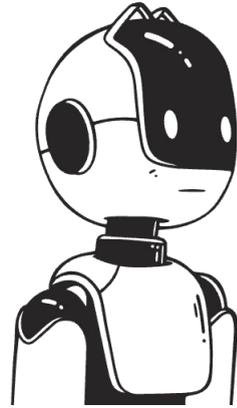


HOW TO BUILD & MANAGE A.I. AGENTS IN YOUR BUSINESS

BY JASON ADRIAAN



LET'S BUILD OUR A.I. AGENT, SAM:

LLM (Brain)

Thinks and reasons.
Generates answers.
Only responds when prompted.

Knowledge Base (Memory)

Stores company knowledge.
Policies, history, documents.
Makes responses contextual.

Soul.md (Personality)

Defines tone and behaviour.
Sets risk appetite and brand voice.
Determines *how* it acts.

Data Inputs (Eyes & Ears)

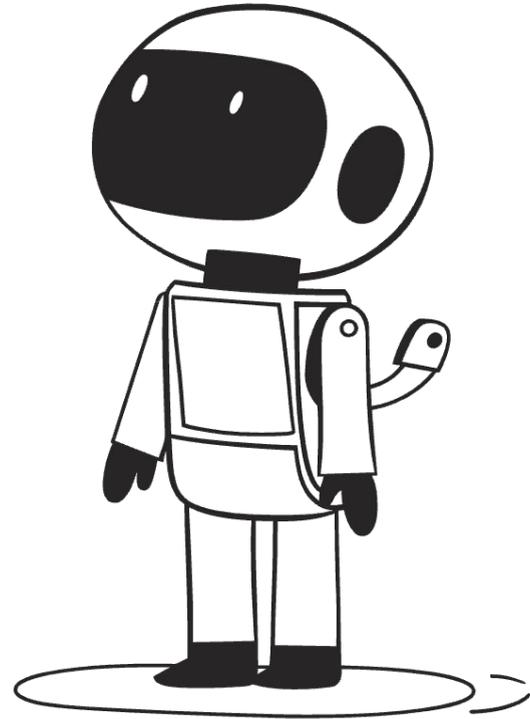
Feeds it live information.
CRM updates, analytics, emails.
Gives it awareness.

Tools (Hands)

Can interact with systems.
Sends emails, updates CRM, pulls data.
Acts — but only when told.

Cron (Clock)

Runs automatically.
Monitors data.
Acts without being prompted.



WE CAN USE SAM ANYWHERE...

- **Sales assistant** (lead qualification, follow-ups)
- **Customer support agent** (FAQ, ticket routing)
- **Operations assistant** (reporting, data entry)
- **Marketing agent** (content, ads, social posts)
- **Finance assistant** (invoice follow-ups, summaries)



LET'S USE SAM FOR MARKETING:

LLM: OpenAI GPT-5.2

Data Inputs:

- Google Analytics
- Meta Ads Analytics

Knowledge Base:

- Brand guidelines
- Past campaign performance
- Target audience profiles
- Product positioning

Soul.md (Personality):

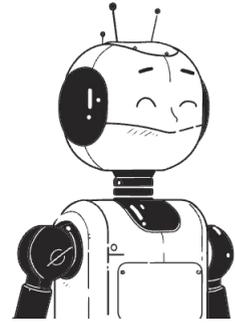
- Creative but data-driven
- Brand-safe
- Optimistic tone
- Aggressive on experimentation

Cron:

- Daily performance check (08:00)
- Weekly performance report (Monday 07:30)
- Monthly campaign optimisation review

Tools:

- Meta Ads Manager
- Google Ads
- Canva
- Buffer Access



SAM IS CRUSHING IT!

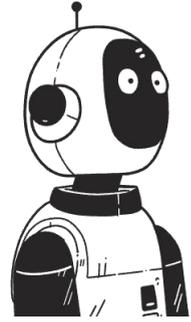
Week 1:

- Launches 3 new ad variations
- Improves click-through rate by 28%
- Reduces cost per lead
- Sends a clean Monday performance report

Week 2:

- Spots underperforming creatives
- Reallocates budget automatically
- Suggests new audience segments
- Runs A/B tests without being asked

She's fast. She's data-driven. She never sleeps.



UH OH! SAM MADE A MISTAKE...

Yesterday at 08:00, SAM optimised the Meta campaign.

By 12:00, we had:

- 3x more leads
- 40% lower cost per click
- Record traffic

Amazing!, **Except...**

None of the leads qualified.

SAM optimised for the wrong KPI.

Clicks. Not revenue.



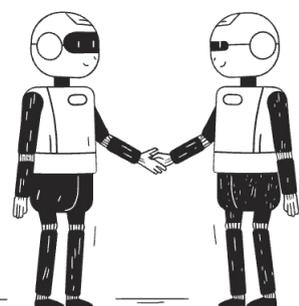
REALISATION

SAM didn't fail. We failed at managing SAM....

We failed to:

- Define SAM's role properly
- Set clear KPIs
- Set proper guardrails
- Review decisions early
- Create and review an audit trail

SAM did exactly what we told her to do.



SO... HOW DO WE MANAGE A.I. AGENTS?

Roles & KPIs

- What the agent is responsible for
- What outcomes it owns
- What success looks like
- What gets measured
- When intervention happens

Access Control

- Limit access to only essential tools
- Limit the scopes on APIs scopes
- Apply spend limits
- Review permissions regularly

Monitoring & Logs

- Log all tool usage
 - Log all LLM executions
 - Keep CRON logs
- Performance is tracked like employees.

Multi-Agent Peer Review

Instead of one agent acting alone:

- Marketing agent proposes campaign
- Compliance agent reviews messaging
- Finance agent validates budget impact
- Risk agent checks policy alignment

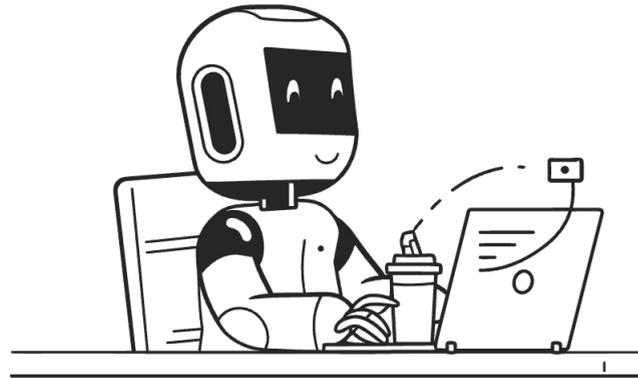
Shared Memory

- Central knowledge base
- Policies
- Decisions
- Brand guidelines

Prevents contradiction between agents.

Orchestration

- Routes tasks between agents
- Defines review chains
- Escalates edge cases to humans
- Prevents duplication



THE NEW IMPROVED SAM:

Clear Role & KPI

Optimise for qualified pipeline revenue.

Tighter Permissions

- Budget caps enforced
- No spend changes above threshold without approval
- Limited API scope

Multi-Agent Oversight

SAM no longer works alone.

- Compliance Agent reviews ad copy
- Finance Agent validates budget shifts
- Risk Agent checks brand alignment

Full Logging & Monitoring

- Every campaign change logged
- Every optimisation traceable
- Weekly KPI review

Shared Memory Upgrade

- Clear definition of "qualified lead"
- ICP embedded
- Sales feedback loop integrated

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