Teamulate

A PRACTICAL GUIDE FROM TEAMULATE

The Company Answer Check

How can AI answer from your company's information and know when it is missing?

A practical guide from Teamulate. Pick one repeated customer question, find the document that should decide the answer, and test whether an AI assistant answers it, asks, or hands it to a person at the right moment.

Four things that are not the same

A file | A passage | The current rule | The right answer

Who this is for

Owners, operations leads and marketing leads whose services, terms and procedures live in several folders, inboxes and pages, and who keep answering the same questions by hand.

You need one repeated question, the documents that should answer it, and the person who owns those documents.

The idea in one paragraph

> Having a file, finding a passage, knowing the current company rule and giving the right answer are four different things. An assistant can quote real text and still give the wrong answer, for example by applying an expired price or a rule written for another customer. A reliable company answer is a chain of checks, and a useful "I cannot confirm this" names what is missing and who will resolve it.

PART 1

What we checked

In October 2026 we read the public documentation of four tools people use to answer from company documents (Microsoft Copilot Studio, Intercom Fin, NotebookLM and Claude) and two pieces of published guidance on measuring and reducing unsupported answers. This is a reading of how the tools say they work, not a ranking.

What the documentation says	What it means for you
1 **Copilot Studio: SharePoint files copied into the agent are synchronized every four to six hours; the direct SharePoint mode queries live search instead**	"Connected to SharePoint" is not enough. Write down which mode you use
2 **Intercom Fin: website content syncs about once a week and can be re-synced by hand**	A change on your site may not reach the assistant the same day
3 **NotebookLM: since May 26, 2026, Google Docs, Sheets and Slides added from Drive update automatically**	Older advice that "you must always re-sync by hand" may now be out of date
4 **Claude Citations: points to the exact passage in the documents you provide**	A valid pointer still is not proof that the passage is current or applies to this case.
5 **Microsoft's evaluation guidance scores retrieval, groundedness and completeness separately**	A good score on one still leaves the others unchecked.

Different tools refresh on different clocks. Before you trust an answer about a price or a term, know when the source last reached the assistant.

PART 2

Three different failures

1. There is no rule. Nobody has written down the answer, so the assistant can only guess or refuse.
2. The rule exists but was not found. The file is there, but the search did not reach it, or the important condition sits in a comment, an image or another page.
3. The wrong rule was found. An old version, a draft, or a rule for another service or customer group was applied as if it were current.

Each one needs a different fix: the owner writes the rule, the source is cleaned up so it can be found, or versions and scope are labelled so the right one wins.

PART 3

The right route for each situation

Situation	Right route	Example wording
A current source covers the question	Answer and point to the passage	"Under the current procedure for this service..."
One deciding detail is missing	Ask one precise question	"Which service and which location is this for?"
Only part is supported	Answer that part, name the gap	"X is confirmed. The documents I can see do not cover Y."
Not enough evidence	Hand off to the owner	"I cannot confirm the timeline. This needs a check by..."
Two current rules conflict	Send both to the owner	"The two documents that apply give different terms."
The source could not be read	Flag an operational problem	"I could not check the current document."
A discount or special promise is asked for	A person with authority decides	"This needs confirmation for your specific case."

Never on autopilot: invented prices, promises nobody approved, and expired terms that change what a customer pays.

PART 4

The source register worksheet

Fill in one row per document that is allowed to decide an answer. Leave a field as unknown rather than guessing.

Field	What goes here	Your notes
1. Source and location	A stable name and the allowed path to the original	
2. Owner and approver	Who maintains it and who signs off real changes	
3. Status	Draft, approved, replaced, withdrawn or pending review	
4. Valid from and to	When the rule starts and stops applying	
5. Applies to	Service, product, location, channel and customer group	
6. Replaces	Which exact older version this one replaces	
7. Last changed and last checked	When the original changed and when someone tested it with a question	
8. Next review	The date, and the events that should trigger an earlier review	

Edit date is not effective date. A newer file can be a draft and the rule in force can be older. When scope or validity is missing for a price or a term, send it for review instead of picking the newest file.

PART 5

A 30-question test before you rely on it

Write the questions and the expected answers before you run anything, and have the person who owns the rules approve them.

Group	Questions	What it tests
Answerable	12	A direct fact, a reworded question, an exception, a table, an exact code, two sources combined
Needs a question or a person	6	Unconfirmed price, availability or timeline, missing context or a missing document
Conflicting	6	Two incompatible sources, a draft, a custom scope, an unproven replacement
Old or future terms	6	An expired offer, a withdrawn document, a future version, a historical question, a slow sync

- Run every question three times in a fresh conversation. Thirty questions run three times is 90 answers per setup. The three runs of one question are not independent cases, so also count how many of the 30 questions pass every run.
- Count a refusal as a failure when a current, sufficient source existed.
- Record numerators and denominators, not just a percentage.
- The 12, 6, 6 and 6 split is a practical starting scope we propose, not a statistically calculated sample.

PART 6

Checklist before customers see answers

- [ ] One repeated question or group of questions is chosen, with an owner.
- [ ] Every document allowed to decide the answer is in the register with scope and validity.
- [ ] The 30 questions and their expected answers were approved before the first run.
- [ ] Every confident wrong answer is classified: missing rule, not found, wrong rule, unsupported addition or missed hand-off.
- [ ] Each hand-off carries the question, what is known, what is missing, the sources checked and who acts next.
- [ ] Someone is named to re-run the set after any change of model, tool or document.
- [ ] The first stage is drafts reviewed by a person. Sending answers on their own is a separate decision.

> **No current source? Say so.** If the rule is not written down, the useful answer names the gap and the person who will close it. Do not let the assistant fill it in.

Limits of this guide

- Nothing here ranks the four tools.
- Any target you set, such as a pass rate for answerable questions, is your decision, not a measured result.
- Product behaviour changes. Re-check the pages below before you choose a tool or publish technical details.
- Zero errors in a small test does not mean zero risk.

Want a second pair of eyes?

If keeping company knowledge current keeps falling between people, it is part of the marketing operations Teamulate runs alongside you, with every step visible: https://teamulate.ca/ai-marketing-team/

Read the full article: https://teamulate.ca/blog/ai-answers-company-information/

Sources

Checked October 27, 2026:

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