

Email Digest Agent

Product Requirements Document, structured against Figma's public PRD framework

Project:	Email Digest Agent (Lenovo OEM Portfolio)
Team:	OEM Portfolio, Commercial IDG
Author:	Stefan Soh, Product Management Intern
Stakeholders :	David Harris (Director, OEM Portfolio), Lenovo Compliance and AI teams
Platform:	Microsoft 365 Copilot Studio
Status:	Live, in daily use by manager, in use by additional team members

Problem Alignment

The Problem

"Something that could kind of rank your emails based on importance by reading them." That is how my manager described the problem in a discovery conversation, not in a written spec. His mornings are back to back meetings with no room to read his own inbox. His team had already tried an existing importance ranking tool. In his words, it gave garbage.

Discovery interviews with him and the rest of the OEM PM team, using a Jobs to Be Done framing rather than a features questionnaire, surfaced two distinct problems: PMs lose hours daily and weekly to email triage between back to back meetings, and separately, PMs can pull a data answer but sometimes lose the reasoning behind it. This PRD scopes the first problem only. The second is explicitly out of scope, addressed below.

High Level Approach

Build a conversational agent inside Microsoft 365 Copilot Studio that, given a time window, reviews only the emails inside that window and returns a structured digest ranked into four tiers of importance. The agent answers one question only: what changed since the user last checked. It does not attempt to replace the inbox itself.

Goals and Success

This section states what the project targeted going in. Actual reported outcomes, including manager feedback after real use, are documented separately in the project case study rather than folded in here, so intent and result are never blurred together.

Target outcomes:

- Reduce the time a PM spends triaging email between meetings.
- Surface what changed since the user last checked, not a full re-ranking of the inbox.
- Make the tool usable without any prompt writing, so it works for less technical teammates too.

Guardrails:

- Never silently drop a message. Anything ambiguous is preserved in its own category rather than discarded.
- Never let sender seniority alone decide importance. A substantive request from a teammate must be able to outrank a low stakes reply from someone senior.
- Never scan outside the exact requested time window.

Scope

In scope:

- Time window selection: last hour, last 2 hours, today since 12 AM, since last check, or a custom range.
- Four tier classification: Need to Know, Be Aware Of, Quick FYIs, Vague or Misunderstood.
- Thread aware summarization, prioritizing what is newly different in a thread.
- Down ranking of routine mass mail, generic company wide notices, and standard calendar invites by default.

Out of scope:

- The separate numbers without context, reasoning problem identified in discovery.
- Drafting or sending responses on the user's behalf.
- Any scanning or summarization outside the exact requested time window.

Alternatives considered: a custom application calling the Outlook or Microsoft Graph API directly was considered and rejected in favor of building natively inside Copilot Studio, for reasons covered under Non-Functional Requirements below.

Key Flows and Edge Cases

Primary flow: user selects a time window, agent gathers messages in that window, groups by thread where useful, scores each item against urgency, explicit action requests, impact on active work, sender seniority, and clarity, then returns a digest sorted into the four tiers, with trivial acknowledgements placed last or omitted.

Edge cases explicitly designed for:

- Ambiguous or incomplete message: preserved in Vague or Misunderstood with a short note on what is unclear, never dropped.

- Mass mail and generic notices: down ranked to Quick FYIs unless they contain a specific request, deadline, or project relevant impact.
- Standard calendar invites: reduced to one line, sender and title, unless the body has meaningful project context beyond logistics.
- Requested window too broad: agent proactively suggests narrowing it rather than returning an overwhelming digest.
- No emails in the requested period: agent states this plainly.
- Missing sender seniority or org context: ranking continues on urgency, action required, and clarity rather than guessing.
- Thread history outside the requested window unavailable: agent summarizes only what is supported by messages actually in scope.

Non-Functional Requirements

Security and access:

- Built entirely within Microsoft 365 Copilot Studio rather than a custom app calling the Outlook or Graph API directly, to keep the agent inside Lenovo's existing enterprise permission model instead of introducing a new access surface requiring separate provisioning.
- Runs as a per user Copilot Studio agent connected to each PM's own Outlook account. It operates only within the requesting user's own mailbox, not a shared or team wide data store.
- Reviewed directly with Lenovo's Compliance and AI teams before deployment to confirm it met internal standards for handling email data.

Voice and formatting:

- No emojis.
- No em dashes.
- Each summary limited to one short paragraph or up to five bullets.

Open Issues and Key Decisions

- **Decision:** triage was prioritized over the numbers without context problem, since it was faster to build, easier to validate, and solved the more acute daily pain. Documented here so the tradeoff is visible, not assumed.
- **Open:** the deferred reasoning problem remains a candidate for a future phase, pending further scoping with the team.
- **Open:** the agent currently lives entirely in chat text with no visual hierarchy. A redesigned, scannable interface concept has been prototyped separately and is documented in the project case study.

Launch Readiness

Rollout phases:

- Discovery and problem scoping with manager and OEM PM team.
- PRD drafted and reviewed.
- Build inside Copilot Studio.
- Review with Compliance and AI teams prior to deployment.
- Deployed for personal daily use, then adopted by additional team members without prompting.

stefansoh.com. Full case study and interactive prototype available at stefansoh.com/email-agent-case-study.html