

How to Build an AI Agent That Converts Program Data into Impact Reports

A source-grounded system for turning program records into clear, reviewer-ready impact reports.

24 copy-paste prompts 6 chapters program teams, nonprofit leaders, monitoring and evaluation staff, and fundraisers

A FIELD GUIDE, NOT A BINDER

Build an agent that organizes approved quantitative and qualitative data, drafts evidence-aware reports, and exposes every item requiring verification.

WELCOME

What this pack helps you build

Build an agent that organizes approved quantitative and qualitative data, drafts evidence-aware reports, and exposes every item requiring verification.

THE HUMAN BOUNDARY

Use only approved, appropriately de-identified data. Never invent outcomes, merge incompatible measures, expose participant identities, or imply causation without evidence. A designated person must verify calculations, quotes, consent, context, and every external claim.

THE WORKFLOW

01 define report -> 02 prepare evidence -> 03 design agent -> 04 draft report -> 05 test evidence and safety -> 06 deploy reporting cycle

Choose the tool that fits the work

TOOL	SHINES AT	GOOD TO KNOW
ChatGPT	interactive agent design, structured drafting, and testing	Use a dedicated project and confirm current privacy and retention settings before adding organizational material.
Claude	long approved source documents and careful synthesis	Require source locations and verify every consequential statement in the original.
Gemini	workflows centered on approved Google Workspace material	Confirm sharing permissions; a linked file is not automatically authorized for agent use.
Microsoft Copilot	organizations governing work inside Microsoft 365	Use only approved tenant sources and retain human approval for consequential or external outputs.

Define Report

Complete this stage to define report with approved inputs, explicit ownership, and a reviewable output before continuing.

IN THIS CHAPTER

- 01 Report Brief Builder
- 02 Stakeholder Question Mapper
- 03 Outcome and Indicator Map
- 04 Success Standard Designer

Report Brief Builder

PURPOSE

Create a reliable report brief builder for this agent workflow.

WHEN TO USE IT

Use this in the define report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the report brief builder. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the define report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The report brief builder is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 02.

Stakeholder Question Mapper

PURPOSE

Create a reliable stakeholder question mapper for this agent workflow.

WHEN TO USE IT

Use this in the define report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the stakeholder question mapper. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the define report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The stakeholder question mapper is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 03.

Outcome and Indicator Map

PURPOSE

Create a reliable outcome and indicator map for this agent workflow.

WHEN TO USE IT

Use this in the define report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the outcome and indicator map. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the define report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The outcome and indicator map is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 04.

Success Standard Designer

PURPOSE

Create a reliable success standard designer for this agent workflow.

WHEN TO USE IT

Use this in the define report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the success standard designer. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the define report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The success standard designer is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 05.

Prepare Evidence

Complete this stage to prepare evidence with approved inputs, explicit ownership, and a reviewable output before continuing.

IN THIS CHAPTER

- 05 Approved Source Inventory
- 06 Data Dictionary Builder
- 07 Data Quality Triage
- 08 Qualitative Evidence Organizer

Approved Source Inventory

PURPOSE

Create a reliable approved source inventory for this agent workflow.

WHEN TO USE IT

Use this in the prepare evidence stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the approved source inventory. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the prepare evidence stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The approved source inventory is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 06.

Data Dictionary Builder

PURPOSE

Create a reliable data dictionary builder for this agent workflow.

WHEN TO USE IT

Use this in the prepare evidence stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the data dictionary builder. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the prepare evidence stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The data dictionary builder is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 07.

Data Quality Triage

PURPOSE

Create a reliable data quality triage for this agent workflow.

WHEN TO USE IT

Use this in the prepare evidence stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the data quality triage. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the prepare evidence stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The data quality triage is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 08.

Qualitative Evidence Organizer

PURPOSE

Create a reliable qualitative evidence organizer for this agent workflow.

WHEN TO USE IT

Use this in the prepare evidence stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the qualitative evidence organizer. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the prepare evidence stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The qualitative evidence organizer is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 09.

Design Agent

Complete this stage to design agent with approved inputs, explicit ownership, and a reviewable output before continuing.

IN THIS CHAPTER

09 Impact Agent Instructions

10 Metric Calculation Plan

11 Claim Evidence Schema

12 Missing Evidence Protocol

Impact Agent Instructions

PURPOSE

Create a reliable impact agent instructions for this agent workflow.

WHEN TO USE IT

Use this in the design agent stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the impact agent instructions. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the design agent stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The impact agent instructions is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 10.

Metric Calculation Plan

PURPOSE

Create a reliable metric calculation plan for this agent workflow.

WHEN TO USE IT

Use this in the design agent stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the metric calculation plan. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the design agent stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The metric calculation plan is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 11.

Claim Evidence Schema

PURPOSE

Create a reliable claim evidence schema for this agent workflow.

WHEN TO USE IT

Use this in the design agent stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the claim evidence schema. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the design agent stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The claim evidence schema is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 12.

Missing Evidence Protocol

PURPOSE

Create a reliable missing evidence protocol for this agent workflow.

WHEN TO USE IT

Use this in the design agent stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the missing evidence protocol. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the design agent stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The missing evidence protocol is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 13.

Draft Report

Complete this stage to draft report with approved inputs, explicit ownership, and a reviewable output before continuing.

IN THIS CHAPTER

- 13 Verified Findings Table
- 14 Impact Narrative Drafter
- 15 Participant Story Builder
- 16 Executive Summary Composer

Verified Findings Table

PURPOSE

Create a reliable verified findings table for this agent workflow.

WHEN TO USE IT

Use this in the draft report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the verified findings table. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the draft report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The verified findings table is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 14.

Impact Narrative Drafter

PURPOSE

Create a reliable impact narrative drafter for this agent workflow.

WHEN TO USE IT

Use this in the draft report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the impact narrative drafter. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the draft report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The impact narrative drafter is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 15.

Participant Story Builder

PURPOSE

Create a reliable participant story builder for this agent workflow.

WHEN TO USE IT

Use this in the draft report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the participant story builder. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the draft report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The participant story builder is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 16.

Executive Summary Composer

PURPOSE

Create a reliable executive summary composer for this agent workflow.

WHEN TO USE IT

Use this in the draft report stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the executive summary composer. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the draft report stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The executive summary composer is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 17.

Test Evidence And Safety

Complete this stage to test evidence and safety with approved inputs, explicit ownership, and a reviewable output before continuing.

IN THIS CHAPTER

- 17 Calculation Recheck
- 18 Claim Audit
- 19 Privacy and Consent Review
- 20 Fairness and Accessibility Review

Calculation Recheck

PURPOSE

Create a reliable calculation recheck for this agent workflow.

WHEN TO USE IT

Use this in the test evidence and safety stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the calculation recheck. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the test evidence and safety stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The calculation recheck is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 18.

Claim Audit

PURPOSE

Create a reliable claim audit for this agent workflow.

WHEN TO USE IT

Use this in the test evidence and safety stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the claim audit. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the test evidence and safety stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The claim audit is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 19.

Privacy and Consent Review

PURPOSE

Create a reliable privacy and consent review for this agent workflow.

WHEN TO USE IT

Use this in the test evidence and safety stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the privacy and consent review. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the test evidence and safety stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The privacy and consent review is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 20.

Fairness and Accessibility Review

PURPOSE

Create a reliable fairness and accessibility review for this agent workflow.

WHEN TO USE IT

Use this in the test evidence and safety stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the fairness and accessibility review. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the test evidence and safety stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The fairness and accessibility review is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 21.

Deploy Reporting Cycle

Complete this stage to deploy reporting cycle with approved inputs, explicit ownership, and a reviewable output before continuing.

IN THIS CHAPTER

- 21 Reviewer Packet Builder
- 22 Publication Version Planner
- 23 Reporting Cadence Designer
- 24 Impact Agent Operating Manual

Reviewer Packet Builder

PURPOSE

Create a reliable reviewer packet builder for this agent workflow.

WHEN TO USE IT

Use this in the deploy reporting cycle stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the reviewer packet builder. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the deploy reporting cycle stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The reviewer packet builder is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 22.

Publication Version Planner

PURPOSE

Create a reliable publication version planner for this agent workflow.

WHEN TO USE IT

Use this in the deploy reporting cycle stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the publication version planner. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the deploy reporting cycle stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The publication version planner is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 23.

Reporting Cadence Designer

PURPOSE

Create a reliable reporting cadence designer for this agent workflow.

WHEN TO USE IT

Use this in the deploy reporting cycle stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the reporting cadence designer. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the deploy reporting cycle stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The reporting cadence designer is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Save this reviewed output and continue to prompt 24.

Impact Agent Operating Manual

PURPOSE

Create a reliable impact agent operating manual for this agent workflow.

WHEN TO USE IT

Use this in the deploy reporting cycle stage after earlier outputs are reviewed and before the next decision.

COPY & PASTE PROMPT

You are helping me build an ai agent that converts program data into impact reports. Create the impact agent operating manual. First ask for the relevant approved inputs, audience, constraints, source owners, and human reviewer. Use only information I provide or explicitly approve. Separate confirmed facts from assumptions and missing information. Return a structured practical output with source references, risks, open questions, a recommended next action, and the person who must approve it. Do not perform restricted actions or invent missing details.

PRO TIPS

- Use a real de-identified example from the deploy reporting cycle stage.
- Name the source owner and final reviewer before accepting the output.
- Test one normal case and one difficult edge case.

EXAMPLE OUTPUT

The impact agent operating manual is drafted. Confirmed inputs are separate from open questions, and each consequential item names its source, risk, next action, and human approver.

WHAT'S NEXT

Assemble and approve the complete program data impact reports operating manual.

WORKSHEETS

Make the system yours

Report Brief

Complete this task-specific report brief before relying on the agent output.

AUDIENCE AND DECISION

REPORTING PERIOD

REQUIRED SECTIONS

DEADLINE

REVIEWERS

CHANNELS

Source and Permission Inventory

Complete this task-specific source and permission inventory before relying on the agent output.

SOURCE

OWNER

COVERAGE DATES

PERMISSION

SENSITIVITY

STORAGE

Data Dictionary

Complete this task-specific data dictionary before relying on the agent output.

INDICATOR

DEFINITION

UNIT

DENOMINATOR

MISSING-VALUE RULE

OWNER

Claim Ledger

Complete this task-specific claim ledger before relying on the agent output.

CLAIM

SOURCE

PERIOD

CALCULATION

CAVEAT

STATUS

Story Consent Check

Complete this task-specific story consent check before relying on the agent output.

STORY SOURCE

CONSENT SCOPE

DE-IDENTIFICATION

QUOTE APPROVAL

RISKS

REVIEWER

Calculation Test Set

Complete this task-specific calculation test set before relying on the agent output.

METRIC

EXPECTED RESULT

INDEPENDENT RESULT

VARIANCE

RESOLUTION

APPROVER

Report Approval Checklist

Complete this task-specific report approval checklist before relying on the agent output.

ACCURACY

PRIVACY

CONSENT

ACCESSIBILITY

BRAND

APPROVER

Maintenance Log

Complete this task-specific maintenance log before relying on the agent output.

CHANGE

REASON

SOURCE AFFECTED

OWNER

REVIEW DATE

VERSION

WHEN YOU REACH THE LAST PAGE

You have a working system

- ☐ A scoped reporting agent
- ☐ An approved source inventory and data dictionary
- ☐ A traceable claim ledger
- ☐ A reviewer-ready report draft
- ☐ Calculation privacy consent and fairness checks
- ☐ A reusable reporting operating manual

Keep the human accountable. Let the agent make the work repeatable.