FOR MARKETING TEAMS

# 10 marketing tasks you can hand to an *AI agent*

The agent does the repetitive part. Your team reviews and decides. Here are ten places to start, and the rules we follow when we build them.

## HOW EVERY AGENT IN THIS GUIDE WORKS

01
### Trigger
A new form, a schedule (every Monday 8 a.m.) or an approved post.

02
### Gather
Pulls what it needs from your CRM, ads, inbox or content calendar.

03
### Think
An AI model writes, summarizes or classifies, following your rules.

04
### You check
Anything that goes out to a customer waits for a person's OK.

05
### Act + report
Publishes, saves or sends, then tells you what it did.

01
### Weekly report

AGENT — Pulls the numbers from ads, social and the CRM and emails a plain-English summary every Monday.

TEAM — Reads it and decides.

02
### New leads into the CRM

AGENT — Every form, ad lead or inquiry lands in the CRM with its source and answers, ready for your team.

TEAM — Calls the lead.

03
### First reply to a lead

AGENT — Drafts a personal reply minutes after the lead comes in, using what the lead wrote.

TEAM — Reviews and sends.

04
### Follow-ups

AGENT — Notices when a lead goes quiet, drafts the next email and stops on its own when they reply.

TEAM — Approves it.

05

## Publishing

AGENT — Posts approved content to Instagram, Facebook, TikTok and YouTube and confirms what went out.

TEAM — Approves the content.

06

## Approvals

AGENT — Reminds the right person when a piece is waiting for approval.

TEAM — Approves.

07

## Repurposing

AGENT — Turns one video or article into captions, short posts and a newsletter draft.

TEAM — Edits and picks.

08

## Ad alerts

AGENT — Checks spend and cost per lead every day and alerts you when something jumps.

TEAM — Decides what to change.

09

## After sales calls

AGENT — Saves the call summary in the CRM and drafts the follow-up email.

TEAM — Checks and sends.

10

## Content ideas

AGENT — Turns customer questions and FAQs into a draft calendar for next month.

TEAM — Chooses and approves.

## BEFORE YOU BUILD ONE

01 **Start with the task that eats the most hours.** One agent working well beats ten half-built ones.

02 **Keep a person on anything a customer sees.** The agent drafts, your team approves. Speed goes up, mistakes don't.

03 **Make it report back.** Every run should tell you what it did, and alert you when something fails.

04 **Use the tools you already have.** Your CRM, inbox and ad accounts stay. The agent connects them.

NEXT STEP

Want to know which 3 we'd start with at your company? **Reply to this email** and we'll map your process in 20 minutes.