

A SELF-PACED GUIDE

Onboarding Playbook

From chatting with AI to running a business on it — what to know before you start, what we do and don't teach, and where to go for the rest.

READ AT

Your own pace

APPLIES TO

Every Agentic OS client

FORMAT

Six sections + glossary

HOW TO USE THIS DOCUMENT

This is yours to read at your own pace — there's no scheduled session where we walk you through it. Work through it in one sitting or over a few days, in whatever order is useful. Section 0 tells you when to start; the rest builds from there.

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Six sections, in the order they matter

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0 Your core sales asset comes first

Everything else in this playbook is secondary until your website — or whatever is the primary place customers land — is live. The Agentic OS dashboard, your agent roster, and everything that runs on top of it needs something to run *against*. Your site is the supply-side foundation; the platform is the engine that operates on top of that foundation once it exists.

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Practical rule: if your site isn't live or in final review yet, read Sections 1 through 3 now for context — but don't expect Sections 4 and 5 to fully click yet. Come back to them once it's live.

1 Questions worth answering for yourself

You don't need to send us answers to these. They're here so you walk into the platform with a clear picture of where you're starting from — there's no wrong answer to any of them.

A · Your AI experience today

- 1 Which AI chat tools have you actually used — and for how long?
- 2 What have you used them for: brainstorming, writing, planning, outlining a business, generating images, writing code, something else?
- 3 Has an AI tool ever *done* something for you beyond writing text back — booked something, sent an email, posted to social, touched a file on your computer? If so, how did it go?
- 4 On a scale of "I mostly copy-paste answers into a doc" to "I've chained multiple AI steps into a workflow" — where are you?

B · The agent platform underneath your dashboard

- 1 Have you taken any course or structured training on the underlying agent platform your dashboard runs on?
- 2 Do you understand, in your own words, what a "workspace" or "venture" is and why your business might have more than one?
- 3 Have you ever created, edited, or enabled/disabled an agent yourself?
- 4 Do you know the difference between an agent's *skill* (what it's allowed to do) and a *task* (a specific thing you asked it to go do)?

C · The agent runtime that actually executes work

- 1 Have you taken any course or training specifically on how the agent runtime that powers your dashboard works?
- 2 Do you know how you'd hand it a task today, and how you'd check whether it finished?

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- 3 Do you know what an "approval gate" is and why some agent actions wait for your go-ahead instead of happening automatically?
-
- 4 Are you aware agents can learn new skills over time, and that you — not the AI — approve a learned skill before it goes live?

D · Email / calendar / drive / social integrations

-
- 1 Do you understand what "draft-only" access means — an agent can prepare something but can't send or post it unless you've explicitly turned that on?
-
- 2 Have you connected your business accounts (email, calendar, drive, social platforms) to the platform yet? Which ones, which are still pending?
-
- 3 Do you know what OAuth is, in plain English — "I'm granting this specific app permission to act on my account, and I can revoke that any time"?
-
- 4 If an agent drafts something for your social account, do you know where you'd go to review it before it goes live, and how you'd stop it?

E · Your business, in your own words

-
- 1 In one sentence, what does your business actually sell?
-
- 2 Who is the customer — be specific, not "everyone who might want this"?
-
- 3 What's working today to bring in customers, even in a small or informal way?
-
- 4 What's the single biggest bottleneck right now — getting found, getting trusted, converting interest into a sale, or something else?

F · Website / core sales asset status

-
- 1 Is it live, in progress, or not started?
-
- 2 If in progress, what's the blocker — content, design, a decision you haven't made yet, something on our end?
-
- 3 Once live, who's the first audience you're sending to it?

G · Technical comfort

-
- 1 Have you ever used a command line / terminal for anything, even once?
-

- 2 Have you heard of or used Claude Code before?
 - 3 If something on the dashboard breaks or looks wrong, is your instinct to try to fix it yourself, or to flag it and wait?
-

H · Time and learning style

- 1 Realistically, how many hours a week can you put toward learning this platform, separate from running the business day to day?
 - 2 Do you learn best from short videos, written guides, or working through it hands-on?
 - 3 Is there anyone else on your team who should also work through this playbook?
-

READ THIS ONE CAREFULLY

2 What we do — and don't — teach

“

Our job is to build and operate the Agentic OS platform for you. We make sure it's live, your integrations stay connected, and the dashboard components we built are working. That's the deliverable, and we stand behind it.

We do not teach, coach, or train on the underlying products we didn't build — the agent platform, the agent runtime, the local model tooling underneath it, AI agents in general, how to write a good agent task, social media strategy, go-to-market strategy, or "best practices" in any domain outside the platform's operation. Those are real skills, worth learning, but they're not something we're positioned to coach you through — we're your platform builder and operator, not a business or AI-literacy coach.

We are also not responsible for changes, updates, upgrades, or new model releases made by AI LLM providers, AI third parties, or other external vendors. The platform depends on models, APIs, and services we don't own or control. When a provider changes how a model behaves, deprecates a feature, updates pricing, or ships a new model version, that's outside our control and outside our responsibility — we'll do our best to adapt the platform around it, but we can't guarantee any specific third-party AI product will behave identically over time.

When you're not sure who owns a question

ASK US

- ✓ "How does this button or feature work?"
- ✓ Anything about the dashboard components we built
- ✓ Whether an integration is connected correctly

NOT OURS TO TEACH

- ✗ "How do I write a task so the agent does what I want?"
- ✗ "What should my marketing strategy be?"
- ✗ "How do I run this business?"

✓ Reporting something that looks broken

✗ General AI-agent or GTM best practices

For the second column — see Section 3, and remember: the chat inside your own dashboard is a live AI conversation. You can literally ask it to explain itself.

2a Scope, fees & changes to the platform

Your **monthly licensing and support** keeps the platform you were delivered running: it stays live, your integrations stay connected, and the components we built keep working. It does **not** include new work.

“

Any changes, removals, upgrades, or updates to the Agentic OS platform are not part of monthly licensing and support. New features, new agents or integrations beyond what was delivered, redesigns, model migrations you request, and similar work are **billed separately, per project**, on a **50% upfront / 50% on delivery** basis. Work on a change request begins only after the change is scoped in writing and the 50% deposit is received.

INCLUDED IN MONTHLY

- ✓ Platform stays live
- ✓ Delivered integrations stay connected
- ✓ Delivered components keep working
- ✓ Support on operating what you have

BILLED PER PROJECT (50 / 50)

- ✗ New features or agents
- ✗ New integrations beyond delivery
- ✗ Redesigns & model migrations
- ✗ Any change, upgrade, or removal

The full terms — support scope, exclusions, intellectual-property and data ownership, acceptable use, and your responsibility for your own third-party accounts — live in the **Master Terms & Client Acknowledgment**, which you sign separately. This section is a plain-language summary; the Master Terms control.

3 Where to actually learn this stuff

Not exhaustive — a starting point.

AI & agent literacy

The model provider's own documentation, short applied courses on prompt engineering and agent-building, and creators who build in public with AI agents and coding assistants — faster-moving than formal courses.

Running the business itself

A lean business-plan or business-model-canvas exercise forces the "what do I sell, to whom, why me" answers no platform can invent for you. Pair it with basic small-business financial literacy.

Marketing — matters most

Fundamentals of content marketing, basic paid acquisition, and email marketing. Go deep on the two or three channels where your customers actually are, not shallow across all of them.

If you want to build yourself

Claude Code's own onboarding materials are free and self-paced. No course is needed to use the dashboard day to day — this is only for going further, on your own initiative.

EACH STAGE ASSUMES THE LAST ONE IS GENUINELY DONE

4 From chatting with AI to running a business on it

0

Core sales asset live

Non-negotiable prerequisite — see Section 0.

1

Orientation to the dashboard

Not a course — get familiar with what's already running: which agents are active, what "approval gate" and "needs your attention" mean, where to look when something needs a decision.

2

The mental shift — chat vs. task

A chat is a conversation that ends when the window closes. A task is a delegation: you state an outcome, an agent works toward it, and something comes back for your review or runs within limits you've approved. The single biggest mental-model gap coming from chat-only tools.

3

Feeding the platform your business

The agents are only as good as what they know about your business. This is your work: what you sell, who the customer is, what tone to use, what's true about your operation.

4

Building further, if you want to · OPTIONAL

Beyond the pre-built agent roster — customizing behavior, scripting something new. Opt-in, not baseline onboarding.

5

The growth loop

Agents handle execution — drafting, triage, research, content, scheduling. You handle strategy and reading the market. Marketing is the connective tissue between the two.

READ THIS ONE TWICE

5 The honest framing

“

This platform puts you dramatically further ahead than starting from zero with the raw underlying tools. You didn't have to figure out agent architecture, credential handling, integration tooling, or how to wire your accounts into an agent safely — that's built, tested, and running for you. Most people never get past that setup phase on their own.

But no platform — this one included — builds you a business. It doesn't create market demand, and it doesn't replace having an actual business plan that builds real supply against that demand. The tools can execute faster than you could alone; they can't decide what's worth executing. That's still on you.

And once your product or service is actually live: **marketing is one of the most crucial parts of what comes next.** A great product with no one hearing about it doesn't sell itself, agents or not. Don't treat marketing as an afterthought once the platform's running — it's one of the first things to get real attention once you're live.

Glossary

Agent

A configured AI worker with a defined role, a set of allowed tools, and a scope of authority you control.

Skill

What an agent is permitted to do — separate from any individual task.

Workspace / venture

An isolated environment for one business or brand, with its own agents, credentials, and memory.

OAuth

The standard way you grant a specific app permission to act on an account you own, revocable any time.

Task

A specific, bounded delegation you give an agent, with a start and an end.

Approval gate

A checkpoint where an agent's action pauses for your explicit go-ahead before it happens.

Draft-only access

An integration mode where an agent can prepare something but cannot send or publish it without you.

ONE MORE THING

Reading this on your own

- Section 1 isn't a form to fill out and submit — it's a warm-up. Let your honest answers shape how much time you spend in Sections 2–4.
- If your answers in Section A show you've never had an AI take a real-world action before, slow down on Stage 2 in Section 4 — that's the whole ballgame.
- If Section F shows your core sales asset isn't close to live, that's genuinely fine — bookmark Sections 4 and 5 and come back once it is.
- Keep your own notes from Section E somewhere — they're the raw material for Stage 3, not just background reading.

Client acknowledgment

By signing below, you confirm that you have received and read this Agentic OS Onboarding Playbook, that you understand it is informational and reflects best-effort opinions rather than professional advice or any guarantee of results, and that the binding terms of the relationship are set out in the separately signed **Master Terms & Client Acknowledgment**.

SIGNATURE

CLIENT SIGNATURE

PRINTED NAME

COMPANY

DATE

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Disclaimer — continued

Not the only way

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