Agent CEO User Manual

Welcome to Agent CEO

Agent CEO is your AI-powered business automation platform that provides strategic intelligence, operational automation, and comprehensive business management capabilities. This manual will guide you through all aspects of using the system effectively.

Getting Started

First Login

1. Navigate to your Agent CEO dashboard
2. Log in with your credentials
3. Complete the initial setup wizard
4. Configure your first AI agent

Dashboard Overview

The main dashboard provides: - **Agent Status**: Real-time status of all your AI agents - **Recent Tasks**: Latest task completions and progress - **Performance Metrics**: Key business performance indicators - **Quick Actions**: Shortcuts to common operations

Navigation

- **Agents**: Manage your AI agents
- **Tasks**: View and manage all tasks
- **Strategic**: Access strategic intelligence features
- **Email**: Manage email campaigns and automation

- **Data**: Upload and analyze business data
- **Social**: Manage social media presence
- **Workflows**: Create and manage automated workflows
- **Settings**: System configuration and preferences

Managing AI Agents

Creating Your First Agent

1. Click "Agents" in the main navigation
2. Click "Create New Agent"
3. Choose agent type:
4. **CEO Agent**: Strategic planning and decision-making
5. **Sales Agent**: Lead generation and sales automation
6. **Marketing Agent**: Content creation and campaign management
7. **Operations Agent**: Process automation and optimization
8. **Analytics Agent**: Data analysis and reporting
9. Configure agent settings:
10. **Name**: Give your agent a descriptive name
11. **Description**: Explain the agent's role
12. **Capabilities**: Select specific capabilities
13. **Personality**: Set communication style and tone
14. Click "Create Agent"

Agent Configuration

Each agent can be customized for your specific needs:

CEO Agent Configuration: - Strategic focus areas (growth, efficiency, innovation) - Decision-making authority levels - Reporting preferences - Risk tolerance settings

Sales Agent Configuration: - Target market segments - Lead qualification criteria - Communication templates - CRM integration settings

Marketing Agent Configuration: - Brand voice and tone - Content types and formats - Social media platforms - Campaign objectives

Monitoring Agent Performance

Track your agents' effectiveness through: - **Task Completion Rates**: Percentage of successfully completed tasks - **Response Times**: Average time to complete different task types - **Quality Scores**: AI-generated quality assessments - **Business Impact**: Measurable business outcomes

Task Management

Creating Tasks

1. Navigate to "Tasks" section
2. Click "New Task"
3. Fill in task details:
4. **Title**: Clear, descriptive task name
5. **Description**: Detailed task requirements
6. **Agent Assignment**: Choose appropriate agent
7. **Priority**: Set urgency level (Low, Medium, High, Urgent)
8. **Deadline**: Set completion deadline
9. **Input Data**: Provide necessary context and data
10. Click "Create Task"

Task Types by Agent

CEO Agent Tasks: - Strategic business analysis - Competitive intelligence reports - Market opportunity assessments - Decision support analysis - Crisis management planning

Sales Agent Tasks: - Lead generation campaigns - Sales email sequences - Prospect research - Sales forecasting - Customer relationship management

Marketing Agent Tasks: - Content creation (blogs, social posts, emails) - Campaign planning and execution - Brand monitoring - SEO optimization - Marketing analytics

Operations Agent Tasks: - Process optimization - Resource allocation - Performance monitoring - Workflow automation - Quality assurance

Analytics Agent Tasks: - Data analysis and reporting - Trend identification - Predictive modeling - Dashboard creation - Performance measurement

Monitoring Task Progress

Track task status through: - **Real-time Progress Updates**: See completion percentage - **Milestone Tracking**: Monitor key checkpoints - **Status Notifications**: Receive alerts for status changes - **Output Preview**: View preliminary results as they develop

Strategic Intelligence

Business Analysis

Get comprehensive insights into your business:

1. Navigate to "Strategic" section
2. Click "Business Analysis"
3. Select analysis type:
4. **SWOT Analysis**: Strengths, Weaknesses, Opportunities, Threats
5. **Competitive Analysis**: Market positioning and competitor insights
6. **Market Analysis**: Market size, trends, and opportunities
7. **Financial Analysis**: Performance metrics and projections
8. Provide business context:
9. Industry and market segment
10. Company size and stage

11. Current challenges and objectives
12. Available data sources
13. Review generated insights and recommendations

Strategic Planning

Create comprehensive business strategies:

1. Click "Strategic Planning"
2. Define planning parameters:
3. **Time Horizon**: 3, 6, 12, or 24 months
4. **Objectives**: Primary business goals
5. **Resources**: Available budget and personnel
6. **Constraints**: Limitations and requirements
7. Review generated strategic plan including:
8. Goal setting and prioritization
9. Resource allocation recommendations
10. Implementation timeline
11. Success metrics and KPIs
12. Risk assessment and mitigation

Decision Support

Get help with complex business decisions:

1. Navigate to "Decision Support"
2. Describe your decision scenario
3. List available options with parameters
4. Define evaluation criteria
5. Review analysis including:
6. Option comparison matrix

7. Risk assessment for each option
8. Recommendation with confidence score
9. Implementation considerations

Email Automation

Creating Email Campaigns

1. Go to "Email" section
2. Click "New Campaign"
3. Configure campaign settings:
4. **Campaign Name**: Internal reference name
5. **Subject Line**: Email subject (use variables for personalization)
6. **Template**: Choose from existing templates or create new
7. **Recipients**: Select email lists or segments
8. **Schedule**: Set send time or schedule for later
9. Customize content:
10. Use drag-and-drop editor for visual design
11. Add personalization variables ({{first_name}}, {{company}})
12. Include dynamic content based on recipient data
13. Preview across different devices and email clients
14. Test and send:
15. Send test emails to verify appearance
16. Review spam score and deliverability
17. Schedule or send immediately

Email Templates

Create reusable email templates:

Template Types: - **Welcome Series**: New customer onboarding - **Newsletter**: Regular company updates - **Product Announcements**: New feature or product launches - **Lead Nurturing**: Educational content for prospects - **Re-engagement**: Win back inactive subscribers

Template Best Practices: - Use clear, compelling subject lines - Include strong call-to-action buttons - Optimize for mobile devices - Maintain brand consistency - Test different versions for optimization

List Management

Organize your email contacts:

1. **Import Contacts**: Upload CSV files or sync with CRM
2. **Segmentation**: Create targeted groups based on:
3. Demographics (location, company size, role)
4. Behavior (email engagement, website activity)
5. Purchase history (customers, prospects, churned)
6. Custom fields (interests, preferences)
7. **List Hygiene**: Automatically manage:
8. Bounce handling and removal
9. Unsubscribe processing
10. Engagement-based segmentation
11. Compliance with email regulations

Data Analysis

Uploading Data

1. Navigate to "Data" section
2. Click "Upload Data"
3. Select file type:

4. **CSV Files**: Spreadsheet data
5. **Excel Files**: Multi-sheet workbooks
6. **JSON Files**: Structured data
7. **PDF Files**: Reports and documents
8. Configure analysis settings:
9. **Analysis Type**: Descriptive, trend, predictive, or comprehensive
10. **Key Columns**: Identify important data fields
11. **Time Periods**: Set date ranges for time-based analysis

Understanding Analysis Results

Your AI agent will provide:

Descriptive Statistics: - Data summary and overview - Key metrics and averages - Distribution analysis - Data quality assessment

Trend Analysis: - Growth patterns and trajectories - Seasonal variations - Anomaly detection - Forecasting projections

Insights and Recommendations: - Key findings and implications - Actionable recommendations - Risk factors and opportunities - Next steps for implementation

Creating Reports and Dashboards

1. Click "Create Report" after analysis
2. Select visualization types:
3. **Charts**: Line, bar, pie, scatter plots
4. **Tables**: Detailed data views
5. **Metrics**: Key performance indicators
6. **Text**: Narrative insights and explanations
7. Customize layout and design
8. Set up automated updates and sharing

9. Schedule regular report distribution

Social Media Management

Connecting Social Accounts

1. Go to "Social" section
2. Click "Connect Accounts"
3. Authorize platforms:
4. **Twitter/X**: Personal and business accounts
5. **LinkedIn**: Personal profiles and company pages
6. **Facebook**: Personal profiles and business pages
7. **Instagram**: Business accounts

Content Creation and Scheduling

1. Click "Create Post"
2. Write your content:
3. Use AI assistance for content generation
4. Optimize for each platform's best practices
5. Include relevant hashtags and mentions
6. Add images, videos, or links
7. Schedule posting:
8. **Immediate**: Post right away
9. **Scheduled**: Set specific date and time
10. **Optimal Timing**: Let AI choose best posting times
11. **Recurring**: Set up regular posting schedules

Content Calendar

Manage your social media strategy: - **Monthly View**: Overview of all scheduled content - **Platform Filtering**: View content by social platform - **Content Types**: Filter by post type (text, image, video) - **Performance Tracking**: See engagement metrics for published content

Analytics and Optimization

Track social media performance: - **Engagement Metrics**: Likes, shares, comments, clicks - **Reach and Impressions**: Audience size and visibility - **Follower Growth**: Track audience development - **Best Performing Content**: Identify successful posts - **Optimal Posting Times**: Data-driven scheduling recommendations

Workflow Automation

Creating Workflows

1. Navigate to "Workflows" section
2. Click "New Workflow"
3. Choose workflow type:
4. **Lead Processing**: Automatically handle new leads
5. **Customer Onboarding**: Welcome new customers
6. **Content Publishing**: Automate content distribution
7. **Data Synchronization**: Keep systems in sync
8. **Alert Management**: Automated notifications
9. Design workflow steps:
10. **Triggers**: What starts the workflow (new data, time-based, manual)
11. **Actions**: What happens (send email, create task, update database)
12. **Conditions**: When to take different paths
13. **Integrations**: Connect with external services

Workflow Templates

Use pre-built workflows for common scenarios:

Sales Workflows: - New lead notification and assignment - Follow-up email sequences - Deal stage progression - Customer feedback collection

Marketing Workflows: - Welcome email series for new subscribers - Social media cross-posting - Content approval and publishing - Campaign performance reporting

Operations Workflows: - New customer onboarding process - Support ticket routing and escalation - Inventory management alerts - Performance monitoring and reporting

Monitoring Workflow Performance

Track workflow effectiveness: - **Execution Statistics**: Success rates and completion times - **Error Tracking**: Failed executions and error patterns - **Performance Metrics**: Business impact of automated processes - **Optimization Suggestions**: AI-recommended improvements

Settings and Configuration

Account Settings

Manage your account preferences: - **Profile Information**: Name, email, company details - **Password and Security**: Change password, enable 2FA - **Notification Preferences**: Email and in-app notifications - **Time Zone and Locale**: Regional settings

System Configuration

Configure system-wide settings: - **AI Model Preferences**: Choose between GPT-4.5 and Claude 3 Opus - **Integration Settings**: API keys for external services - **Data Retention**: How long to keep historical data - **Backup Settings**: Automated backup preferences

Team Management

Manage user access and permissions: - **User Roles**: Admin, Manager, User, Viewer - **Permissions**: Control access to different features - **Team Collaboration**: Shared agents and workflows - **Audit Logs**: Track user activities and changes

Troubleshooting

Common Issues and Solutions

Agent Not Responding: 1. Check agent status in dashboard 2. Verify API key configurations 3. Review recent error logs 4. Restart agent if necessary

Task Failures: 1. Review task requirements and input data 2. Check agent capabilities match task needs 3. Verify external service connections 4. Retry with corrected parameters

Email Delivery Issues: 1. Check email service configuration 2. Verify sender authentication (SPF, DKIM) 3. Review content for spam triggers 4. Monitor delivery and bounce rates

Data Analysis Errors: 1. Verify file format and structure 2. Check for missing or corrupted data 3. Ensure proper column headers 4. Try smaller data samples first

Getting Help

- **In-App Help**: Click help icons throughout the interface
- **Documentation**: Access comprehensive guides and tutorials
- **Support Chat**: Real-time assistance during business hours
- **Community Forum**: Connect with other users and experts
- **Video Tutorials**: Step-by-step visual guides

Best Practices

- **Start Small**: Begin with simple tasks and gradually increase complexity
- **Monitor Performance**: Regularly review agent and system performance

- **Keep Data Clean**: Ensure high-quality input data for best results
- **Regular Updates**: Keep your configurations current with business changes
- **Security First**: Follow security best practices for API keys and data handling

Advanced Features

Custom Integrations

Connect with specialized business tools: - **CRM Systems**: Salesforce, HubSpot, Pipedrive - **Marketing Platforms**: Mailchimp, Constant Contact, ActiveCampaign - **Analytics Tools**: Google Analytics, Mixpanel, Amplitude - **Project Management**: Asana, Trello, Monday.com

API Access

For developers and advanced users: - **REST API**: Full programmatic access to all features - **Webhooks**: Real-time notifications for external systems - **SDKs**: JavaScript, Python, and other language libraries - **Custom Workflows**: Build specialized automation with code

Enterprise Features

Advanced capabilities for larger organizations: - **Single Sign-On (SSO)**: Enterprise authentication integration - **Advanced Security**: Enhanced encryption and compliance features - **Custom Deployment**: On-premises or private cloud options - **Dedicated Support**: Priority support and account management

This manual provides comprehensive guidance for using Agent CEO effectively. For additional help, consult the in-app documentation or contact our support team.