ONBOARDING AI AGENTS: HOW TO DELEGATE WORKFLOWS

Ai-Coaching.Academy

Caelan Huntress

- AI Educator & Public Speaker
- American/New Zealand dual citizen
- From Portland, Oregon

WHAT I DO

- **Speaking** - AI Topics
- **Training** - Workshop Series
- **Coaching** - Advisory
- **Consulting** - Implementation

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BECOME A CONFIDENT AI OPERATOR

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AI TRAINING CURRICULUM

AI Foundations



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AI Agent Accelerator

- Ai301 · Context Engineering
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AI Applications

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- 211 – AI FOR THINKING
- 212 – AI FOR GOVERNANCE

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Onboarding AI Agents: How to Delegate Workflows

AGENDA:

- ✧ Exponential Change
- ✧ Loops & Slash Commands
- ✧ 4 AI Agents for Growth
- ✧ The SAGE Framework

“The AI displacement of white-collar jobs is upon us. The traditional career path is dying, and AI-driven productivity is redefining what’s possible.”



- Peter Diamandis



AI AGENTS NEED CONSTANT ATTENTION.

The promise of a 24/7 AI Agent controlling its own computer is that it accomplishes work without you, but it often needs multiple daily sessions with you, as its Agent Manager.



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"AI AGENTS DON'T HAVE A SPEED LIMIT, BUT THE PERSON MANAGING THEM STILL DOES."



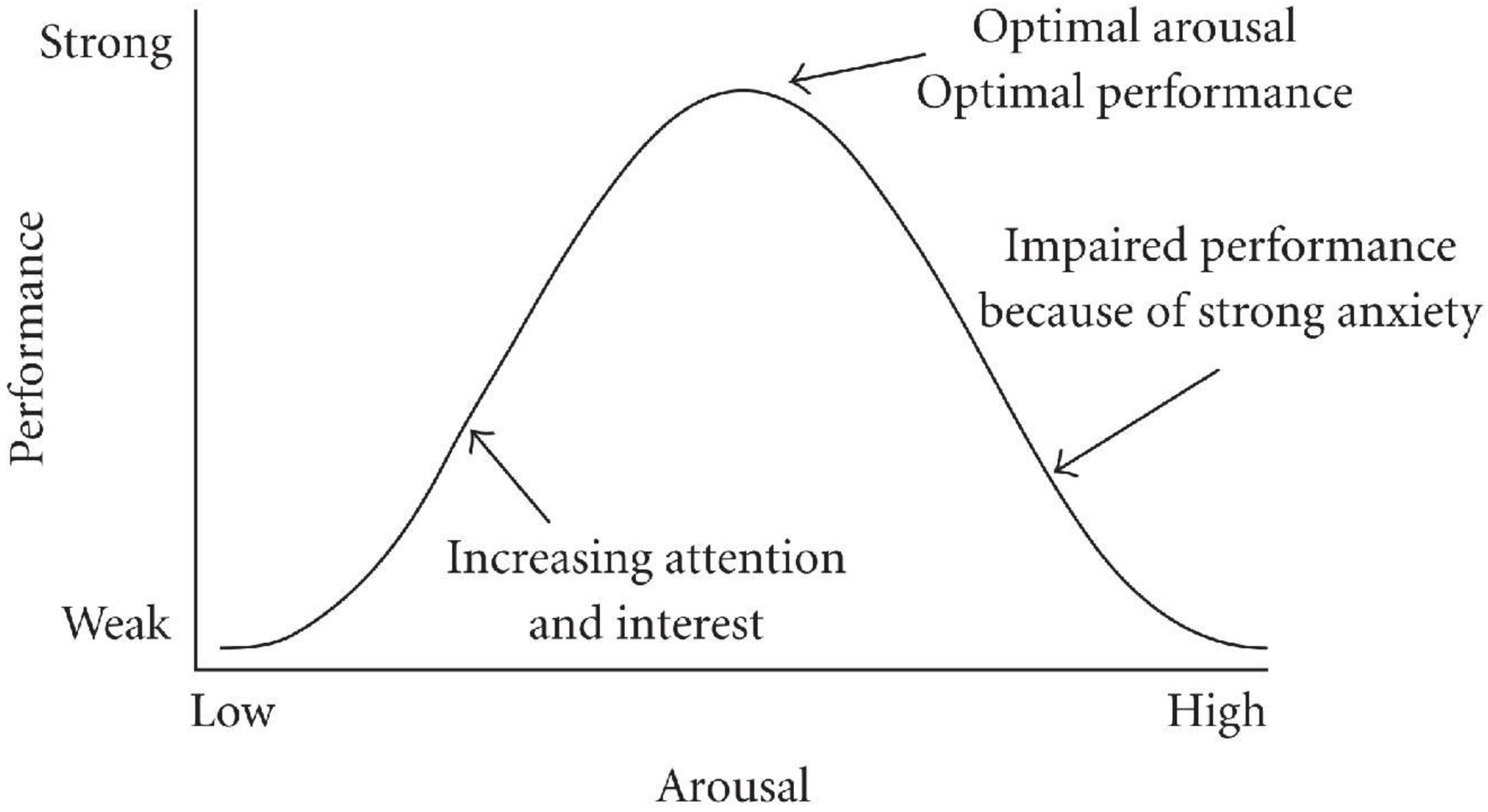
- Kieran Klaassen

DIARY STUDY OF TASK SWITCHING AND INTERRUPTIONS

HTTPS://ERICHORVITZ.COM/TASKDIARY.PDF

- Information workers are interrupted 4 times an hour
- 40% of the time - original task is not completed

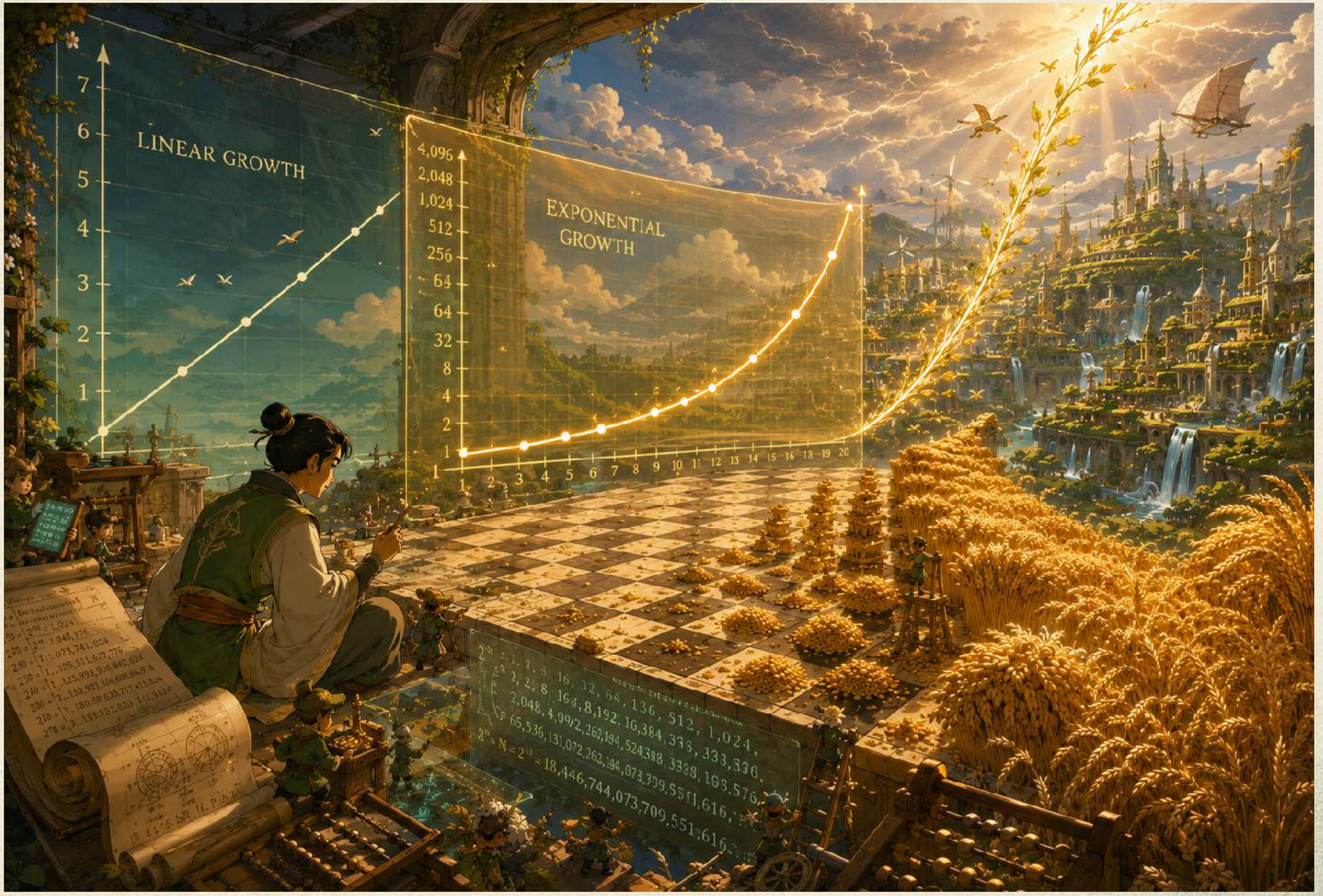
YERKES-DODSON LAW



“As soon as you start getting into agentic coding, you realise the bottleneck is kicking off follow-up tasks.”

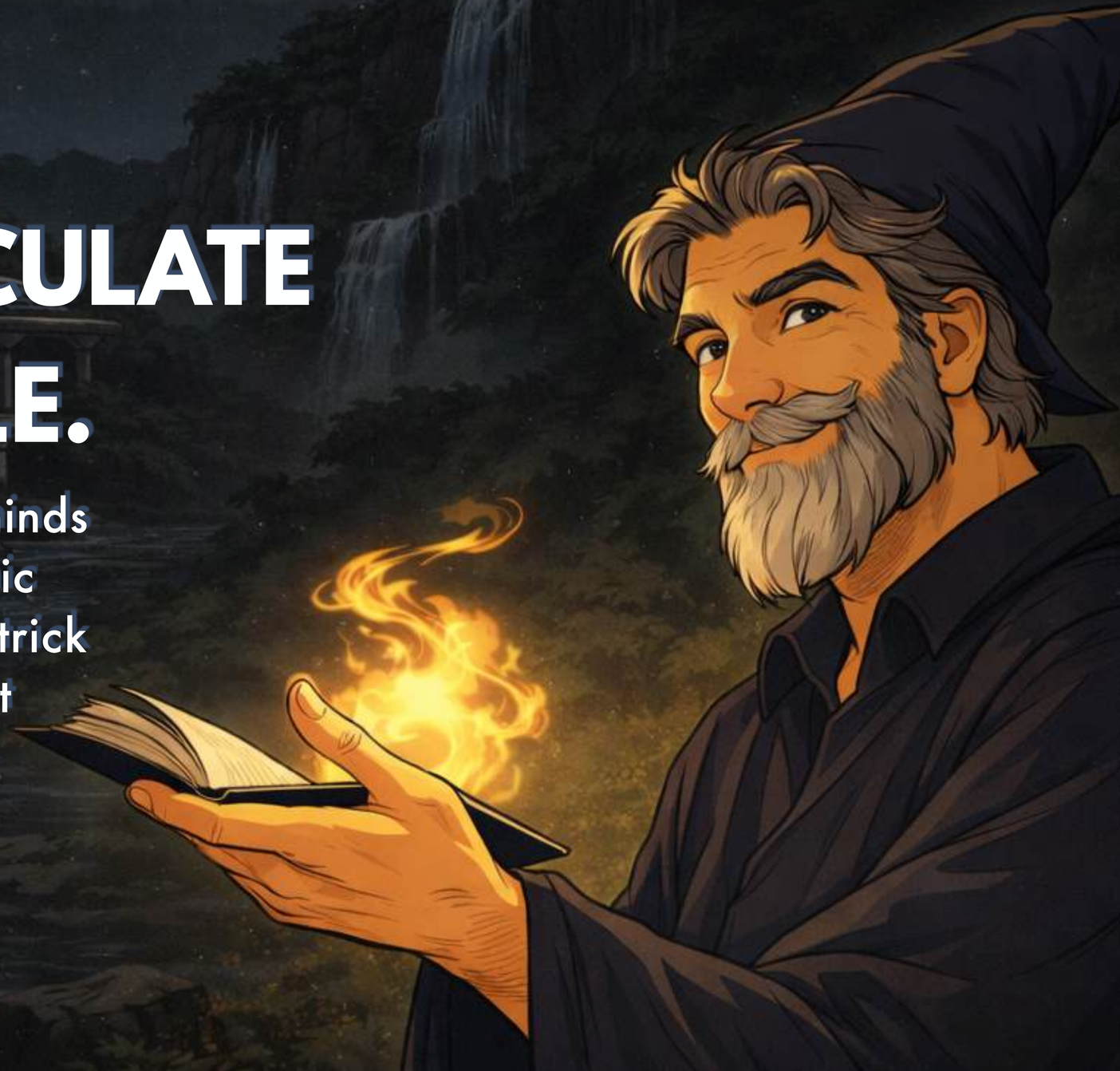


- Nat Eliason


LINEAR GROWTH
EXPONENTIAL GROWTH

WE ARE CLEVER ENOUGH TO CALCULATE THE UNKNOWABLE.

Exponential numbers are so vast, our minds cannot conceive of them. The logarithmic function lets us tame these numbers, to trick ourselves into knowing something about them, but we will never really know the vastness.



EXPONENTIAL TIME

EXPONENTIAL TIME

- 1K seconds

EXPONENTIAL TIME

- 1K seconds 1,000

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds 1,000,000

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds 1,000,000
- 1B seconds 1,000,000,000

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds 1,000,000
- 1B seconds 1,000,000,000
- 1T seconds 1,000,000,000,000

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds 1,000,000
- 1B seconds 1,000,000,000
- 1T seconds 1,000,000,000,000

- 16 Minutes

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds 1,000,000
- 1B seconds 1,000,000,000
- 1T seconds 1,000,000,000,000

- 16 Minutes
- 11.5 Days

EXPONENTIAL TIME

- 1K seconds 1,000
- 1M seconds 1,000,000
- 1B seconds 1,000,000,000
- 1T seconds 1,000,000,000,000

- 16 Minutes
- 11.5 Days
- 31 Years

EXPONENTIAL TIME

1K seconds	1,000	16 Minutes
1M seconds	1,000,000	11.5 Days
1B seconds	1,000,000,000	31 Years
1T seconds	1,000,000,000,000	317 Centuries

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“The greatest shortcoming of the human race is our inability to understand the exponential function.”



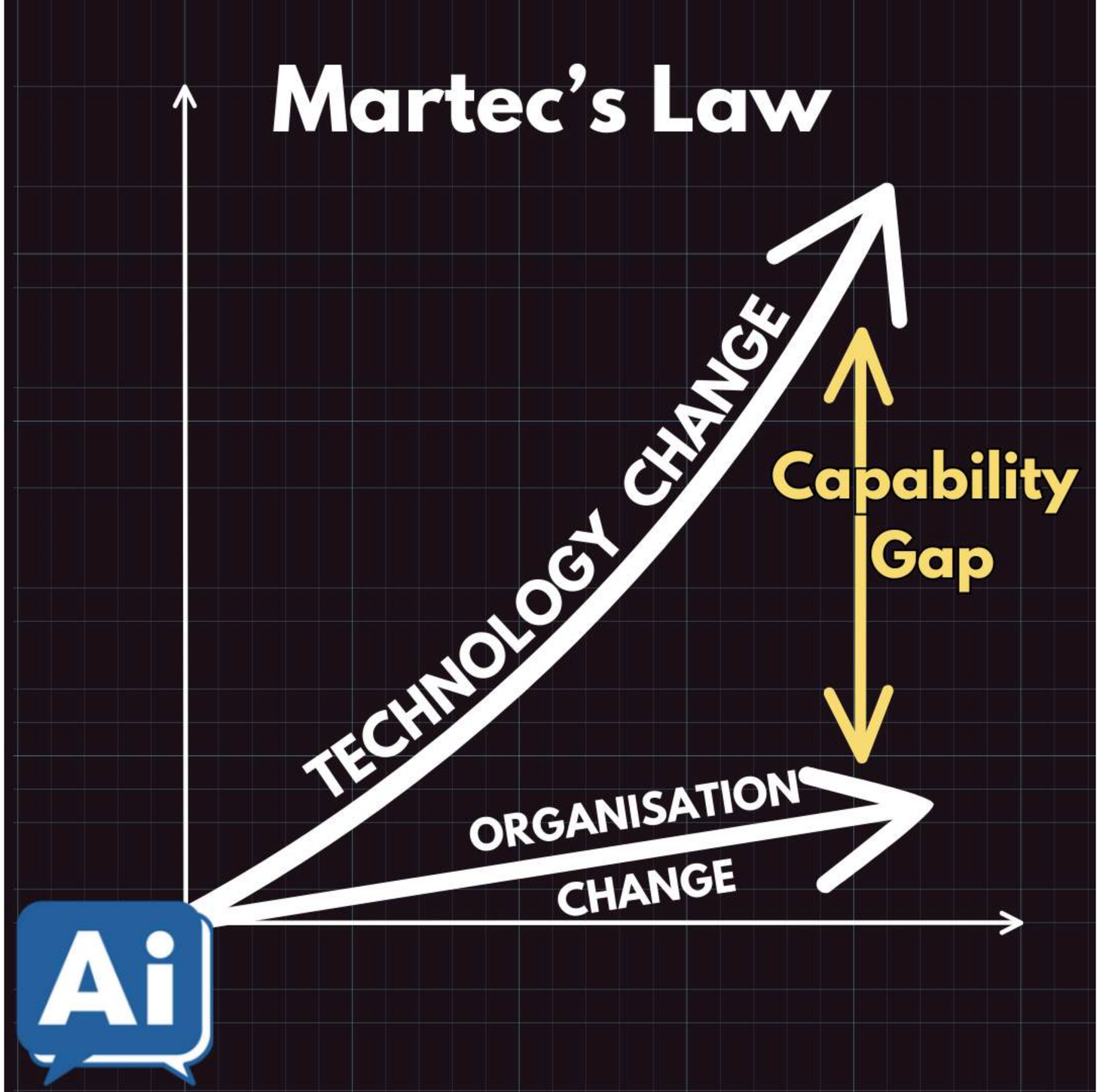
— Albert Allen Bartlett

GAME: EXPONENTIAL HIKER

- **GOAL:** Experience the surprising scale of exponential growth.
- **RULES:** Choose two locations. Measure a linear path between them, and then make that journey exponential.
- **FEEDBACK:** When did the result stop feeling intuitive?

GAME: EXPONENTIAL HIKER

1. How many one-metre steps could I take in NUMBER seconds?
2. If each step doubled in length, exponentially, how far would that number of steps take me?
3. Convert that distance into other units of measurement.


Martec's Law
TECHNOLOGY CHANGE
Capability Gap
ORGANISATION CHANGE
Ai

WRITING A LOOP WILL PROMPT THE AGENT FOR YOU.

Rather than handholding your agent to completion of your goal, loops let you measure progress against exit criteria, and automate the iteration of innovation to find the fastest path to achieve your goal.



DAME AROHA RERIT-CROFTS

1976 WORLD RECORD FOR POI PERFORMANCE, 30 HOURS 19 MINUTES



Try, try again

Reflexion

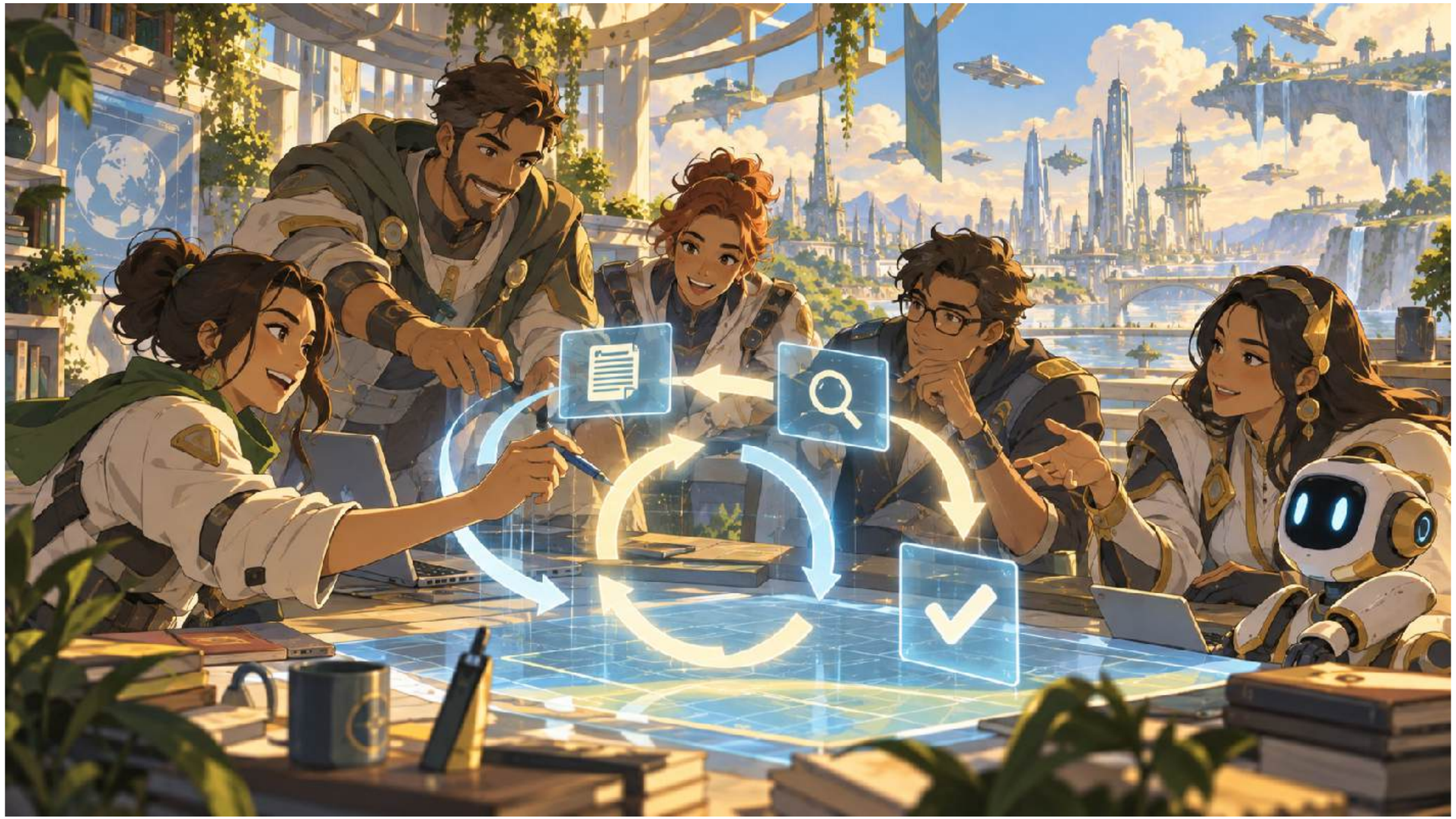
- Human evaluated coding performance increases 80-91% by adding reflection and retry loops

"I don't prompt Claude anymore.
I have loops that are running. They're the ones that are prompting Claude and figuring out what to do. My job is to write the loops."



- Boris Cherny, Anthropic

GAME: SPINNING THE LOOP



GAME: SPINNING THE LOOP

- **GOAL:** See how a loop can research, evaluate, and iterate toward better decisions without repeated prompting.
- **RULES:** Let the agent keep spinning until its exit criteria are satisfied.
- **FEEDBACK:** Compare the first recommendation with the loop's final winner—notice what additional evidence and problems the iterations uncovered.

GAME: SPINNING THE LOOP

1. Find the best AI meeting transcription tool for a five-person team under $100/month. Recommend one.
2. Repeat: search → compare → find missing evidence → search again. Stop when 3 viable tools meet the budget and you have enough evidence to choose one winner.
3. Turn this into a reusable decision loop. Ask me what I need to choose, define the exit criteria, then loop until you can recommend one clear winner.

THE AGENTIC LOOP

Observe	Reason	Act
Harness	Model	Tools
Goal	Memory	Skills
Journal	Bookshelves	Toolbox
Intake	Interpret	Implement
OS	CPU	Apps



AGENT Agency

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AGENT Agency



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.co.nz

FOUR CORNERSTONES



FOUR AGENTS

Content Agent

Company Brain



Prospecting Agent

Operations Agent

FOUR AGENTS

Content Agent

Company Brain



Prospecting Agent

Operations Agent

VOICEPRINT.MD



VOICEPRINT PATTERNS

- 1. Overall voice and tone
- 2. Sentence length, variation, and cadence
- 3. Paragraph length, density, and pacing
- 4. Typical openings and conclusions
- 5. Point of view and reader relationship
- 6. Vocabulary, jargon, humour, and repeated expressions
- 7. Use of stories, examples, metaphors, frameworks, and evidence
- 8. Formatting habits
- 9. Signature rhetorical patterns

"Caelan's professionalism, clear communication, and deep understanding of thought leadership made the entire experience so easy. It's incredible what he was able to produce from the content of my book. The newsletters are just what I was hoping for."

Testimonial



Meredith Wilson

FOUR AGENTS

Content Agent

Company Brain



Prospecting Agent

Operations Agent

PROSPECTING AGENT

Google Calendar, Drive, & Gmail

- **Outbound lead generation**
- **Prospecting lists in Google Drive**
- **25 cold emails per day**
- **Inviting qualified leads to discovery calls**

PROMPTS: LEAD GEN CAMPAIGN

1. Create a Google Drive spreadsheet called “Prospects.” Find 10 prospects matching my Customer Avatar. Include columns for first and last name, company, role, email, website, phone, LinkedIn, location, qualification reason, lead score, and outreach status.
2. Set a daily cron job to find 10 new prospects matching my customer avatar, and add them to this list. Avoid duplicates, score each lead 1–100, and explain the score.
3. After each daily prospecting run, select the 5 highest-scoring new leads and draft a short personalized outreach email. Add the drafts to my email outbox.

"Working with Caelan has been just fantastic. We're finally at the position where we can unleash the power of our CRM, and the hard work we've put into the content will pay back in spades. In all the conversations I've had with Caelan, it's just been obvious that he's a cut above anyone else I've ever talked to about automated marketing."

Testimonial



Bryan Whitefield

FOUR AGENTS

Content Agent

Company Brain



Prospecting Agent

Operations Agent

COMPANY BRAIN



PROMPTS: BRAIN IN A BOX

1. Tell me what your project context contains: key people, projects, decisions, dates, topics, and recurring themes. Cite the source for each.
2. Find 5 important connections across multiple documents that would be difficult to notice by reading them individually. Show me the evidence for each connection.
3. Turn these documents into a Company Brain. Summarize what this organization knows, what decisions it has made and why, lessons it has learned, unresolved questions, and 10 valuable questions I can now ask this brain.

We have made more traction and implementation of AI in the last month than we have in 2 years. Caelan has provided a powerful balance of strategy and practical support."

Testimonial



Jane Anderson

AGENT Agency

FOUR AGENTS

Content Agent

Company Brain



Prospecting Agent

Operations Agent

SUB-AGENT MANAGEMENT



PROMPTS: MISSION CONTROL

1. Using everything you know about me, build a one-screen Mission Control dashboard for my work: goals, projects, deadlines, metrics, bottlenecks, and next actions. Mark anything you don't know.
2. Reduce this to the 7 gauges I can use to steer. Give each a red, yellow, or green status.
3. Turn this into a reusable weekly dashboard. Show what should update automatically, what I should review manually, and the single most important action right now.

“We reduced the admin burden by 50% for two of our staff. This has given us more time to do other tasks. Caelan is a great coach, and is as experienced as you can be in AI, with everything being so new. He’s very genuine about wanting to improve people’s knowledge, and being able to build with AI.”

Testimonial



Zephyr Guyton

AGENT Agency

FOUR AGENTS

Content Agent

Company Brain



Prospecting Agent

Operations Agent



THE SLASH COMMAND INVOKES CAPABILITY ON DEMAND.

Using familiar slash commands empowers you to quickly tune the specs of your agent on the fly. Your aptitude with slash commands only increases with use.



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Hermes
Claude Code
Claude Cowork
Claude Skills
Custom GPT
Prompt Engineering

Ai-Coaching.Academy

Hermes
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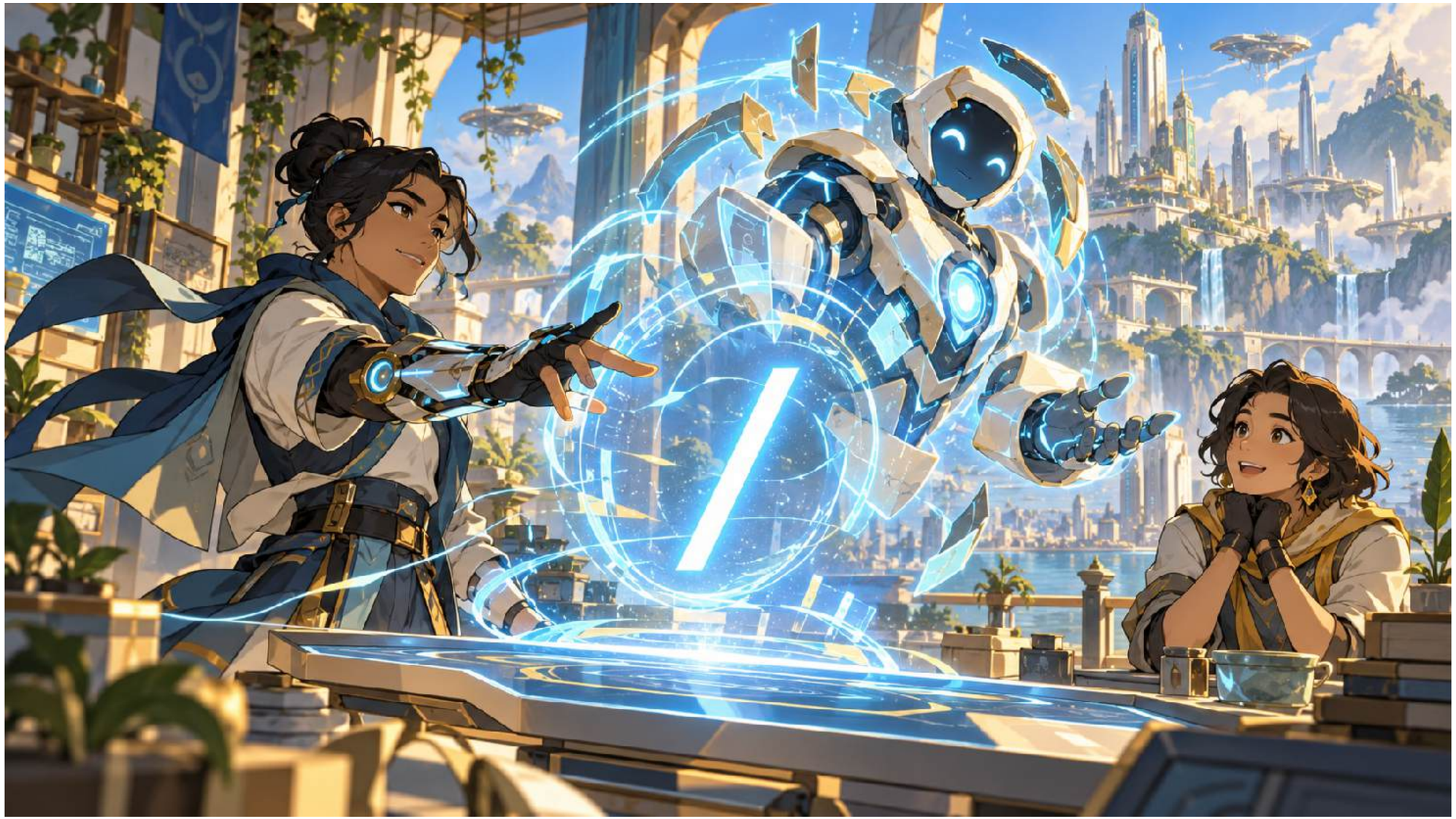
ANTHROPIC SKILLS BENCHMARKS

On the same GPT-5 Task

- 41,975 tokens - progressive disclosure
- 846,713 tokens - preloaded all skills and support documents

GAME: SLASH A COMMAND



GAME: SLASH A COMMAND

- **GOAL:** Discover, invoke, and manage your AI agent's capabilities with slash commands.
- **RULES:** Connect an AI Agent via Telegram or Discord.
- **FEEDBACK:** What new commends can you try next?

GAME: SLASH A COMMAND

1. /help
2. /model
3. /new

SLASH COMMAND



SLASH COMMAND STATS

- 60% of Discord users use slash commands

SUMMONING SPELL





Where is the human in the loop?



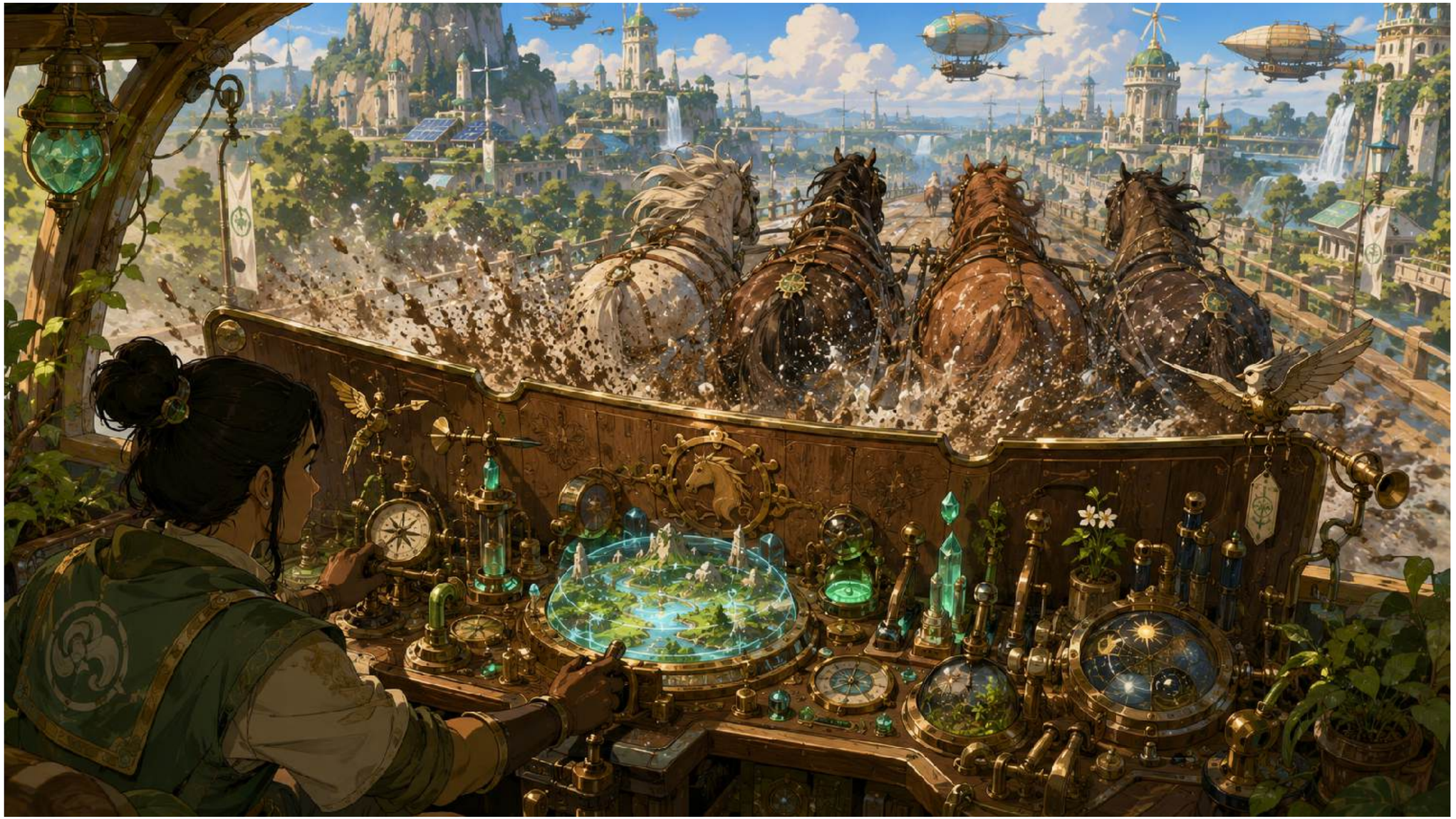
A DASHBOARD GIVES YOU VISIBILITY & CONTROL.

Having everything you need to manage all the complicated aspects of the work gives you a handle to hold the whole project, and see it from any side.



ETYMOLOGY OF DASHBOARD

ETYMOLOGY OF DASHBOARD



DASHBOARD STATISTICS

- 30% Faster Decision-Making
- 15-25% Lower Reporting Costs
- 22% Revenue Growth

1- DataRoars, 2 - PowerBI, 3 - Retail Chain Case Study

“What gets measured gets managed.”



- Jim Rohn

GAME: DAILY NEWSPAPER



GAME: DAILY NEWSPAPER

- **GOAL:** Set up a Daily Newspaper that delivers a digest of news topics to you every morning.
- **RULES:** Select a topic, and ask an agent to deliver information on that topic, every day at the same time.
- **FEEDBACK:** How can you change the format more to your liking? What can you improve for tomorrow's delivery?

GAME: DAILY NEWSPAPER

1. I want you to do comprehensive research on the latest news on TOPIC. Include 5 relevant news headlines, each with a 3 bullet summary and a link to read more.
2. Send me a daily brief with the latest updates every day at TIME.
3. Add a section for the day's weather in my location.

ONBOARDING INTERVIEW PROMPT

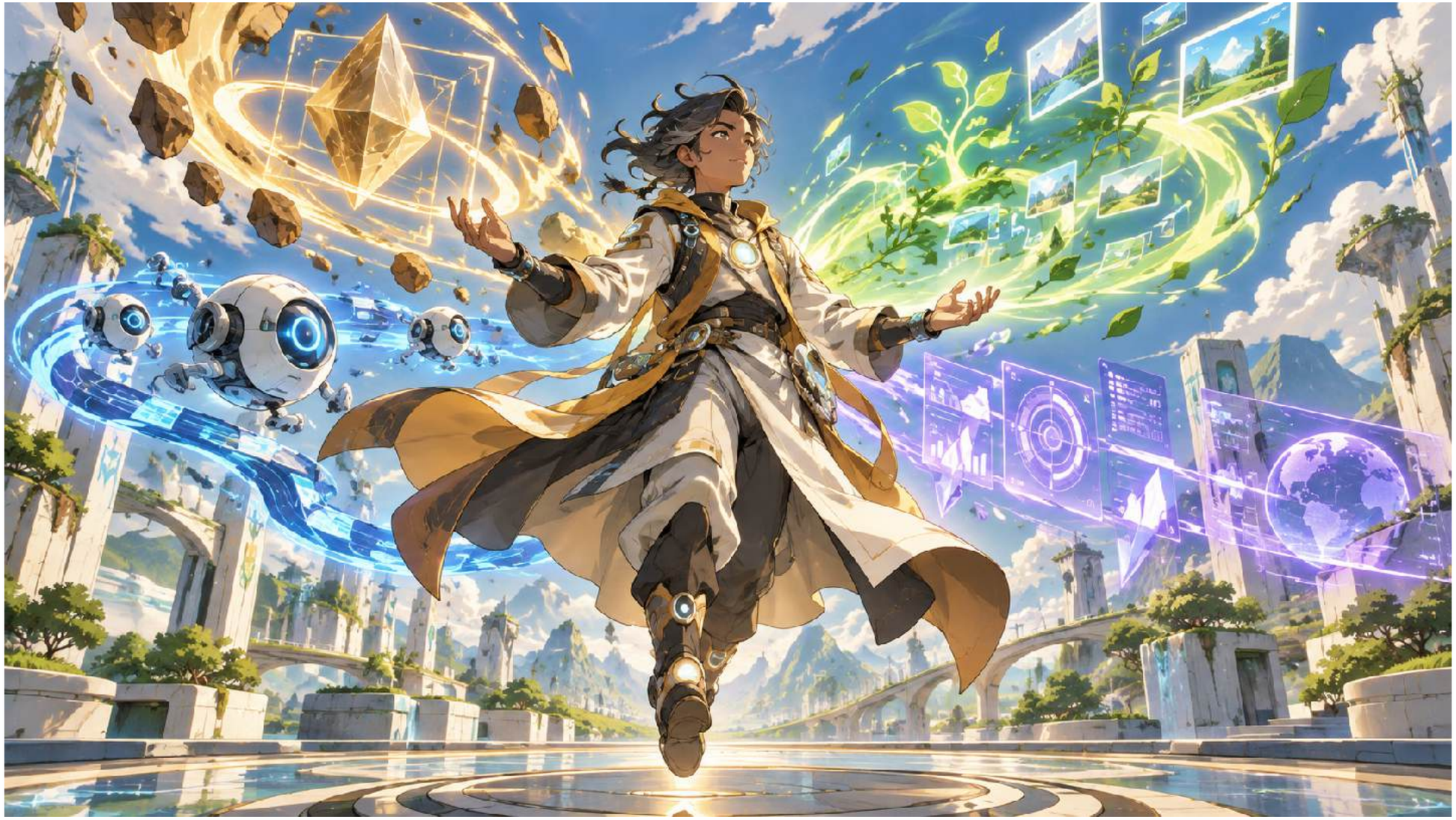
I want you to run a deep onboarding interview with me as my agent.

Your job is to learn enough about me to become genuinely useful: how I think, what I'm building, what matters to me, how I make decisions, how I like to communicate, what I'm responsible for, and what success looks like.

Treat this conversation as foundational context for our future work together. Use it as a reference point whenever a task requires judgment, prioritization, strategy, or alignment with my goals.

Begin by presenting the interview structure in full, organized into categories. Then ask your questions one at a time, in sequence. Be curious, specific, and adaptive. Ask follow-up questions when something is important or unclear. Keep the conversation focused on gathering the context that will help you support me well over the long term.

SAGE FRAMEWORK



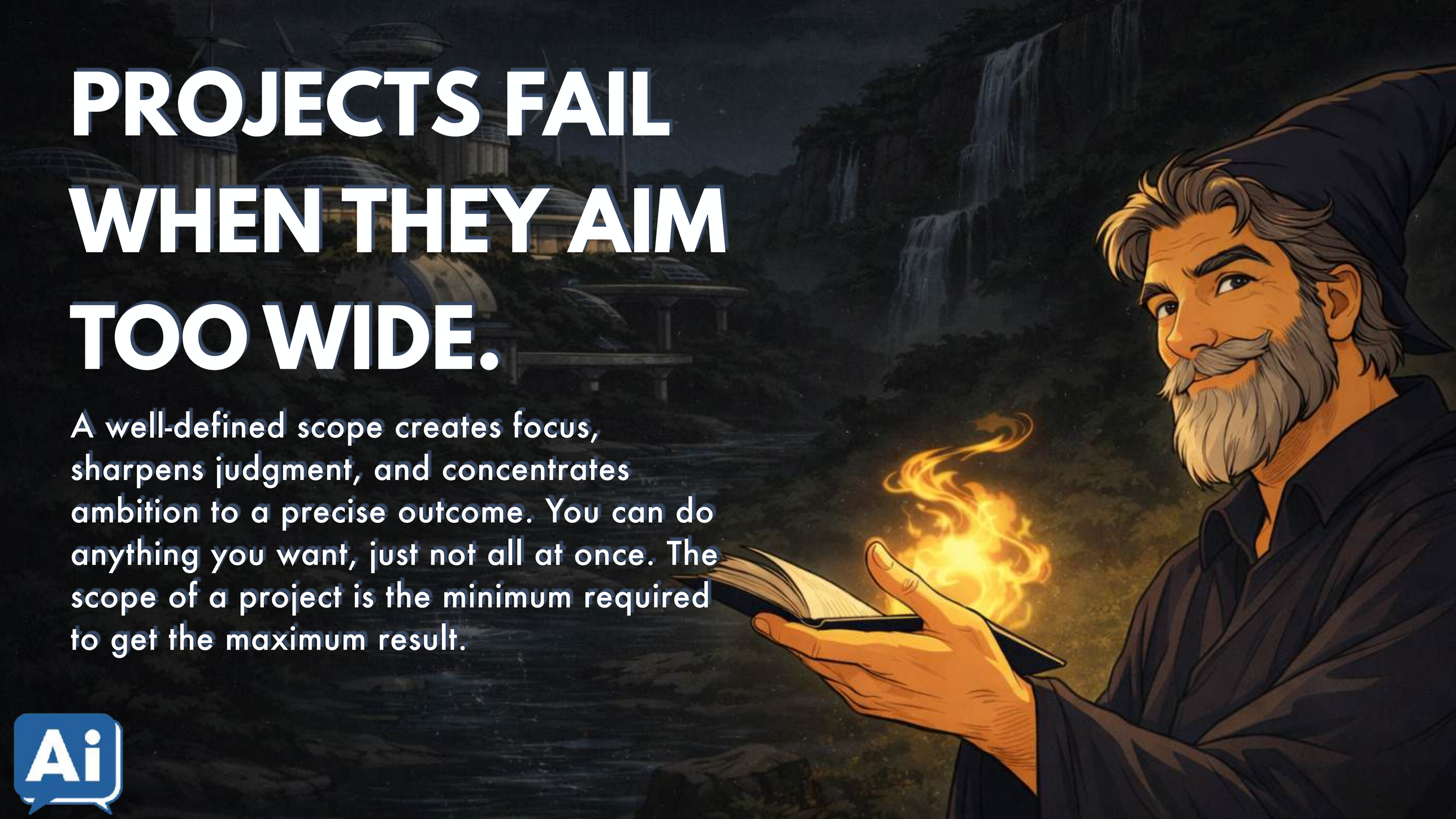
SAGE FRAMEWORK

- **Scope**
- **Automate**
- **Generate**
- **Evaluate**


S.C.O.P.E.

PROJECTS FAIL WHEN THEY AIM TOO WIDE.

A well-defined scope creates focus, sharpens judgment, and concentrates ambition to a precise outcome. You can do anything you want, just not all at once. The scope of a project is the minimum required to get the maximum result.



S.C.O.P.E.

- **Situation** - Job to be done
- **Constraints** - Time, Data, Risk
- **Outputs** - Tangible thing exists at the end
- **Personas** - Human roles
- **Exclusions** - Out of scope

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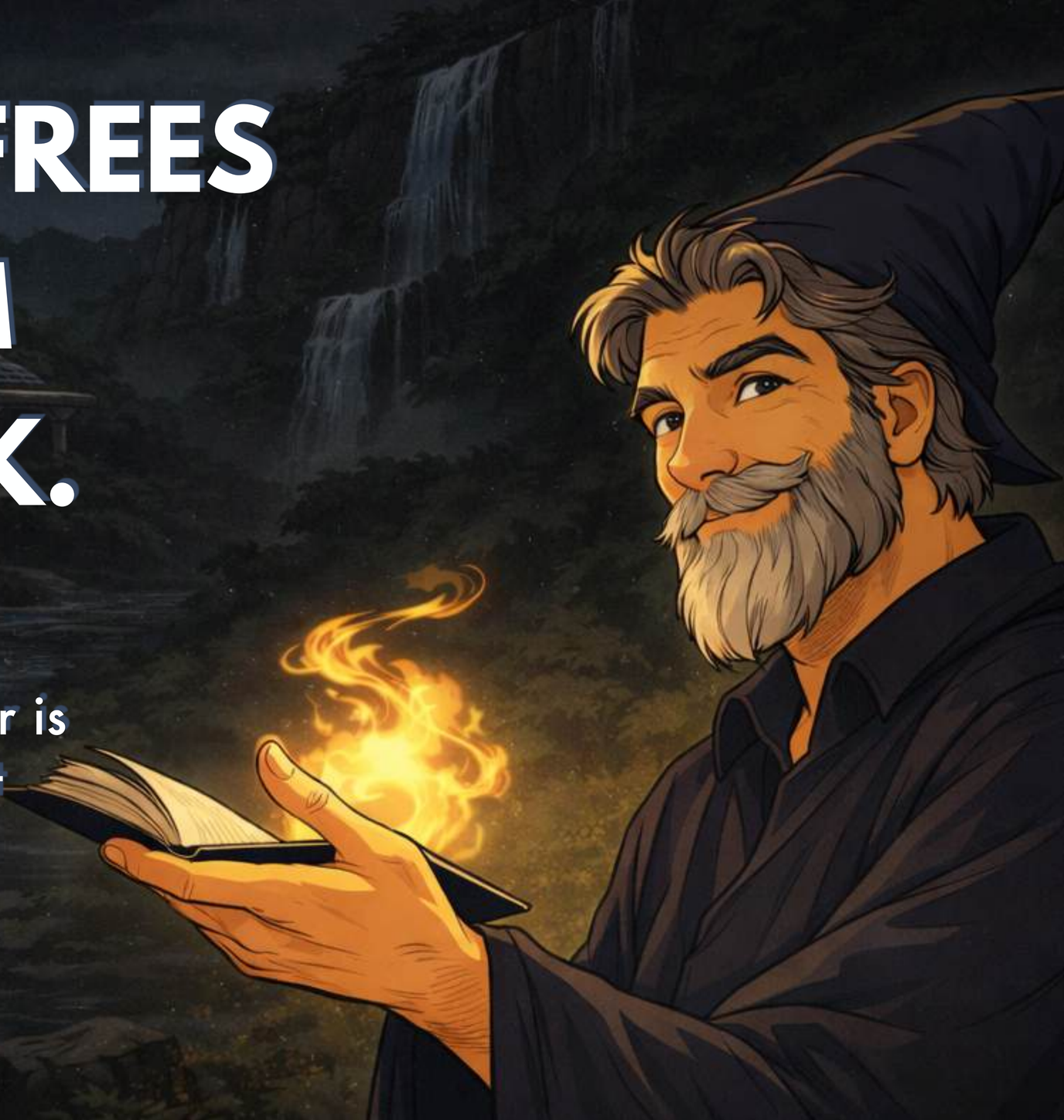
AUTOMATION FREES HUMANS FROM ROBOTIC WORK.

Robots can handle repeatable drudgery better and faster than us. The best role of the human operator is as a robot manager. Your judgment guides AI to accomplishment exponentially faster.



AUTOMATION STATISTICS

Zapier, State of Business Automation 2021

- Workflows save 10-20 Hours/Week

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Skill.md
Agent
Automation
Workflow
Template
Manual

GAME: AUTOMATION INTERVIEW

- **GOAL:** Define a reliable automation.
- **RULES:** Lay out the automation steps at a high level, then use AI to interrogate assumptions, failure modes, and handoff points through structured questioning.
- **FEEDBACK:** What would matter if this automation ran 10x more often?

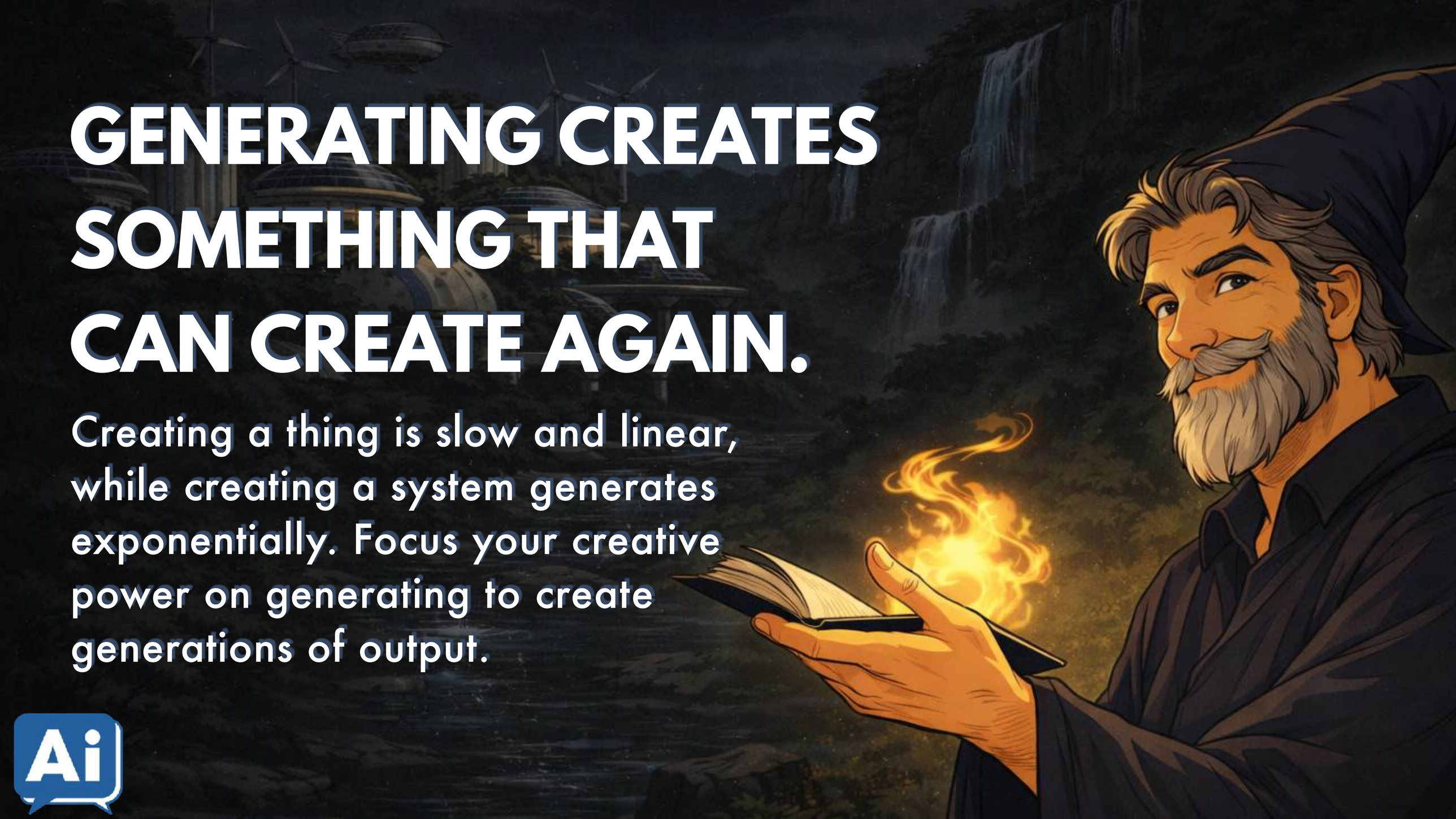
GAME: AUTOMATION INTERVIEW

1. Interview me about this automation as if you were responsible for running it. Ask whatever questions you need to understand the context, assumptions, and risks before you'd trust it in production.
2. Assume this automation fails quietly. Ask questions to identify where and why that would happen.
3. Ask questions to clarify when a human should intervene, review, or override.



GENERATING CREATES SOMETHING THAT CAN CREATE AGAIN.

Creating a thing is slow and linear, while creating a system generates exponentially. Focus your creative power on generating to create generations of output.



GUTENBERG’S PRINTING PRESS



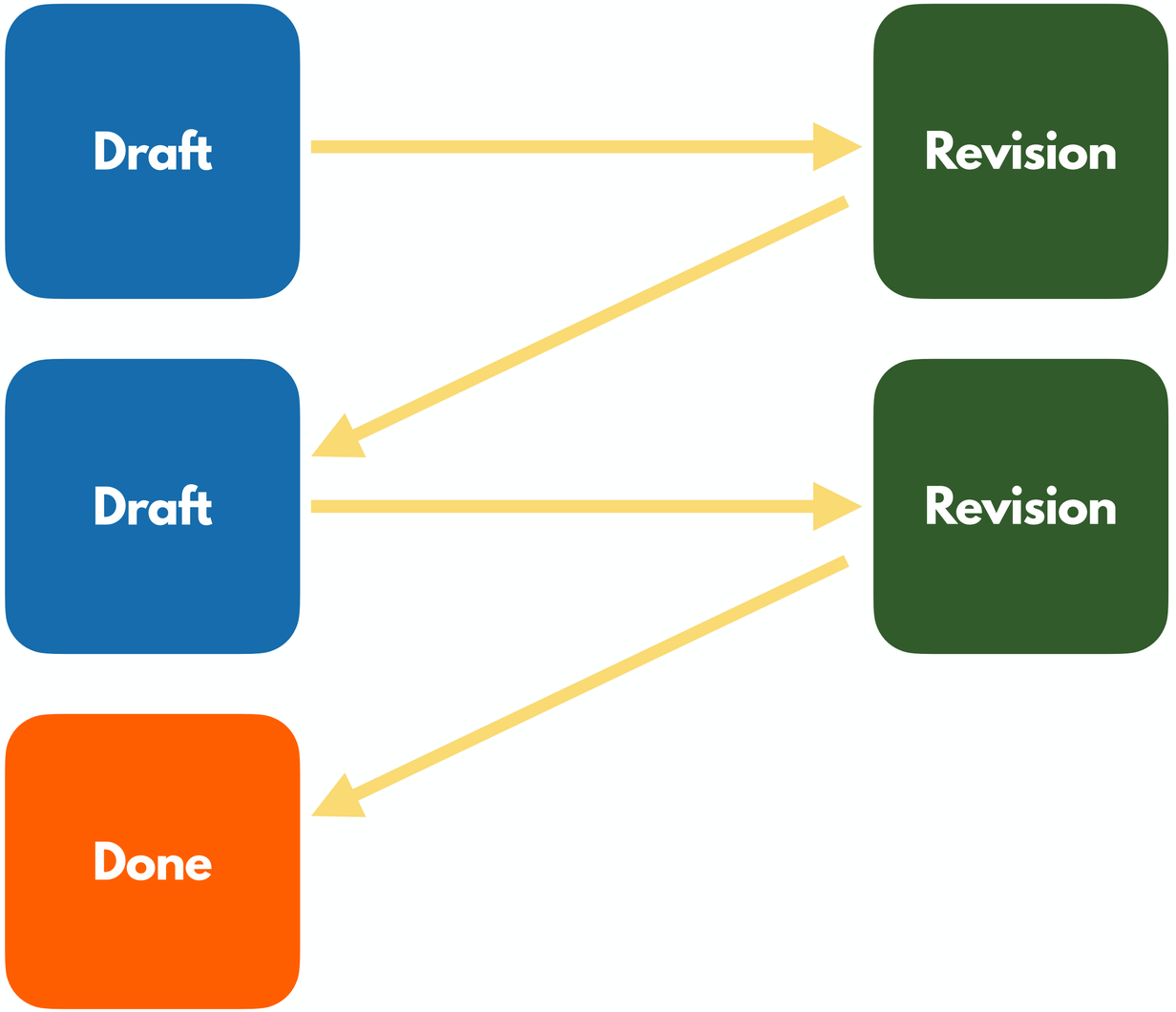


LLMS ARE BETTER AT EVALUATING CONTENT THAN GENERATING IT.

Recognizing quality is easier than creating it. LLMs are trained on vast datasets filled with examples of good work. They're excellent at recognizing patterns, when content aligns with known best practices. Evaluating a draft is simpler than producing a perfect response from scratch.



THE REVISION CYCLE



GAME: PROBATION OFFICER

- **GOAL:** Decide what an AI Agent must prove before you trust it.
- **RULES:** Define the rules of the test, and judge the agent against those rules.
- **FEEDBACK:** What would it take for this agent to be trusted in production?

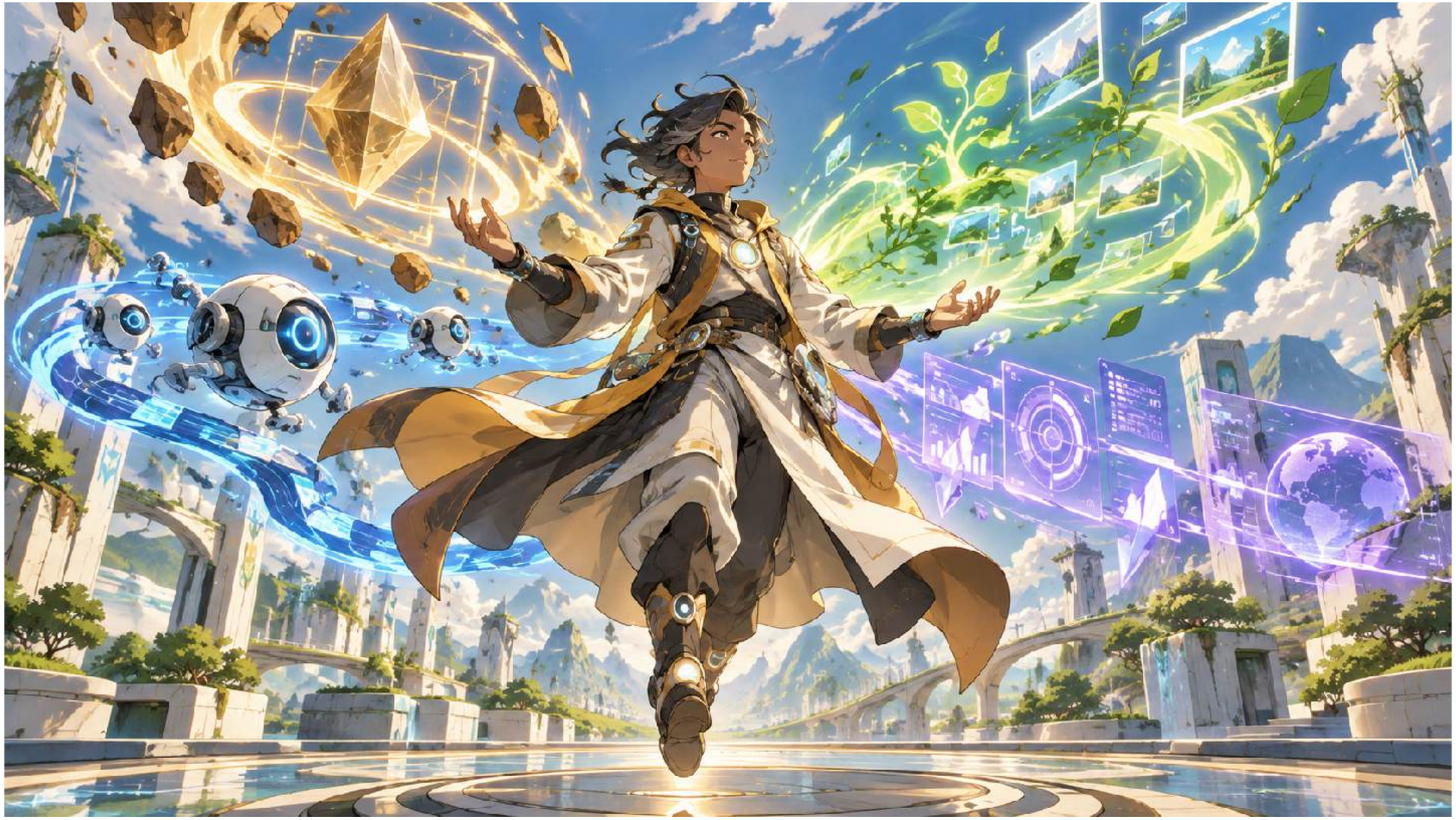
GAME: PROBATION OFFICER

1. I'm testing a new AI agent. Ask me what it does, then help me to define 3 success criteria, 2 allowable mistakes, 2 unacceptable mistakes, and 1 stop condition.
2. Create 3 tests for this agent with clear pass/fail criteria. Make one a normal task, one a difficult edge case, and one with ambiguous instructions.
3. I'll give you the results of my agent's real-world tests. Evaluate them against our criteria, identifying recurring failures, and recommend whether to Graduate, Extend Probation, Retrain, or Stop. Tell me exactly what evidence would change the decision.

SAGE FRAMEWORK

- **Scope**
- **Automate**
- **Generate**
- **Evaluate**

SAGE FRAMEWORK



AI AGENT ASSESSMENT

- **Call 1** 45-minute Interview
- **Report** for 30, 60, 90 days
- **Call 2** 45-minute Report Review

AI AGENT ASSESSMENT

SCAN HERE

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ARTIFICIAL INTELLIGENCE
MEETUP GROUP
https://christchurch-ai.com

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4.7 • 309 ratings

Christchurch, New Zealand

1,978 members

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About us

This is a group for people who want to explore, share, and learn about artificial intelligence, Generative AI, AI Agents, and AI Agent management.
We meet every month at **EPIC Innovation**. We typically feature a couple of speakers, mingle with drinks, and share new tools and insights about AI.
Give feedback on the group, or apply to speak, by filling out this form.

Organizers

You and 5 others

You are a **Super Organizer**

Members 1,978

See all

https://www.meetup.com/christchurch-ai/

SECOND MONDAY @ EPIC INNOVATION

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AI in Public Sector & Local Business

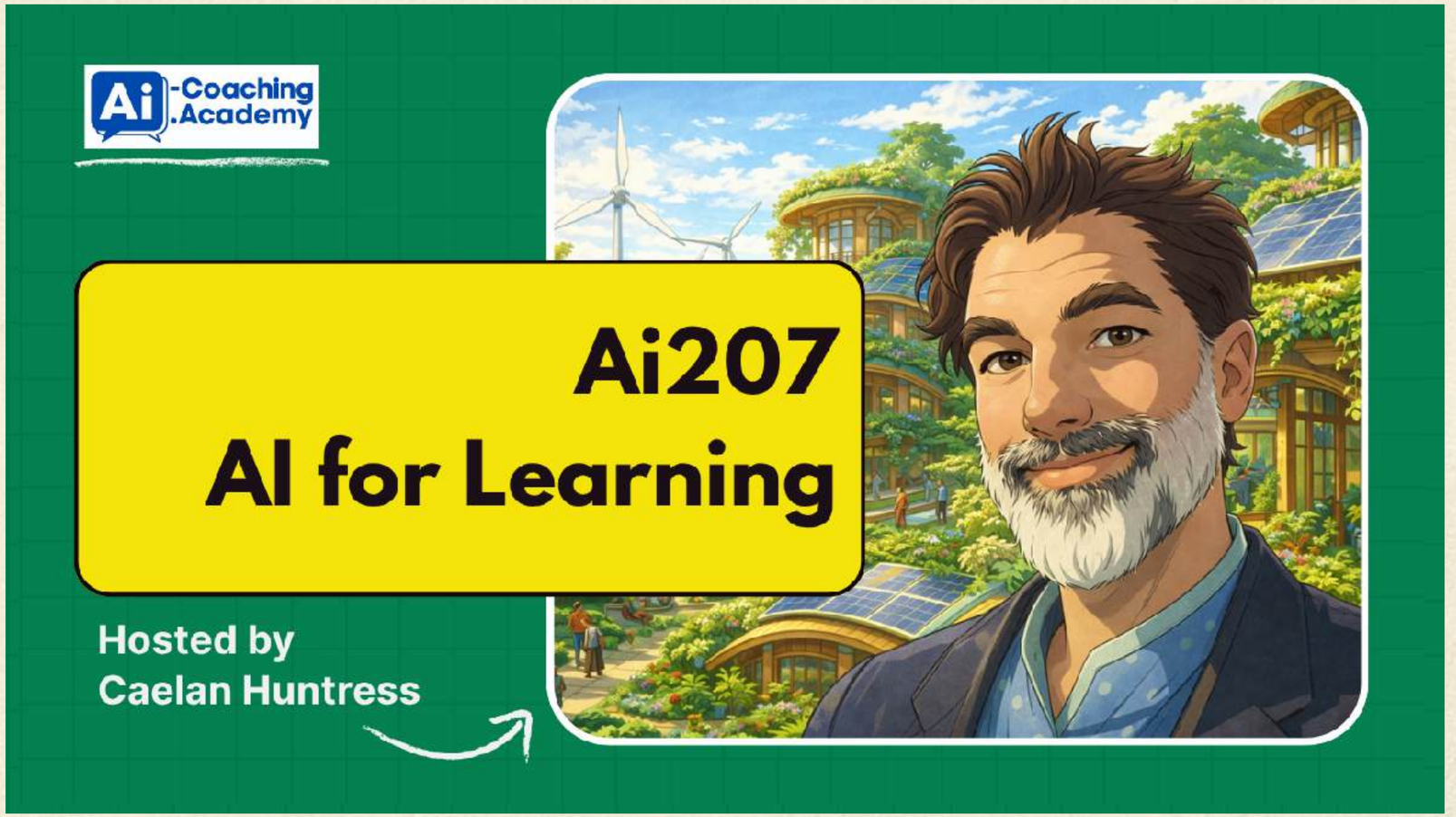
📍 Where? EPIC Innovation
⏰ When? 5:30 - 8:00 PM
📆 **Monday, 9 November**

Christchurch-Ai.Com

Speakers:

Cr. Joe Davies & Blake Harkness

Friday, 23 Oct, 11am



For Members of the AI Campus

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- Monthly AI Coaching Power Hour
- 30 AI Games in 30 Days
- Video Training Library
- Weekly Tutorials

$19/MO

SCAN HERE

Create an AI Agent Webmaster



ONLINE WEBINAR

Friday, 13 Nov 11am-12pm

Speaker:

Caelan Huntress

Friday Drinks @ the EPIC Exchange



Friday, 16 Oct 4-6pm

$15 Coworking on Friday

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SCAN HERE

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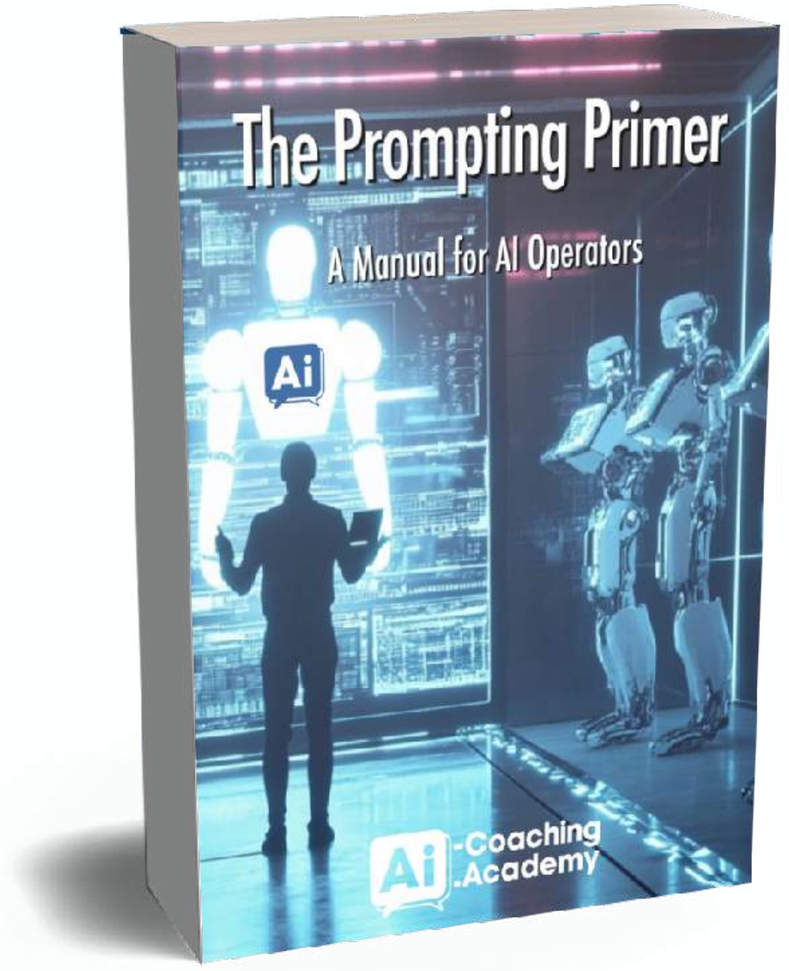
What Was Most Useful For You?

TAKE THE SURVEY, GET THE SLIDES

SCAN ME



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“I use AI every day now, and I hardly did before taking this training programme. Caelan’s positivity and enthusiasm is really engaging. His workshops are full of facts and anecdotes, and a lot of fun.”

Testimonial



Silena Kirkconnell-Kawana

Ai-Coaching.Academy

"I came into Caelan's workshop not knowing anything about custom GPTs or comparing prompts between different AI models. Now I can draft blog articles in my own voice, iterate across tools, and polish them in a fraction of the time. This training gave me the confidence to try new things, and a clear way of cutting through to what works. Caelan's workshop was memorable and absolutely worth it."

Testimonial



Andrew Pitts

Ai-Coaching.Academy

“This was probably the best workshop that I have attended, and multiple people said the same thing. The shift in confidence and engagement across the team is exactly what we were hoping for.”

Testimonial



Matt Harris

Ai-Coaching.Academy