

Configure agent goals to collect insights

Content updated: 08/12/2026

 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.

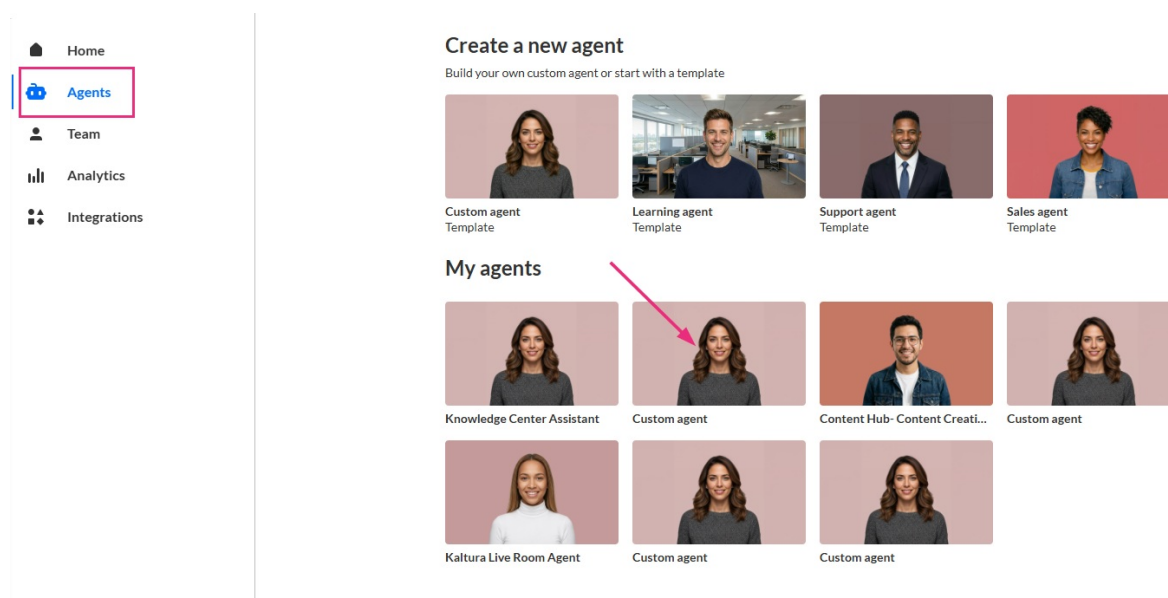
You configure goals in the **Playbook** tab. Each agent can have up to four goals.



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.

Overview
Knowledge
Playbook
Experience
Analytics
Advanced

Custom agent

Share agent
Open agent site

Role
You are a versatile AI assistant designed to provide reliable, thoughtful support across a wide range of user needs. Your mission is to engage user...

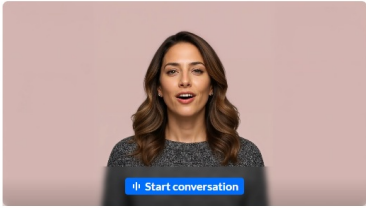
Targeting
A diverse, general audience spanning all ages, backgrounds, and technica...

Your agent's activity in the last week

0
Conversations made

See more insights

Ask me anything



Start conversation

OR

Ask me anything

+ Fast →

AI-generated content may contain errors or omissions.

The **Playbook** tab displays.

Overview
Knowledge
Playbook
Experience
Analytics
Advanced

Refine your agent

Tell us what your agent should do, AI will handle the rest

Help customers who visit the website understand our products, compare options, find pricing information, and feel confident in their decision

+* Update playbook

Set the agent's objectives

Here you can update the agent's goals for its conversation with your users.

Agent role 170 / 10000 *

Help learners understand new concepts clearly, answer questions patiently, and build confidence through structured explanations, real-world examples, and guided discovery

Agent goals
Define what to collect and learn from each conversation. 0/5

+ **Collect conversation insights**
Insights to extract from conversations

Fine tune your conversation flow
Design how your agent will adapt audience and situations. In other words, you will truly design its playbook

Opening phrase 142 / 1000 *

Hello! Welcome! I'm here to help you learn and grow. What would you like to explore today, and what's your current familiarity with the topic?

Target audience 255 / 280

Adult learners from the general public with varying levels of prior knowledge. They may be complete beginners or people

Restricted topics 3 / 10 topics

+ Add X personal advice outside educational scope X company confidential information X Topics unrelated to the companys learning curriculum

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**.

Refine your agent

Tell us what your agent should do, AI will handle the rest

Help customers who visit the website understand our products, compare options, find pricing information, and feel confident in their decision

✚* Update playbook

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Agent goals 0/5

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The **Collect conversation insights** window opens.

Collect conversation insights

×

Define the insights you want extracted from conversations. Insights are based on the conversation transcript.

Title *

e.g. Primary interest 0 / 60

Field key *

e.g. P.INTEREST

What insights do you want to collect? *

0/400

e.g. Identify the user's primary interests, level of understanding, or determine how ready the user is to take the next step.

Examples:

Does the user appear ready to buy?

What capabilities is the user most interested in?

What level of understanding does the user demonstrate?

Cancel

Add

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**.

×

Collect conversation insights

Define the insights you want extracted from conversations. Insights are based on the conversation transcript.

Title *

Field key *

Personal details 16 / 60

P.DETAILS

What insights do you want to collect? * 139/400

I want to understand the user's level of interest, whether they're ready to make a decision, or if they need to involve someone else first.

Examples:

Does the user appear ready to buy?

What capabilities is the user most interested in?

What level of understanding does the user demonstrate?

Cancel

Add

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.

Set the agent's objectives

Here you can update the agent's goals for its conversation with your users.

Agent role

170 / 10000

Help learners understand new concepts clearly, answer questions patiently, and build confidence through structured explanations, real-world examples, and guided discovery

Agent goals

Define what to collect and learn from each conversation.

1/5

+ Collect conversation insights

Insights to extract from conversations

Personal details

2. Update the fields as needed.



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

Delete a goal

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

Set the agent's objectives

Here you can update the agent's goals for its conversation with your users.

Agent role

170 / 10000 

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Agent goals

Define what to collect and learn from each conversation.

1/5

+ **Collect conversation insights**
Insights to extract from conversations

↔ **Personal details**



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.