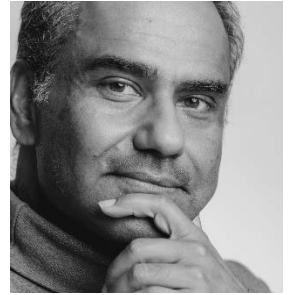


If you need help visit <https://nadeemazhar.com/ai-agent> and click “Build This With Me” button

AI Agent Build Checklist

Use this checklist to plan, set up, and safely test a simple AI agent for your business or team.



Before You Start

- Decide what job the AI agent will do
Example: write emails, summarize meetings, create marketing content, review documents, answer staff questions, or help prepare for sales calls.
- Pick one clear use case first
Do not try to build an AI agent that runs the whole business on day one.
- Choose the platform carefully
Use a reputable AI platform with business or team privacy controls when possible.

1. Pick One Job for the Agent

Choose one role for your first AI agent

Example: marketing assistant, meeting summarizer, sales follow-up assistant or client email helper.

Do not try to make one agent do everything

Start small. You can always build more agents later.

Write the agent’s job in one sentence

Example: “This agent helps our team turn raw notes into polished client follow-up emails.”

2. Protect Your Private Information First

Review the platform’s privacy settings before uploading documents

Turn off any setting that allows your information to be used for AI or LLM training

This may be called “model training,” “improve the model,” “chat history and training,” or “improve services.”

Do not upload passwords, banking information, payroll records, private HR files, or sensitive client data

Decide who inside your business should have access

3. Give the Agent the Right Business Knowledge

Add your specific information

Who you are, what you do, who you serve, and what makes you different along with any info that a person would need in this role.

Include examples. Most people miss this.

4. Give the Agent Clear Instructions

Tell it what role it plays

Example: “You are a private business assistant for our company.”

Tell it what it can help with

Example: draft emails, summarize meetings, organize notes, create first drafts, or prepare talking points.

Tell it what it should not do

Example: do not make legal, financial, HR, or security decisions.

Tell it not to guess

If information is missing, it should ask a question instead of making something up.

5. Test It Before You Trust It

Ask it to complete one real task

Review anything before it goes to a client, employee, vendor, or prospect

Final rule:

AI creates the first draft. A human makes the final decision.

Tip: If you have ChatGPT Plus plan, you can use existing GPTs to reuse what others have already developed to help speed things in creation of your agent.