

How to Train *Your AI Agents*

Five simple habits that turn AI tools into a team
that actually knows your business.

BUILDING AN AI TEAM, MADE SIMPLE

Less hustle, more systems.

The Real Goal

Why I treat my AI tools like a team, not a toy

Most people use AI the same way every time. They open a chat, explain their business from scratch, get an answer that is fine but a bit generic, and start all over again the next day.

I wanted something different. I wanted AI helpers that actually know my business, remember how I like things done and quietly take care of the repetitive work, the way a good team member would.

So I started treating them like new hires. I give them training, access to the right information, a manager, a place to work and one clear job each. These are the five things that made the biggest difference.

IN PLAIN WORDS

An AI agent is simply an assistant that can do one job on its own, within limits you choose. Think of it as a very fast, very patient new team member who needs good onboarding.

The goal is not to use AI for the sake of it. It is to build a team that takes repetitive tasks off your plate.



A Few *Words*

Everything in this guide, in plain English



AI agent

An assistant set up to do one job by itself, like sorting your inbox or writing your morning briefing.

Claude Code

A version of Claude, the AI assistant, that can work with files and tools on your computer. I use it to build and run most of my agents.

Transcript

Everything said in a video, written out as text, so an AI can read it.

Digital brain

One place where all your business knowledge lives. Mine is in an app called Obsidian.

.md file

A simple text document that any AI tool can read. Perfect for passing knowledge from one agent to another.

Notion

An online workspace where we keep our project boards and documentation.

You do not need to be technical to use any of these ideas. Start with the one that sounds easiest and build from there.

Teach Them From *Videos*

Build expertise once, instead of starting from scratch every time

There is a YouTube video for almost everything I want my agents to know, from new marketing ideas to the latest AI tools. So I let them learn from those videos, the same way I would.

01

How it works

- I set up Claude Code to pull the transcript from a YouTube video
- It turns the transcript into tidy notes, with the key takeaways and action items
- The notes are saved straight into my digital brain
- After a batch of videos, I quiz it on what it has learned and we go through the material together
- What we agree is useful becomes a short .md file I can give to my other agents

Think of it as a training library your whole AI team can share.

TRY THIS FIRST

Pick three videos on one topic you care about. Ask your AI to summarise each one into key takeaways and action items, then ask it to combine them into one page of guidelines.

**You are not just watching videos. You are building expertise
your agents keep.**

STEP TWO

Give Them Your *Digital Brain*

Context is what makes an answer sound like you

An agent can only be as good as the information it has. If it does not know your offers, your clients or your tone of voice, it will guess. Guessing is where the generic answers come from.

I keep everything about my business in Obsidian, a notes app that lives on my computer. When my agents can read it, they understand how I work, who I work with and how I want things done.

02

What lives in my digital brain

- My brand voice, story and the words I never use
- Our offers, prices and what is included
- Client notes, projects and important files
- Step-by-step processes for the things we do often
- Ideas, research and notes from the videos my agents learn from

Business information only. Keep anything private out of it.

Write it down once, and every agent can use it forever.



STEP THREE

Hire a *Supervisor*

Meet Bibi, the one agent I talk to most



When you have several agents, telling each one about every change gets old very quickly. So I created a supervisor agent called Bibi. She is the main point of contact between me and the rest of the team.

03

What Bibi does

- If I want everyone to follow a new guideline, I tell Bibi once
- She passes it on to the agents who need to know
- She updates our Notion boards and documentation, so nothing gets lost
- She keeps the whole team aligned, without me repeating myself

AN EXAMPLE

Say I decide we no longer use a certain phrase in emails. I tell Bibi. The inbox agent and the content agent both get the update, and our brand voice notes change too. One message, done.

One clear manager means you give instructions once, not five times.

STEP FOUR

Give Them an *Office*

See what everyone is working on, at a glance

Talking to agents one chat at a time makes it hard to see the big picture. So I built a simple visual office, a digital workspace where every agent has its own desk.

04

What I can see in the office

- What each agent is working on right now
- Recent activity, so I know what has been done
- A way to message one agent, or several at once
- Our Notion board, connected, so tasks and progress stay in one place

You do not need a fancy office to start. A shared board where each agent has a column works too.

If you can see the work, you can trust the work.



A peek inside our office. Each team has its own room, and I can see who is working, waiting or taking a break.

One Agent, *One Job*

Specialists beat one assistant trying to do everything

It is tempting to have one agent that does it all. In my experience, specialists do much better. Each one focuses on its own responsibilities and builds up the context to get really good at them.

The inbox agent

Sorts my emails, flags what matters and drafts replies in my voice.

The morning briefing

Starts my day with what is on, what needs me and what can wait.

The news scout

Keeps an eye on our industry and tells me what is worth knowing.

The tool tester

Finds new tools and explains, in two lines, whether they are worth trying.

The local events finder

Spots events in Alicante worth showing up to.

Give every agent a job title and a short job description. It changes everything.

Start *Here*

You do not need all five at once



1

Day one, choose one job

→ Pick the task you repeat most and enjoy least, like your inbox or your morning planning

2

Day two, write it down

→ Create one page with your voice, your offers and how you like things done

3

Day three, teach it

→ Feed it three videos or documents on that job and ask it to write its own guidelines

4

Day four, test it

→ Let it do the job while you check the work, and correct it in plain words

5

Day five, keep it

→ Save what works into your digital brain, so the next agent starts smarter

Repeat with a second job next week. That is how a team grows.

ONE LAST THING

Less Hustle, *More Systems*

None of this is about replacing the human side of your business. It is about protecting it. When your agents handle the sorting, summarising and remembering, you get your time and headspace back for clients, ideas and the parts of the work you love.

Build a team that understands your business, works together and takes the repetitive tasks off your plate.

WANT HELP BUILDING YOURS?

We build custom AI agents for coaches and consultants, connected to your inbox, calendar, CRM and documents, and supervised by you. If you would like to talk it through, book a free call.

[BOOK A FREE CALL](#)

Your business runs. With or without you.

