Configure agent goals to collect insights

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This article is designated for administrators.

About

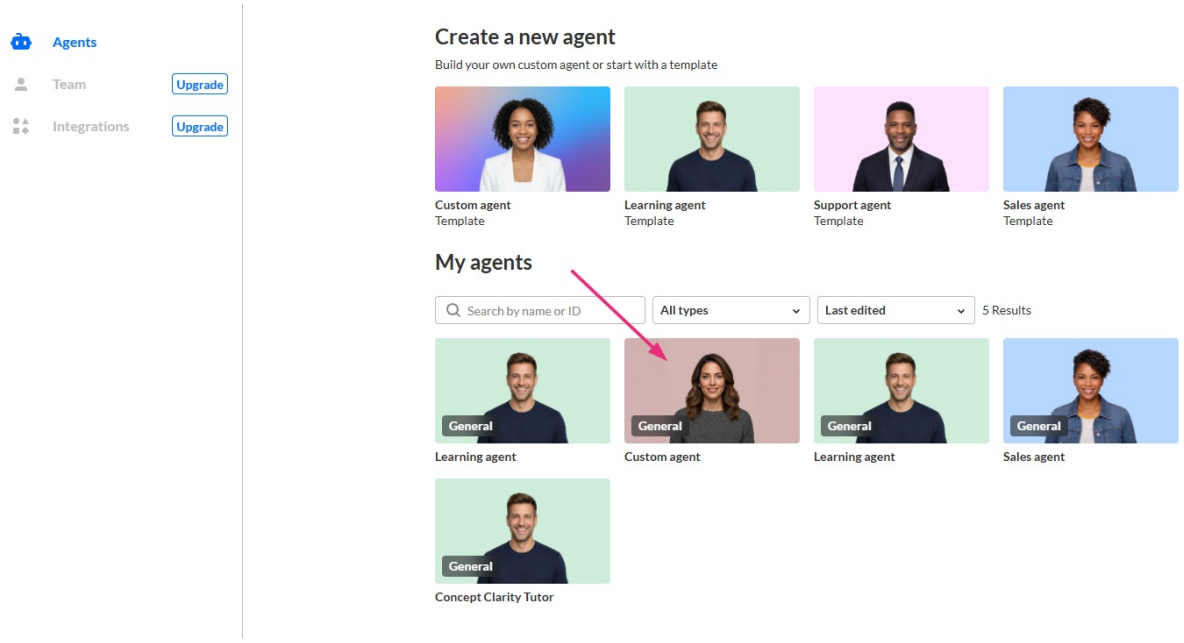
You can configure goals that tell your agent what information to gather from users during conversations. For example, your agent can collect information about a user's interests, requirements, challenges, or readiness to take the next step.

You configure goals in the **Playbook** tab. Each agent can have up to four goals.

Goals are configured separately for each agent and aren't shared between agents.

Access the Playbook tab

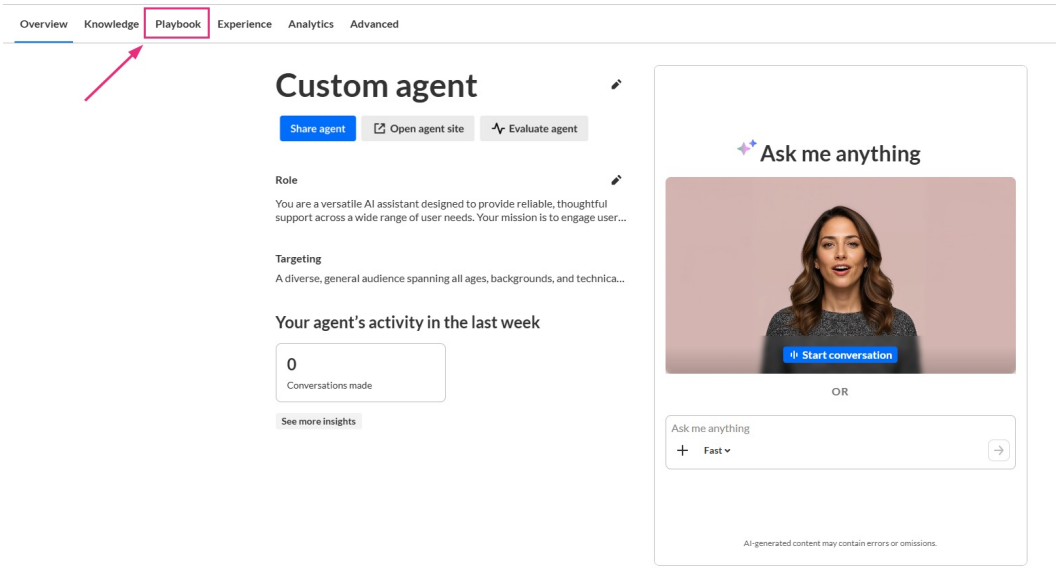
1. From the **Agents** tab, click the agent you want to configure.



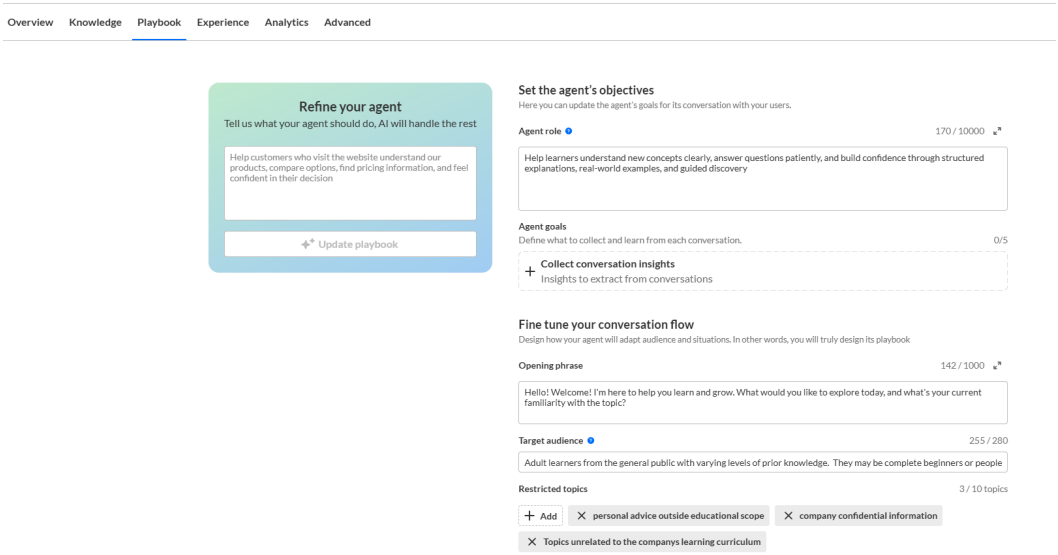
   The agent workspace opens on the **Overview** tab.

2. Click the **Playbook** tab.

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The **Playbook** tab displays.

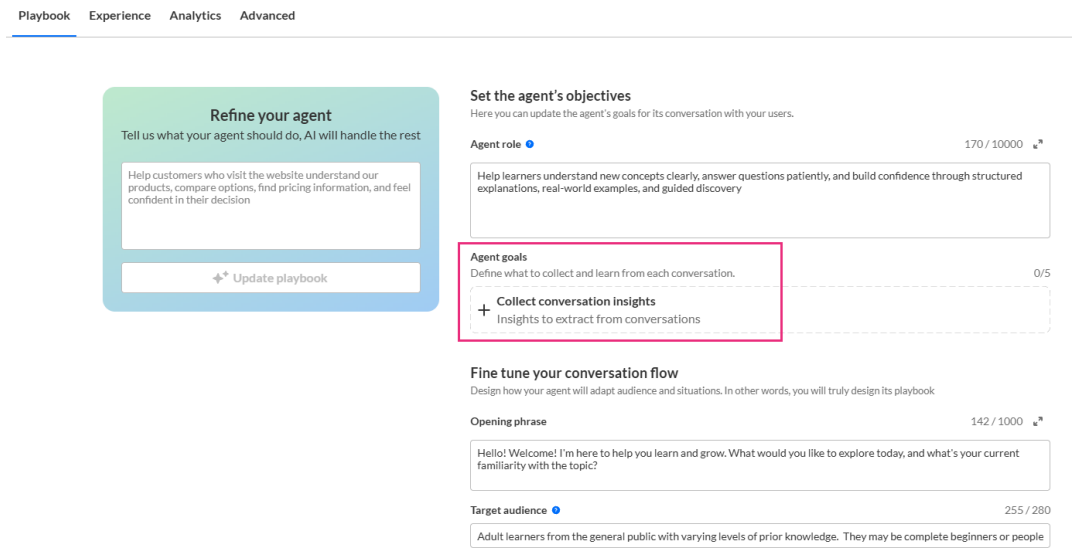


Collect insights from conversations

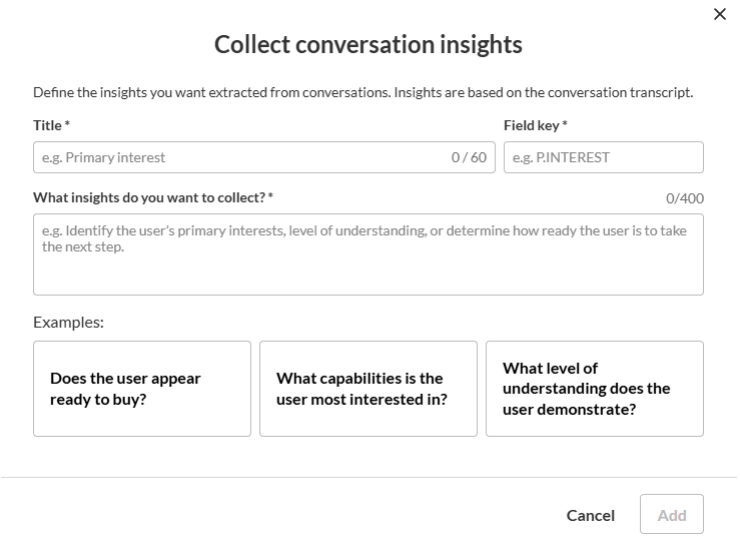
Use **Collect insights** to define information you want the agent to gather from a user's responses during a conversation.

1. In the **Agent goals** section, click **Collect insights**.

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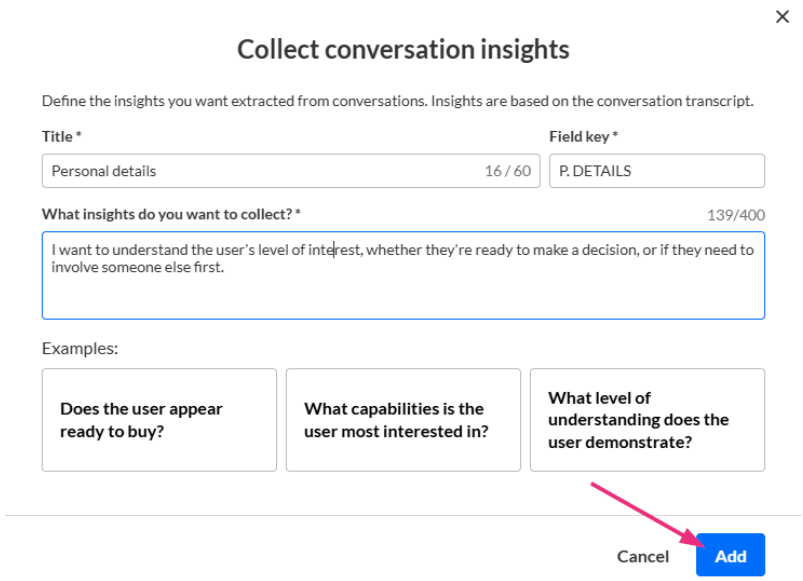


The **Collect conversation insights** window opens.



2. Enter a **Title**.
3. Enter a **Field key** to identify the insight you want to collect, for example, `P.INTEREST`. Don't include spaces in the key.
4. In the **What insights do you want to collect?** field, describe the information you want the agent to gather during the conversation. You can also click an example in the Examples section to populate the field. Selecting an example replaces any text already entered.
5. Click **Add**.

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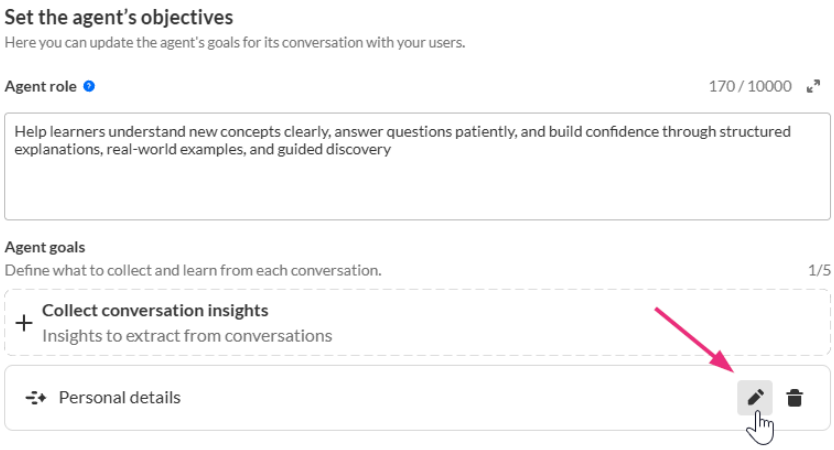
The goal is added to the **Agent goals** list. Your changes aren't applied to the agent until you publish them.

Manage your goals

Configured goals appear in the **Agent goals** section of the **Playbook** tab. The counter shows how many of the four available goals you've configured.

Edit a goal

1. Hover over or focus the goal you want to change and click the **pencil** icon.



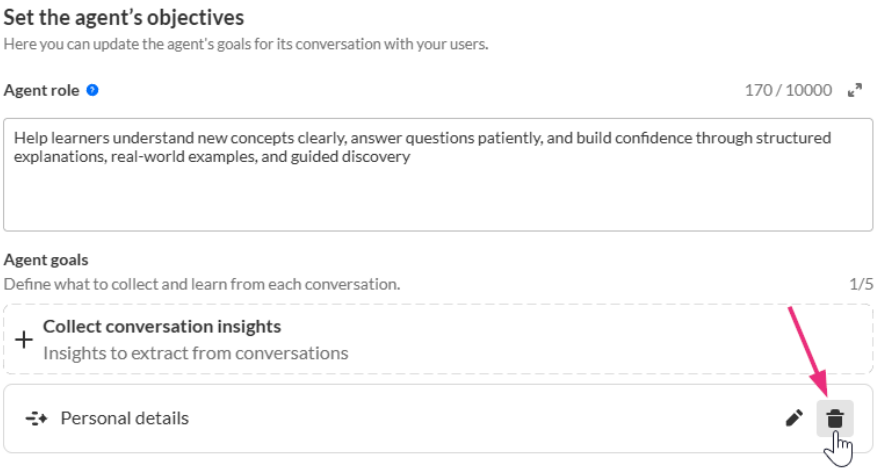
2. Update the fields as needed.

Changes to a goal don't affect information collected from previous conversations.

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Delete a goal

Hover over or focus the goal you want to remove and click the **trash can** icon.



The goal is removed.

> Deleting a goal doesn't remove or change information already collected from previous conversations.

Publish your changes

Creating, editing, or deleting a goal is treated as an unpublished change. Click **Publish** at the top right to apply your changes.

Until you publish your changes, they won't affect conversations with your agent.

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