



The Ultimate AI Agents ✨ Playbook for Ecommerce Brands

How to use agentic AI for
smarter and faster decisions

2025



Ecommerce brands need simplicity.

After years of adding more integrations, ad platforms, retention platforms, and selling on more and more online marketplaces, many brands are still unable to make sense of the constellation of datapoints in front of them.

Plenty of platforms collect the necessary data on customer behavior and preferences, but when they're all in different places, it's difficult to make decisions individually that will make sense holistically.

Comprehensive data platforms can pull a brand's data together into one place, so they can make data-backed decisions with a view of their entire ecommerce ecosystem. But, even then, the bandwidth of small teams has bottlenecked decisions, because good data hygiene and analysis takes time.

Many brands already use generative AI for daily operations, and Large Language Models (LLMs) are increasingly capable of handling complex, multi-step tasks. Tasks like generating product descriptions, improved search functionality on the website, generating email and ad copy, and automatic bundling and upselling product recommendations are just a few ways generative AI has made running an ecommerce brand easier and quicker.

Agentic AI is about to change everything.

In this guide, we'll break down what agentic AI is, why you need agents for ecommerce, and precisely how AI agents can help you accomplish everything a brand needs to succeed, from getting that first sale to scaling your operation to seven figures (or more!).

We'll also explore the power and customizability of [Triple Whale's Moby Agents](#), which are already helping both brands and agencies save time and scale.

Introduction

The modern ecommerce challenge: Brands collect a lot of data, but they're not sure how to work with it in the most effective way.

Brands add integrations that promise to address one challenge or another, and neglect to understand how they work together. This leads to ballooned expenses, more time spent trying to analyze everything in different places, and a strapped team that can't make good decisions fast enough.

The Modern Ecommerce Dilemma

Fragmented Data

- Ad platforms
- Analytics platforms
- CRM
- Organic/social media
- Offline channels (in-person shopping, print advertising, out-of-home ads)

Cost

- Adding integrations = higher cost
- Increasing headcount is costly
- Data analysts are prohibitively expensive for most brands
- Advertising expenditures continue to rise

Speed

- Multiple tools must be analyzed independently, slowing the path to answers and decisions
- Manual reporting and scattered data breeds analysis paralysis
- Delayed answers can mean decisions made based on the wrong data

Bandwidth

- Small teams are resource-strapped, and can't analyze data fast enough
- Higher headcount would help with better quality/quicker analyses, but would add additional cost
- Limited resources cause decisions to be based on incomplete analyses



Agentic AI: The Ecommerce Game Changer

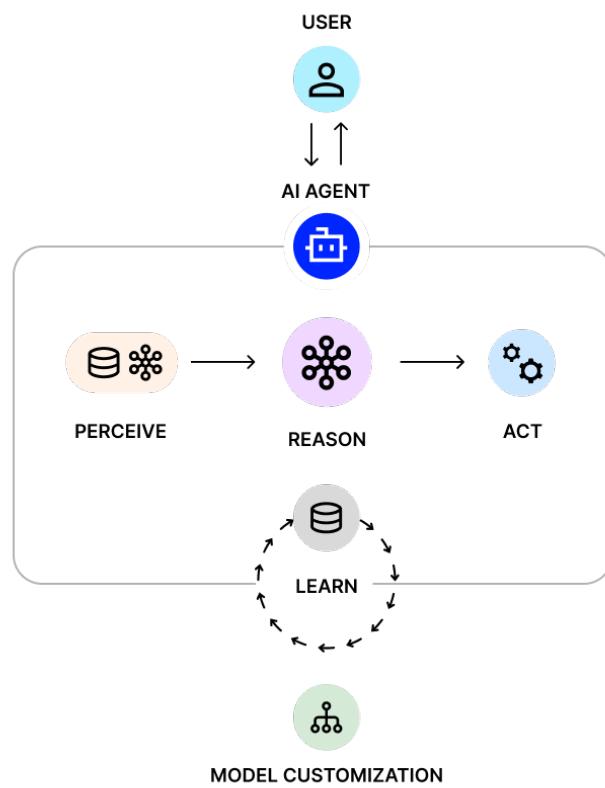
The next generation of artificial intelligence is [agentic AI](#), which is poised to completely change the ecommerce landscape. These agents can process data, make decisions, learn from interactions they participate in, and are able to proactively work towards goals.

What is Agentic AI?

Agentic AI is a system or program that's capable of autonomously performing tasks on behalf of a user.

They are intelligent programs that can perceive, reason, and act:

- **Perceive.** An AI agent gathers and processes data from various sources and recognizes the features that are relevant to the problem.
- **Reason.** A LLM serves as the agent's brain and generates solutions using machine learning algorithms.
- **Act.** Agentic AI can execute a task based on the plan it formulated in step two, and it can do this without human interaction.
- **Learn.** A data flywheel allows agentic AI to continuously improve through a feedback loop. The data generated from the interactions the agent completes is fed back into the system to enhance the model.



How does agentic AI work?

To understand how agentic AI works, let's consider the steps an agent would take to execute a task — in this case, optimizing inventory for an ecommerce brand:

i 1. Understand the task and gather the necessary information

The agent has access to both the inventory platform and sales platform, including historical sales and available inventory by product.

ii 2. Break down the task into subtasks

The high-level task is to prevent stockouts or overstock of products.

The subtasks will be: monitor sales levels, monitor available inventory, and order more inventory when necessary to prevent stockouts.

↗ 3. Execute actions

If the agent detects low inventory levels for a product that is selling well (for example, inventory level falls below a set threshold of 1000 units), the agent can notify you of low inventory levels and provide recommendations for how to optimize sell-through and also inventory management strategies.

⌚ 4. Repeat the process for each subtask

When it comes to inventory levels, this task would be completed on a variant-by-variant basis for each product, which would alleviate a lot of manual labor and oversight.

📅 5. Provide the completed plan to the user

After completing the necessary tasks, the agent would present the end user with a fully-operating inventory flywheel.

What's the difference between agentic AI and generative AI?

Agentic AI

- Operates autonomously and adapt in real-time
- Achieves complex, multi-step tasks without human intervention
- Continuously learns from both the external and internal environment via feedback

Generative AI

- Trained on large datasets and designed to generate new content
- Generates novel and creative outputs or data (based on previously-trained material)
- Can output code, images, or other forms of data

The previous example outlines how an AI agent can effectively monitor inventory for an ecommerce brand. When you consider all of the other components of an online store that might require constant monitoring, it becomes very clear there are several opportunities for agents to simplify ecommerce processes.

Best practices for implementing agents

With endless opportunities for what agents can accomplish, it can be tempting to go full throttle immediately. But, a measured approach using the following steps will help ensure you're on the right track:

- **Start small.** Begin with automating a single high-impact agent before building complex workflows.
- **Build in human oversight.** Create review checkpoints for critical decisions, especially in early implementation phases.
- **Document decision logic.** Maintain clear records of how your automated agent systems make decisions.
- **Create a fallback protocol.** Establish what happens if an agent fails to run or produces an unexpected output.
- **Test in parallel.** Run automated systems alongside manual processes at the beginning to validate the output of agents.



Successful agent implementation will be an iterative process.

Continuously measure outcomes against your goals and be prepared to refine the approach as you learn what works best for your business.

How to Build Your First Agent

Now that you know all of the amazing things agents can do, how do you decide where to start?

1. Centralize your data

For agents to quickly analyze your data and surface insights, they need to be able to access it all in one place (Triple Whale solves for this).

2. Identify high-value use cases

Which repetitive analysis or decision process have you been stressing over? What is the biggest time saver an agent can solve for you?

3. Define success metrics

How will you measure the impact of your automated agent system?

4. Map the flow of information

Chart exactly how information should move between systems, agents, and team members.

5. Start with test runs

Begin with supervised automation before transitioning to fully autonomous operation to ensure things are working properly.

6. Gather feedback

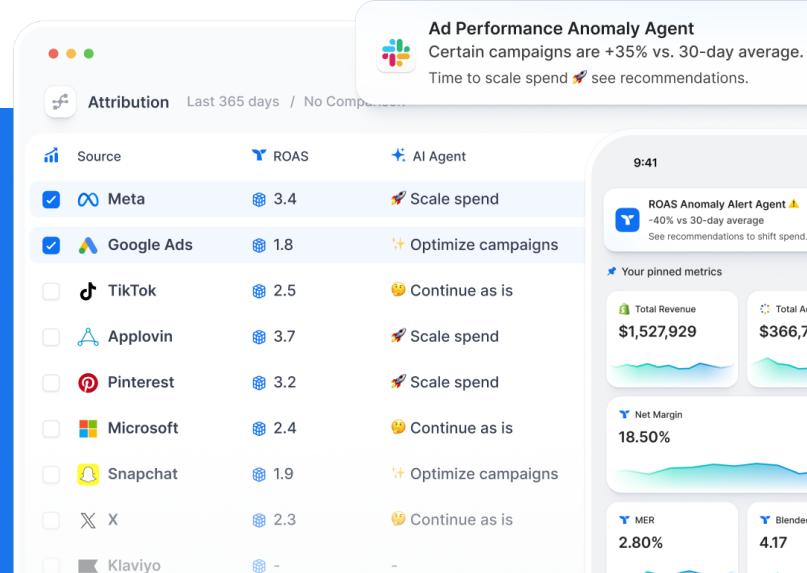
Collect inputs from all stakeholders about the quality and usefulness of the insights you're generating.

7. Refine and iterate

Use the feedback to continuously improve the automation rules and distribution methods.

Save hours of manual analysis by implementing Moby Agents in your business today.

[Book a demo today](#)





This guide will show you exactly how to utilize ecommerce intelligence agents for each stage of your brand's journey:

1

Acquiring Shoppers

- Build brand awareness
- Run smarter and more efficient ads

2

Converting Customers

- Optimize product pages
- Analyze and optimize the product journey
- Prioritize ad channels that convert

3

Retaining Customers

- Automated LTV analysis with audience targeting recommendations
- Churn prevention, personalized recommendations
- Smarter, personalized email campaigns

4

Operating an Efficient Brand

- Predictive forecasting
- Optimized inventory based on data
- Real-time revenue monitoring



Acquiring Shoppers with AI Agents

Customer acquisition is increasingly difficult in a crowded, competitive marketplace. Tracking multiple ad platforms is complex, and siloed data prevents comprehensive decision-making. Each independent ad platform often over-attributes its role in acquisition, and there are more acquisition channels and data points than ever before. But, automated tools can make acquisition faster, easier, and more efficient. Here is an overview of the acquisition problem, as well as some ways AI agents can specifically be used to acquire more shoppers.

⚠ The problem

Uncertainty around what to do with the data

- Multiple ad platforms, metrics, and data overload causes overwhelm
- Unable to act on decisions quickly

Wasted spend

- Platform performance shifts cause unexpected overspending
- Performance anomalies detected too late to fix

Creative fatigue

- Brands run stale ads without considering ROI
- Manual analysis of best performing ads is time consuming and tedious

🌟 The agent-powered solution

Clear, actionable insights — fast

- Agents analyze performance metrics across all channels
- Detect underperforming campaigns and redistribute budgets automatically

Efficient spend

- Agents understand context with historical averages
- Dynamic alerts to monitor spend in real time

Automatic creative monitoring

- Agents spot creative fatigue before it impacts performance
- Prevent wasted spend and save hours on manual reporting time

1. Analyze performance efficiency across platforms, all at once

As ecommerce brands grow, they continue to use more integrations, ad platforms, and analytics tools to understand how they are performing. The best way forward is to use a tool that is not only capable of bringing all of that data together into one place, but also performing complex analyses in little to no time.

AI agents can analyze performance metrics and efficiency of ad spend across platforms and provide advice to improve performance. They are also able to detect underperforming campaigns and redistribute budgets to channels showing the strongest ROI — automatically.

2. Monitor and optimize ad spend

Ad platforms are not the most stable of environments — dramatic and unexpected shifts in platform performance can cause large investments to go sideways, resulting in a brand overspending on an underperforming ad, which can severely damage the bottom line.

Using AI agents, brands will be able to monitor ad spend for all platforms in one place, with the additional context of historical averages for spend performance. Using the cumulative data, agents can inform financial strategies to move forward. They are also able to produce dynamic alerts to show percent change in real-time, and turn off underperforming campaigns automatically to shift spend to ones that are getting better ROI.

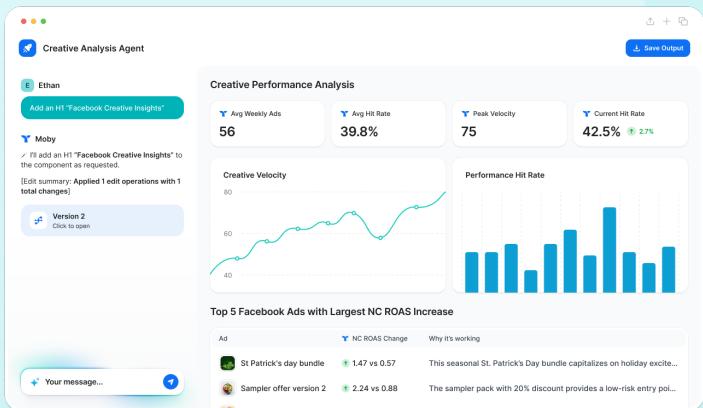
3. Optimize creative campaigns

Businesses are often guilty of running the same ads all the time, without considering if they are, in fact, having the best return on investment. When running ads across multiple platforms, it is difficult to tease out which ads are responsible for the best ROI, especially when relying on manual analyses that take too much time.

AI agents can:

- Spot creative fatigue before it impacts campaign performance
- Monitor declining creative and turn the ads off that are wasting spend
- Provide advice for crafting new campaigns based on the ones that perform best

For example, [Triple Whale's Creative Analysis Agent](#) identifies your top-performing and underperforming ads, all in one easy-to-interpret dashboard. Monitoring the change in NC-ROAS for each ad, the agent also provides analysis as to why ads performing well are working, so you can create similar campaigns to capitalize on, or discontinue the ads that aren't performing.



DIXXON x CREATIVE ANALYSIS AGENT

260+
hours saved
per year with
Moby Agents

500K
incremental
revenue captured
by Sonar Send

3x
ROI on Triple
Whale investment
in first 3 months

Dixxon Flannel Company crafts premium flannels using its proprietary D-Tech fabric, which doesn't wrinkle, shrink, or fade. Their business model focuses on limited-edition product drops, and they needed accurate attribution and quick analysis of ad performance to adjust their time-sensitive campaigns for optimal efficiency.

Using the Creative Analysis Agent, Dixxon was able to automatically analyze creative performance across hundreds of ad variations on Meta and Google to identify the top and underperforming creative assets — that would have taken hours to accomplish in the past.

[→ Read the full case study here](#)

Moby Agents help me identify both underperforming and overperforming ads from the roughly 600 variations we run simultaneously. Agents have been a significant breakthrough that has greatly improved our operational efficiency.



Austin Urlocker,
Marketing Strategist

DIXXON

 **Triple Whale**

Ready to transform your business with AI agents?

[Talk to our team](#) to see how **Triple Whale's Moby Agents** can scale your growth and provide superhuman insights.



Converting Customers with AI Agents

Getting customers to click on an ad and visit your website is only half of the battle. You need to get them to convert. With an average of 70.19% of all carts being abandoned, distracted shoppers won't always be in the purchasing mindset. Even the best ads directed towards pages with a mismatch of ad and landing page copy or speed issues can mean a lost purchase. Here is an overview of the roadblocks to conversion for ecommerce brands, and how utilizing AI agents can dramatically improve conversion performance.

⚠ The problem

Complicated web analytics

- Platforms like GA4 are hard to interpret
- Data is available, but requires a lot of expertise and time to analyze

Web visitor dropoffs

- Page visitors aren't converting due to poor landing pages or speed issues
- High bounce rate for pages with no understanding of why

Revenue data spread across platforms

- Difficult to analyze metrics when they are spread across several platforms
- Manual comparisons across platforms take too long, making it impossible for a marketer to make quick decisions

🌟 The agent-powered solution

Agent-powered web analytics & insights

- Key metrics automatically aggregated and presented in clear tables
- Quick, automated insights that saves hours of manual analysis

Agent-optimized landing pages

- Analyze conversion metrics to identify landing pages that need optimization
- Turn high-traffic and low conversion rate pages into conversion powerhouses

Agent-streamlined reporting

- Revenue data from all streams pulled into one simplified report
- Automated detailed web analytics reports that save on manual work, plus instant AI-generated insights

1. Analyze web performance & conversion flows

Analytics tools that were popular in the past (like GA4) remain complicated to use and difficult to interpret results quickly enough to act on.

An AI agent can easily aggregate key metrics from a web analytics dashboard and present them in clear tables for easy interpretation. This means raw analytics you used to try to analyze manually for hours are presented in actionable insights you can make a move with immediately. Informed decisions.

2. Detect where customers are dropping off to optimize landing pages

It's inevitable that some customers will drop off after landing on your site and not make a purchase, but if certain landing pages are underperforming, you might be spending too much money driving traffic to a page that doesn't convert.

AI agents analyze your traffic patterns and conversion metrics and identify the pages that need testing or optimization, then present you with a digestible output and action plan. That way, you can turn high-traffic and low conversion rate pages into pages that actually convert those frequent visitors.

Analyzing all pages at once, [Triple Whale's Landing Page Performance Agent](#) presents a full analysis of traffic patterns and conversion metrics, and identifies the specific landing pages that require more testing and optimization to turn into conversion powerhouses.

Priority Landing Pages for Testing & Optimization

High-Traffic Pages with Suboptimal Conversion

Landing Page	Visitors	Add to Cart		Conversion Rate	Opportunity
		Rate	Rate		
/products/legging-black-cropped	72,319	0.80%	0.04%	Very high traffic with extremely low conversion	
/products/tshirt-bra-white-stripes	62,307	0.03%	0.01%	Second highest product traffic with minimal engagement	
/products/long-sleeve-shirt	59,823	0.28%	0.003%	Nearly zero conversion despite high traffic	
/products/short-dry-fiber-brown	3,450	0.17%	0.00%	Zero conversions despite targeted collection traffic	

3. Streamline revenue stream reporting

With multiple revenue streams, analyzing them separately would take too much time, and the relationships between them is difficult to tease out.

An AI agent can streamline the reporting and amalgamate data from across all ad channels, and present it in a clear, actionable format. Automated generation of detailed web analytics reports can save you hours of manual work, and AI-driven recommendations to optimize your web strategy will be readily available to apply.

UNDEROUTFIT x AD PERFORMANCE OPTIMIZATION AGENT

5

open roles filled
by Moby Agents

20+

hours saved per week
on data analysis

12+

agents launched
within 2 weeks

Underoutfit designs bras that feel as good as they look, and they are one of the fastest growing Shopify stores in the ecommerce game. As they expanded their marketing to include TV and other channels that aren't easily measurable, they needed a more unified view of insights to understand the blended impact of all marketing activities at once.

Underoutfit created over 12 agents in two weeks to address their specific needs, including Triple Whale's Ad Performance Optimization Agent, which they run twice per week to identify trends and make strategic adjustments to their Meta campaigns. With a systematic approach, Underoutfit was able to shift from chasing new customers to optimizing for overall ROAS as they expanded to TV advertising.

[→ Read the full case study here](#)

We were about to start hiring a few analysts. Then I spoke with AJ and we started testing **Moby Agents**. I said, 'There's no way we need to hire these people.' It's mind-blowing, really.



Felix Leshno,
Co-Founder & CXO
UNDEROUTFIT



Ready to transform your business with AI agents?
[Talk to our team today](#)



Retaining Customers with AI Agents

After AI agents have helped you acquire more shoppers and convert more customers, the next trick is to keep them coming back. Brands traditionally focus heavily on acquisition, and neglect to nurture their existing customers. While owned channels are often the key to retention magic, their siloed platforms and segregated performance data makes it difficult to decipher their true value in a holistic way. Here are some ways AI agents can help drive retention for your ecommerce brand.

⚠ The problem

Discount code overload

- Difficult to monitor large quantity of codes manually
- Personalized codes are only used once

Lack of clear insight into repeat purchase path

- Unable to analyze why customers make repeat purchases from raw data
- Product-level analysis is cumbersome

Inefficient operation of owned channels

- Channels like SMS and email are underused for retention
- Brands run broad campaigns instead of personalized ones based on data

🛠 The agent-powered solution

Agent-generated discount code insights

- Immediate summary of discount code effectiveness in clear tables
- Easily gather which codes are driving highest AOV with 60- or 90-day look

Agent-deciphered repeat purchase behavior

- Repeat purchase data presented across 7, 14, and 30 day periods
- Strategic recommendations for improving conversion paths

Data-backed email/SMS campaigns to drive LTV

- Breakdown of campaign flow stats by campaign
- Actionable recommendations for optimizing flow and campaign effectiveness

1. Analyze your best-performing discount codes

Using discount codes to entice existing customers is a common strategy, but it can be tedious to monitor all of the codes to determine which are most effective, especially when personalized codes are used.

An AI agent, however, can **easily summarize the performance of multiple discount codes at once** by aggregating key discount metrics into a clear table for review. AI agents can provide information regarding which discount codes are most effective at driving both AOV and also monitor the 60-day and 90-day LTV for each code to understand the full impact of discounting on customer retention.

2. Discover the path to purchase generates the most LTV

Understanding how and why customers make repeat purchases is necessary for optimizing retention strategies. Additionally, if a specific first-purchase product often generates customers with high LTV, then those products could be prioritized for new customer ads.

AI agents can **present the metrics necessary to help you make decisions about retention strategies**, like repeat purchase revenue, conversion rates, and order counts across 7-, 14-, and 30-day periods. By analyzing critical data points in the path to purchase, AI agents can also identify opportunities for growth and provide tailored suggestions based on data-backed insights.

3. Run better email/SMS flows with data-backed recommendations

Owned channels like SMS and email can be retention powerhouses, but only when they're utilized effectively. Oftentimes, brands will neglect the opportunity in these channels because they are focused on new customer revenue, or perhaps because it is difficult to decipher how owned channels contribute to overall performance with siloed data.

With AI agents, a brand can **quickly visualize email campaign data alongside performance data**, with a breakdown of campaign flows, actions, and messages with metrics like total sent, open rate, click-through rate, placed order rate, purchase count, and conversion value. AI agents can quickly summarize performance along with providing actionable recommendations for optimizing flow and campaign effectiveness.

The **Email + SMS Campaign Analysis Agent** will output your top-performing elements, best campaign types, and optimal send times for your campaigns. Using actual historical data, it will provide a recommended campaign idea along with the target segment and explain why it is likely to succeed.

The screenshot shows a user interface for the "Email + SMS Campaign Analysis Agent". At the top, there's a header with a profile icon and the text "Email + SMS Campaign Analysis Agent". Below the header, there are three main sections: "Top Performing Elements", "Best Campaign Types", and "Optimal Send Times".

- Top Performing Elements:**
 - Urgency messaging (24hr limits,...)
 - Price-specific headlines (\$XX.X...)
 - Problem-solution framing
 - Social proof from customer revi...
 - Weekend morning sends (9AM...)
- Best Campaign Types:**
 - Flash Sales: 0.75% CTR
 - Holiday-Themed: 0.68% CTR
 - Limited Colors: 0.78% CTR
 - Customer Reviews: 0.25% CTR
 - Text-Only Updates: 1.77% CTR
- Optimal Send Times:**
 - Saturday 9:00 AM: +22%
 - Sunday 9:30 AM: +18%
 - Weekday 7:30 PM: +35%
 - Thursday 3:00 PM: +16%
 - Tuesday 7:00 PM: +28%

Below these sections is a section titled "Recommended Campaign Idea #1" with a subject line "FLASH SALE 🚨 50% OFF Spring Essentials (24 HRS ONLY)". To the right of this, there are three callout boxes:

- Target Segment:** Recent Browsers who haven't purchased in 30+ days + previous flash sale responders
- Recommended Send Date:** Saturday, April 12th at 9:00 AM
- Why it Will Succeed:** Saturday morning sends showed 22% higher open rates. Previous flash sales with '50% off' and '24-hour' limitation...

WHITELABELED x PRODUCT ANALYTICS AGENT

10+
hours saved
weekly across
portfolio

78%
reduction in
weekly reporting
time

7+
Moby Agents live across
5 client accounts within
2 weeks

Whitelabeled is a boutique digital growth agency serving clients ranging from ambitious startups to established 9-figure brands. They focus on delivering precision-driven paid media, retention, and creative strategies that fuel growth across DTC brands. With a large portfolio, the manual workflows they had in place were limiting how quickly they could scale and act on strategic insights. Some clients with over 1,500 product SKUs needed a time-consuming and tedious product-level analysis, including manual work with pivot tables and CSV exports.

But the extensive product catalogs are no match for the Product Analytics Agent, which is able to automatically identify the top performers and underperformers and surface the vital 20% of products that are driving 80% of revenue. This agent is able to analyze performance across multiple channels simultaneously and factor in margins, conversion rates, and ad spend attribution quickly, and surface insights about product performance across the whole catalog.

What sets this agent apart from generic AI tools is that there's no need for exporting reports of any kind, Triple Whale houses all the data for you, the prompts are already set, and all you have to do is press a button. It ties revenue growth and marketing efficiency to specific products, all in one agent.



Darcy Velazquez,
Senior Growth Strategist

WHITELABELED

→ [Read the full case study here](#)

 Triple Whale



Operating an Efficient Ecommerce Brand with AI Agents

Ecommerce stores contain plenty of moving parts, and the modern brand continues to add more integrations into their tech stack — which means multiple data sources to manage all at once. When integrations don't share data, a human must manually compile and analyze it. Staying on top of inventory, orders, revenue, fulfillment, and profitability could be the full-time job of several humans. Here are some ways AI agents can juggle all the balls a brand has in the air at any given moment, to make scaling and operations a lot easier.

⚠ The problem

Inventory management difficulties

- Poor database management leads to inventory stockouts or overstocking
- Inaccurate demand forecasting disrupts operations

Incomplete view of revenue trends

- Manual analysis of revenue statistics misses essential points
- Monitoring across ad channels means lack of context for data and decisions

Inaccurate view of performance data

- Disjointed data across platforms prevents clear understanding of performance
- Unable to make quick business decisions

✖ The agent-powered solution

Agent-powered inventory insights

- Product performance and inventory levels monitored automatically
- Automated recommendations for inventory management strategies

Agent-monitored revenue changes

- Agent continuously analyzes revenue data — strategically
- Anomaly alerts when anything differs significantly than expected

Agent-powered performance insights

- Agent aggregates key metrics and insights from ecommerce dashboards
- Maximizes ROAS and makes smarter budget allocation decisions

1. Accurately forecast inventory needs to prevent stockouts

There's nothing worse than running an ad that directs customers to a landing page where a product is sold out. Wasted money on an ad and lost funds on a sale means two losses, and ecommerce margins can't support losing twice. Additionally, inaccurate forecasting data can cause brands to overinvest on products they expect to sell, but then they end up with way too much inventory that doesn't move.

AI agents will **deliver both product performance and inventory levels in tandem**, so you can be ahead of the game with preparing additional stock for hot items, or running bigger promotions on products that have been in inventory for longer periods.

2. Detect revenue anomalies before they do major damage

With all of the moving parts in an ecommerce business, it's possible that something can shift, cause revenue declines, and impact your bottom line for a significant period before you even know what's happening.

An AI agent designed to monitor revenue trends will automatically analyze daily revenue data, and understand the context of revenue changes presented with clear percentage comparisons. With real-time data, an AI agent can **provide immediate notifications when revenue anomalies are detected**, so you can take action quickly and efficiently to address the issue.

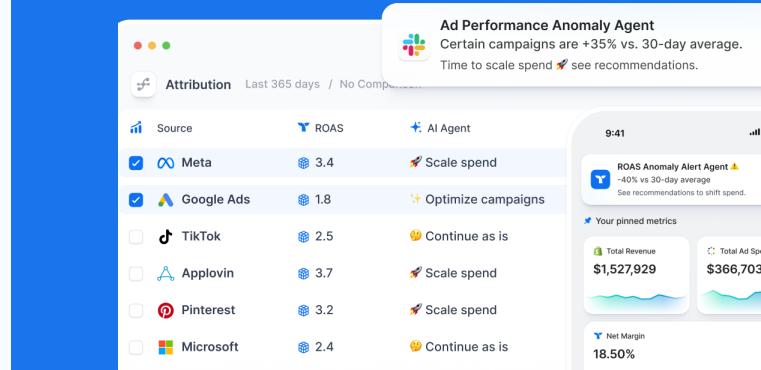
3. Uncover hidden opportunities to increase AOV and profitability

Driving up average order value is a proven way to scale revenue, but with multiple ad platforms and marketing strategies for each, it can be difficult to decipher which marketing efforts are making the biggest impact.

An AI agent will **synthesize sales data across all ad platforms** and leverage real-time insights to inform pricing and promotional strategies to enhance AOV on every order, ensuring each transaction contributes maximally to your bottom line. Tailored recommendations for pricing adjustments, upselling strategies, and promotional tactics to boost AOV are readily available to utilize and drive profit.

Save hours of manual analysis by implementing Moby Agents in your business today.

[Book a demo today](#)



PORTER MEDIA x PRODUCT ANALYTICS AGENT

70%
reduction in
weekly reporting
time across
client portfolio

20+
hours saved on
data analysis
and reporting

16%
increase in strategic
capacity to focus on
initiatives that drive
client results

Porter Media is a growth marketing agency specializing in paid acquisition and marketing for DTC brands, with a portfolio of companies ranging from \$1M to \$75M+ in annual revenue. With so many brands to manage and multiple key metrics to pull from Meta, Google, Klaviyo, and Shopify into their final reports for clients, Porter Media was wasting a collective 20 hours on Mondays just to create simple reports.

The agent-powered solution to reducing reporting time and data analysis was to use the **Monthly Pacing Targets Agent**, which pulled their clients' forecasted targets from Google Sheets to compare their actual performance against monthly goals. The target metrics for email revenue, blended ROAS, and other KPIs are presented in a structured format that makes goal tracking transparent and actionable. As a result, Porter Media was able to reduce their reporting time by 70% to save 16-20 hours per week, which gave them more time to focus on strategic analysis and other revenue-driving activities.

HIt started with realizing we were wasting a gross amount of time on processes that could be automated with **Moby Agents**, but now expanding that initiatives such as creative strategy, and media buying — to name a few. The list of what is possible with Moby Agents just keeps going and going. **T**



Allan Porter,
CEO



[→ Read the full case study here](#)

Custom Agents

Triple Whale has several agents available out of the box for you to use with your business, but you might need a specialized agent that can perform specific tasks. Not a problem, you can build your own agent in a few different ways:

Build With Steps, Build With Chat, or Deep Dive.

Build with steps

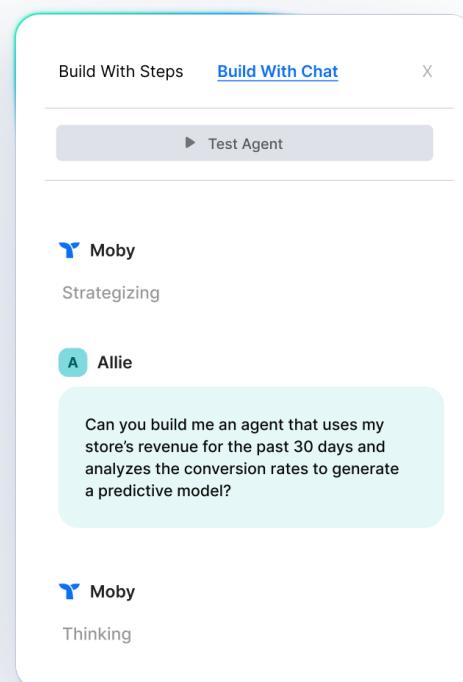
Triple Whale's custom agent builder will lead you through the steps required to create your agent:

- 1 Get data.** Access and import data from various sources.
- 2 Analyze data, add logic.** Transform raw data into meaningful insights or create conditional logic to make your agent smarter and more responsive.
- 3 Get a report.** Generate actionable insights and recommendations from the analyzed data.
- 4 Send to destinations.** Deliver your agent's outputs to the right people and platforms.

Build with chat

If you don't have time to build an agent step by step, Moby Chat is Triple Whale's AI data scientist that enables you to chat directly with your data to answer questions, build reports, and yes, even build custom agents.

In plain English, you can describe what data the agent should use to generate the information you seek.





Deep Dive

The most comprehensive agent builder is available in Deep Dive, where you can use natural language to request a report. Use Deep Dive to recruit, create, and save agents to give you contextually-relevant answers with clear action items and recommendations — all from a simple question.

Using a Retrieval-Augmented Generation (RAG) approach, Moby Chat (in Deep Dive mode) can answer hard business questions by either running a matching agent from the Agent Library or generating a custom Moby Agent for you. The agents can then be saved, allowing the analysis to be run on a regular basis.

You can either choose an existing prompt or write your own question to get started on the dive!

The screenshot displays the Triple Whale AI platform interface. At the top, there's a search bar labeled "Q Deep Dive". Below it, a message bubble contains the text: "Can you help me build a report of how my store is doing year-over-year and point to all the key insights I need to crush it going forward?". To the right of the message is a blue button with the text "Deep Dive".

Below the search bar, there's a section titled "YoY Performance & Grow Insights" which includes two cards:

- Spend (Last 90 Days)**: \$8,711,159.42 (Up 2.7%)
- Revenue (Last 90 Days)**: \$15,492,791.60

At the bottom of this section, there are filters: "Data Source" (Blended Data), "Data Range" (Last 7 Days), and "Dimensions" (None).

On the right side, there's a "Key Recommendations" section with three items:

- Reduce ad spend 30%**: Between 10pm and 7am to limit spend during low performing hours.
- Increase Daily Budget 25%**: on Monday and Wednesday to capitalize on strong new customer ROAS.
- Future Projection**: the revenue is expected to increase steadily, reaching around \$265,573 by September 2025.



Ready to transform your business with AI agents?

[Talk to our team today](#)

The Power of Automated Agent Workflows

The beauty of delegating projects to agents is that you can set them and forget them. Manually running analyses or waiting to check dashboards means you're always going to be one step behind.

By automating agent deployment, you can transform your business intelligence from a reactive tool into a proactive one. This section explores how to create a self-sustaining ecosystem of AI agents that deliver insights and take action with minimal human intervention.

1. Schedule regular agent runs

The most basic way to automate is to schedule your agents to run at specific intervals, to receive consistent intelligence without the need for a manual trigger. These can be set up in a few different ways:

- ⌚ **Time-based scheduling.** Set agents to run daily, weekly, monthly, or specific times that are aligned with your decision-making cycles – like having a marketing performance report ready for 7am on Monday mornings.
- 📅 **Event-based scheduling.** Configure agents to activate when specific events occur, like a ROAS anomaly detection agent that only runs when ROAS drops below a certain threshold.
- ⌚ **Conditional execution.** Create logic trees where agents only run when certain conditions are met, like a discount recommendation agent that runs when you have excess inventory for certain product SKUs.

2. Automate the distribution of insights

Insights are fantastic — if they reach the right people at the right time, and in the format they prefer.

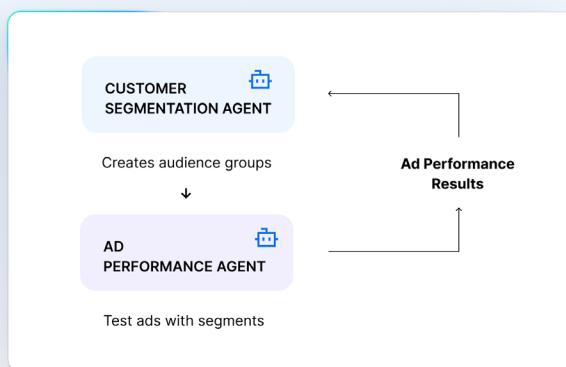
- ✉️ **Email digests.** Schedule an automated email report with agent insights.
- ># **Slack integration.** Push agent findings directly to relevant Slack channels.
- 📱 **Mobile notifications.** Configure push notifications for time-sensitive agents.
- 💻 **Dashboard refreshes.** Automatically update shared dashboards with the latest findings.

3. Set up agent-to-agent workflows

Multiple agents can be combined in cooperative workflows:

⌚ **Sequential processing.** An agent chain where the output from one agent becomes the input for another.

✍ **Feedback loops.**
System where agents learn from each other's performance.



❖ **Collaborative decision-making.**
Create a “mega agent” that enables multiple specialized agents to make complex decisions.

For example, a **Post-Purchase Survey Mega Agent** can pull the Post-Purchase Survey Report and Survey Response & Count Insights to holistically understand what led customers to purchase alongside order data and provide AI-generated suggestions for next steps.

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Discover what AI agents are, how they work, and why they're revolutionizing ecommerce and marketing.



Artificial intelligence (AI) has slowly integrated itself into the daily lives of many people.



Using AI in ecommerce can enhance personalization, automate customer service, and increase sales. Discover the latest strategies transforming online retail.

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The future of ecommerce is agentic

Agentic AI is poised to completely change the ecommerce landscape, along with changing the way many industries will operate in the future. This playbook only scratches the surface with the ways that AI agents can improve how brands acquire more website visitors, convert more customers, invest in retention strategies, and utilize data-backed insights to scale an efficient brand.

By implementing the strategies outlined in this playbook, you can transform previously fragmented data into actionable intelligence, and replace manual analysis with automated insights you can trust.

As agentic AI technology continues to develop and advance, we'd expect agents to handle increasingly complex tasks while providing you with more time to focus on creative strategy and business growth. The future belongs to the brands that can harness the power of agentic AI to make faster and smarter decisions across all aspects of their business.



Triple Whale is the agent-powered intelligence platform built for faster, more confident decisions across your entire brand.

Powered by AI agents that sit on top of a fully-managed data warehouse, proprietary identity resolution technology that uncovers rich customer behaviors other platforms miss, and powerful tools for customer acquisition, conversion, and retention, Triple Whale turns complex data into clear guidance for profitable growth.

More than 35,000 innovative brands like True Classic, OUAI, and OLIPOP trust Triple Whale to scale more efficiently.

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