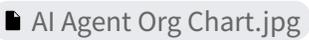


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# AI-Native Agency Operating System

Workflow Link: 

## How it works?

### Step 1: Define the human control layer

Start by clearly separating strategy from execution.

- Assign humans to:
  - Strategy
  - Positioning
  - Client relationships
  - Final approvals
- Remove humans from repetitive operational tasks.
- Document which tasks must remain human-owned.

### Step 2: Map repeatable tasks across departments

Identify work that can be systemized.

Break down each department into repeatable workflows:

- Content
- GTM
- Sales
- Project Management
- Customer Success

### Step 3: Deploy Content Agents

Systemize content production.

Create agents for:

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- **Competitor Research:** Analyze top creators and formats
  - **Content Ideation:** Generate structured post ideas
  - **Interview Preparation:** Create research briefs and questions
  - **Design Brief Creation:** Generate creative briefs for visuals
  - **Repurposing:** Convert posts into other formats
  - **Newsletter Formatting:** Adapt content into email format
  - **Client Activity Tracking:** Monitor publishing and PR activity

#### Step 4: Deploy GTM Agents

Automate pipeline generation workflows.

Create agents for:

- **List Building:** Pull ICP-filtered account lists
- **Qualification:** Score and filter leads
- [Outbound Strategy](#): Generate campaign structures
- [Copywriting](#): Produce outbound email and LinkedIn messaging

#### Step 5: Deploy Sales Agents

Reduce rep administrative workload.

Create agents for:

- **Pre-Call Research:** Prepare structured call briefs
- **CRM Updates:** Log activities and update deal stages
- **Email Drafting:** Generate follow-up responses
- **Pipeline Analysis:** Monitor forecast and performance trends

#### Step 6: Deploy Project Management Agents

Automate tracking and reporting.

Create agents for:

- **Task Tracking:** Monitor deadlines and deliverables
- **Outbound Reporting:** Aggregate campaign metrics
- **LinkedIn Reporting:** Track impressions and engagement

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## Step 7: Deploy Customer Success Agents

Systemize retention and expansion.

Create agents for:

- **ICP Matrix Creation:** Build positioning frameworks
- **Company Research:** Gather account intelligence
- **Meeting Summarization:** Convert transcripts into action items
- **Onboarding Automation:** Standardize setup workflows
- **Expansion Detection:** Identify upsell signals in conversations

## Step 8: Centralize data infrastructure

Prevent agent fragmentation.

- Use a single CRM for pipeline data.
- Use a unified content database.
- Centralize enrichment logic.
- Ensure all agents write back to the same system of record.

## Step 9: Scale by deploying new agents

Expand capacity without adding headcount.

- Identify repetitive bottlenecks.
- Convert them into agent workflows.
- Deploy new agents instead of new roles.
- Continuously refine existing agents.