	One admin, reviewed by the owner
Add or change actions	TOO OPEN Any admin	Admin proposes, owner approves, tested first
Turn the agent off	NOBODY Unclear: each respondent named the other	Owner and one named backup
Review what the agent said to customers	NOBODY Nobody	Owner, weekly sample

AGENT MAP

What the agent can do, and for whom

Every subagent and its actions, from the export. An action that changes something should be tied to the customer who proved who they are.

Customer Verification

Open to any customer

- Send Verification Code
- Verify Code

Claim Status

Only after the customer is verified

- Get Claims for Customer — TIED
- Get Claim by Number — TIED

Claim Updates

Only after the customer is verified

- Add Claim Note — CHANGES DATA, TIED
- Update Contact Details — CHANGES DATA, TIED

Technician Visits

Only after the customer is verified · Finding 3

- Identify Customer by Email — NOT TIED
- Get Visit Slots — NOT TIED
- Book Visit — CHANGES DATA, NOT TIED
- Cancel Visit — CHANGES DATA, NOT TIED

Coverage Questions

Open to any customer · Finding 7

Answer from Knowledge

Escalation

Open to any customer

Hand Off to a Person

Create Case CHANGES DATA

Add Case Comment CHANGES DATA

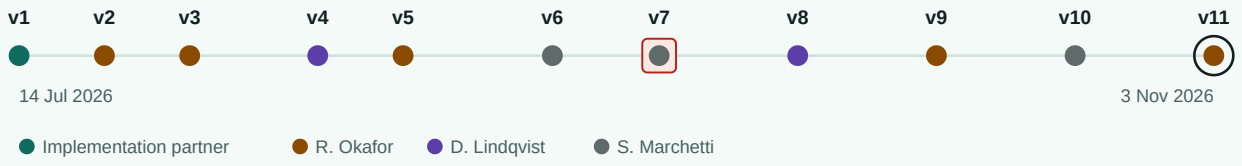
TIED receives the verified customer's ID NOT TIED works from whatever the customer types

CHANGES DATA creates, updates or cancels something

CHANGE HISTORY

11 versions, 4 authors, no review recorded

Each dot is a committed version, placed by date and colored by who made it. The ringed version is the one customers are talking to; a boxed one is named in a finding.



v1	14 Jul 2026	Implementation partner	Go-live version.
v2	22 Jul 2026	R. Okafor	Reworded the welcome message.
v3	30 Jul 2026	R. Okafor	Added two lines to Coverage Questions.
v4	11 Aug 2026	D. Lindqvist	Changed how visit dates are shown.
v5	19 Aug 2026	R. Okafor	Removed a line from Claim Status.
v6	2 Sep 2026	S. Marchetti	Added the Cancel Visit action.
v7	12 Sep 2026	S. Marchetti	FINDING 4 Added: "deny cancellation and then send an alert email to the claim owner." No email action exists.
v8	25 Sep 2026	D. Lindqvist	Reworded the handoff message.
v9	8 Oct 2026	R. Okafor	Edited Technician Visits instructions.

v10	21 Oct 2026	S. Marchetti	Edited Claim Updates instructions.
v11	3 Nov 2026	R. Okafor	LIVE Edited Coverage Questions instructions.

FINDINGS

7 findings, most urgent first

Each finding says where its evidence came from: the export, the questionnaire, or both.

1

FIX WITHIN 30 DAYS · QUESTIONNAIRE

No accountable owner

EVIDENCE

Each respondent was asked who owns the agent. The service lead named the admin; the admin named the service lead.

RISK

Problems are noticed by customers before staff. Decisions about scope default to whoever edits the agent last.

FIX

Name the service operations lead as owner, in writing, with the rights in the ownership map.

2

FIX WITHIN 30 DAYS · EXPORT · QUESTIONNAIRE

Production changes are unreviewed

EVIDENCE

The export holds eleven committed versions since go-live, made by three admins. Comparing them shows exactly what changed in each. Salesforce's Setup Audit Trail does not record these edits, and the questionnaire confirms no one reviews a change before it goes live.

RISK

A well-meant wording change alters how the agent answers every customer, with no test and no way to tell which edit caused a problem.

FIX

Reduce edit rights to one admin. Require a sandbox test and the owner's sign-off for any change, and record each one in the decision record.

3

FIX WITHIN 30 DAYS EXPORT

Visit actions are not tied to the verified customer

EVIDENCE

Claim Status and Claim Updates pass the verified customer's ID into every action. Technician Visits does not: it looks up a customer from whatever email address is typed, and Cancel Visit accepts a visit number alone. The only safeguard is an instruction telling the agent not to switch customers.

RISK

A customer who has verified their own identity may be able to see, book or cancel another customer's technician visit. An instruction is a request to the model, not an enforced check.

FIX

Pass the verified customer's ID into the visit actions, as the claim actions already do. Until then, test it: verify as one customer and ask about another's visit.

4

FIX WITHIN 30 DAYS EXPORT

An instruction tells the agent to do something it has no action for

EVIDENCE

Version 7 added this to Technician Visits: "deny cancellation and then send an alert email to the claim owner." The subagent has no action that sends email. The line is still in the live version.

RISK

The agent either skips the step silently or tells the customer an alert was sent when none was.

FIX

Add an email action and test it, or remove the instruction.

5

FIX THIS QUARTER QUESTIONNAIRE

No stop procedure

EVIDENCE

Neither respondent could describe the steps to deactivate the agent, or what customers would see if it were turned off.

RISK

In an incident, the agent keeps answering while people work out how to stop it.

FIX

Write a one-page stop procedure, name two people who can run it, and test it once in a sandbox.

6

FIX THIS QUARTER QUESTIONNAIRE

Success is not defined

EVIDENCE

The service lead measures the agent by case volume, the admin by containment rate, finance by licence cost. The three numbers have never been compared.

RISK

The agent cannot be shown to be worth its cost, or shown to be failing.

FIX

Adopt the four measures below and review them monthly.

7

FIX THIS QUARTER EXPORT QUESTIONNAIRE

The agent answers from an outdated policy article

EVIDENCE

The export shows which knowledge source the agent answers from. The questionnaire confirms coverage terms changed in March, and the source still includes the 2025 coverage guide.

RISK

Customers are told the old coverage limits.

FIX

Retire the old article and give the owner a quarterly check of the agent's knowledge sources.

HUMAN APPROVAL POINTS

What the agent should do alone

The agent may do this alone	A person must approve
Answer claim-status questions	Change a claim's contact details
Explain coverage from current articles	Anything involving a payment or reimbursement
Book a technician visit in an open slot	Rebooking a visit a third time
Create a case and hand off	Closing a claim

SUCCESS MEASURES

Four numbers to agree on

Resolved without a person	Share of conversations the customer did not reopen or escalate within seven days.
Wrong answers	Count found in the owner's weekly sample of 25 conversations.
Handoff wait	Time from the customer asking for a person to a person replying.
Cost per resolved conversation	Against the cost of the same contact handled by staff.

FIRST 30 DAYS

What to do, in order

Week 1	Name the owner. Reduce edit rights. Write the stop procedure.
Week 2	Tie visit actions to the verified customer. Fix or remove the email instruction. Retire the outdated article.
Week 3	Start the weekly conversation sample and the decision record.

Week 4	First monthly review of the four measures.