

WPP Open AGENT GUIDE

WPP Open

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Introduction

Discover how to unlock the power of AI with the *Agent Builder* in WPP Open. This guide will walk you through creating and customising *agents* to perform specific tasks.

Agents can

- Automate repetitive tasks
- Provide unique insights and perspectives based on their knowledge
- Enhance decision-making with precision

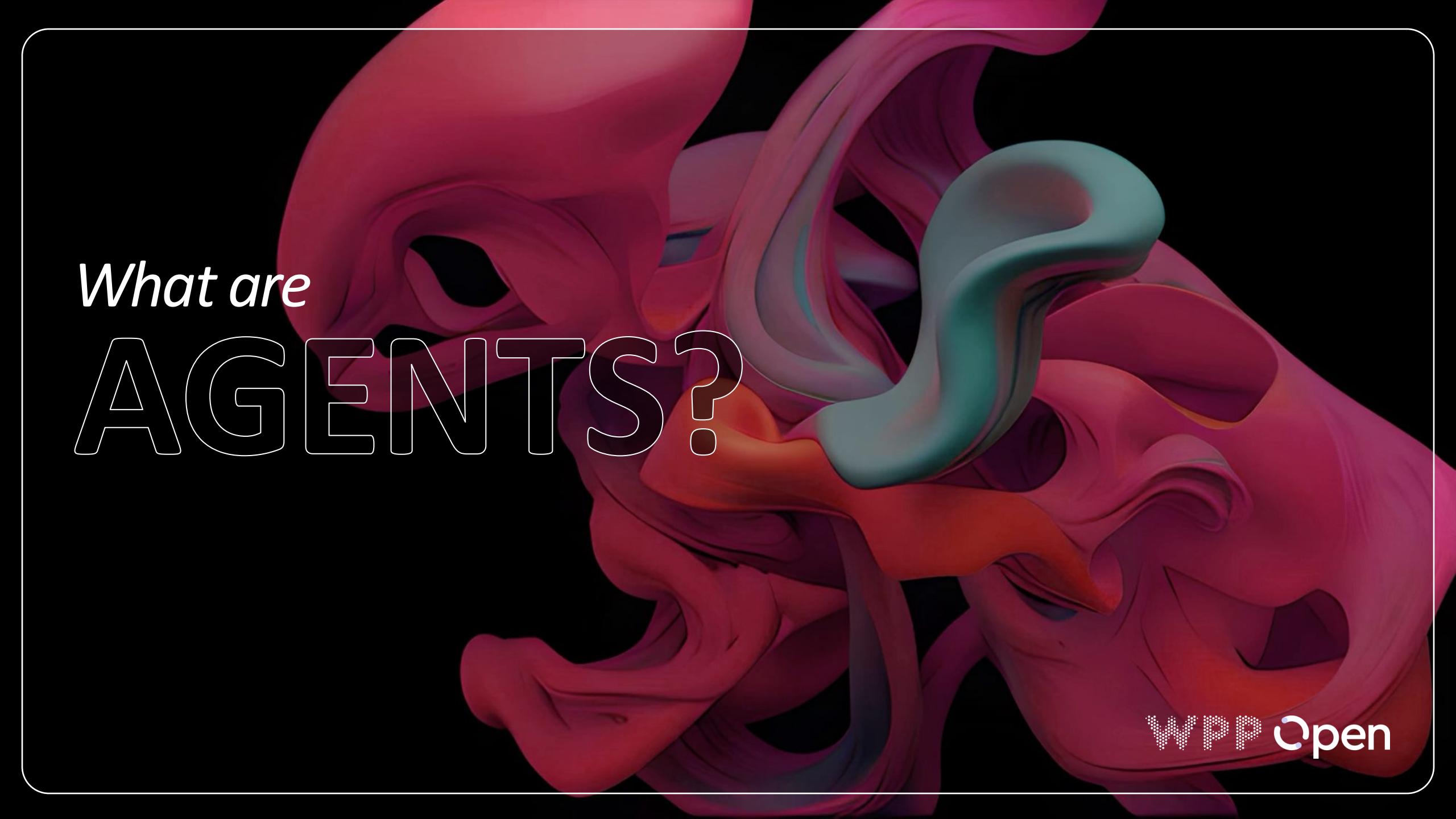
And much more

By integrating *agents* into your workflow, you can boost efficiency, improve accuracy, and focus your team's efforts on strategic, high-value activities.



If you'd rather listen to a quick podcast (created with NotebookLM) that provides a 2 min overview of what is included in this document, please click on the icon.



The background of the slide features a complex, abstract design composed of numerous overlapping, flowing layers of fabric. The colors transition through various shades of red, pink, purple, and teal, creating a sense of depth and movement against a solid black background.

What are
AGENTS?

WPP Open

What are AGENTS?

Agents in WPP Open can be designed to serve specific purposes while operating with defined capabilities and limitations.

Task Augmentation

Agents can serve as assistants to enhance and support your existing workflow.



Task Automation

Agents can be designed to automate specific tasks and improve efficiency and consistency.



Agents can be set up with minimal configuration and basic guardrails by most users. Our Agent capabilities are quickly evolving to provide true *Agentic AI* capabilities, where multiple *agents* are working together autonomously to execute a specific task or goal. Watch this space!

Why Create Agents?

Agents provide significant value to a client's workflow. Here are some key benefits:



Automation

They can handle repetitive tasks, reducing human workload and the risk of errors.



Increased Efficiency

Agents can process large volumes of information and make decisions faster than humans.



Adaptability

They can learn from feedback and can be adjusted to suit changing needs rapidly.



Optimise Process and Workflows

By automating processes and minimising errors, AI agents can help businesses reduce operational costs.



Enhanced Decision-making

Agents can analyse vast amounts of data to make informed decisions in real-time.



Increased Personalisation

Agents can provide tailored experiences by learning from past interactions.



Data Insights

They generate valuable data on user interactions, helping businesses understand trends and improve their offerings.

Types of Agents?

The following outlines the different *agent* types that can be created in Open.

<i>Project Agent</i>	<i>Workspace Agent</i>	<i>Certified Agents</i>
<i>Who can create them</i>	<i>Who can create them</i>	<i>Who can create them</i>
Project Agents can be created by anyone, inside a WPP Open Project.	Workspace Agents are created or organised by client and workspace owners in the business.	Certified Agents are created by nominated SMEs in the business.
<i>How can others use them</i>	<i>How can others use them</i>	<i>How can others use them</i>
Invite others to your Open or CS Project. You can not share Project Agents across Projects or Workspaces.	Workspace Agents can be published to any level of an Open hierarchy.	Certified Agents are available to all users of WPP Open.
<i>Use case</i>	<i>Use case</i>	<i>Use case</i>
An <i>agent</i> can be configured to be editable by anyone in a Project, or alternatively only a Project Owner.	The Tenant Admin of the workspace can edit, publish and unpublish Workspace agents.	The SME team responsible for creating and maintaining the <i>agent</i> .



Creating
AGENTS

WPP Open

Bring Your Agent to Life in 7 Simple Steps

Prepare Data

Prepare and optimise the data that will be used by the *agent*.

Populate Agent Data

Upload the *agent* data.

Test & Adapt

Test your *agent* to ensure it's working properly.

Refine & Iterate

Use the Evaluate feature to periodically test an *agent*, review feedback and add memories.



Define Profile

Define your *agent* profile and assign the *agent* capabilities.

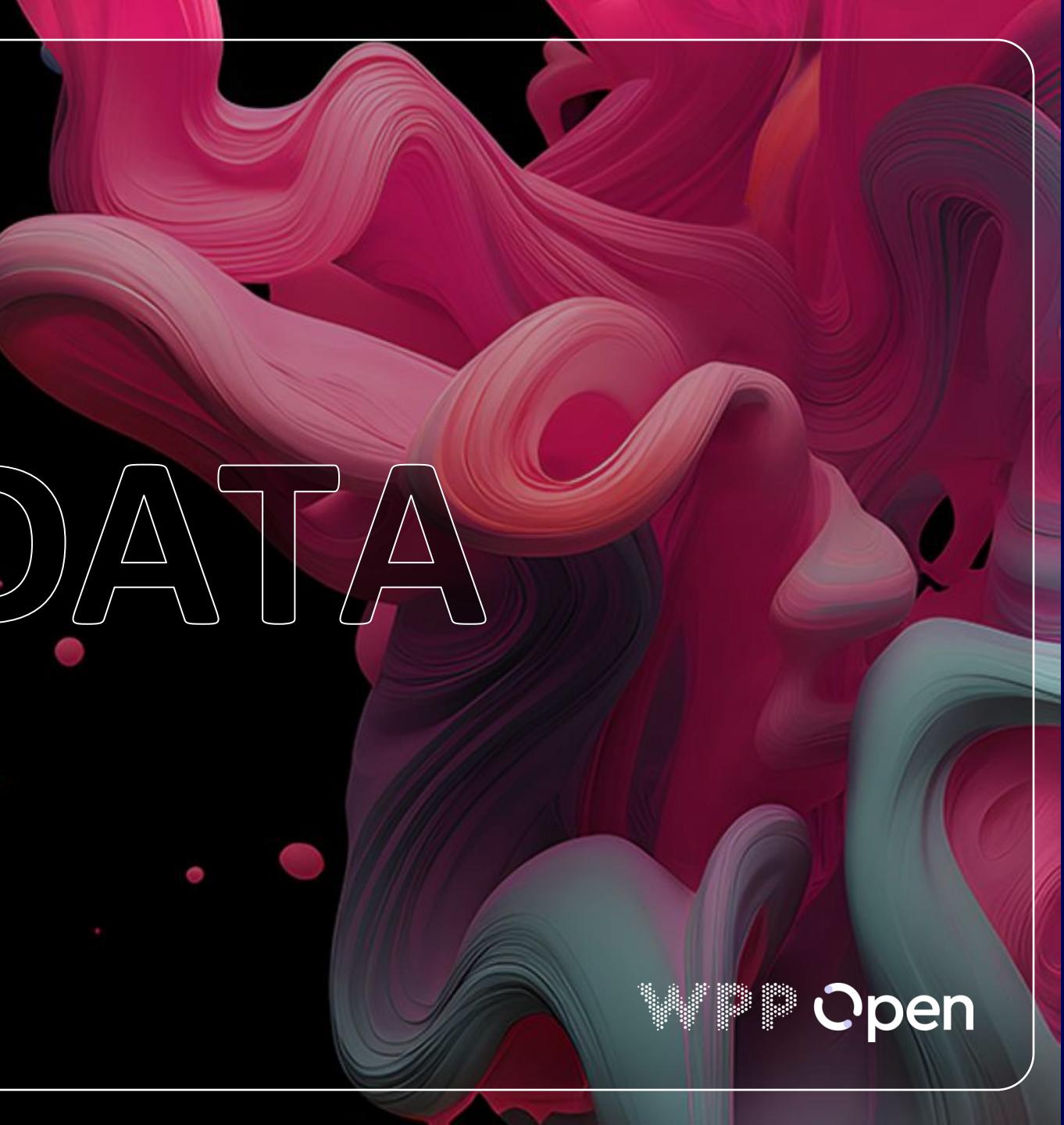
Define Instructions

Define *agent* prompts and select the *agent*'s capabilities.

Publish

Go live with your *agent* to start making an impact!

Optimising
AGENT DATA



WPP Open

Optimising Data for AI Models

Data is the foundation of AI success. Clean, organised, and clear data ensures your AI *agents* perform accurately and efficiently. Here are some simple steps for cleaning or preparing different types of data.

⊕ *Golden Rules for Data Prep*

- Keep it clean and clear
- Use straightforward language
- Use consistent formatting
- Organise neatly

🚫 *What to Avoid*

- Complicated jargon or technical lingo
- Messy, cluttered documents
- Hard-to-read, handwritten text



Optimising Data for AI Models

Here are some recommendations for preparing your data across various file types:



Word Documents

- Save as a text file for AI-friendly formatting.
- Ensure clear structure with numbered or bulleted lists for important points.
- Remove unnecessary styles or fancy formatting.
- Use descriptive, hierarchical headings (e.g., H1, H2) to guide the AI model's understanding.



PowerPoint Presentations

- Extract key text from slides into a text file.
- Keep slide order intact.
- Focus on main points.
- Avoid embedding images with text; extract the text separately.
- Remove visuals that do not convey actionable information, such as background images or animations.



Excel Spreadsheets

- Structure data into clear columns
- Eliminate empty or inconsistent cells
- Use simple and consistent labels
- Avoid merging cells as it can disrupt parsing.
- Avoid big Excel tables as they won't be processed accurately (no more than 100 rows)



PDF Documents

- Extract raw text using OCR if necessary, preserving logical reading order.
- Remove non-informative elements like watermarks or annotations.
- Split lengthy PDFs into smaller segments for better AI processing.



Pro Tip: Convert documents to .txt files and avoid uploading big files (>50 Mb) for better file management, performance and improved accuracy in the model's outputs.

Optimising Data for AI Use

Here are some recommendations for preparing your data across various file types:



Handling Images

- Use clear, high-quality pictures.
- Add concise descriptions explaining the image.
- Avoid blurry, busy, or low-quality visuals.



Working with Videos

- Create written transcripts.
- Summarise key points for clarity.
- Add timestamps for better context.



Working with Audio Files

- Transcribe audio word-for-word for precision.
- Remove background noise to ensure clarity.
- Break files into smaller, manageable pieces



Pro Tip: Avoid uploading big files (>50 Mb) for better file management, performance and improved accuracy in the model's outputs.

Defining the
AGENT'S.

Profile



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Defining the Agent Profile



Access Agent Builder

Click 'Agent Builder' to begin.

Create New Agent

Click the 'Create New' button to open the Agent Profile setup.

Personalise with an Image

Upload an image for your agent, or let Creative Studio generate one automatically.

Name and Describe

Enter a relevant name and a detailed description for your agent to define its purpose.

Select Agent Type

Choose between Expert or Persona. (More details on the next slide!)

Define Agent Personality

Define the style in which your agent interacts with users to shape user experience.



If you don't see the Agent Builder as an option, it means you have not been granted access. To obtain access, send a request using via our Help agent (see section on getting help).

Defining the *Agent* Profile – Choose the Right Type of *Agent*



Experts

- Act as task specialists with deep knowledge.
- Serve as a knowledge hub for specific topics.

Personas

- Simulate an audience's point of view.
- Represent specific user perspectives and preferences.



Your choice will determine how your agent interacts with users and the type of value it provides.



Optimise the Agent's Output with Advanced Controls

Within advanced settings, you can select a model for your *agent* and adjust the parameters that control how the *agent* responds.



Access Advanced Settings

Navigate to your agent's configuration panel.



Model Selection

Change the default model to one more suitable for your use case.



Adjust Parameters

Adjust advanced settings to tailor your agent's behaviour.

Optimise the Agent's Output with Advanced Controls

Within advanced settings, you can select a model for your *agent* and adjust the parameters that control how the agent responds.



Temperature

This is like the "creativity dial" of the *agent*. Controls response creativity and randomness.

Low (e.g., 0.2)

More predictable, factual responses. Best for fact-based tasks.

High (e.g., 1.5)

More creative and varied. Use for brainstorming.



Top P

Think of this as a "focus knob" of the *agent*. Determines if the response is focused or explorative.

Low (e.g., 0.3–0.5)

Sticks to the most likely words. Prioritizes relevance.

High (e.g., 0.8–1.0)

Considers a wider range of words. Creates diverse responses.



We strongly recommend sticking with the defaults to ensure optimal functionality. These tools are for advanced users only. Use with caution.

Optimise the Agent's Output with Advanced Controls

Default settings work for most tasks, but you can customise them to suit your needs if required. We strongly recommend sticking with the defaults to ensure optimal functionality.



Max Tokens

This limits the length of responses. Each token represents roughly $\frac{3}{4}$ of a word.

- Use fewer tokens (e.g., **500-1000**) for concise answers.
- Use more tokens (e.g., **5000+**) for detailed explanations.



Top K

Think of this as limiting the AI's choices.

- Use **low values** (e.g., 10) for *simple and predictable language*.
- Use **high values** (e.g., 40) for *unique and creative phrasing*.



We strongly recommend sticking with the defaults to ensure optimal functionality. These tools are for advanced users only. Use with caution.

Default the Agent Settings

Here's an example of a prompt and the output generated using Creative Studio's *default settings*. Our goal is to write a brief story about living on Mars.

Default Settings

- Temperature: 1
- Top P: 0.5
- Max Tokens: 8192
- Top K: 40

Expected Behaviour

These settings make the model suitable for a wide range of tasks, from creative writing to technical explanations, by avoiding extremes in creativity or rigidity.

Example Prompt

"Come up with a story about living on Mars.
Keep it to 150 words or less."

Generated Output

"Life on Mars feels like living in a giant science experiment. Our dome protects us from deadly dust storms, but nothing grows easily. I manage the oxygen farm, a greenhouse where hardy crops like potatoes thrive. Every week, my family and I step outside in our suits, gazing at the red horizon and dreaming of Earth's blue skies. It's isolating, but we're building a new world here, one breath at a time."

Adjusting Temperature

Here's an example of the same prompt but we have *increasing temperature to 1.8* to make the agent a bit more creative.

Default Settings Temperature: 1

Adjusted Settings

Temperature: 1.8

Expected Behaviour

Higher creativity and randomness; more unexpected phrasing and ideas.

Prompt Used

"Come up with a story about living on Mars. Keep it to 150 words or less."

Results

"On Mars, the red sands glow under a sun that feels like a distant memory. Inside the dome, I experiment with alien crops—bright purple leaves that grow faster than anything Earth ever knew. My kids chase robotic pets around the habitat while I wonder if we'll ever see rain again. Outside, Mars hums with a quiet that feels alive, whispering secrets we can't yet understand. This isn't Earth. It's something else. Something strange—and beautiful."

Adjusting Top P

Here's an example of the same prompt but with Top P lowered to 0.25 to make the output more focused and concise.

Default Settings Top P: 0.5

Adjusted Settings

Top P: 0.25

Expected Behaviour
Narrower range of possibilities; more predictable and consistent output.

Prompt Used

"Come up with a story about living on Mars. Keep it to 150 words or less."

Results

"Mars is harsh and unrelenting. Every day, I check the oxygen levels in the greenhouse and monitor the water recycling systems. Life here is about survival. The dome shelters us from storms, but we rarely venture outside. When we do, we're always careful. There's beauty in the red landscape, but it's also unforgiving. My children long for Earth, but I remind them: we're pioneers. One day, Mars will be home."

Adjusting Max Tokens

Here's an example of the same prompt but with lowered Max Tokens for a more concise output.

Default Settings

Max Tokens: 8192

Adjusted Settings

Max Tokens: 1000

Expected Behaviour

Shorter and more concise output, cutting off longer thoughts.

Prompt Used

"Come up with a story about living on Mars. Keep it to 150 words or less."

Results

"Living on Mars is a test of endurance. The red sands stretch endlessly, and the dome keeps us alive. I spend my days in the oxygen greenhouse, ensuring our survival. Outside, it's silent but hostile."

Adjusting Top K

Here's an example of the same prompt but with lowered Top K to show how it affects output.

Default Settings Top K: 40

Adjusted Settings

Top K: 10

Restricted range of word choices.

Expected Behaviour

Focuses on only the top 10 most likely word choices at each step; can become repetitive or overly straightforward

Prompt Used

"Come up with a story about living on Mars. Keep it to 150 words or less."

Results

"Life on Mars is about survival. We live in a dome, protected from storms. I work in the greenhouse, growing food. Outside, the red sands stretch endlessly. It's quiet here, but we dream of Earth. Every day feels the same, but we're building a future."

Populate

AGENT DATA

WPP Open

Populate Agent Knowledge

Now it's time to upload the files to the agent's Data tab. This allows you to provide the *agent* with additional data relevant to your client, persona, or task. In other words, you are grounding your *agent* with this data.



Knowledge Documents

Add key files (e.g., brand guidelines, strategy documents, etc.) required for your *agent* to execute its task(s). This equips your *agent* with vital context for tailored responses.



Adding & Managing Files

Use the 'Choose Files' button or drag-and-drop to upload. To update, click 'Download' or 'Delete' next to any file.





Defining Agent

INSTRUCTIONS

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Defining Agents Instructions

Follow these key steps to establish how your *agent* will operate:



Define Your Agent's Prompt

Set up clear instructions for your *agent*'s roles and how your *agent* should respond to user queries.



Select Agent Tools

Choose the appropriate tools your *agent* will need to perform its tasks effectively.



*Pro Features Option**

Access additional advanced features to enhance your *agent*'s capabilities.



*Steps**

Agents can be defined to have multiple steps. If applicable, define your *agent* steps and the actions for each step.

*Only available for beta tests at the moment.

Select your Agent's Tools

Under Tools section you can enhance your *agent* by selecting from the following capabilities:



Web Search

Allows the *agent* to retrieve real-time information from the internet. For instance, you can create an *agent* to research holiday trends, delivering fresh insights that inspire and shape a campaign for your next promotion.

Code Interpreter

Executes and writes Python code for tasks like data analysis, problem-solving, and automation.

Artifact Generation

Enables the agent to generate artifacts instead of text only outputs.

Chain of Thought

Turn this on to enable the Chain of Thought feature.

Select your Agent's TOOLS

Under Tools section you can enhance your *agent* by selecting from the following capabilities:



*Required Information**

To require inputs or specific information for your *agent*, enable this feature.

*Show Input Form**

If you have enabled Required Information, you can collect the information in a form. This allows you to create a custom AI-powered tool similar to what you see in Operations, Strategy, Idea Generation and Content Creation.

**Only available for beta tests at the moment.*

Defining the Agent's Prompt

When setting up your *agent's* prompt, follow these steps:

Step



Select the System Prompt Window

Navigate to the Instructions section and locate the system prompt window to begin defining your *agent's* prompt.

Step



Define the System Prompt

Within the system prompt, you are defining the prompt for your *agent*. Typically, this is the prompt that identifies the *agent* role and objectives.

However, if you are NOT using CoT or Steps features (described in later in this manual) enter the whole prompt for your agent here.

Step



Create Chain of Thought (CoT) Prompt

In your CoT prompt, you will define how the *agent* should think or carry out the tasks related to the objective.

If you are defining agent Steps (described in later in this manual) you should NOT enable CoT.

Define the *Chain of Thought* Prompt

Once enabled, you can input your Chain of thought in the right-hand panel under Settings.



Access the Settings

Once Chain of Thought is enabled, locate the field within the right-hand panel under Settings to begin.

Input Your Instructions

Enter your Chain of Thought prompt in the dedicated prompt field.



When should you use *Chain of Thought*?

Chain of Thought (CoT) prompting is a powerful technique for enhancing the reasoning capabilities of large language models (LLMs). However, the decision to include CoT instructions or not depends on the task at hand.



Complex Tasks

Math problems,
logic puzzles, regulatory
compliance



Accuracy-Critical Scenarios

Healthcare diagnostics,
financial analysis



Explaining Processes

When reasoning is
as important as
the answer

- Using Chain of Thought helps mitigate reasoning mistakes by breaking problems into smaller steps, which is particularly valuable when precision matters.
- CoT may not be necessary for straightforward queries like factual lookups or simple text generation.
- It can also increase response time, making it less ideal for time-sensitive applications.
- *CoT should not be enabled if you will enable/define Steps.*

Chain of Thought (CoT) Prompt Considerations

Provide *Chain of Thought (CoT)* instructions to guide your *agents* to deliver clear, accurate, and context-aware responses.



Step-by-step Reasoning

Explain how the *agent* should execute its task.
Break the task down into logical, detailed steps.



Response Requirements

Instruct the *agent* on how to respond to user queries.



Citations

Explain how you would like the *agent* to include citations for the documents referenced when responding (if relevant). Instruct the *agent* to clearly state when internal documents were not used for the response.

Chain of Thought (CoT)

Prompt Considerations *cont.*

Provide *Chain of Thought (CoT)* instructions to guide your *agents* to deliver clear, accurate, and context-aware responses.



Document Selection

Generally, instruct the *agent* to leverage the full knowledge base. Depending on the requirement, you may want to instruct the *agent* to use only specific documents if the query relates to a specific topic and set of documents.



Handling Ambiguity and Out-of-scope Queries

Instruct the *agent* to ask clarifying questions for unclear queries. Acknowledge limitations and focus on the *agent's* defined scope for out-of-scope questions.



Formatting Responses

Explain how you would like the *agent* to format its response.

Enabling Steps*

To create a more sophisticated *agent* you can create steps for your *agent* to follow. This is very similar to CoT but Steps enable you to break down *agent* steps into separate actions and define specific capabilities for each step. Here's how to configure *agent* Steps:



Select Simple

Find and click on the Simple option in your *agent* interface.



Switch Mode

Click the Switch Mode button to activate Pro Mode.



Add Step

You will now be able to define steps below the system prompt window.

*Only available for beta tests at the moment.

Defining Steps

Once you have enabled Steps, it's simple to define your *agent* steps.



Click Add Step



Define the Step Name



Select the Step Type



Define your Prompt for the Step within Instructions

Step Types

The Step Types are organised into two sections: Blocks and Tools. Here are quick definitions of each:



Instruction

Provide instructions or a prompt for the step.



Artifact

Indicate the type of artifact that should be created. For example, a content matrix.



Self Reflect

This instructs the agent to think about all previous step(s).



Web Search

Enables the *agent* to perform a web search.



Code Interpreter

Allows the *agent* to generate code.

Required Information*

If you would like the *agent* to collect information before formulating a response, you can enable Required information. If you enable this feature, the *agent* will ask the user for the information within the chat. Here's how to set this up:



Step
01

Enable Required Information

Turn on Required information in the *agent* settings panel.



Step
02

Add New Fields

Click Add to create a new required information field.



Step
03

Define All Required Fields

Enter the required field and repeat the process for all required information.

The *agent* will then request this information and will not formulate a response unless the user provides all required inputs.

*Only available for beta tests at the moment.

Input Form*

To streamline data collection, you can enable the **Input Form** option. Here's how to set it up:



Enable Required Information

Turn on the Required Information feature in the *agent* settings panel. Add the fields for the information the *agent* will collect.

Show Input Form

If desired, enable the input form option to collect the required information in a custom form.

User Experience

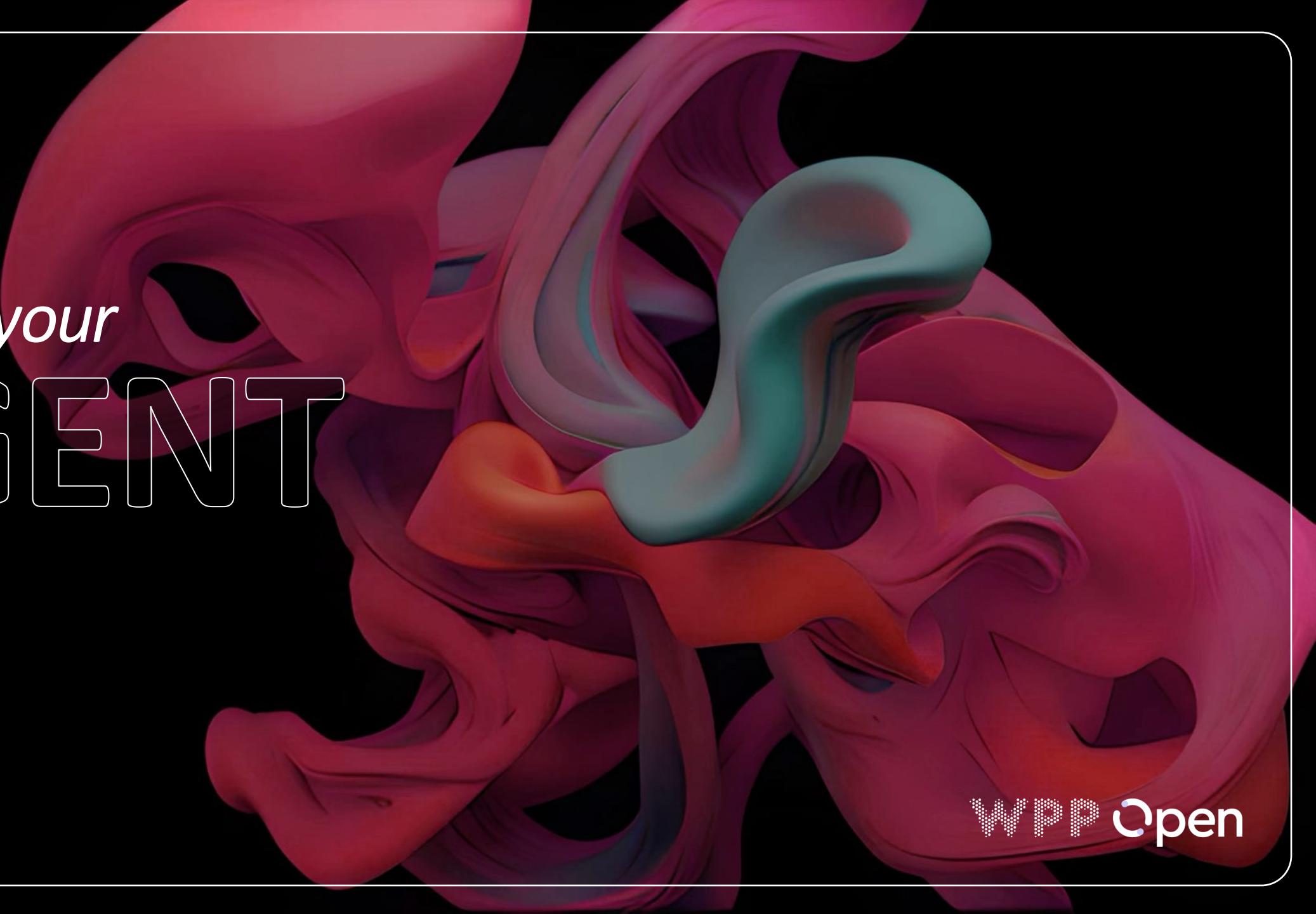
The *agent* will now collect all necessary information via the input form before formulating a response to the user's query.

*Only available for beta tests at the moment.

Example of Multi-step Agent

Here's an example of an *agent* that has been defined with multiple steps and required information that is captured in an Input Form.

The screenshot shows the 'Creative Studio' interface for creating an agent named 'Kaia Creative Researcher'. The profile section is active, displaying fields for Name, Description, Personality, and Role. The 'Name*' field contains 'Kaia Creative Researcher' with a placeholder icon. The 'Description*' field contains the text 'I'm your research assistant. Ask me anything and I'll help you research a topic.' The 'Personality*' field contains the text 'You will be a bit cheeky in your responses and theatrical as a true creative.' The 'Role*' field is set to 'Expert'. A 'Persona' button is visible next to the role field. The top right corner shows user 'Nick Drake' and buttons for 'Preview' and 'Publish'. A 'Pro' badge is also present.

A large, abstract, organic shape composed of many overlapping, wavy, translucent layers in shades of red, pink, purple, and teal, resembling a stylized flower or brain structure against a black background.

Testing your
AGENT

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Two Methods of Testing

Before you share your *agent*, you will want to thoroughly test it. There are two steps when it comes to testing your *agent*:

Automated Testing

This method is accessible within the Testing section/AI Evaluation section.

The feature automates the testing of your *agent* across several pre-defined scenarios.

User Acceptance Testing

User acceptance testing happens outside of the platform with a select group of users who will thoroughly test the agent functionality.

Users will test the *agents* and provide vital feedback to ensure the *agent* is working and adding value.



It is highly recommended that you test agents extensively before deploying them across projects, hubs, or workspaces.

Quick Explanation of Agent Evaluation*

The Evaluation feature, located under the Learning tab, is where you can execute testing scenarios to automate the testing your *agent* across various scenarios. Based on these tests, you can make changes to optimise the *agent's* performance.



User Input

Enter the queries for the *agent* within this column.



Evaluation Criteria

Enter the ideal *agent* response for each user input question.



Agent Response

When you execute the evaluation test, the actual *agent* response will appear in this column.



Pass/Fail

Displays the test results for each user input.



Quality Score

Provides the score for each testing scenario.

*Only available for beta tests at the moment.

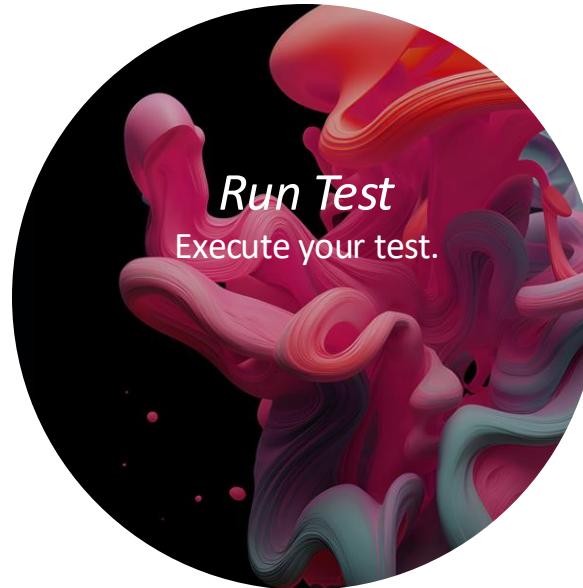
Testing Your Agent Across Different Scenarios

The Evaluation Centre you can test your *agent* across a series of scenarios. The *agent* scores its response to each testing scenario. This information enables you to quickly identify issues with an *agent* and allows you to make adjustments.

01



02



03



Create Testing Scenarios

Before you get started, it's crucial to think about what you want to include in your testing and evaluation criteria. We recommend doing this externally (e.g., in Excel) and then import the user your scenarios to the agent via the Evaluation Changes window. Here are some suggestions for preparing testing scenarios for your *agent*:

Step



List Use Cases

Think of all the use cases for your *agent*. Break them down and work on them one by one.

Step



Create List of Inputs

For each use case, generate a list of the inputs or questions a user might ask your *agent* for each testing scenario.

Step



Generate Evaluation Criteria

For each list of inputs or questions, create a corresponding ideal response for how your *agent* should respond.

Step



Determine Acceptance Criteria

Think about what you are willing to accept as a quality score for each input for which you will evaluate the *agent*.

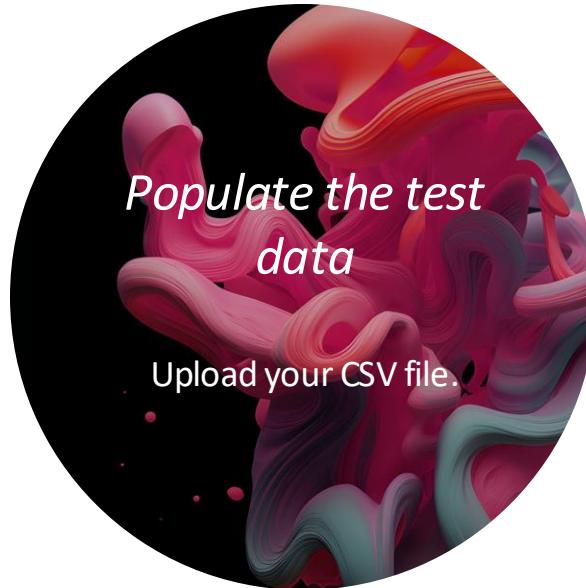
Execute testing

Once you have finished completing the scenario testing CSV, you are ready to execute testing. To do so:

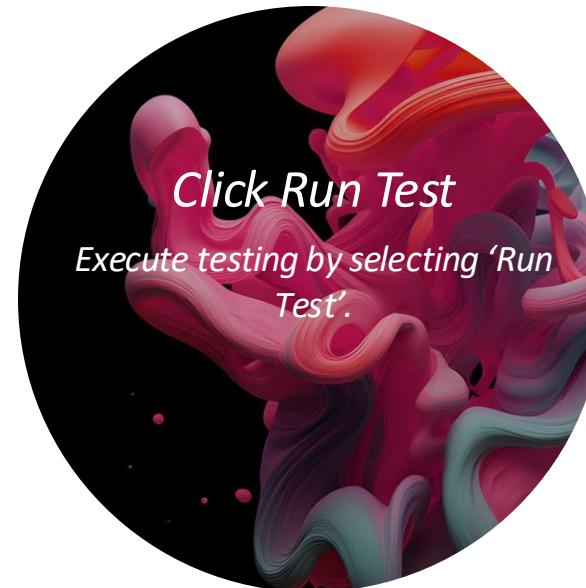
01



02



03

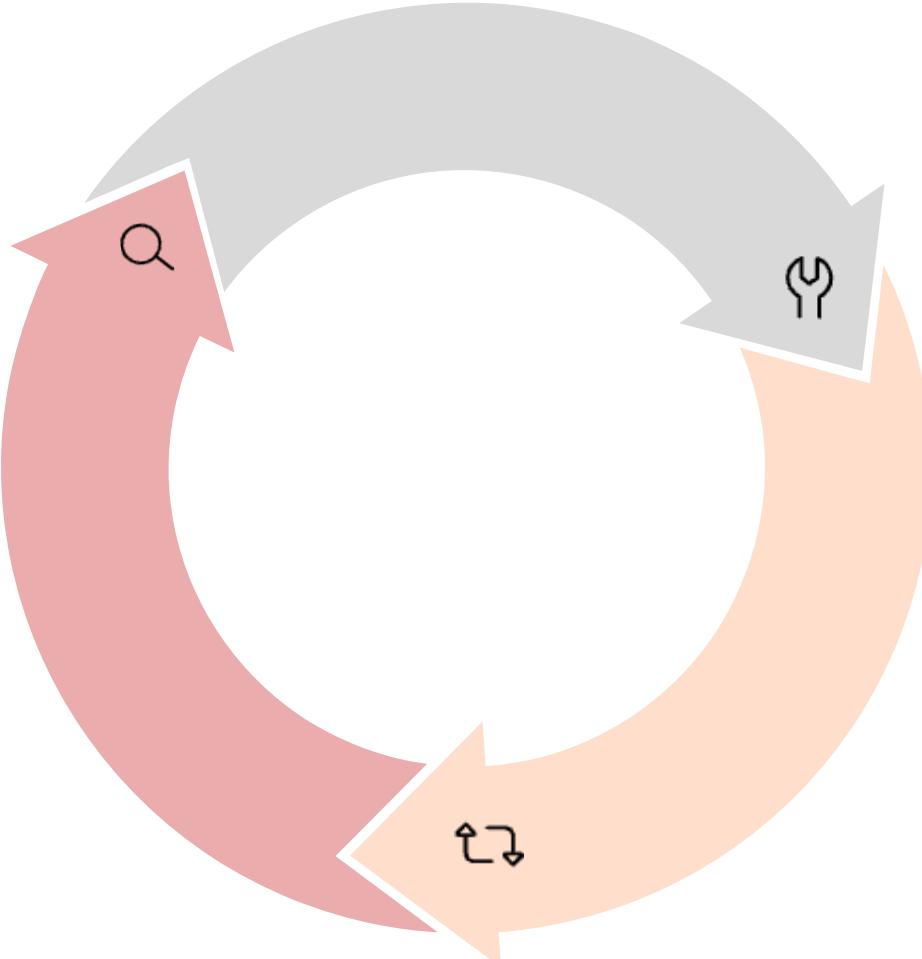


Review Testing Results

When the evaluation completes you can review the results and make any adjustments to your *agent* to improve its performance.

Reviewing Results

Select a row for with a failed response and click the *Agent* response field to review the *agent's* response.



Adjust Agent to Address Issues

Use this information to adjust the *agent* (i.e., Data or Instructions within the *agent* properties) for all failed tests.

Repeat Testing

Repeat the testing until you are satisfied with the results.

User Acceptance Testing

User Acceptance Testing (UAT) complements automated testing (done within the Evaluation Change feature) by:



Evaluating complex requirements

Assesses subjective elements that automated tests cannot measure.



Identifying unexpected issues

Discovers edge cases and unanticipated use scenarios.



Assessing user experience

Examines usability factors and overall satisfaction.



Validating brand requirements

Ensures adherence to branding guidelines and soft requirements.



This approach ensures a comprehensive evaluation of your AI agent, builds trust, and ultimately will improve user satisfaction.

Periodically Test and Update Your Agent

Regular testing and updating ensures your *agent* maintains optimal performance over time. Here are some of the reasons why this is important:

Evolving AI Models



Updates and new training data can change how models process input, requiring prompt adjustments.



Changing User Needs

As user queries grow more varied and complex, prompts must adapt to stay aligned with expectations.

Optimising Results



Iteration refines outputs for greater clarity, coherence, and alignment with specific objectives.

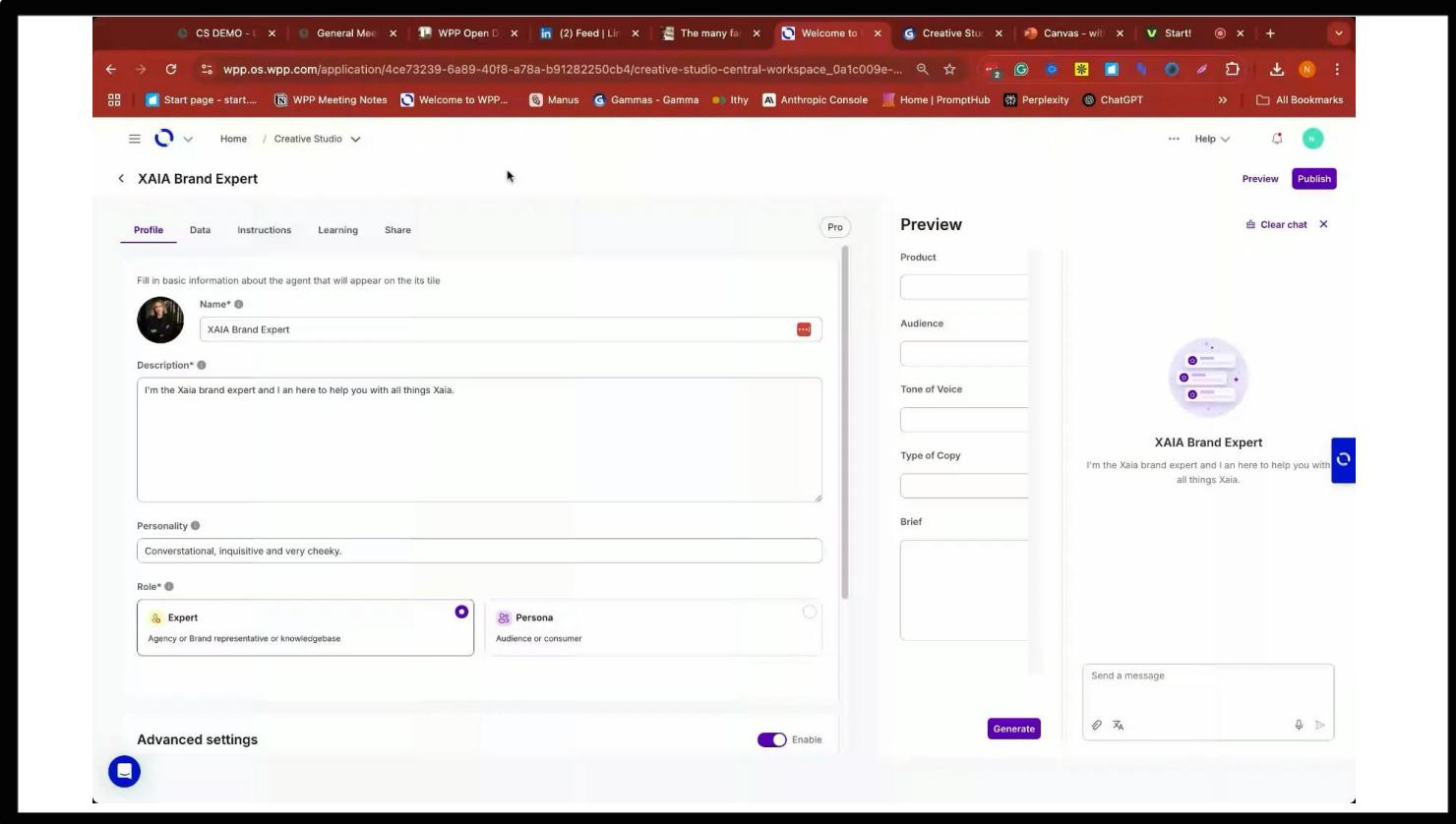


Adapting to New Capabilities

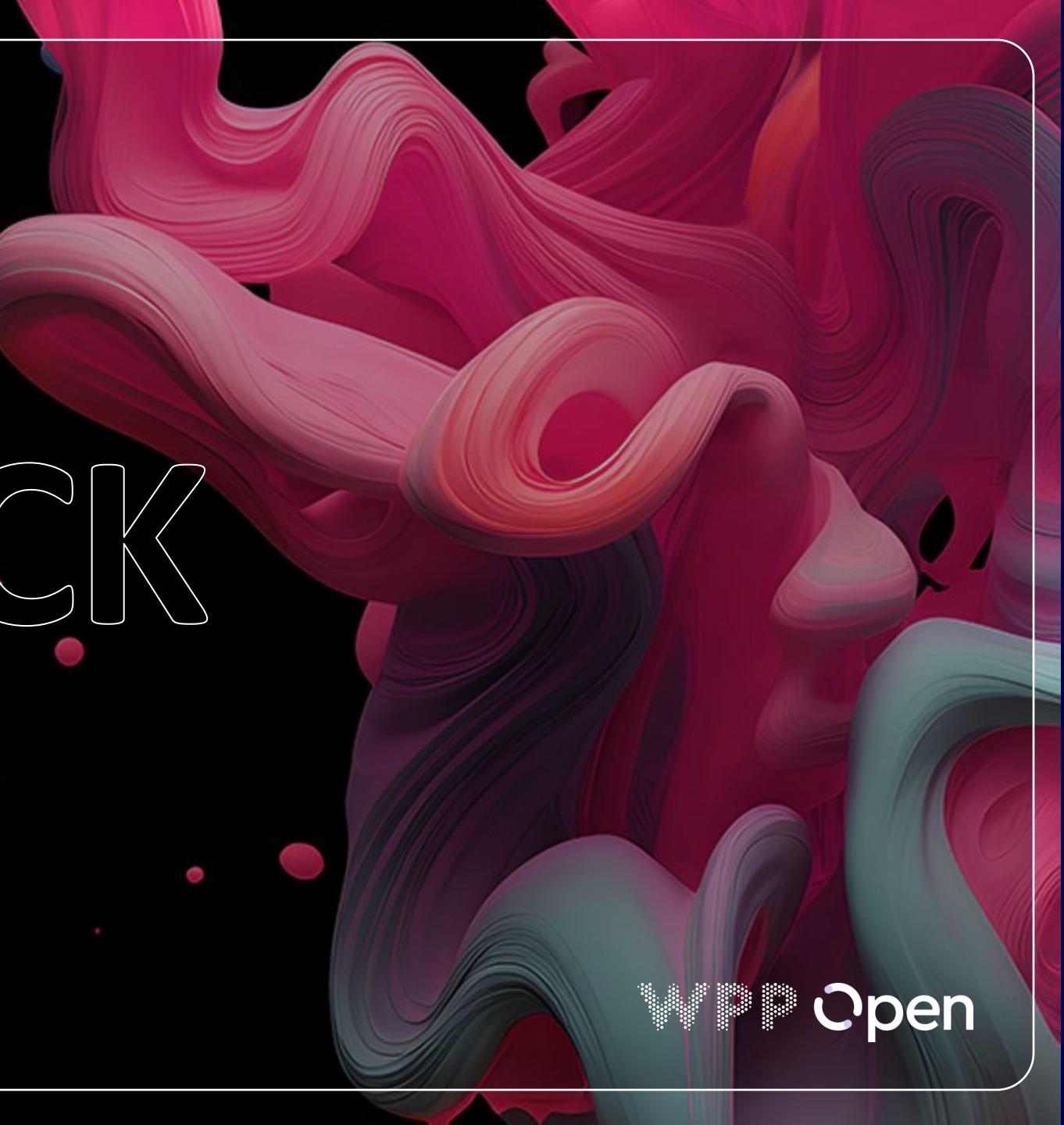
As AI capabilities improve, iterating prompts allows you to leverage new features for better performance.

Testing Example

Here's an example of how to conduct a simple automated test using the AI Evaluation feature.



Agent
FEEDBACK



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Agent Feedback*

WPP Open enables users to share feedback on their interactions with an agent, allowing the agent to learn and continuously improve over time.



Enable Feedback Collection

If you would like users to provide feedback on your *agent's* responses, you can enable this feature within the Learning tab under Settings.

Gather User Insights

As users interact with your *agent*, they will share feedback when insufficient or inaccurate responses are generated.

Improve Agent Performance

The user feedback is very valuable and enables you to improve the behaviour of the *agent*. All submitted feedback is available for review and application within the Feedback feature.

*Only available for beta tests at the moment.

Agent FEED BACK

Access and manage user feedback to continuously improve your *agent's* performance.

Agent Feedback



Access Feedback

Feedback will be available within the Learning tab under Learning Activity.



View All Feedback

Here you will see all feedback (recent and historical).



Filter Results

You can filter the list of feedback using the filter buttons to isolate New feedback from older feedback items.

How Feedback is Shared

When users provide feedback on your *agent*, here is the process:



Poor Response

When the *agent* generates a response that isn't great, the user can take action.



Feedback Initiation

The user selects the 'Add Feedback' button to begin the improvement process.



Improvement Submission

The user provides details about how the model can improve and submits their suggestion for review & application.

Accessing Agent Feedback

All feedback from users will end up in the *agent* Feedback window.

To review and apply the *agent* feedback:



*Navigate to
Agent Builder*

Open the *agent* you
want to adjust.

*Click the
Learning Tab*

Access the learning
section of your *agent*.

*Review
Learning Activity*

Examine user feedback
and performance data.

*Click
Improve*

Apply the feedback
to enhance your
agent.

Improve the Agent's Response

After reviewing the feedback, follow these steps to improve the *agent* response:



Enter your Suggestion

Enter your suggestion for improvement within the Improve window.



Test your Changes

Click Enter or Test. Review the new response from the *agent*. Repeat testing until you are satisfied.



Apply Improvements

Click Apply and the status will change to Fixed.

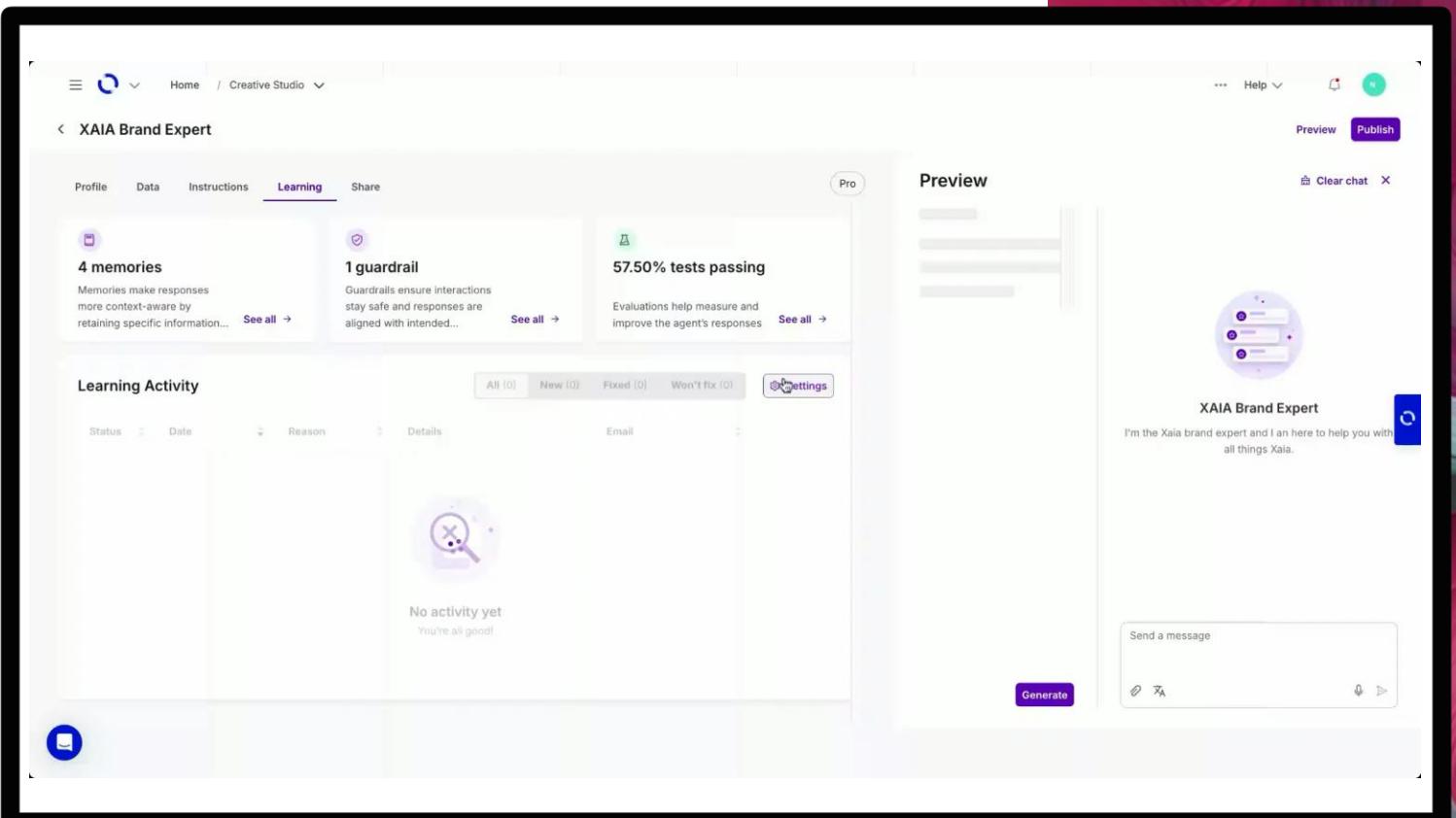


Review and Verify

Once the feedback is applied, it will appear in the Learning Activity as Fixed. If you need to edit any feedback, click Edit and repeat the process. After applying your feedback, we suggest testing your *agent* to ensure everything is working properly.

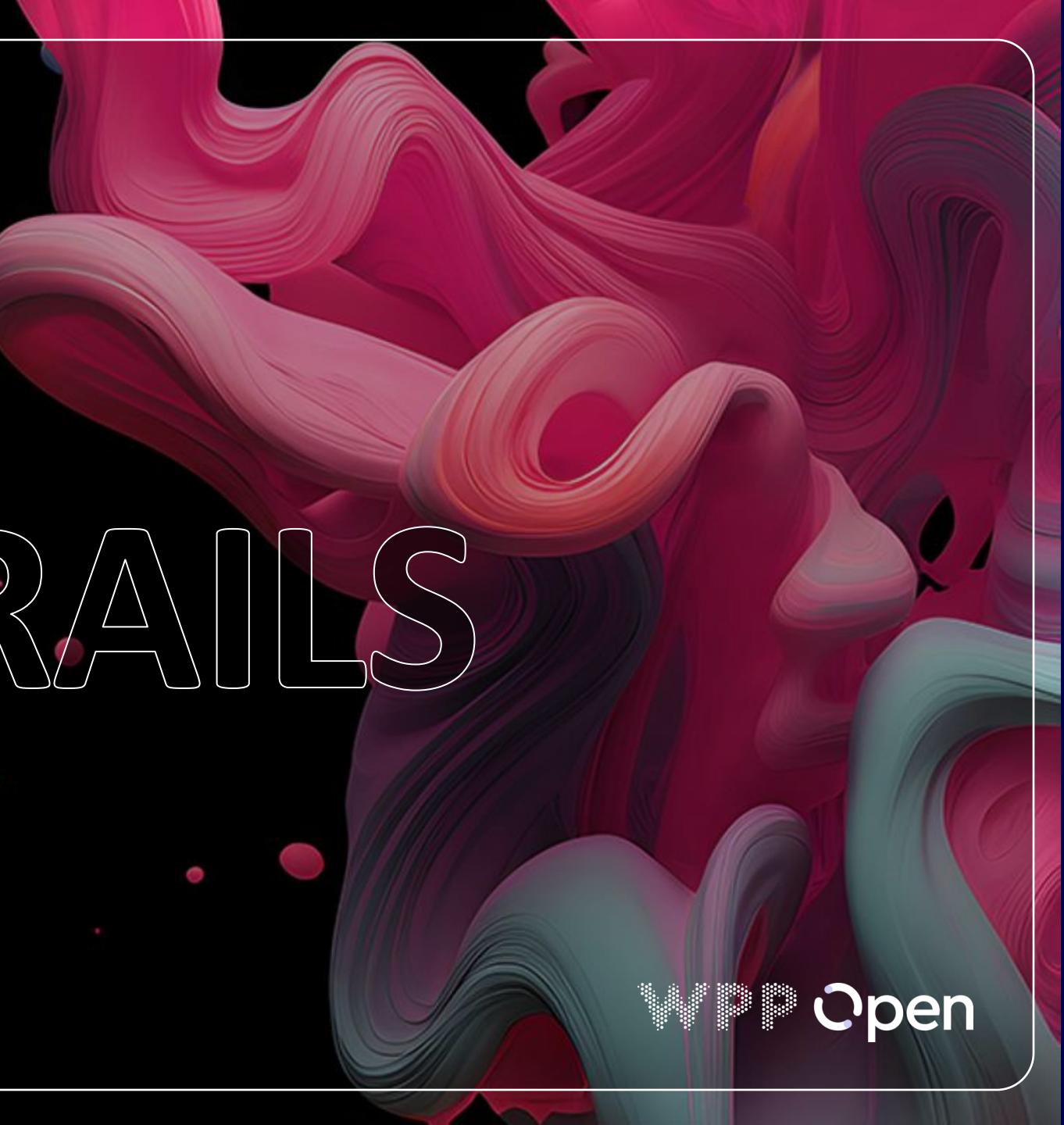
Agent Feedback Example

Here's an example of how to configure an *agent* to collect user feedback.



WPP Open

Memories &
GUARDRAILS



WPP Open

Memories & Guardrails*

In addition to modifying prompts under the Instructions and Knowledge tabs of the *agent*, you can add Memories to further refine and control your *agent's* outputs.

Memories act as persistent knowledge, shaping the model's responses over time. Unlike prompts, which provide one-time instructions, memories ensure consistency by storing and applying context across interactions.

*Only available for beta tests at the moment.

Types of Memories



Feedback

User feedback, when applied, become memories.



Guardrail

Overarching guidelines that restrict *agent* responses.



Generic

Overarching instructions to the *agent* beyond the Instructions tab.



User Memories

This allows the *agent* to retain memories about each user.

Enabling Memories

Follow these steps to enable memory features for your *agent*:



Navigate to Learnings Tab

Access the Learnings section of your *agent* to begin the process.

Switch to Pro Mode

Activate Pro mode to access advanced memory features.

Select Settings

Open the Settings panel to view memory options.

Toggle Memory Options

Enable User Feedback, Learning Mode, or User Memories according to your needs.

Adding Agent Memories & Guardrails

*Navigate to Agent
Learning Tab*

Select the *agent*
Learning tab.



*Enter the Memory or
Guardrail Text*

Write the instruction
that will influence the
agent's responses.

*Select Add Agent Memories
or Guardrails*

Select Add Agent Memories or
Guardrails and click
See All.

Save

Click Save to implement the
Memory or Guardrail in your
agent.



*To make changes, simply click edit, make any adjustments and save. After
adding new Memories or Guardrails, we suggest testing your agent again to
ensure everything is working properly.*

User Memories*

The User memory feature allows the Open to retain user-provided information across conversations, enabling more personalised and contextually relevant interactions. Here's how it works:



Persistent Context

Agents can remember details shared by users, such as preferences or personal information, to improve future responses. For example, if a user mentions they are vegetarian, Agents can recall this detail when suggesting recipes.



Automatic Updates

The memory evolves based on interactions. Users may see notifications like "Memory updated" when new details are added. These updates can be reviewed or managed via settings.



Explicit and Implicit Learning

Users can explicitly instruct the Agent to remember specific facts or preferences. Additionally, Agents may infer details indirectly based on conversational cues.

*Only available for beta tests at the moment.

Managing User Memories

Follow these steps to view and manage your user memories:

Access Your Profile

Select your profile icon located in the top right-hand corner of the screen.

Open User Memories

Choose "User Memories" from the dropdown menu to reveal all of your stored memories.

Manage Your Memories

To delete a memory, simply highlight it and click the delete button. To add a new user memory, click "Add" and input your information, similar to how you add memories for agents.

Agent Learning Mode



Automatic Learning

This powerful feature enables *agents* to continuously evolve and improve by automatically learning from real-world user interactions and conversations.



Feedback Integration

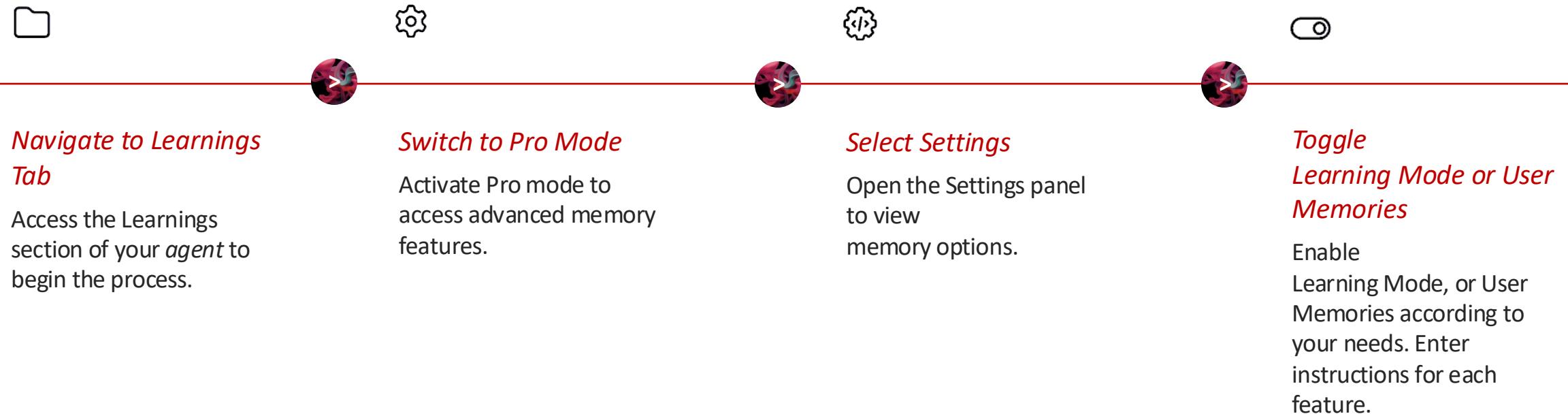
When users provide feedback or request corrections, the system can intelligently capture these insights as learning opportunities, automatically saving them as valuable feedback when enabled.

**Only available for beta tests at the moment.*



Enabling Learning Mode & User Memories

Follow these steps to enable memory features for your *agent*:



Memories Example

Here's an example of how to add Memories and Guardrails to an *agent*.

The screenshot shows the XAIA Creative Studio interface for creating an agent named "XAIA Brand Expert". The left side of the screen displays the agent's profile information, including its name, description, personality, and role. The right side shows a preview of the agent's responses and a chat interface where a message is being sent.

Profile

- Name*: XAIA Brand Expert
- Description*: I'm the Xaia brand expert and I am here to help you with all things Xaia.
- Personality*: Conversational, inquisitive and very cheeky.
- Role*: Expert (Agency or Brand representative or knowledgebase)

Preview

- Product: [Empty field]
- Audience: [Empty field]
- Tone of Voice: [Empty field]
- Instructions: [Empty field]

Chat Preview:

XAIABrandExpert

I'm the Xaia brand expert and I am here to help you with all things Xaia.

Send a message



Publishing & Sharing AGENTS

WPPP Open

Publishing Your AGENT

Follow these steps to publish your *agent* successfully:

Select Publish

To begin the publishing process, locate and select the Publish option in your *agent* builder interface. This will publish the *agent* to the project level.

Test Before Wider Release

Before sharing the *agent* more widely within Open (e.g., Brand level), you will want to test the *agent* thoroughly.

Publishing Agents?

Once your *agents* are published, you'll be able to leverage them across a variety of tools within WPP Open.



Agents Section

Find all your published *agents* under the *Agents* section on Creative Studio's main screen.



Chat Model

Use your *agents* (Experts or Personas) within Chat, just like selecting other foundational models (e.g., Claude Sonnet).



AI Tools

Assign *agents* to various AI tools like Customer Journey (excluding image-generation tools).



Content Matrix

Assign Personas to your Content Matrix. (Note: Experts are not supported in this feature).



Focus Group

Invite Personas to a Focus Group.



Canvas

Use your *agents* (Experts or Personas) within Canvas.



WPP AI Assistant

Use your *agents* within the AI Tools pinned within WPP's AI Assistant.

Sharing Agents?

Once your *agent* has been thoroughly tested, the *agent* can be shared with larger groups of users at different levels within the organization if desired:

IMPORTANT: Only select users have the ability to share agents. If you want to share the agent at a higher level within your works space place submit this request via the help Intercom menu.

Tenant Level

Grants everyone within the workspace access to the *agent*.

Client Level

Provides access to the *agent* for specific clients.

Brand Level

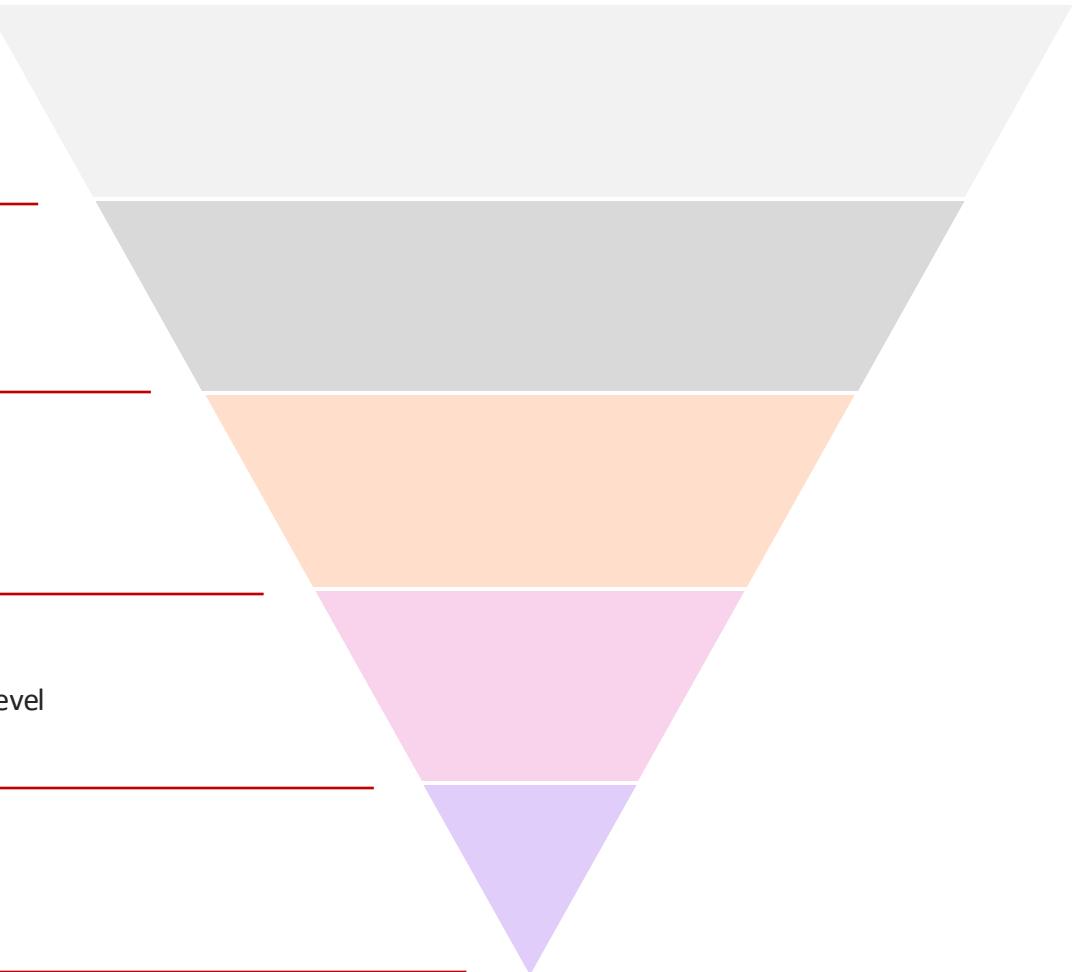
Enables access to the *agent* based on the brand.

Market Level

Provides access to *agents* at the market level for the selected market.

Project Level

Agents published at this level are only available at the project level.





Managing AGENTS

WPPP Open

Setting Default Agents

We recommend that you set a default *agent* if the *agent* will be often used. Setting a default *agent* reduces errors by ensuring the correct *agent* is used across your workflow.

How to Set Defaults

Using Agent Builder

To begin the publishing process, locate and Open the *Agent Builder*, click the ellipsis (•••) next to the *agent*, and choose 'Set as Default.'

From Agents Section

On the main screen, click the star icon beside the *agent* to make it your default.

Editing Agents

If you need to update or make changes to your *agent*, it's very easy to do.

Access the Agent Builder

Navigate to the *Agent Builder* and locate your *agent*.

01

Save and Publish

Once your updates are complete, click 'Publish' to save changes and apply them instantly.

03

Edit Your Agent

Click the ellipsis menu (•••) next to the *agent* and select 'Edit.'

Adjust the profile, knowledge, capabilities, or prompts as needed.

Duplicating & Deleting Agents

You can easily duplicate or delete *agents* in the *Agent Builder*.



Duplicate an Agent

Quickly create a copy for experimentation or reuse:

- Go to the *Agent Builder*
- Click the ellipsis menu (•••) next to the *agent*
- Select 'Duplicate' to generate an identical version



Delete an Agent

Permanently remove *agents* you no longer need:

- Go to the *Agent Builder*
- Click the ellipsis menu (•••) next to the *agent*
- Select 'Delete' and confirm the action

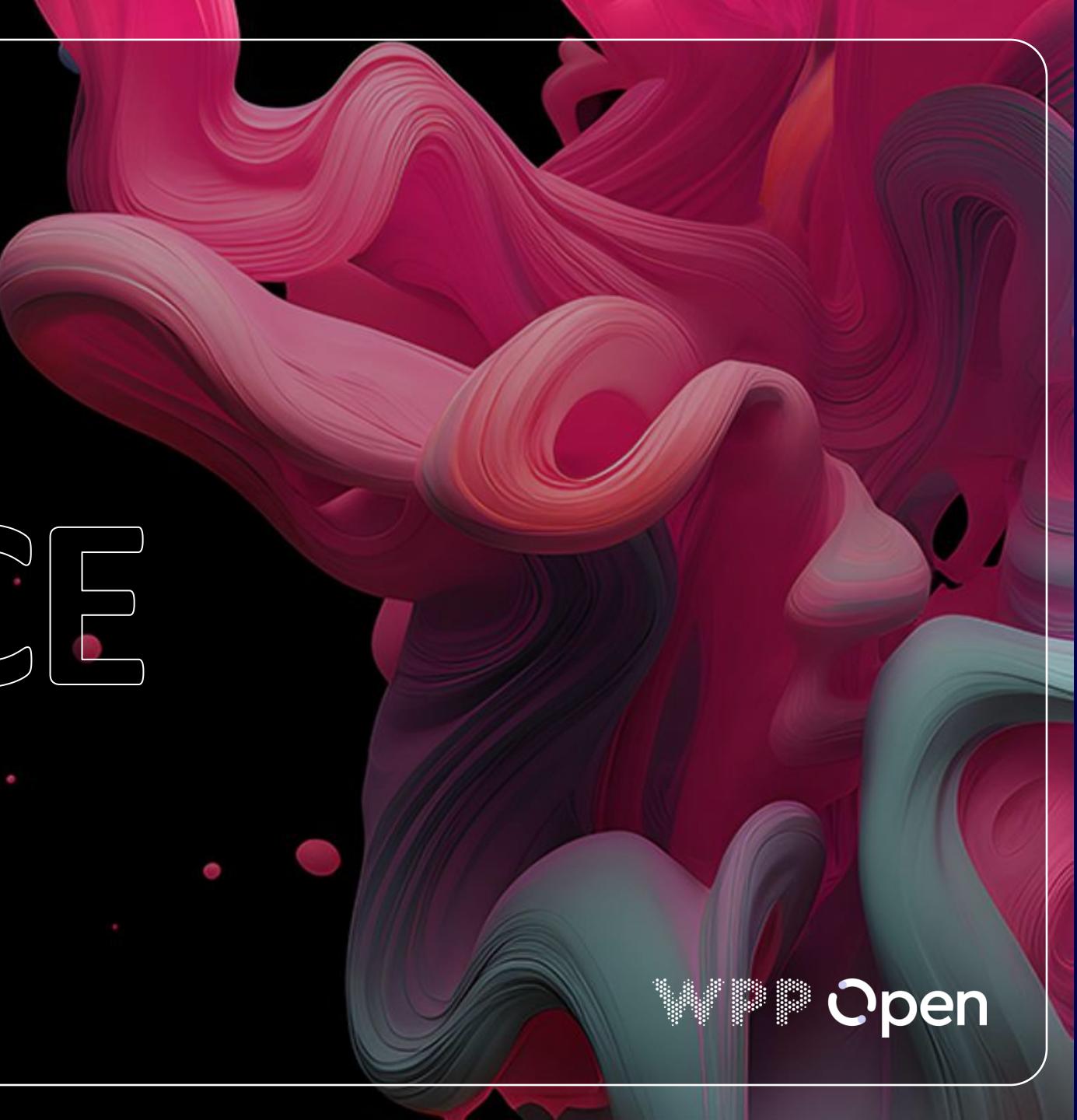


Pro Tip: You can set up an agent template if you need to create multiple agents with slight variations.



Best

PRACTICE



WPP Open

Best Practice

The following provides some suggestions to ensure optimal performance from your *agent*.



Define the Purpose

Clearly articulate your *agent*'s primary role and responsibilities before you get started.

Ask yourself:

- Is it automating repetitive tasks?
- Answering specific types of questions?
- Generating tailored content or insights?

Providing a clear purpose ensures your *agent* delivers targeted and effective results.



Know your Audience

Think about who will interact with your *agent* and tailor its tone, language, and complexity accordingly:

- For customers: Keep it conversational and approachable.
- For technical teams: Focus on precision and detail.



A well-defined purpose and an audience-focused approach empower your agent to deliver accurate and impactful results.



Best Practice

Follow these best practices to ensure optimal performance from your *agent*:



Prepare Agent Data

Properly preparing your data before importing it to your *agent's* Knowledge ensures smooth *agent* performance.

- **Parse Text:** For larger files be sure to parse the text if there are a lots of images.
- **Clean Data:** Eliminate inconsistencies (e.g., formatting errors) for accuracy.

Managing Data Files Effectively

Agents reference uploaded documents in the context window (temporary memory used for responses). While this boosts accuracy, it increases computational load.

- **Focus on Essentials:** Only upload files directly relevant to the task.
- **Avoid Overloading:** Large files can slow responses—keep them lean and specific. Avoid uploading big files (>50 Mb).

Optimise Agent for Performance

Efficiency is key! Follow these steps for optimal results:

- **Keep Prompts Concise:** Provide clear, direct instructions to achieve the desired outcome with minimal effort.
- **Eliminate Redundancy:** Avoid repeating information in prompts to streamline processing.

Iterative Testing and Feedback

Periodically test and analyse your *agent* to optimise performance.

- **Initial Testing:** Test diverse scenarios before publishing the *agent*.
- **Feedback Loop:** Review user feedback and adjust prompts to improve *agent* responses.
- **Evaluate & Improve:** Use the Evaluation Change feature to periodically review and improve the *agent* performance.

AGENTIC

Team

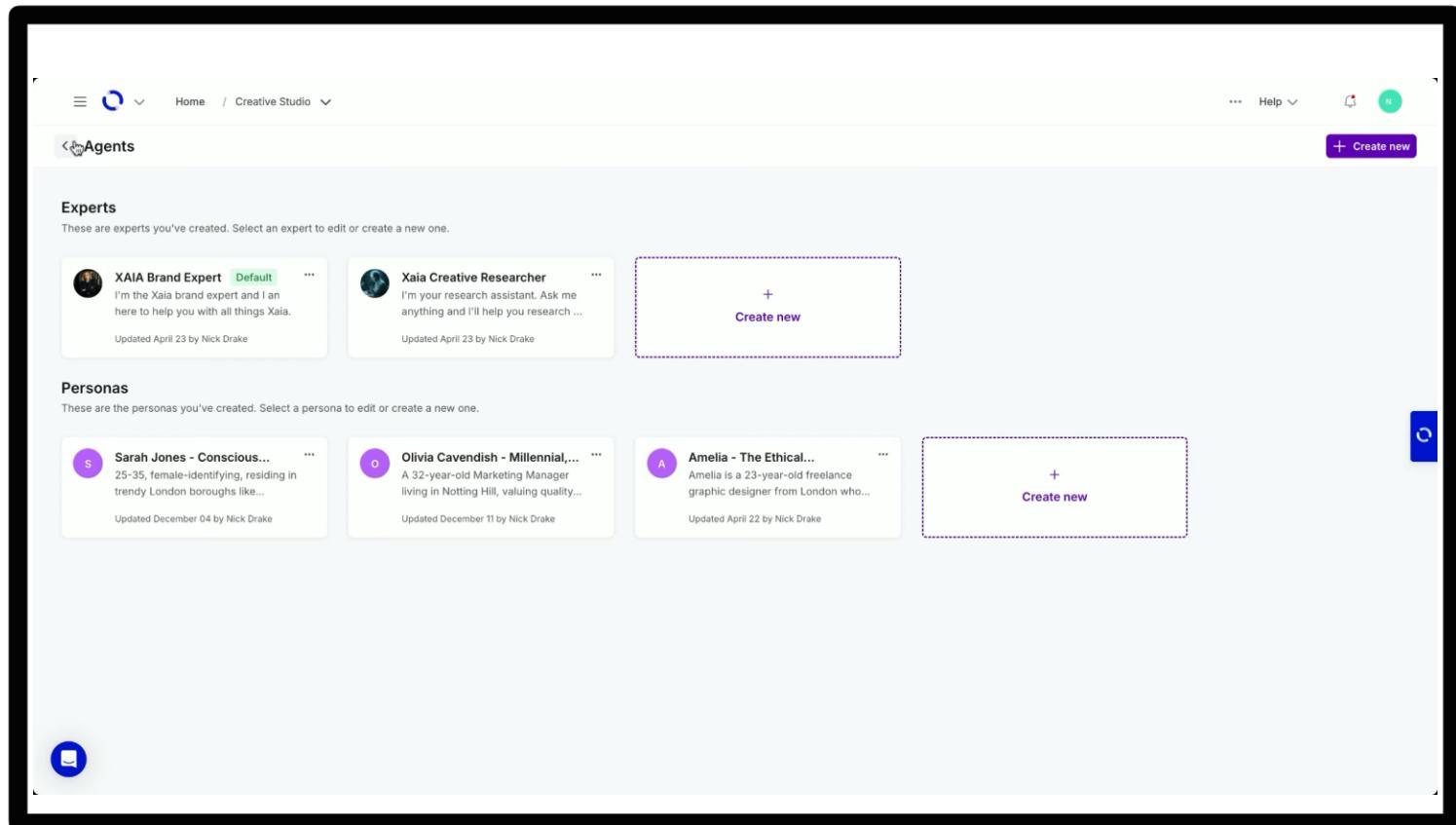
WPPP Open

Agentic Team Feature

The *Agentic Team* feature is WPP's first step toward enable *Agentic AI* for teams. This means that *agents* will begin to start working on tasks in a more autonomous way.

How it Works

When selecting the *Agentic Team* (Beta) model within Chat, it will work with all of the *agents* (in your project) to accomplish the task at hand.



AGENTS VS. BRAINS

Vs. WPP AI Assistant

WPP Open

How do the AI Assistant, *Agents* and WPP Brains differ?

Understanding the unique capabilities and purposes of our AI tools helps you choose the right solution for your needs.

WPP AI Assistant

Choose the AI model or *agent* that best fits your task. Change it anytime.

Purpose: The WPP AI Assistant is a 24/7 AI guide designed to streamline workflows, answer questions, provide insights, and automate tasks.

Key Difference: Orchestrates workflows by providing context-aware suggestions and seamless access to tools (using integrated *Agents & Brains*) and data.

Example: Helps users to define a comprehensive, brand-aligned brief.

Agents

Purpose: *Agents* are designed to expedite or automate various tasks by retrieving, processing and combining relevant data in real-time. *Agents* can be 'grounded' with client data to shape outputs.

Key Difference: Rely on retrieving and contextualising client data dynamically. *Agents* have a limited data set (i.e., documents in Data tab) to draw upon when responding to requests.

Example: *Agents* Can be designed to provide detailed information about a brand and can be queried to provide information that helps someone develop a marketing strategy.

WPP Brains

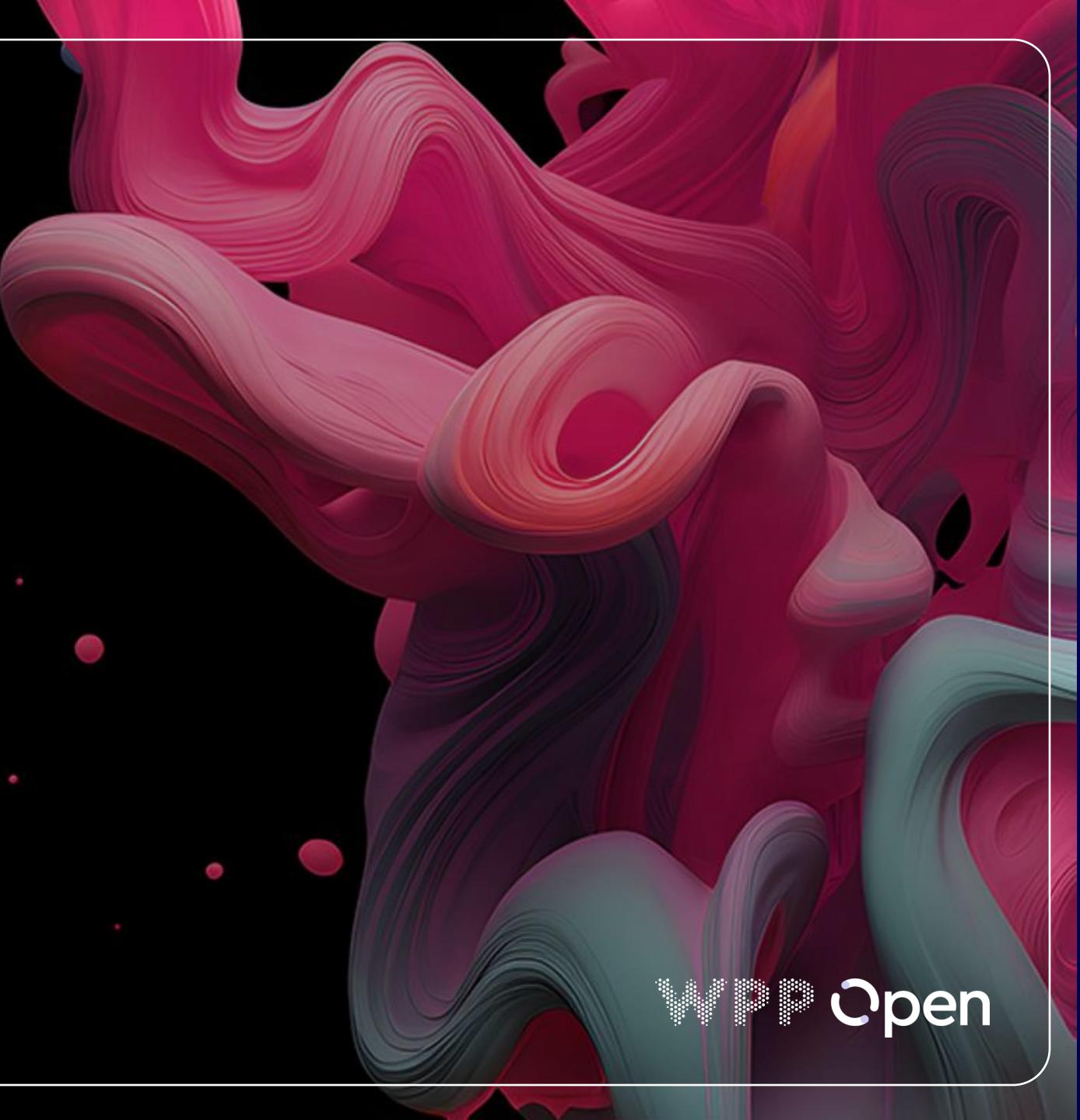
Purpose: WPP Brains are a logical grouping of specialised AI services that delivers fully on a specific client use case. Brains utilise other types of services where relevant, however mainly consist of specialised AI services. WPP Brains are utilised by *agents* to accomplish tasks. with client data to shape outputs.

Key Difference: Understand your brand, audience, etc. deeply because it has been trained to learn from and adapt to your data. Automatically improve over time. *Agents* utilise WPP Brains for more complex use cases and when high fidelity outputs are required.

Example: Examples include combining fine tuning of foundational models with custom algorithms to produce on-brand content (Brand Brain) or developing specific machine learning algorithms based on client data to predict ad performance (Performance Brain).

AGENT

Examples



How Teams are Leveraging Agents across WPP



Client Brand/ Product Experts

Specialized agents that provide deep knowledge on specific client brands and products.



Playbook/ Guideline Agents

Support teams by providing standardized processes and best practices.



Audience/ Persona Agents

Offer insights into specific demographics and consumer segments.



Channel Format Experts

Provide guidance on optimizing content for different media channels.



B2B Experts

Agents designed to navigate complex business-to-business environments and relationships.



Project Brief Agent

Streamlines the briefing process by organizing and structuring project requirements.



Growth Category Experts

Specialized in identifying and capitalizing on emerging market opportunities.



Retail Customer Expert Agents

Focus on enhancing retail experiences and customer engagement strategies.

The background features a complex, abstract organic shape composed of thick, flowing lines in shades of red, orange, and teal. These lines form various loops and swirls against a black background, creating a sense of depth and movement.

Getting HELP

WPPP Open

Getting HELP

Getting help within WPP Open is easy!

WPP Open

Getting Help



Need Support?

Just click the icon in the bottom left-hand corner of the screen.



Access Resources

Find user guides, FAQs, and more.

And much more...



Use Our Agent

Get answers quickly to your questions.



Create Support Tickets

Submit issues with ease.

And much more...

APPENDIX

Examples of Documents

When it comes to populating your *agent's* data, the use case will determine the type of documents you will upload. We thought it would be helpful to provide a few examples of what certain teams have done.



Marketing Strategy

Brief

Marketing Strategy Documents

Customer Personas

Target Audience Segmentation

Messaging Pillars

Competitive Analysis

Market Research Reports

Campaign Performance Data



Creative Development

Brief

Brand & TOV Guidelines

Content strategy

Content Guidelines

Past Successful Campaign Examples

FAQs



Media & Content Planning

Brief

Media Strategy Snapshot

Channel Strategy

Content Style Guides

Channel Specific Playbooks

Targeting Matrix

A/B Testing Results

Social Listening Data



Campaign Performance & Learnings

Performance Summary

Post-Campaign Learnings