

# The B.O.T.S.A.F.E. Blueprint

## PLAN



### B - BUSINESS GOAL

- Define a specific business problem before writing a single prompt
- Set measurable targets: time saved, consistency, or decisions accelerated
- Separate good goals (quantified outcomes) from bad goals (vague experiments)
- Validate that the bot is worth building before investing in the build

### O - OWNERS & USERS

- Assign a single business owner who is accountable for the bot's performance
- Define exactly who will use the bot and how they interact with it
- Establish a clear approval chain before the bot touches real outputs
- Document escalation paths so humans stay in control

### T - TRIGGERS

- Decide whether the bot runs on a schedule, an event, or a manual signal
- Set a primary trigger tied to a specific close milestone or data confirmation
- Define secondary triggers for reruns when new data posts or errors occur
- Ensure triggers are documented so the bot never runs unexpectedly

### S - STEPS

- Map the full process in plain language before any prompting begins
- Identify every input, decision point, and output the bot must handle
- Apply materiality rules and routing logic as explicit steps, not assumptions
- Keep each step discrete so failures are easy to isolate and fix

## PROMPT



### A - ACCEPTANCE CRITERIA

- Define exactly what a correct output looks like before the bot is built
- Set numeric rules: variances must tie to source, thresholds must be applied
- Establish tone and content rules: no invented numbers, limited drivers
- Include format standards so outputs drop cleanly into existing workflows

### F - FAILURE & FALLBACK

- Identify every condition that should stop the bot from proceeding
- Build explicit fallback steps: flag the exception, route to an analyst, halt output
- Define rollback procedures so a failed run never corrupts the close
- Treat failure design as seriously as success design — it's not optional

## DEPLOY



### E - EVIDENCE & METRICS

- Track efficiency metrics to prove time savings are real and repeatable
- Monitor accuracy rates so rework and exceptions stay within acceptable limits
- Measure adoption and reliability to identify where the bot needs refinement
- Use data from every run to build the case for expanding automation further