HOW TO GUIDE

For professionals that love How to Guides

BUILDING AI AGENTS

November 2025

Level 1: Apprentice

→

Level 2: Scout

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Level 3: Ninja

Master the art of building AI agents for change management. Progress through three levels to transform your workflow and reclaim strategic thinking time.

Level 1: Apprentice

Step 1: Introduction & The Stakeholder Nudger

- [ ] Welcome!

It's 4pm Friday. 23 unread stakeholder emails. Risk register two weeks stale. Karen from Finance still hasn't confirmed Monday's go-live readiness.

- [ ] What if you had a tireless assistant who could:

- Send personalized follow-ups while you sleep.
- Flag risks before they explode.
- Track stakeholder readiness automatically.

- [ ] Reality Check

AI agents aren't magic. They won't navigate office politics or replace your judgment. But they will handle repetitive tasks so you can focus on actual change management.

- [ ] Your Three-Level Quest

Build 3 agents. Each level takes 20-30 minutes. Complete them in order:

- Level 1: Apprentice - Stakeholder Nudger (20 min)
- Level 2: Scout - Risk Radar (25 min)
- Level 3: Ninja - Readiness Tracker (30 min)

- [ ] Pick Your Tool

Choose one of these AI platforms:

- Copilot Chat - Built into Microsoft 365.
- Claude via Poe - poe.com.
- Custom GPTs - OpenAI Plus.

- [ ] Level 1: The Stakeholder Nudger

Mission: Get stakeholders to respond without sounding desperate or robotic. Turn non-responses into engagement wins.

- [ ] Build It (20 Minutes) - Step 1

Open your AI tool: Launch ChatGPT, Copilot, Claude, or Poe. Start new conversation.

- [ ] Build It - Step 2

Copy-paste this prompt: 'You are my Stakeholder Follow-Up Assistant. When I give you: name, role, original message, days since contact, and typical behavior - create a personalized follow-up email (max 100 words). Make it conversational but professional. Assume good intent (they're busy, not avoiding). Reference their role. Include clear call-to-action. Always end with: If now isn't good, just let me know when works better.'

- [ ] Build It - Step 3

Test drive: Try this: 'Name: James Chen | Role: Operations Director | Message: Invited to kickoff meeting | Days: 5 | Behavior: Usually responsive, detail-oriented.' Review output. Too formal? Tell it: 'Make it more casual.'

- [ ] Build It - Step 4

Use for real: Copy your actual non-responders' details. Generate messages. Always review before sending. Track if personalization improves responses.

- [ ] Pro Tips for Level 1

- Save prompt in doc called 'My Agent Prompts' - you'll reuse it.
- More context leads to better output. 'No response' is vague. 'Hasn't confirmed despite 2 reminders' is specific.
- If output feels generic, add personality: 'James is data-driven, prefers bullet points'.

- [ ] Success Criteria

Generated 3+ messages, sent 1, got response.

Level 2: Scout

Step 2: The Risk Radar Scout

- [ ] Mission

Spot project risks before your sponsor asks 'Why didn't we see this coming?'

- [ ] The Opportunity

Every status update contains early warning signals that could save your project. Imagine catching those signals on Tuesday instead of firefighting on Friday. An agent that scans for warning signs - scope creep, timeline slips, adoption concerns.

- [ ] Build It (25 Minutes) - Step 1

Level up existing agent: Open your Stakeholder Nudger conversation. You're adding a new skill to the same agent.

- [ ] Build It - Step 2

Add risk detection: Paste below previous prompt: 'New skill: Risk Detection. When I share status updates/notes/emails, scan for: Scope creep, Timeline risks, Adoption risks, Dependencies. Rate each: low (watch) | medium (action) | high (urgent). Suggest mitigation for medium/high.'

- [ ] Build It - Step 3

Feed it real data: Copy your latest project update, meeting notes, or email thread. Paste and ask: 'What risks do you see?'

- [ ] Build It - Step 4

Act on findings: Agent flags risks. You judge validity. For medium/high: add to risk register, assign owner, set follow-up.

- [ ] Build It - Step 5

Tune the radar: After 2-3 weeks, adjust: 'Stop flagging minor timeline slips. Focus more on adoption risks.'

- [ ] Pro Tips for Level 2

- Add context: 'This team is usually proactive but seemed hesitant yesterday'.
- False alarms are fine! Better to check than miss real risks.
- Track hit rate: What % of flagged risks actually mattered?

- [ ] Success Criteria

Flagged 3+ risks you hadn't considered, prevented 1+ issue.

Level 3: Ninja

Step 3: The Readiness Tracker Ninja

- [ ] Mission

Answer 'How ready are we?' with actual data instead of gut feel.

- [ ] The Opportunity

Transform vague readiness conversations into data-driven confidence. Walk into leadership meetings with '82% of key stakeholders report high confidence, Finance needs attention'.

- [ ] Build It (30 Minutes) - Step 1

Design feedback ask: Create simple weekly pulse: 'Quick check (60 seconds): Reply with: 1) Readiness (1-5) 2) Biggest concern 3) What you need from me'

- [ ] Build It - Step 2

Enhance your agent: Add: 'New skill: Feedback Analysis. When I paste responses, create summary with: Avg readiness by dept, Top 3 concerns, Trends vs last week, Actions for low-readiness groups, Red flags (anyone 1-2). Format as leadership email.'

- [ ] Build It - Step 3

Collect batch 1: Send pulse check to 10-15 stakeholders. Give 48 hours.

- [ ] Build It - Step 4

Analyze: Copy all responses. Paste to agent: 'Analyze and create summary.' Review. Too detailed? 'Make it 3 paragraphs max.'

- [ ] Build It - Step 5

Track trends: Save each week's summary. After 3-4 weeks, paste multiple: 'What trends? Are we improving?'

- [ ] Pro Tips for Level 3

  - Keep feedback short. People reply to 3 questions, not surveys.
  - Incentivize: 'Everyone who replies gets 15 min of my time for questions'.
  - If someone scores 1-2, call them personally. Don't automate empathy.

- [ ] Success Criteria

Ran 3 weeks, leadership said 'This data is helpful.'

- [ ] Quest Complete.

You built 3 agents, tested and tried them. Here's what you've achieved:

  - Personalized stakeholder communications.
  - Proactive risk detection.
  - Data-driven readiness reporting and strategic thinking time reclaimed.

- [ ] Real Talk

Agents will mess up. They'll miss nuance, suggest tone-deaf responses. That's why you always review output before acting. They're power tools, not autopilot. Remember to practice the habits for AI Empowered teams, they can act as your guide.

- [ ] Level Up Even More

  - Combine agents: Use Risk Radar to inform Stakeholder Nudger.
  - Teach someone: Show a colleague. Their questions will sharpen your skills.

- [ ] Final Thoughts

Think of agents as your support crew - they handle logistics so you can run the race. Now go automate responsibly. For change managers who'd rather be changing minds than chasing emails.

CERTIFICATE OF ACHIEVEMENT

This certifies that

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has successfully completed the training and demonstrated skills in building AI agents for change management, earning the distinguished title of

AI Agent Ninja

Mastered the creation of:

Stakeholder Nudger • Risk Radar Scout • Readiness Tracker

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Date of Completion