

FREE WORKBOOK

AI Agent Starter Kit

Pick the first workflow worth automating, calculate the payoff, write safer agent instructions, and roll it out with review rules before buying another AI tool.

1

Pick

one workflow

2

Score

ROI + risk

3

Ship

with review

Use this before buying a tool or starting a build.

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1. Pick One Workflow

The best first agent is usually boring: repeated work, clear input, clear output, and an obvious human review point. Do not start with autonomous decisions.

Criterion	Question	What good looks like
Frequency	How often does it happen?	Daily/weekly beats monthly.
Input clarity	Are the inputs consistent?	Forms, tickets, CRMs, docs, calls.
Output clarity	Can a human judge quality quickly?	Drafts, summaries, scores, briefs.
Risk	What happens if it is wrong?	Start low-risk and reversible.
Owner	Who maintains it?	No owner means no agent.

Good first workflows

- Support ticket triage
- Meeting follow-up
- Content brief creation
- Customer onboarding nudges
- Lead research
- Weekly reporting
- CRM cleanup

Avoid first: autonomous refunds, legal/medical/financial advice, irreversible system updates, vague personal assistants

2. ROI Worksheet

Only count savings after subtracting human review time. A fast draft that takes longer to fix is not leverage.

Input	Your number
Task name	
Times per week	
Minutes per task today	
Hourly cost of person doing it	
Expected AI draft/research time	
Expected human review time	
Software/API cost per month	
Setup budget	

Formula

Weekly time saved = current weekly time - AI/review weekly time

Monthly labor value = weekly time saved x hourly cost x 4.33

Payback months = setup budget / monthly labor value

Rule: if payback is unclear, simplify the workflow before building.

3. Prompt System Builder

Agent prompts need more than a clever role. They need source rules, boundaries, output format, examples, and review criteria.

Prompt block	Write your instructions
Role	What job does the agent perform?
Goal	What does a good result achieve?
Trusted sources	Which docs, fields, or systems outrank others?
Boundaries	What must the agent never do?
Output format	Bullets, table, JSON, email draft, checklist?
Escalation	When should it stop and ask a human?
Review checklist	How will a person judge quality?

Strong instruction pattern:

Use only the provided sources. If required data is missing, say exactly what is missing. Draft the output for review; do not send, update, refund, promise, or decide without approval.

4. Risk And Review Matrix

The first version should usually draft, summarize, classify, or recommend. Let it act automatically only when the action is low-risk, reversible, logged, and owned.

Risk level	Examples	Control
Low	Internal summary, draft, classification	Sample review
Medium	CRM suggestion, follow-up draft, report	Human approval
High	Customer message, refund, contract, hiring	Manual decision
Blocked	Legal, medical, financial advice, irreversible updates	Do not automate

Launch checklist

- Inputs logged
- Reviewer named
- Failure examples saved
- Outputs logged
- Escalation rule written
- Weekly review scheduled

5. Agent Workflow Canvas

Trigger

What starts the workflow?

Inputs

Fields, docs, CRM data, tickets, calls.

Agent task

Classify, extract, summarize, draft, score.

Tools

Apps and sources the agent can use.

Review

Who approves, edits, rejects, escalates?

Output

Where does final work go?

Log

What gets saved for improvement?

Metric

How do we know it worked?

A workflow is ready to build when every box has a clear answer.

6. Testing And Eval Pack

Do not trust a demo. Test normal cases, messy cases, missing data, conflicting instructions, and high-risk requests before launch.

Test	Pass condition	Result
Normal case	Expected output	
Messy input	Should still produce useful draft or ask for more context	
Missing data	Should state what is missing	
Conflicting sources	Should choose source priority or escalate	
High-risk action	Should stop for approval	
Tool failure	Should explain failure and next step	

Save reviewer edits. They are the fastest way to improve the workflow.

7. 30-Day Rollout Plan

Phase	Actions
Week 1	Baseline current process, collect examples, pick owner, write first workflow brief.
Week 2	Build draft-only version, run test cases, revise prompt and source rules.
Week 3	Pilot with one reviewer, log edits, measure time saved and quality issues.
Week 4	Decide scale, keep in review, or stop. Document SOP and next workflow.

Metrics to track

- Minutes saved
- Failure rate
- Cost per run
- Reviewer edits
- Customer impact
- Team adoption

Decision rule

Scale only when the reviewed workflow saves time, keeps quality stable, has an owner, and has clear failure handling.

8. Useful First Agent Examples

Workflow	Agent job	Review rule
Support triage	Summarize ticket, classify category, draft reply	Human approves customer reply
Lead research	Research account, find trigger, draft notes	Rep approves outreach
Content brief	Cluster keyword, gather sources, draft outline	Editor approves angle
Weekly report	Collect metrics, summarize changes, flag anomalies	Manager reviews before sending
Onboarding	Find missing setup steps, draft nudges	CS approves customer message

Next step

Open the A8gent readiness quiz, score your workflow, then use the AI Agent Course for Business Owners only if the payoff and review model are clear.

a8gent.com/tools/ai-agent-readiness-quiz