

## Defining Your AI Agents Conversation Guidelines

Establishing clear **conversation guidelines** is the most effective way to ensure your AI Agent provides a high-quality, consistent experience. These guidelines act as a manual for the agent's brain, dictating how it represents your brand and interacts with visitors.

### Navigating to Conversation Guidelines

1. Click **AI Agents** from the left navigation menu.
2. Select the AI Agent you want to provide guidelines for.
3. Select the **Conversation guidelines** section.

### Default Conversation Guidelines

To help you get started quickly, we **automatically generate** a baseline set of **Conversation guidelines** based on the **Goal** you provided when you **first created your AI Agent**. While these generated guidelines provide a strong foundation, you can customize the guidelines as desired to better align with your specific brand needs.

We do however recommend that your **Conversation guidelines** always include the following sections:

1. **Tone:** The personality and voice used to represent your brand.
2. **Goals:** The primary objectives guiding the AI Agent toward successful outcomes.
3. **Restrictions:** Hard rules and boundaries to keep the AI Agent compliant.

### 1. Tone: The Voice of Your Brand

Your **Conversation guidelines** should start with a defined personality. This ensures the AI Agent is an extension of your existing brand identity.

- **Personality Attributes:** Select three to five adjectives that describe the voice of the AI Agent (e.g., Professional, Empathetic, Witty, Direct).
- **Adaptability:** Instruct the agent on how to adjust its tone based on the visitor's sentiment. For example: "Be cheerful during the initial engagement, but switch to a neutral, solution-oriented tone if a visitor expresses frustration."
- **Style Standards:** Define whether the agent should use industry-specific jargon, or concise bullet points.

### 2. Goals: Defining Success

Every interaction must have a clear objective. Without a defined goal in your **Conversation guidelines**, the AI

Agent may provide information without actually driving value..

Provide specific goals the AI Agent should aim for, such as:

- **Education Oriented:** “Educate visitors on the platform’s capabilities and best practices.”
  - **Sales Oriented:** “Encourage visitors to explore or trial a specific solution.”
- 

### 3. Restrictions: Establishing Guardrails

Restrictions are the hard rules within your **Conversation guidelines** that keep the AI Agent safe, compliant, and focused.

- **Topic Boundaries:** List subjects the AI Agent must avoid (e.g., providing legal/medical advice, discussing competitor pricing, or sharing personal opinions).
  - **Operational Limits:** Clearly state what the AI Agent cannot do, such as promising custom discounts to visitors.
  - **Company Policies:** Specify if the AI Agent can disclose specific company policies or if certain internal documentation is off-limits.
- 

### How to Publish the Changes to Your AI Agent

Changes are automatically saved. To make the changes you have made public, click **Publish changes** in the top right.



**NOTE:** We recommend always testing any changes to your AI Agent before you make public.

For more information, please take a look at our **How to Test and Publish the AI Agent** section.

---

Next Up: [How To Manage Knowledge Sources For AI Agents](#)

---