

Beyond Prompting

How AI Agents Run Your Business Autonomously

Alane Boyd, Biggest Goal



Made with GAMMA

stablediffus

Isn't everyone an AI Guru now?

Here's what makes me different.

- I've been an entrepreneur for over 20 years.
- With my first business I scaled to 300 clients and got acquired.
- I then helped one of my original clients raise \$1.1M and scale up to a team of 19.
- My second business I scaled to over 600 clients, \$15M in revenue, merged with a competitor, applied our operational procedures to the combined entity, and exited in 2018.
- Since 2019, I've helped over 300 teams operationalize their workflows

I've been involved in the evolution of operational efficiency as it's happening:

Systemize with Asana/Monday/ClickUp → Add Automation → Improve Automation w/ AI → Now: Deploy AI Agents

You might know me

Build a Better Agency Podcast with Drew



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[HOW WE HELP](#)

[MEMBERSHIP](#)

Finding the right project management software for your team with Alane Boyd

By **Drew McLellan**

Episode 441



Welcome our guest
Alane Boyd



Remember Blockbuster Video?

They didn't keep up with the change from DVD to Streaming. But, we've seen this before:

1 Land lines → Cell phones

2 Horses → Cars

3 Oxen → Tractors

4 Fax machines → Email

Easter morning 1900: 5th Ave, New York City. Spot the automobile.



Source: US National Archives

Easter morning 1913: 5th Ave, New York City. Spot the horse.



Source: George Grantham Bain Collection

When was the last time you drove to a pay phone to make a call?

What seems futuristic today will be standard practice tomorrow.

Three Levels of Leveraging AI



Level 1: Chatting

AI responds to Human with augmented memory between interactions.



Level 2: Advanced LLM Functionality

Deep research, customGPTs, projects, agent mode, skills, etc.



Level 3: Automation w/ Agents

AI has instructions (prompts), unique context (RAG), input (chat/other agents/webhooks), and tools (integrations/other agents/workflows) to take actions independently.

AI Engines for Chatting

ChatGPT

General-purpose conversational AI for a wide range of tasks.

Claude

Known for advanced reasoning and longer context windows, ideal for complex analysis.

Perplexity

AI search engine providing summarized answers with sources, great for research.

Gemini

Google's multimodal AI, excelling in text, image, audio, and video understanding.

Specialized AI Engines

Each AI engine offers unique strengths tailored for different needs and tasks.

We'll revisit this when we talk about AI Agents

Call Recordings —> Media Quotes / Testimonials

Copy Call Recording Transcript

Paste transcript into AI (CoPilot or ChatGPT)

Use the prompt:

"This is a call transcript with a client, [name of client]. Will you pull any positive feedback shared about our work together that we can use as a testimonial. Do not edit their words, only write what they said. [paste transcript]"

Send for client approval

Authentic quote with their own words.



Stephanie Preece

Gym Launch



"This is exactly how I was hoping it would work! Your team did exactly what I envisioned with the merge and automation. Now they're able to independently operate and then automatically update in one master file. This is amazing. This is exactly what we were hoping to harness. There's absolutely no way that I would have ever been able to figure this out. And I will tell you, the part that was the best is that you heard exactly what I needed and delivered on those pieces. Exactly. We're super, super excited."



Three Levels of Leveraging AI



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AI responds to Human with zero memory between interactions.



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Custom GPTs (Projects, Gems)

These platforms allow you to create "specialized" versions of their main AI models, pre-instructed to handle specific tasks so you don't have to repeat your requirements every time.

All three platforms represent **specialized, persistent environments** where you can tailor a general AI model with your own specific data (documents, guidelines, code) and unique instructions. They transform a "blank slate" chatbot into a **dedicated expert** that remembers your context, follows your specific rules, and performs repetitive, niche tasks without needing to be retrained or re-prompted every time.

Context windows are super important and often a limiting factor.

Revisiting the Three Levels of Leveraging AI



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What is an AI Agent?

An AI Agent is similar to an intern doing a job in the following ways:

1. They are given data/input to handle
2. They are given instructions to follow
3. They are given tools to work with

Using those items, their job is to produce a specific output. The more context provided and the better the instructions, the more predictable and successful their output will be.

The Difference

Like a really smart assistant who doesn't just answer your questions—but actually takes action for you.

ChatGPT

You ask a question

✅ "Here's what you should do."

Responds to your prompts with information but doesn't take independent action.

AI Agent

It watches for something

🤖 "Let me do that for you."

Proactively performs tasks by using tools and making decisions on your behalf.

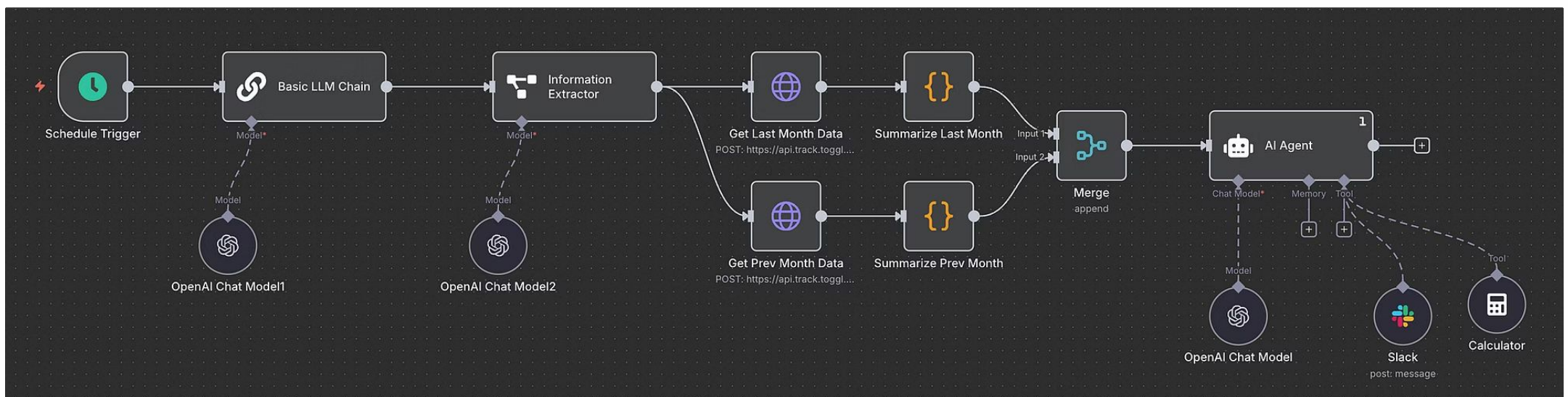
Wild West vs. Operationalizing

- When it comes to standardization, you want a system that can perform its tasks the same over and over
- You don't want to be relying on users to remember to prompt correctly, or at all
- You want the inputs to be as standardized as possible and the outputs to be predictable

To achieve this, you need to operationalize your agents and systems. Typically, this means that...

- You're creating agents as workflows in a centralized platform (**not each user creating their own individual agents that nobody else on the team knows about**)
- These workflows are triggered by systems or chat interfaces, but have the prompts, tools, actions, and outputs defined and tested
- You're not leaving it up to individual team members to create something in GPT's agent mode and letting others reinvent the wheel — wasting time creating something similar and neither person knows about what the other has created.

Example of an operationalized workflow that supports multiple teams:



It has been designed, tested, and created for a single purpose.

You Automate Software, Not People

Tech Stack for AI Agents



PM Software



CRM System



Time Tracking Tools



Communication Platforms

AI Agent Examples & Use Cases



Meetings —> Action Items

An agent that summarizes meetings, identifies follow-ups, creates the tasks in your PM tool, and drafts recap emails.



Instant Proposal Generation

Sales calls into proposals. AI agent takes your meeting transcript and creates a custom proposal—tailored to the customer's pain points and your specific offerings.



Chatbots & Email Triage Support

24/7 access to company-specific information. Provides consistent answers and actionable items for support teams.



Reporting & Analysis

Informal: Teams & Slack messages with daily data summary

Formal: Slide decks and PDF reports with data analysis

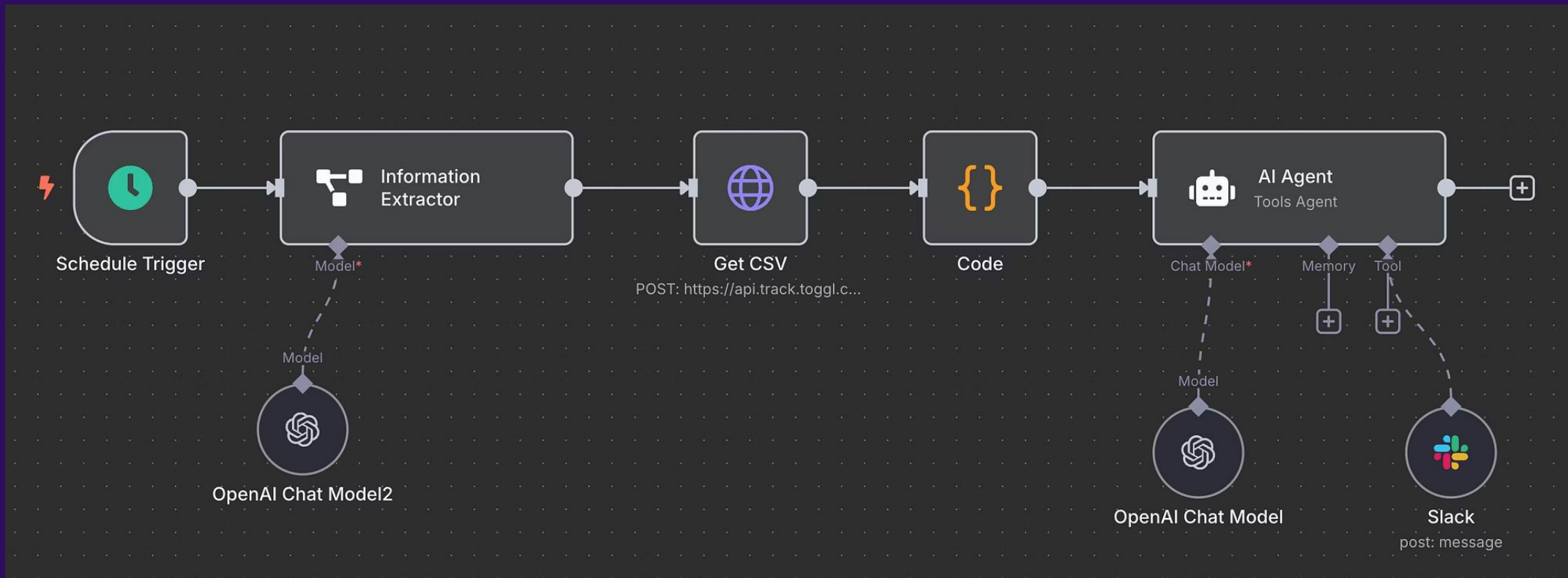
Client Time Tracking

Problem

Visualize time spent on client work by our team.

Solution

Automated AI notification each day with a summary of hours for each client.



AI Agent Analyzes client hours daily

The screenshot shows a Slack workspace with a sidebar on the left containing navigation options: Home, DMs, Activity, Later, Templates, More, and Admin. The main area displays the 'time-tracking-reviews' channel. A message from 'Ally AI' is shown, dated Wednesday, April 30th at 12:00 AM. The message content lists clients with their hours and the next highest hours under 30.

time-tracking-reviews

Messages Add canvas +

Wednesday, April 30th

Ally AI 12:00 AM

Clients Over 30 Hours:

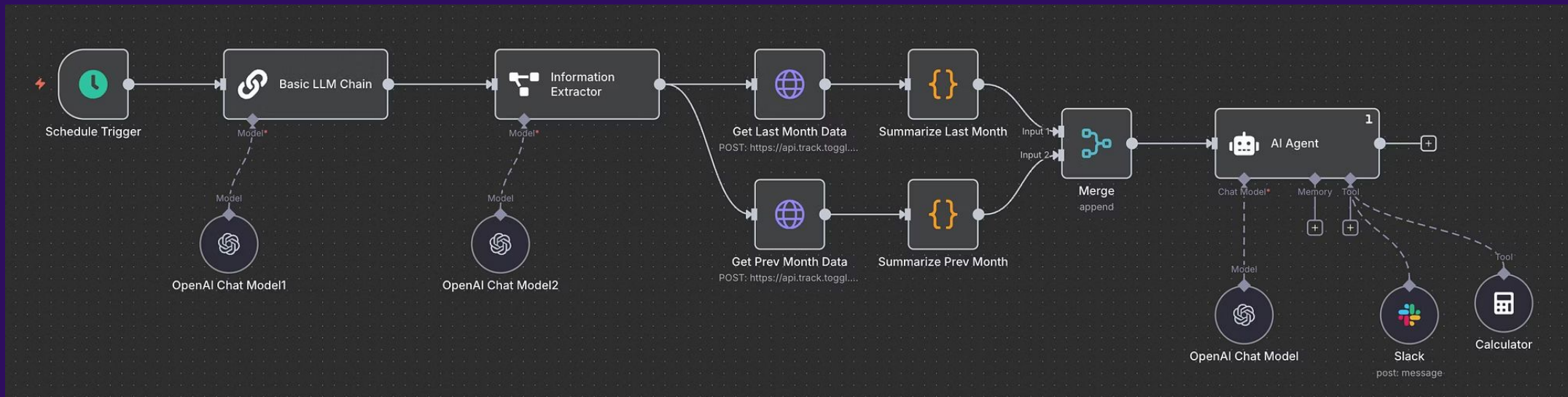
- Nexora Systems: 46.41
- Brightwell & Co.: 46.21
- Verdi Lane: 45.19
- StratusForge: 44.75
- Oakridge Analytics: 41.41

Next Highest Hours (under 30):

- Loopline Creative: 28.82
- Zenith Path Advisors: 20.48
- Crimson Relay: 19.49
- EmberNest: 17.82
- Cascade Alloy: 16.96

Message @time-tracking-reviews

Notifies the team every morning in Slack



Month over Month Analysis

Monthly Hours Analysis: June vs July 2025



Total Hours

- June: 661.26 hours
- July: 832.73 hours
- Growth: +26%



Top 5 Clients - July 2025

1. Bob Haver Co: 298.31 hrs (+50% from June)
2. Internal Work: 139.81 hrs
3. Red Hill Co: 88.07 hrs (significant increase from 12.36 hrs)
4. Stars Property: 56.81 hrs
5. Apple Core Solutions: 40.49 hrs



Team Activity - July 2025

- Sally: 195.32 hrs
- Edward: 181.11 hrs (+75 hrs from June)
- Bart: 162.27 hrs
- Jane: 110.77 hrs (+59 hrs from June)
- Teller: 87.54 hrs

Key Observations:

- Overall hours increased by 171.47 hours in July
- Notable growth in Red Hill Co hours
- Strong performance increases from Edward and Jane
- Bob Haver Co remains the largest client with significant growth

Instant Actionable Data

Automated Proposal

Problem

Creating proposals takes on average 2 hours per prospect.
It is time consuming to get right.

Solution

Automated AI tool that generates proposals based on the sales call you had with the prospect.

Meeting Transcripts —> CRM —> Proposal Template

The screenshot displays a CRM interface for a deal named "BurgerFit Test deal". At the top, there's a search bar and a user profile for Micah Johnson (Owner) with 2 followers. A status bar shows "Won" in green and "Lost" in red. Below this is a timeline with four segments: "0 days", "72 days", "98 days", and "0 days". The deal is associated with "BGBO Co Consulting" and "Discovery".

On the left sidebar, there's a section "Organize your sidebar" with a "Watch video" button. Below it, a "Summary" section lists items: "\$0", "BurgerFit", "Alane Boyd", "Set expected close date", and "Add labels".

The main content area shows a meeting transcript from December 10, 2024, at 11:28 AM, added by Grain. The transcript details a meeting with attendees Alane Boyd and Micah Johnson. It includes a summary of the meeting's focus on platform overview and proposal discussions, and a list of key points discussed.

Meeting: Sales Automation - 32m. | Added by Grain
Attendees
Alane Boyd, Micah Johnson
Summary
Micah Johnson introduced the meeting's focus on the platform overview and proposal discussions. Alane Boyd emphasized the team's outreach strategies targeting burger franchises and hospitals, detailing the use of spreadsheets and LinkedIn for contact identification, as well as the importance of A/B testing for improving email response rates. She proposed completing setup tasks in December to prepare for a campaign launch in January, including establishing a new email domain for cold outreach.

Key Points

- Micah Johnson introduces the purpose of the meeting, which includes an overview of the platform and proposal discussion. 2:36
- Alane Boyd outlines key areas of focus for the team, including burger franchise outreach and hospitals, and explains how they will build outreach sequences using software. 4:02
- Alane Boyd details how they identify contacts for campaigns, mentioning the use of spreadsheets and LinkedIn to target specific individuals based on industry and geography. 6:56
- Alane Boyd discusses the concept of A/B testing for email sequences, detailing how different messaging can be tested for better response rates. 14:35
- Alane Boyd explains that conversion rates depend on factors such as LinkedIn connections and email quality, noting that cold lists typically yield lower response rates. 15:58

The AI-generated Proposal

 **Biggest Goal**

PREPARED FOR:

Stephanie Sloan

BurgerFit

PREPARED BY:

Alane Boyd

Biggest Goal

AI Agent Training

for BurgerFit



Scope of work

Here is an overview of the challenges and goals of this new business project. It includes a detailed description of the pricing strategy, timeline, and deliverables you can expect from us.

In summary, there is a description of the legal requirements outlined in our business proposal contact.

Challenges and Goals

Challenges	Goals and Objectives
Low Engagement Rates in Outreach Campaigns	Achieve a 20% increase in response rates by using automated tools for contact identification and integration with LinkedIn.
Inefficient Campaign Setup Process	Reduce campaign setup time by 50% through automation.
Inconsistent Conversion Rates Across Campaigns	Improve conversion rates by 15% with refined strategies and optimized messaging.

Deliverables and Timeline

Deliverables	Timeline

Content Creation (Podcast ex)

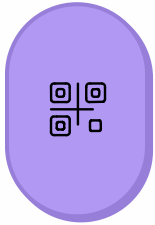
Problem

Creating content is time consuming and takes going in and out of multiple software platforms

Solution

Automated AI agent that takes off 75% of the work.

Experience an AI Agent for Yourself



Scan this QR code



Answer a few questions about which software platforms you use



Get emailed a custom report with 25 automations you could put in place right now



Provide Boilerplates for consistent structure

Boilerplates are pre-defined templates that guide the AI to produce output in a consistent format. By using square brackets [] to denote dynamic content or placeholders, you can ensure that the AI fills in the blanks while adhering to a specific structure every time.

Example Boilerplate Structure

[DOCUMENT TYPE]: [Topic Name]

SECTION 1: [Section 1 Title]

[Section 1 Content Summary - Keep to 2-3 sentences]

SECTION 2: [Section 2 Title]

[Section 2 Key Points - Use bullet points]

CONCLUSION:

[Conclusion Summary - Highlight main takeaways]

How it Ensures Standardization

When you provide a boilerplate, the AI's task shifts from creative generation to filling in the pre-defined slots. This significantly reduces variability in the output's structure, ensuring that all generated content follows the same organizational pattern. It's particularly useful for creating reports, emails, meeting summaries, or any document type that benefits from a predictable layout and content flow.

ack

a great partner in helping us do what we started out to do. provided frequent updates. He showcased integrity and skill. Highly recommend !"

- 5.0 Quality
- 5.0 Deadlines
- 5.0 Cooperation

Feedback to the client

Make your PM Tool a your Hub for AI Agents

AI Agents can work with your project management system (Asana, ClickUp, and Monday) so that work stays where work is happening

Why PM Systems Are Agent-Ready

Centralized Data

Single source of truth for all project information, timelines, and deliverables

API Access

Robust integrations allow agents to read, write, and trigger actions automatically

Structured Workflows

Defined processes create predictable patterns agents can follow and optimize

Identifying Your First Digital Worker



Repetitive Tasks

Work that follows the same pattern every time



Time Drain

Processes consuming hours of manual effort weekly



Error-Prone

Activities where human mistakes create downstream issues



Scaling Blocker

Bottlenecks limiting growth without headcount increase

Impact on Agency Operations

60%

Reduction

Manual data entry eliminated across
systems

85%

Faster

Client onboarding completion time

40%

Capacity

Increase without additional headcount

Building Your AI Agent Strategy

Audit Current Workflows

Map repetitive, high-volume tasks across departments

1

2

Prioritize Quick Wins

Start with simple, high-impact processes to build confidence

Implement First Agent

Deploy, monitor, and refine your initial digital worker

3

4

Scale Strategically

Expand agent deployment based on proven ROI and team adoption

Free AI Tools to Use Anytime



Access Now



THANK YOU AMI!

Thank you for your time today and the ability to work with so many of you!

“

"So much of the value! Biggest Goal helped us map out what it is that we need to do with project management and AI Agents. They identified our use cases, evaluate tools, make a recommendation on tools, and had education on project management and building AI Agents."

Jerry Gennaria, TOKY

”

“

"Biggest Goal was absolutely instrumental in helping us get set up! They were great with hands on demos and helping us just understand really how the tool worked inside and out. They truly were the experts and I couldn't recommend them enough. We would have been lost without them!"

Bryn Fetrow, Shiny Agency

”

See you at BABA!

Beyond a Glorified Checklist:

Turning Your Project Management System into an AI Automation Engine

Tuesday, May 19th

1:20-2:05 PM

What's Next for Your AI Journey?

Alane Boyd

alane@biggestgoal.ai

Upcoming Trainings:

Learning to Build AI Agents Cohort
Project Management Masterclass

