Introduction

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We build custom AI agents for business — tools designed to handle repetitive tasks, manage workflows, and keep things running smoothly. Agents that leverage the power of AI with the ability to take action in unique ways that makes sense for your company.

Our approach is straightforward. We start by getting to know your business: what you do, how your processes work, and where things could be more efficient. Maybe your team is spending hours each week on manual data entry, overloaded with customer inquiries, or trying to keep track of schedules and invoices.

> We look for areas that are slowing you down and build agents that can step in and help.

Once we have a clear understanding of your operations, we design agents specifically for your needs. These aren't off-the-shelf solutions that you have to bend your business around. They're built to fit how you already work, because they're integrated directly into your existing systems.

Some of our builds include:

- CRM Management & Sales Support
- Data Management & Analysis
- Content & Document Creation
- Workflow & Task Automation
- Research & Prospecting
- Admin Operations

What's different about us is we don't just set it up and disappear. AI evolves, your business evolves, and what worked a year ago might need tweaking today. That's why we stay involved, helping you adjust and improve as your needs change or as new AI capabilities come out.

We also make a point to keep things practical. There's a lot of noise in the AI space right now—big promises and buzzwords that don't always translate to real-world value.

> Our priority is building tools that *genuinely make a difference*, whether that's saving your team hours on routine tasks or helping you scale your company.

We're here to help businesses in ways that make sense for them. If you're curious how agents can fit into your workflow but don't know where to start, schedule a call with us today!

No hype, no gimmicks—just practical solutions that work.

Schedule a call with us today!

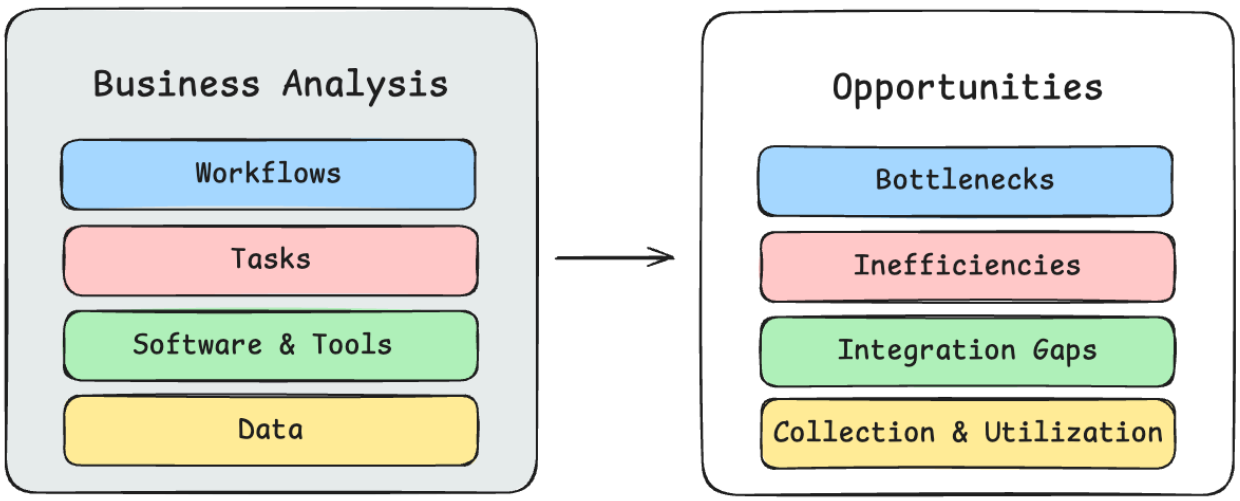
Our Approach

Our Approach

Business isn't one size fits all. Our approach begins with understanding your business and building agents that fit ***your*** operations.

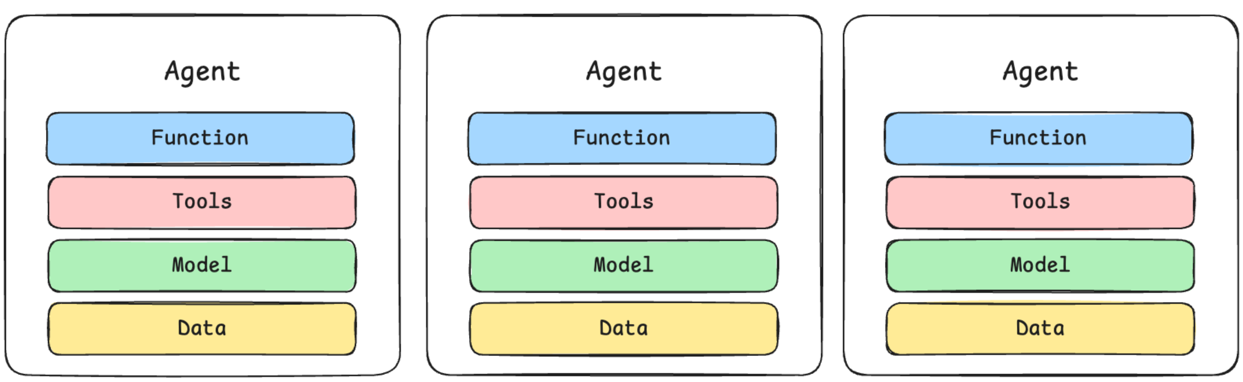
Understand Your Operations

We start by mapping out your business processes and identifying repetitive tasks, operational challenges, inefficiencies, and opportunities for optimization. This clarifies what data and tools you're already using to get the job done.



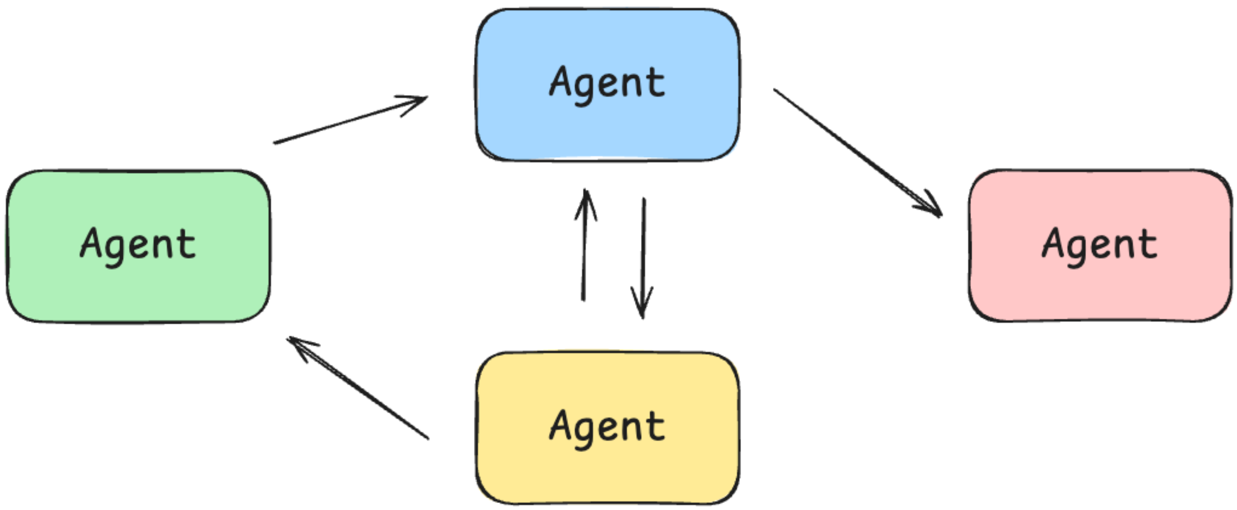
Agent Design

Once we understand your workflow, we work with you to design agents that fit your specific needs. They're built to align with your goals and equipped with the tools and context they need to function effectively in your systems.



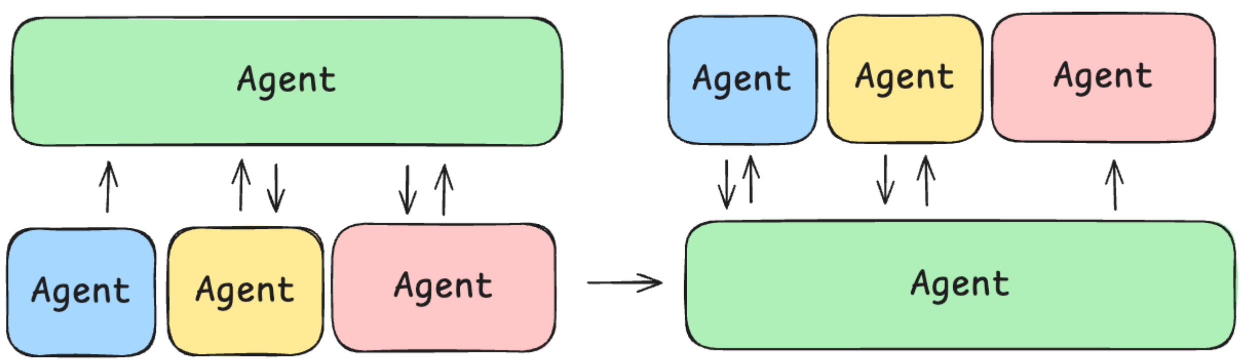
Implement

After the agents are ready, we deploy them into your workflows and run tests to make sure they're working as expected. We tweak and refine as needed to ensure everything runs reliably.



Optimize and Scale

As your business evolves, so can your agents. We can add new capabilities, expand their functions, or bring in more agents to handle additional operations. The system is designed to grow with you, making it easy to scale without overhauling everything.



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How We Engage Clients

How We Engage Clients

1. Consulting Expertise

If you're just starting to explore how AI agents could help your business, we're here to guide you. We'll work closely with you to understand your operations, identify areas where agents can make the biggest impact, and develop a clear roadmap for integrating them into your workflows. Whether it's automating repetitive tasks, increasing capacity, or improving decision-making processes, our goal is to help you see what's possible and where to start.

2. Custom Agent Development

For businesses ready to take the next step, we design and build custom AI agents tailored to your needs. Every agent is mapped to fit your specific use cases, whether that's managing customer interactions, handling internal workflows, or analyzing data. Once developed, we deploy these agents into your systems, ensuring they integrate smoothly and deliver real, measurable results in the environment you're familiar with.

> Our approach is collaborative, transparent, and focused on creating solutions that truly work for your business. Whether you need expert advice or hands-on development, we're here to make AI agents practical, effective, and valuable for your unique goals.

If you're curious how agents can fit into your workflow but don't know where to start, schedule a call with us today! No hype, no gimmicks—just practical solutions that work.

Schedule a call with us today!

Our Strategy Development Process

Our Strategy Development Process

1. Discovery & Needs Assessment

The goal of this phase is to develop a complete understanding of the organization's current state, workflows, and goals.

Activities:

- **Executive Kickoff Meeting/s**
  - Identify which key team members or managers we should meet with.
  - Get access to CRM pipeline data for insight into revenue & conversion rates.
  - Get access to the org chart, including roles and responsibilities.
  - Understand the revenue, hiring, product/service improvement, and other goals for the business.
- **Key Player Exploratory Meetings**
  - What is the breakdown of your team?
  - What are their roles & responsibilities?
  - What are the workflows you oversee?
  - What are bottlenecks or pain points you're experiencing?
  - What new 'things' would you implement if you had unlimited resources?
  - What are your major goals for the team (3, 6, 12 months)?
  - How do you think AI could support your team - please share ideas?
- **Web Activity Tracker**
  - We ask all of our clients to have their team download a web activity tracker. This allows us to accurately asses how much time is spent on various platforms - which will serve as the benchmark to grade our multi-agent system against.

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2. Analysis

This phase focuses on breaking down the collected data into actionable insights and uncovering inefficiencies, gaps, and opportunities.

Activities:

- **Revenue & Expenses Audit**
  - Identify revenue drivers & ROI per workflow. The two main costs we're worried about are:
    - Tech stack costs
    - Employee costs
- **Org Chart Breakdown**

    - Analyze the roles, responsibilities, and team structure.
    - Identify areas of redundancies, bottlenecks, and other inefficiencies.
- **Aggregate & Analyze the Web Activity Tracking Data**
    - Mind map the workflows & data flow.
    - Centralize data if possible & consolidate the tech stack.
        - There may be areas for a custom solution.
- **Align with Executive Goals**
    - Align findings with leadership goals.

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3. Solution Design

Once we've gathered and analyzed the data, we will begin designing the implementation solution.

Activities:

- **Data**
- **Tech Stack**
- **Super Agents**
- **UI / UX**
- **Estimated Cost**
- **Goal Alignment & ROI Expectation**

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4. Implementation Proposal

We deliver a clear, actionable roadmap outlining our development timeline. We break this down into various phases.

Activities:

- **Proposal Deck Creation:**
    - Present findings.
    - Walkthrough the proposed solution.
    - Step-by-step roadmap with milestones, timelines, and deliverables.
    - Cost-benefit analysis to demonstrate ROI.

Outcome

A comprehensive proposal that details an actionable AI Implementation plan and a roadmap to get it done.

[Schedule a call here]

Custom Development & Implementation

Custom Development & Implementation

All the planning and goal-setting are just concepts until the right tools and processes are in place.

Our philosophy is simple:

*Build a multi-agent operating system that helps you **SCALE** without adding to headcount.*

We integrate into existing operations ensure our solution becomes natural part of daily work rather than another piece of tech to worry about and maintain.

Our process isn't about plugging in a handful of new tools and hoping for the best. Instead, we cut through the 'AI Hype' by keeping our toolset small and focusing on the underlying frameworks behind AI Agent Development & Architecture.

Our SuperAgents are the core of our multi-agent operating system. They can handle:

- customer-facing communication
- sales follow-ups
- content generation
- CRM management
- data analysis
- task management
- scheduling coordination
- prospecting
- researching & web scraping
- comprehensive document creation
- reconciling of invoices
- business intelligence
- insight extraction
- etc. etc. etc.

The key to making this all work is constant updating and iteration - our clients understand that they're early adopters who are the forefront of AI adoption.

What we know today, may be made irrelevant tomorrow. We spend considerable time & resources maintaining a pulse on the AI industry.

Can't keep up with the evolving landscape? Don't worry, we'll stay up to date on your behalf and share our findings with you.

But we never lose site of the main goal:

*Building practical multi-agent systems that lead to **tangible** ROI.*

This is why data plays a central role. Every day, systems generate insights into what's working smoothly and where adjustments might yield better results.

We regularly review performance indicators—whether that's time saved on internal tasks, increased conversion rates on inbound leads, or improved client satisfaction scores—to pinpoint where small tweaks can spark meaningful gains.

These don't need to be sweeping changes. We've found that a series of incremental refinements can build steady momentum that compounds over time.

20 minutes saved gives you 20 minutes back. What would you do with an extra 20 minutes a day?

Even if it's simply taking a break, you will have more brain-space to make better decisions or think more creatively.

> Brain-space is often an ignored asset. A cluttered mind moves fast, but gets nothing done. There are folks in your organization that are at full brain capacity. It's time to provide them some relief!

Something to Remember…

AI is an emerging industry and an infant technology. The space is evolving quickly with new products and tools to play with coming out every day.

The only way to start early and stay ahead is to develop a framework & blueprint based on your personal convictions about AI, then stick to it.

That's what we've done and it's worked beautifully so far.

All of us know we need to implement AI into our businesses - most of us don't even know where to start - and some are too scared to jump in for fear of making the wrong decision.

Our team has seen at all at this point and it's allowed us to develop signal.

This is what ultimately separates us from the grifters & opportunists. We see AI for what it is today, what is can be in the future, and how it can provide immense value (if implemented properly) to every business in 2025.

If you're tired of analysis-paralysis and ready to get started with AI Agents, I encourage you to book a call to speak with us. We might have the answers you've been looking for this whole time.

[Schedule a call here]

Devin Kearns | Co-founder, Custom AI Studio

Strategy

Strategy

Our strategy process begins with understanding your business inside and out so we can develop agents that truly deliver value. This involves a deep dive into your operations, goals, and challenges to ensure we build the right solution for your needs. Here's how we approach strategy and what you can expect when working with us:

1. Discovery: Getting to Know Your Business

Before we build anything, we take the time to learn about your business. We'll ask questions like:

- What are your key workflows and operations?
- How is your team structured, who does what?
- What's working well, and where are the pain points?
- What are your short-term and long-term goals?

This phase is about getting a clear picture of how things currently work and your motivations going forward.

2. Needs Assessment

Our goal here is to understand where agents can deliver value and fit into your existing processes and tools. Including:

- Map out workflows to see how tasks move through your organization.
- Analyze your current tech stack and data organization to identify integration opportunities.
- Identify inefficiencies, bottlenecks, or gaps where agents could step in.
- Evaluate data availability and quality.

3. Solution Design

Once we have a full understanding of your business, we move into designing agents.

- **Agent Functions**: Define what the agents will do — whether that's handling customer communication, managing data, ect.
- **Tools & Extensions:** Layout the framework to accomplish tasks in your systems.
- **Data Needs**: Ensure the data agents will need to operate effectively is accessible.
- **Goal Alignment**: Make sure the agents align with your objectives and delivers measurable results.

4. Implementation Plan

After the design phase, we create a proposal that serves as a roadmap to bring the solution to life. The plan includes:

- Detailed walkthrough of the agents to clarify the scope and capability.
- Timeline and milestones of deployment.

Executive Assistant - SuperAgent

Executive Assistant - SuperAgent

1. **Send a Customized Daily Agenda**
   - Compiles your tasks, deadlines, and meetings into a personalized daily briefing.
   - Pulls data from **Google Calendar**, **Google Sheets**, and task management tools to ensure nothing is overlooked.
2. **Manage Your Inbox**
   - Sorts, prioritizes, and labels emails in **Gmail or Outlook** based on context, urgency, and sender.
   - Drafts responses for your review or sends automatic replies for routine inquiries.
3. **Coordinate Scheduling with Internal and External Contacts**
   - Handles meeting requests, cross-checks availability using **Google Calendar**, and finds optimal time slots.
   - Automatically sends calendar invites and updates attendees about schedule changes.
4. **Keep You on Track by Scheduling Tasks After Meetings or Ad Hoc Conversations**
   - Extracts actionable items from meeting notes stored in **Google Docs** or Slack messages.
   - Updates your task list in **Google Sheets** or similar tools, ensuring deadlines are met.
5. **Send You Daily, Weekly, or Monthly Reports on Your Productivity**
   - Aggregates data from **Google Sheets**, email activity, and calendar events to track productivity metrics.
   - Delivers insights on time allocation, completed tasks, and upcoming deadlines.
6. **Manage Your Communication Channels**
   - Filters Slack messages, ensuring critical updates or messages from key stakeholders are surfaced.
   - Integrates with **email and Slack** to declutter channels and ensure efficient communication.
7. **Retrieve Data or Execute Actions in Your Tech Stack Upon Request**
   - Quickly pulls documents from **Google Drive**, updates spreadsheets in **Google Sheets**, or locates information in shared folders.
   - Executes actions like setting reminders, updating meeting agendas in **Google Docs**, or creating folders in **Google Drive**.

This agent seamlessly integrates with **Google Workspace (Drive, Docs, Sheets, Calendar)**, **Slack**, and **Gmail**, offering a tailored and efficient support system for your daily operations.

Operations – SuperAgent

Operations – SuperAgent

1. **Ensure Your Data Flow Is Consistent and Nothing Slips Through the Cracks**
   - Automates data syncing between platforms like **Airtable, HubSpot, and Google Sheets**.
   - Detects and resolves missing or conflicting information in real-time.
   - Ensures consistent updates across all tools used for operational workflows.
2. **Keep Everyone Informed with Automated Project Updates**
   - Sends updates via **Slack, Microsoft Teams, or email** whenever milestones are reached or changes occur.
   - Integrates with project management tools like **Asana, Trello, or ClickUp** to notify stakeholders of progress.
   - Configures updates to be tailored by team or individual roles to avoid unnecessary noise.
3. **Track Progress in Real Time and Get Alerts If Something Comes Up**
   - Retrieves details about KPIs and project metrics upon request.
   - Sends real-time alerts.
   - Provides dashboards with drill-down options for deeper insights into operational health.
4. **Receive a Project Report with Performance and Improvements**
   - Generates weekly or monthly reports summarizing project status and areas for improvement.
   - Pulls data from platforms like **Jira or HubSpot** to create actionable insights.
   - Highlights delays, resource overuse, or unmet goals to streamline future operations.
5. **Manage Your Operational Data So Everyone Stays Aligned**
   - Centralizes data storage with integrations to tools like **Notion, Airtable, Google Sheets, etc.** for shared team access.
   - Ensures all team members have up-to-date information on tasks, deadlines, and dependencies.
   - Tracks updates and edits to maintain accountability across the team.
6. **Streamline Resource Allocation Across Projects**
   - Dynamically adjusts resource allocation in tools like **Harvest or Float** based on changing priorities or workload.
   - Tracks resource usage to identify under- or overutilization.
   - Provides recommendations for reallocating team efforts to meet deadlines efficiently.
7. **Automatically Document Workflows and Processes**
   - Creates step-by-step documentation for recurring tasks or workflows.
   - Updates workflows automatically when operational processes change.
   - Provides easy access to SOPs (Standard Operating Procedures) for new hires or cross-functional teams.

8. **Coordinate Seamlessly Across Departments**
    - Manages interdepartmental communication through **automated meeting reminders, shared calendars, and task assignments**.
    - Flags misaligned priorities and suggests ways to realign teams towards shared objectives.
    - Integrates with platforms like **Calendly or Zoom** for smoother coordination of meetings or collaboration sessions.

This Operations Assistant Agent ensures **flawless execution and real-time alignment across your projects**, giving you complete control and visibility while reducing the administrative burden on your team.

Customer Support - SuperAgent

Customer Support - SuperAgent

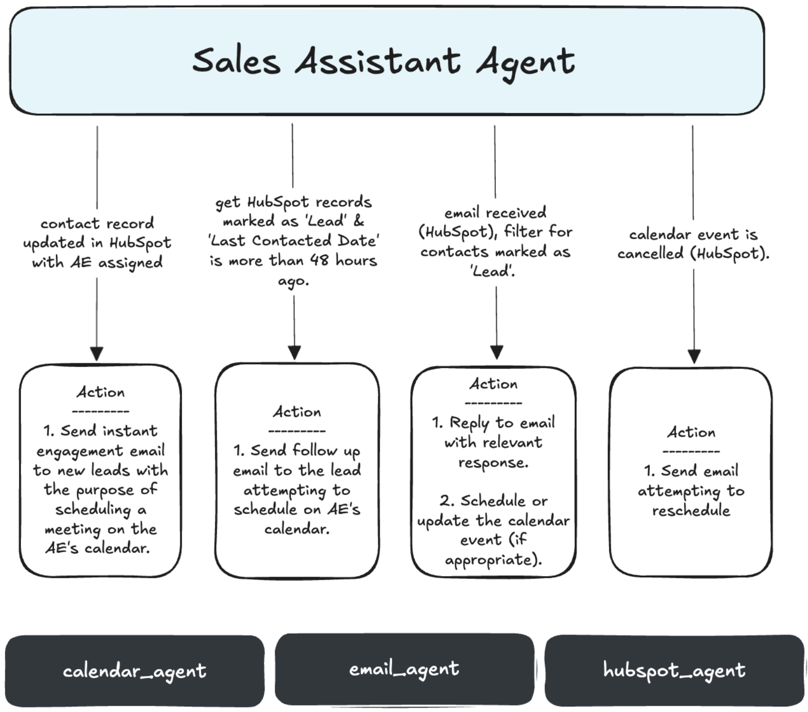
1. **Categorizing Customer Conversations, Preferences, and Issues**
    - Analyzes historical conversations from channels like **Zendesk** to identify recurring issues and preferences.
    - Categorizes customer inquiries by urgency, type, and sentiment for better prioritization.
    - Creates detailed customer profiles by mapping preferences, past behaviors, and support history.
2. **Handling Customer Inquiries Across Voice, Chat, Email, and SMS**
    - Integrates with platforms like **Twilio, WhatsApp, or HubSpot Service Hub** to manage communication seamlessly.
    - Uses AI to craft accurate and empathetic responses to common questions.
    - Escalates complex issues to human agents with a detailed summary of the problem.
3. **Providing Tailored Support for Individual Customers**
    - Leverages CRM data from systems like **Salesforce, Zoho, or Pipedrive** to personalize responses.
    - Suggests solutions based on past interactions, product usage, or known preferences.
    - Automates follow-up processes with personalized messaging for unresolved tickets.
4. **Updating CRM Based on Customer Conversations**
    - Automatically logs interactions, notes, and resolutions into CRMs like **HubSpot, Salesforce, or Zoho**.
    - Updates contact details, preferences, and open tickets in real time to maintain accuracy.
    - Tracks and syncs resolution timelines and satisfaction metrics to inform future interactions.
5. **Transferring Live Calls When Issues Require Escalation**
    - Detects when a live agent is required and routes calls with detailed context.
    - Ensures smooth handovers by summarizing conversation history and key customer concerns.
    - Adheres to escalation protocols based on issue severity or customer requests.
6. **Routing Inbound Calls to the Appropriate Team Member**
    - Uses IVR (Interactive Voice Response) systems integrated with **Twilio** to intelligently route calls.
    - Assigns calls based on agent availability, expertise, and customer preferences.
    - Ensures no call is dropped by queuing and notifying the appropriate team member.
7. **Proactively Monitoring and Resolving Issues**
    - Continuously scans customer feedback and social mentions.

    - Sends automated check-ins to customers to ensure issue resolution satisfaction.
8. **Gathering Insights to Improve Customer Experience**
    - Analyzes support trends and creates reports on ticket resolution times, common issues, and customer satisfaction.
    - Suggests areas of improvement for team training or FAQ documentation.

This Customer Support Assistant Agent enhances your ability to **deliver fast, accurate, and personalized customer service**, while automating repetitive tasks and ensuring your team focuses on the most critical cases.

Sales - SuperAgent

Sales - SuperAgent



Capabilities:

1. **Engage New Leads in Under 2 Minutes**
    - When a new lead is added to your CRM (HubSpot, Salesforce, etc.), the agent sends a **personalized engagement email** immediately.
    - It offers the **assigned sales team member's calendar availability**, dynamically fetching times from Google Calendar or Outlook.
    - The agent then **coordinates with the lead**, automating back-and-forth communication to schedule a meeting.
1. **Lead Nurturing**
    - The agent performs a **daily scan of CRM records** to identify leads that haven't been contacted in the last 5 days.
    - It generates **context-aware follow-up emails**, pulling in content like **case studies, YouTube videos, blog posts, or newsletters** to keep leads engaged.

    - The emails are fully tailored based on the lead's previous interactions and position in the sales pipeline.
2. **Personalized Follow-Ups**
    - The agent analyzes **email threads, meeting notes, and sales call transcripts** to generate highly **relevant follow-up emails**.
    - It adapts follow-ups to specific pipeline stages, whether it's after an initial demo or during negotiation phases.
    - The agent ensures that no lead falls through the cracks by scheduling these follow-ups automatically.
3. **Dynamic FAQ Handler and Meeting Coordinator**
    - For ongoing conversations, the agent:
        - Analyzes the **content and context of email threads** to determine next steps.
        - **Books meetings directly in Google Calendar**, ensuring there are no conflicts in the sales member's schedule.
        - Pulls **real-time answers to FAQs** (e.g., pricing, product details, or feature comparisons) from a **central knowledge base** or integrated databases.
        - If required, it attaches relevant marketing materials like **brochures, one-pagers, or PDFs** to support the conversation.
4. **Calendar Management**
    - The agent manages **event creation, updates, and cancellations** directly in platforms like Google Calendar or Outlook.
    - It adds **detailed meeting descriptions**, links to **Zoom, Microsoft Teams, or Google Meet**, and **follow-up action items**.
    - If a meeting is canceled or rescheduled, the agent automatically:
        - Notifies the lead or sales rep.
        - Sends a **new time proposal** or confirmation email.
5. **CRM Management**
    - The agent updates CRM platforms like **HubSpot, Salesforce, or Pipedrive** by:
        - Enriching contact records with **email history and meeting notes**.
        - Updating **pipeline stages** as deals progress.
        - Logging **tasks and action items** for the sales team.
6. **Proposal and Contract Generation**
    - The agent uses templates to **draft proposals, quotes, or contracts**, pulling in custom data (e.g., client name, pricing, and terms).
    - It sends the completed documents to the appropriate stakeholders or integrates with tools like **DocuSign or PandaDoc** for e-signatures.
7. **Post-meeting summaries and notes**
    - After every meeting, the agent generates a **summary of key insights** (e.g., action items, client concerns, or next steps).
    - It logs these notes in the CRM and emails them to the sales team for easy reference.
8. **Lead Re-engagement**

    - The agent identifies **dormant leads** in the CRM and sends personalized messages to re-establish communication.
    - It leverages historical data to highlight **past discussions or updates** that may interest the lead.
9. **Reporting**
    - Generates **weekly sales performance reports**, highlighting:
        - Number of new leads engaged.
        - Follow-ups completed.
        - Meetings scheduled or rescheduled.
    - These reports can be shared directly with sales managers through email or Slack.

By implementing this Sales Assistant Agent, your team can **save hours on administrative tasks, ensure consistent follow-ups, and maintain a well-organized CRM** while focusing on closing deals and driving revenue.

In this short read, we'll walk you through how one of our clients automated their top-of-funnel sales process—engaging new leads in under 2 minutes and reclaiming hours of sales admin time each week.

Marketing - SuperAgent

Marketing - SuperAgent

1. **24/7 Research on Industry, Audience, and Competitors**
    - Continuously monitors trends, audience behavior, and competitors using platforms like **Google Trends, SEMrush, or SimilarWeb**.
    - Provides actionable insights, such as **emerging keywords**, **content performance metrics**, and **market positioning comparisons**.
    - Summarizes industry news and relevant events into daily or weekly briefs for marketing teams.
2. **Content Generation and Posting**
    - Generates **SEO-optimized blog posts**, **social media captions**, and **graphics** using tools like **Canva, ChatGPT, or Jasper**.
    - Automatically schedules posts on platforms such as **Hootsuite**, **Buffer**, or **Sprout Social**, ensuring consistent posting times.
    - Tailors content to different formats (e.g., Instagram stories, LinkedIn articles, YouTube descriptions).
3. **Instant Customer Engagement in Direct Messages**
    - Monitors and replies to **social media DMs** on platforms like **Instagram, Facebook, or Twitter**.
    - Responds to frequently asked questions with **personalized, pre-approved responses** or escalates conversations that need human attention.
    - Captures lead information from conversations and syncs it with **CRM systems like HubSpot or Salesforce**.
4. **Real-Time Campaign Monitoring and Updates**
    - Tracks ad performance on platforms like **Google Ads, Facebook Ads Manager, and LinkedIn Ads**.
    - Provides live updates on **CTR (click-through rates)**, **impressions**, and **conversion metrics**.
    - Alerts the marketing team when certain KPIs fall below predefined thresholds and suggests adjustments.
5. **Campaign Ideation and Strategy Development**
    - Generates tailored campaign ideas based on **your unique value proposition** and **customer personas**.
    - Creates comprehensive briefs for campaigns, including target audience, tone of voice, and suggested visuals.
    - Analyzes past campaigns and suggests **new directions** or optimizations based on historical performance.
6. **Comprehensive Campaign Reporting**
    - Generates detailed reports summarizing campaign results, including:
        - ROI
        - Audience reach
        - Engagement metrics

    - Highlights areas for improvement and suggests actionable next steps.
    - Integrates with tools like **Google Analytics, HubSpot, and Tableau** for advanced data visualization.
7. **Marketing Workflow Automation**
    - Creates drip email campaigns and handles automated email sequences with platforms like **Mailchimp, ConvertKit, or ActiveCampaign**.
    - Updates and manages leads, tags, and segments in your email marketing tools based on campaign performance.
    - Automatically gathers assets for future campaigns, pulling from repositories like **Dropbox, Google Drive, or Airtable**.
8. **Audience Re-Engagement**
    - Identifies dormant audience segments and creates re-engagement campaigns to **bring them back into the funnel**.
    - Sends personalized emails, offers, or reminders tailored to their previous behavior.
    - Tracks re-engagement success and updates CRM data accordingly.
9. **Social Listening and Sentiment Analysis**
    - Monitors brand mentions across social platforms and analyzes audience sentiment using tools like **Brandwatch or Meltwater**.
    - Provides real-time notifications of negative comments or reviews and suggests responses to protect brand reputation.
    - Identifies influencers or advocates engaging with the brand and tracks their activity.

By implementing this Marketing Assistant Agent, your team can **streamline content creation, optimize campaign performance, and build stronger connections with your audience**, all while focusing on high-level strategy.

Voice Receptionist AI Agent for an Accounting Firm

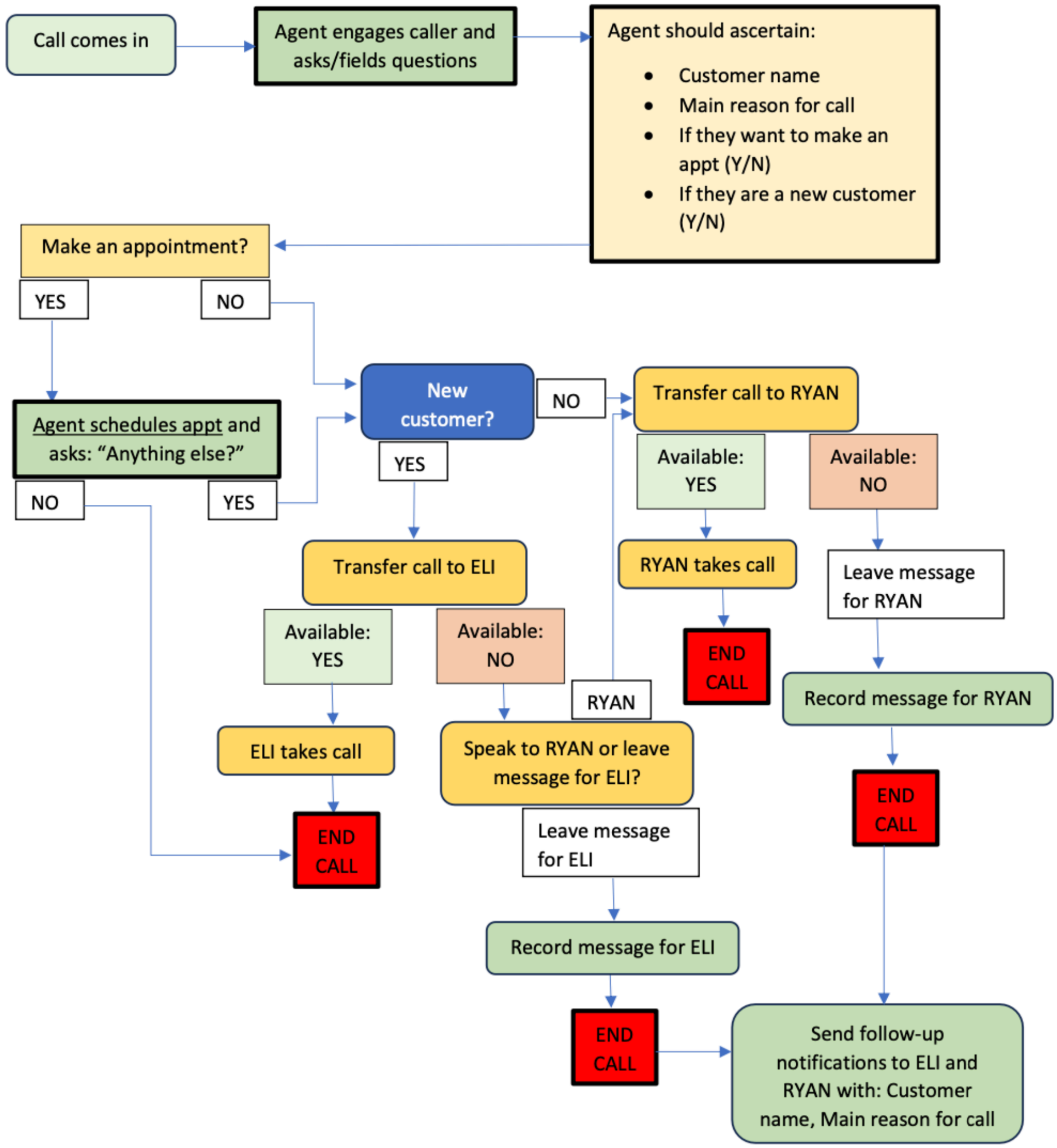
Voice Receptionist AI Agent for an Accounting Firm

Project Piper

AZZ Inc., a local tax and accounting firm, faced a common challenge after their longtime receptionist retired: how to maintain seamless client communication without tying up a partner's time. The solution was to deploy a specialized calling agent that could handle the receptionist's core responsibilities. This agent answers incoming calls promptly, schedules appointments, and, when necessary, connects callers to the right team members. Freed from these administrative tasks, AZZ Inc.'s partners can now concentrate fully on delivering quality accounting services, ensuring that both new and existing clients receive attentive, professional support from the very first call.

> "Our receptionist retired a few years ago, and ever since my partner and I don't have the time to handle the inbound calls, especially when tax season comes around"
>
> - President Elias Azzouz

Build Request



Build Roadmap

1 month

Phase 1 - Minimal Viable product

- Agent capable to answer basic questions, book a Zoom/inperson meeting, check Eli's calendar availability, forward calls to ELI/Ryan and send email with instructions
- Dashboard with received calls in Airtable
- Able to send link with national tax return URL for refunds
- 6 different types of appointment

2. month

Phase 2 - CRM integration

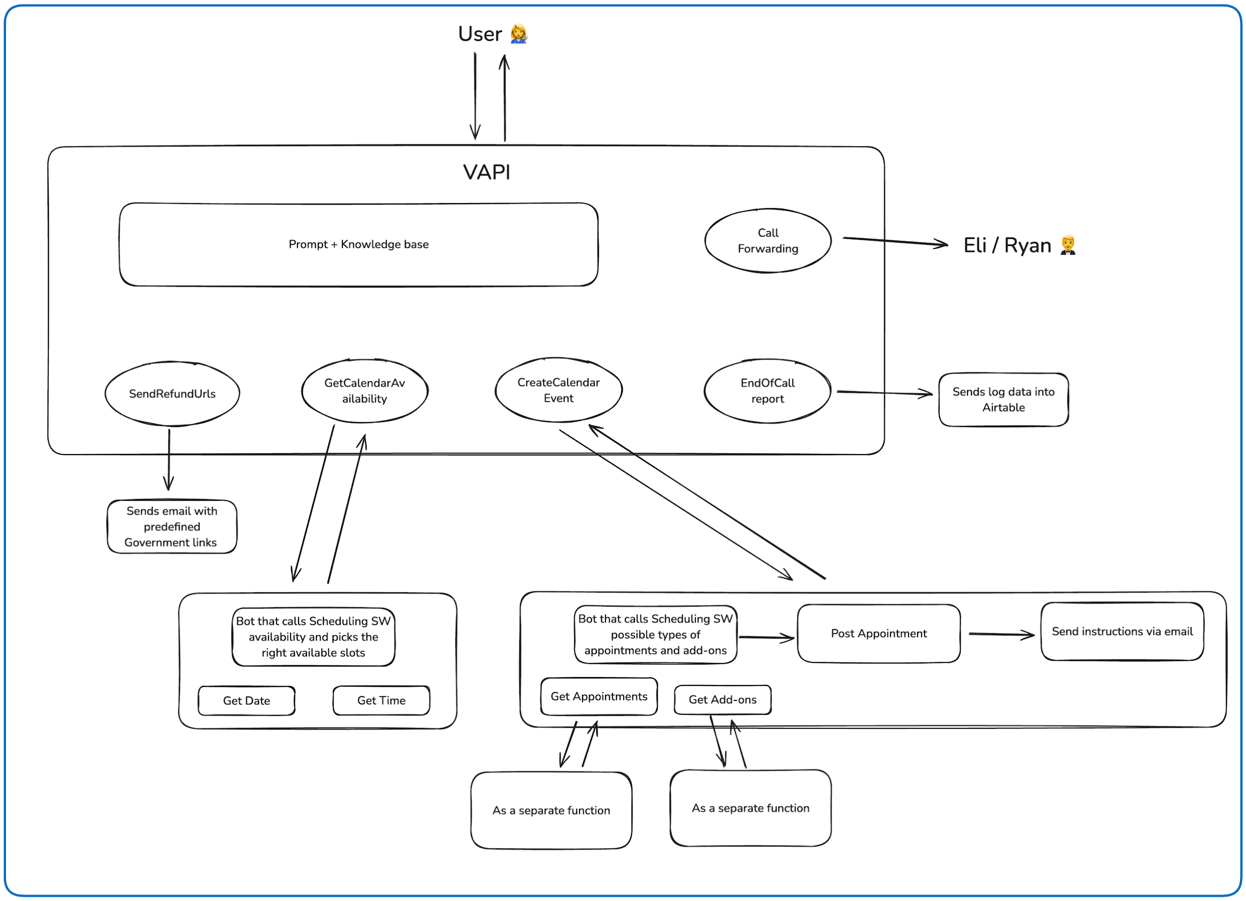
- Check in CRM for existing phone number, if exists, the customer is already having phone picked with his name.
- CRM synchronisation with ringcentral + google calendar
- Customized customer url for document upload to Taxdome in confirmation email (depends if possible due to API endpoints)
- Adjusting the prompts to dynamic working hours representing exact availability in Acuity

3. month

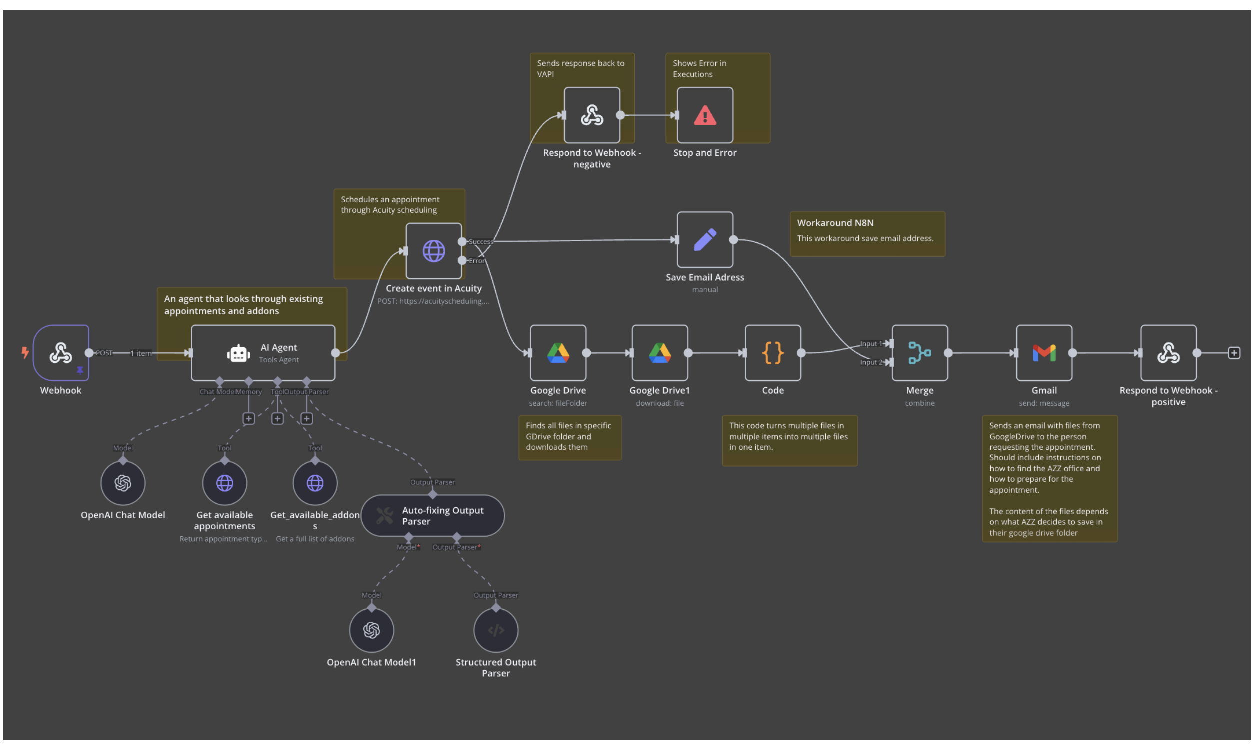
Phase 3 - additional improvements

- sms approvals + on call cancelations (requires CRM integration)
- memory of what has been discussed with a specific customer

Agent Architecture



User
VAPI
Prompt + Knowledge base
Call Forwarding
Eli / Ryan
SendRefundUrls
GetCalendarAvailability
CreateCalendar Event
EndOfCall report
Sends log data into Airtable
Sends email with predefined Government links
Bot that calls Scheduling SW availability and picks the right available slots
Get Date
Get Time
Bot that calls Scheduling SW possible types of appointments and add-ons
Post Appointment
Send instructions via email
Get Appointments
Get Add-ons
As a separate function
As a separate function



Sends response back to VAPI
Respond to Webhook - negative
Shows Error in Executions
Stop and Error
Schedules an appointment through Acuity scheduling
Create event in Acuity
POST: https://acuityscheduling....
Success
Error
Save Email Adress
manual
Workaround N8N
This workaround save email address.
An agent that looks through existing appointments and addons
Webhook
POST
1 item
AI Agent
Tools Agent
Chat Model
Memory
Tool
Output Parser
Google Drive
search: fileFolder
Google Drive1
download: file
Code
Input 1
Input 2
Merge
combine
Gmail
send: message
Respond to Webhook - positive
Finds all files in specific GDrive folder and downloads them
This code turns multiple files in multiple items into multiple files in one item.
Sends an email with files from GoogleDrive to the person requesting the appointment. Should include instructions on how to find the AZZ office and how to prepare for the appointment.
The content of the files depends on what AZZ decides to save in their google drive folder
Model
Tool
Tool
OpenAI Chat Model
Get available appointments
Return appointment typ...
Get_available_addons
Get a full list of addons
Output Parser
Auto-fixing Output Parser
Model*
Output Parser*
Model
Output Parser
OpenAI Chat Model1
Structured Output Parser

Build Walkthrough

Sales Automation

Sales Automation

Matthew Ferry is a master life coach, productivity expert and best-selling author. His coaching business has helped **thousands** of clients achieve transformational growth through personalized, high-value coaching programs. But what happens when manual processes start to weigh down momentum and scalability?

Challenges

High-ticket coaching relies on timely communication, genuine personalization, and actionable insights to build trust and close deals. However, scaling these traits face significant obstacles:

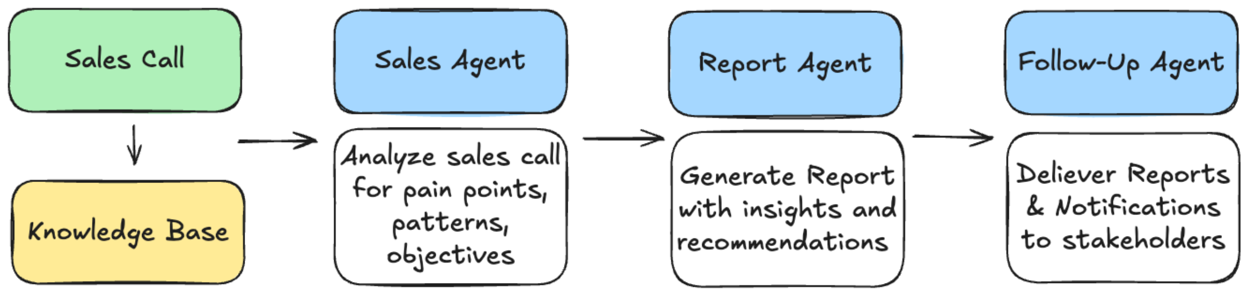
- **Lack of Sales Insights**: Analyzing hundreds of sales calls for personal insights and opportunities was tedious and time consuming.
- **Delayed Follow-Ups**: Manual follow-ups are slow and often reactive, high volume makes it harder to personalize, leading to missed opportunities and lower conversions.
- **Workflow Disconnect**: While tools like Slack and Zoom are used, they lacked automation, leading to fragmented communication and manual inputs between tools.
- **Scalability Issues**: Handling a growing volume of leads and sales calls without automation was unsustainable.

Solution

To address these challenges, we developed a comprehensive Sales Automation Agent System **tailored for Matthew Ferry's current sales tools and workflows**. System includes:

- **Sales Agent**: Automatically retrieve sales call transcripts to identify client challenges, potential strategies and actionable areas of improvement.
- **Report Agent**: Produce detailed sales reports with recommendations and insights. Maintaining your personal touch by writing in your style and tone.
- **Follow-Up Agent**: Send personalized follow-ups, including emails, text and slack messages, to the right team members for approval and next steps.

Agent Architecture



This **Agent System** allows Matthew Ferry to create fast personalized responses to leads, significantly reducing follow-up times. Allowing his team to handle greater volume in a clear, organized way while improving their sales process.

Building this framework enables Matthew Ferry to **scale** without increasing manual workload or sacrificing quality.

Why This Matters for You

If you're managing high-volume sales processes, the challenges Matthew Ferry faced might sound familiar: slow follow-ups, fragmented workflows, and difficulty scaling without overwhelming your team.

Our approach demonstrates how AI can bridge these gaps by:

- Automating repetitive tasks to free up your team's time.
- Delivering actionable insights to accelerate the sales process.
- Ensure scalability without sacrificing personalization.

For businesses looking to automate and optimize their operations, **agent systems** are no longer a luxury—they're a necessity.

Ready to Automate Your Sales Process?

Discover how Custom AI Studio can help you unlock growth and efficiency. Let's design a tailored solution for you.

Appointment Setting & Sales Training

Appointment Setting & Sales Training

AllOn4 Liaison is a Dental Medical Call Center that helps dental practices generate appointments with high quality leads and fill up their calendar. Facing challenges with scaling their lead management and HR processes, they required a custom solution to automate workflows while maintaining high conversion rates and operational efficiency.

Challenges

AllOn4's business model relies on connecting a high volume of dental leads with dental practices while ensuring optimal performance from their treatment coordinators. However, as volume increased current workflows presented several bottlenecks:

- **Lead Volume Overload**: Lead coordinators experienced burnout when managing 500-700+ leads reducing their efficiency and client satisfaction.
- **Inconsistent Performance**: Sales trends show lead conversions drop later in the day, reducing overall conversion rates.
- **Manual Training Processes**: Hiring and training treatment coordinators require significant manual effort, leading to inconsistency and longer onboarding.
- **Scaling Issues**: Handling leads for larger clients with 100+ offices was unsustainable without automation.

Solution

To overcome these challenges, we developed a **Calling and Sales Training Agent System** for AllOn4 Liaison, tailored to their workflows and integrated with their existing tech stack.

Calling Agent

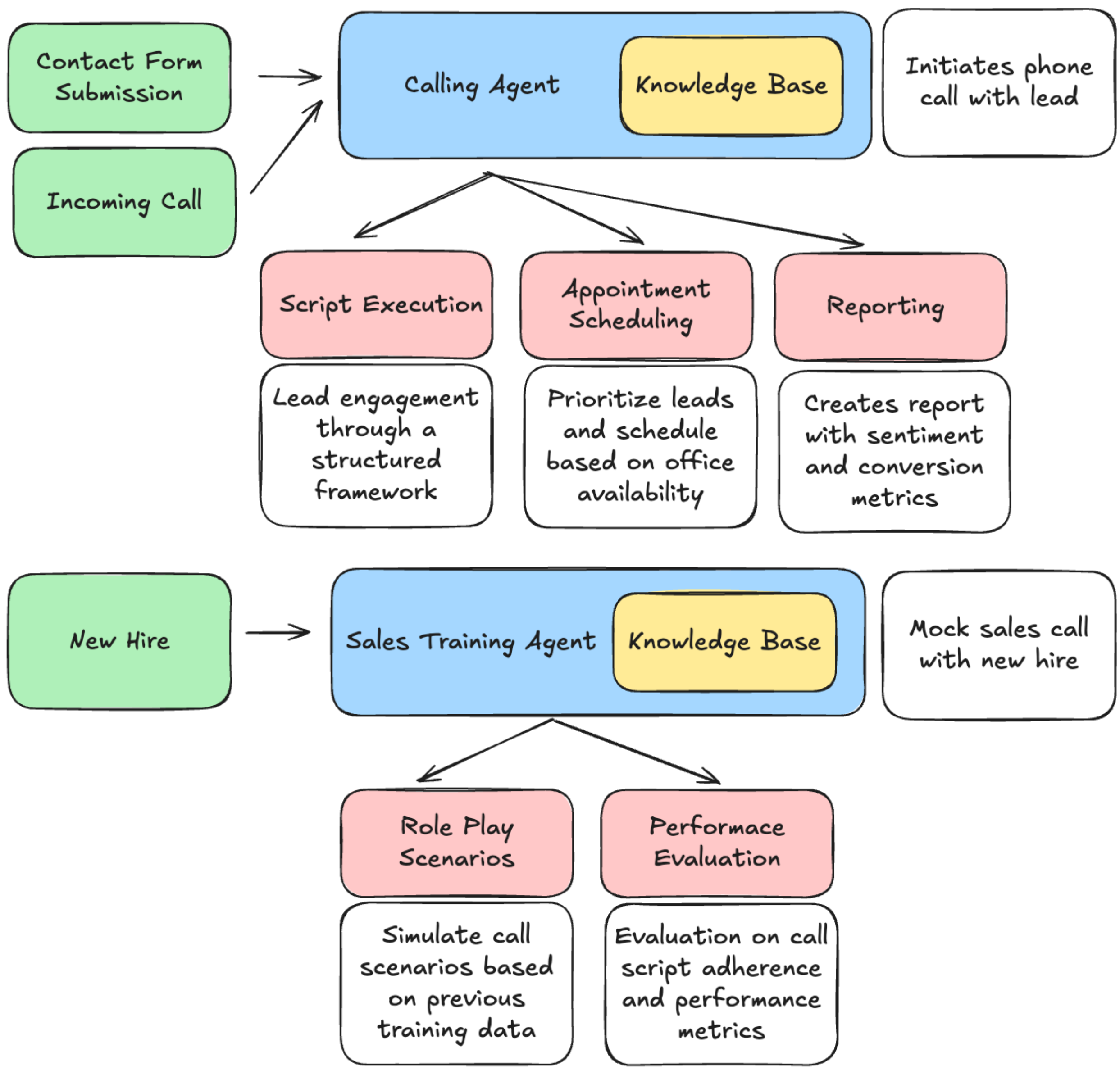
- **Inbound and Outbound Calls**: Initiate phone call with lead from contact form submissions and manage incoming calls.
- **Script Execution:** Lead engagement through structured conversational frameworks, and make decisions real time based on caller preferences.
- **Appointment Scheduling**: Sort leads and scheduled appointments based on dental office availability, integrating directly with their CRM.
- **Call Reporting**: Generate performance reports, analyzing key metrics like conversion rates and sentiment to identify opportunities for improvement.

Sales Training Agent

- **Training Support**: Use recorded training materials to prepare new hires efficiently.

- **Onboarding Acceleration**: Accelerate the onboarding process by using role-playing scenarios to evaluate treatment coordinators based on adherence to sales scripts.
- **Performance Reporting**: Monitored call performance metrics to filter coordinators and assess ongoing training needs.

Agent Architecture



These **Agent Systems** allow AllOn4 to improve lead capacity without compromising performace ensuring a consistent experience as they scale. Building these frameworks enable them to handle greater volume in a clear, organized way while improving their sales process.

Why This Matters for You

If you're managing high-volume sales processes, the challenges AllOn4 Liason faced might sound familiar: burnout decreasing performance, fragmented workflows, and difficulty scaling without overwhelming your team.

Our approach demonstrates how AI can bridge these gaps by:

- Automating repetitive tasks to improve capacity.
- Taking action to accelerate the sales process.
- Ensure scalability without sacrificing quality.

> For businesses looking to automate and optimize their operations, **agent systems** are no longer a luxury—they're a necessity.

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Lead Enrichment

Lead Enrichment

Joya Dass is a world renowned business coach and leadership consultant. As her successful webinars and content led to growing interest from more people, she faced challenges connecting with everyone in a timely manner, while maintaining the personal touch her clients value. She needed a way automate her engagement without sacrificing her style and tone. Allowing her to bring on more clients and maintain the growth of her business.

Challenges

Growing the business while maintaining her personal touch requires effective lead engagement strategies and integration of the platforms involved in the process. Joya experienced how these challenges impact your business:

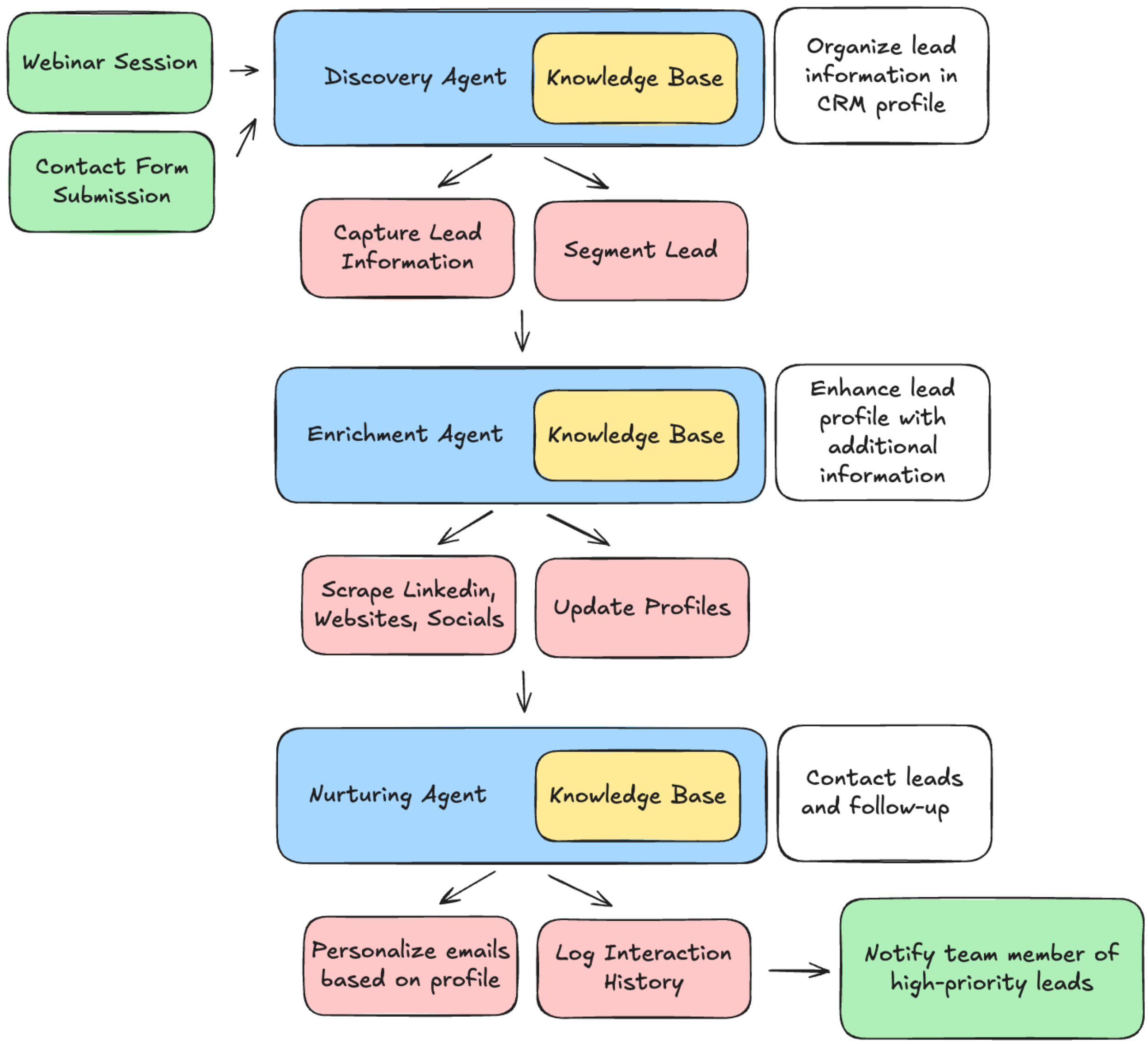
- **Time-Consuming Lead Profiling:** Creating that person touch meant doing addition research, and building detailed lead profiles manually was inefficient and time-consuming.
- **Inconsistent Lead Nurturing:** Tailoring each outreach manually, took too much time and led to inconsistent and decreased engagement quality.
- **Disconnected Workflow:** Limited integration between platforms made data entry a tedious and time consuming process, reducing effectiveness.
- **Scalability Issues:** Managing a growing audience without automation led to missed opportunities.

Solution

To address these challenges, we developed a **Lead Enrichment Agent System** personalized to Joya's style and tone, to enhance lead management and sales funnel processes. The system includes:

- **Lead Discovery Agent**: Capture lead information from webinar and contact form submissions then log and segment leads in CRM.
- **Lead Enrichment Agent:** Enhance lead profiles by gathering additional data from social media platforms and updating this information.
- **Lead Nurturing Agent:** Tailor emails based on profile information and interaction history. Following up at optimal times to ensure leads remain engaged.
- **Lead Escalation:** Notify team members of high-priority leads requiring direct attention.

Agent Architecture



This **Agent System** ensures that no lead is left behind and handles the growing volume in a clear and organized way, without losing time or quality of work. By automating this process, Joya Dass can spend more time building and maintaining those personal relationships that clients value so much.

Building this framework is the foundation that enables Joya to **grow** her business.

Why This Matters for You

If you're managing high-volume sales processes, the challenges Joya Dass faced might sound familiar: slow follow-ups, disconnected workflows, and difficulty scaling while maintaining quality.

Our approach demonstrates how AI can bridge these gaps by:

- Automating lead engagement fast.
- Connecting platforms together to reduce manual data entry.
- Ensure scalability without sacrificing personalization.

For businesses looking to automate and optimize their operations, **agent systems** are no longer a luxury—they're a necessity.

Ready to Automate Your Sales Process?

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Data Centralization & Company FAQ Agent

Data Centralization & Company FAQ Agent

Remark is a platform dedicated to simplifying homeownership by providing homeowners with tools and resources to manage their properties effectively. Despite their innovative approach, they faced challenges with fragmented data, inefficient workflows, and limited scalability. Remark partnered with us to build a centralized knowledge base and agents for automation, enabling them to simplify their operations and user engagement.

Challenges

Remark's goal of creating dynamic, personal campaigns and providing exceptional customer support was challenging due to several obstacles:

- **Fragmented Knowledge Base:** Data was spread across multiple platforms, leading to inefficiencies in data retrieval and management.
- **Dynamic Data Issues:** Frequent data duplication and lack of real-time synchronization made it difficult to maintain current, accurate information.
- **Limited Integration:** Existing tools were not fully optimized to work seamlessly with each other, causing workflow disconnects.
- **Scalability Challenges:** Managing a growth without automation led to missed opportunities.

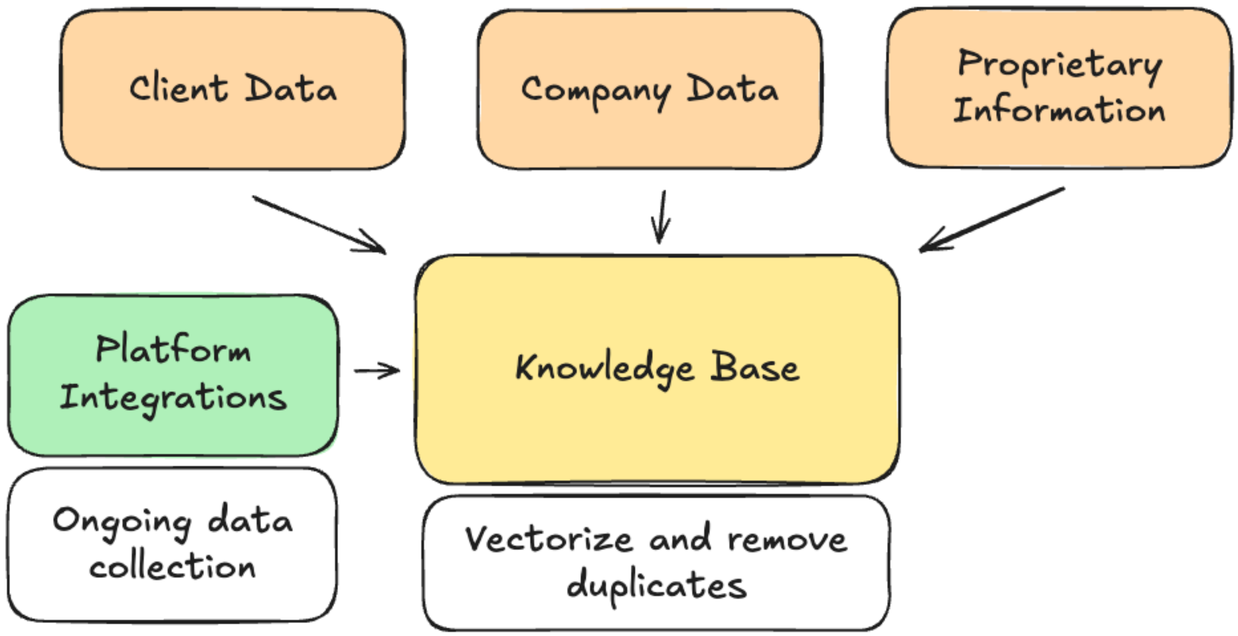
Solution

To address these challenges, we developed a **Centralized Knowledge Base** that connected Remark's data and became the foundation to build additional **Agent Systems**.

We integrated these solutions into Remark's existing software and tools to ensure a smooth migration.

Centralized Knowledge Base

- **Data Synchronization:** Create a data capture system for all data inputs from existing platforms into a vectorized database for efficient access.
- **Data Cleaning:** Remove duplicates to ensure clean and accurate data.

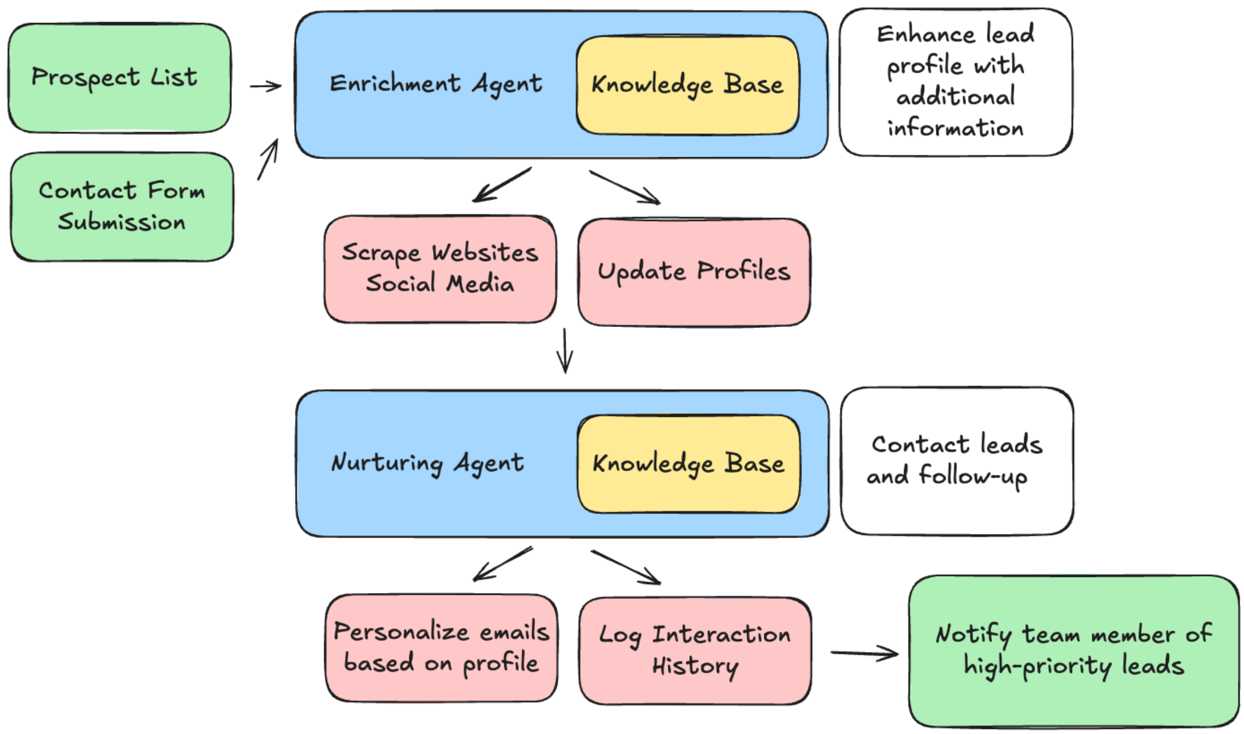


Agent Systems

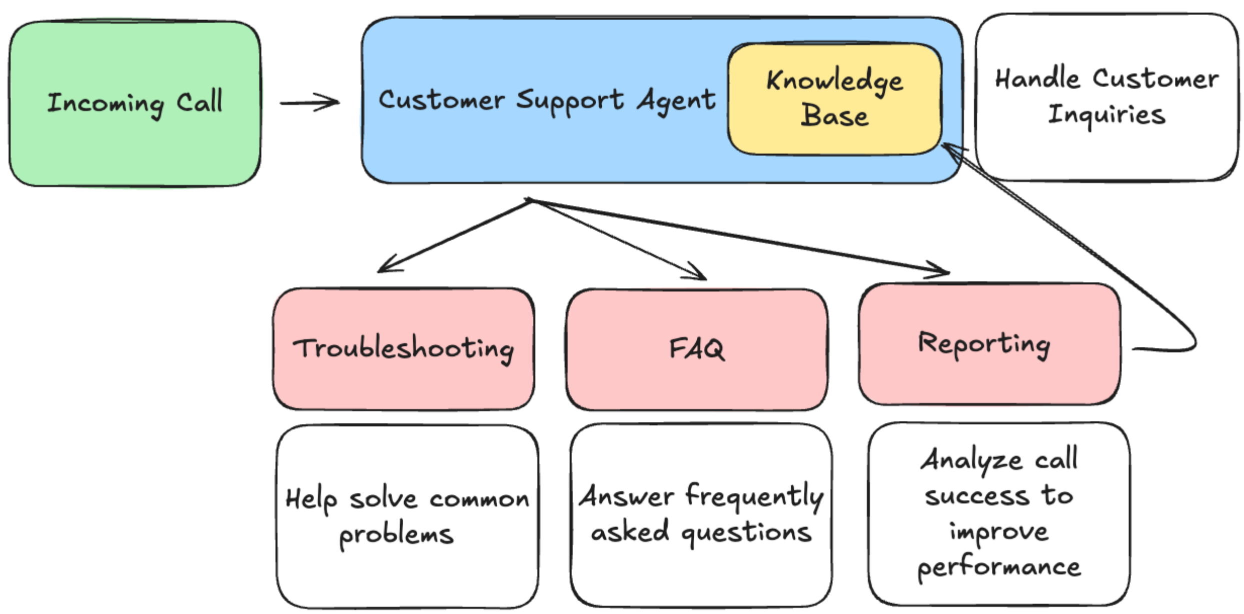
- **Lead Enrichment Agent:** Enhance lead profiles by gathering additional data from websites and social media platforms and updating this information to the knowledge base.
- **Lead Nurturing Agent:** Tailor emails based on profile information and interaction history. Following up at optimal times to ensure leads remain engaged.
- **Customer Support Agent:** Handle customer inquiries, provide real-time support, and pull answers directly from the knowledge base.
- **Data Analysis Agent:** Monitored user interactions and generated actionable insights for campaign optimization.

Agent Architecture

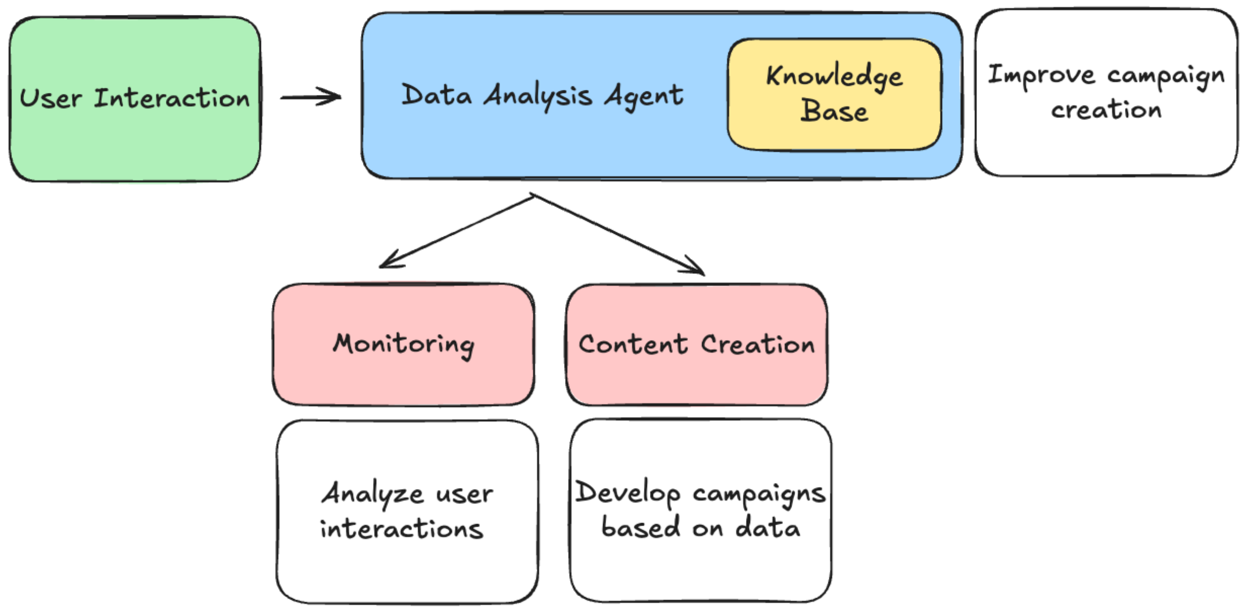
Lead Engagement



Customer Support



Data Analysis



Data is at the foundation of everything we do. By centralizing Remark's knowledge base, it gave them the accessibility to maximize their data with Agents.

This **Agent System** allows them to support their users without additional manual effort and improve their services with data insights.

Why This Matters for You

If your data is spread across multiple platforms without integration, these challenges probably sound familiar. Creating a centralized knowledge base gives you leverage to improve workflows, scale and understand what your data's telling you.

Our approach demonstrates how AI can:

- **Improve Data Accessibility:** Create a single source of truth for all your operations.
- **Automate Repetitive Tasks:** Free up resources for high-value activities.
- **Enhance Campaigns and Support:** Deliver personalized experiences at scale.

Ready to Scale Your Operations?

Discover how Custom AI Studio can help you build a centralized, AI-powered system to optimize workflows and grow your business.