



AIXP CONFERENCE 2026 | HOUSTON, TX

Build Your First AI Agent

Live in 60 Minutes

WORKSHOP KIT

Built on the AI Agent Playbook™ 5-Step Framework

Presented by Reme Ekoh

Founder, Autegy AI | autegy.com

Platform: Voiceflow | No Coding Required

*Everything you need to follow along is in this kit.
Pre-written prompts included — type or copy-paste.*

BEFORE WE BUILD

Meet NextStep Consulting

Today you're building an AI agent for a fictional company. This is the scenario we'll use throughout the session.

THE CLIENT

NextStep Consulting is a 12-person management consulting firm based in Houston. They specialize in digital transformation, change management, and process optimization. Their website gets 50–70 inquiries per week — a mix of potential clients, existing clients, and general questions.

Right now, a junior consultant manually answers every inquiry. It takes 15–20 hours per week. They want an AI agent that can: answer common questions about their services, qualify potential leads by asking the right questions, and know when to escalate to a human consultant.

WHAT YOU'LL BUILD TODAY

A working AI agent on Voiceflow that:

- Greets visitors and understands what they need
- Answers questions about NextStep's services using a knowledge base
- Qualifies leads by collecting key information
- Escalates complex requests to a human
- Is deployed to a live, shareable link anyone can test

Pre-Session Setup

Complete these before the session starts. It takes 2 minutes.

1. Go to voiceflow.com and click **Get Started Free**.
2. Create an account with your email or Google. No credit card required.
3. You'll land on the All Projects dashboard. You're ready.

FREE PLAN DETAILS

The free plan gives you \$5.00 in AI credits. At ~\$0.01 per message, that's roughly 450+ messages. More than enough for today's workshop. No upgrade needed.

1 Design AI-First Experiences

Before you touch a tool, you need to answer one question: what problem does this agent solve?

NextStep's problem is clear: 50–70 inquiries per week, most of which are routine. A junior consultant spends 15–20 hours per week on them. The agent should handle the routine ones and route the complex ones to a human.

That's an AI-first experience: the default path is AI, and humans handle the exceptions.

NOW BUILD IT:

4. From the All Projects dashboard, click the blue **New project** button (top right).
5. In the Create new project dialog, fill in:

Name	NextStep Assistant
Type	Webchat (already selected by default)
Framework	Agentic (already selected by default)
Objective	Resolution (already selected by default)

6. Leave the Prompt field empty for now — we'll write it in the next step.
7. Click **Start from scratch** (not "Generate project" — we're building intentionally, not auto-generating).

YOU SHOULD NOW SEE

The Agent page with two sections: Global prompt and Instructions.

The left sidebar with: Agent, Knowledge base, Behaviour, Playbooks, Workflows, Tools, and more.

The top bar shows: Claude 4.5 - Haiku (your AI model), Share, Run, and Publish buttons.

2 Create Personality, Not Just Prompts

The Global Prompt defines who your agent is — every single response will be shaped by what you write here. This isn't just instructions. It's personality, tone, boundaries, and purpose.

NOW BUILD IT:

You should be on the Agent page. Find the Global prompt section. Clear the placeholder text and paste this:

```
# Persona
You are Ava, the virtual assistant for NextStep Consulting, a management consulting firm based in Houston, TX. You are professional, warm, and knowledgeable. You speak like a helpful colleague – not a robot and not a salesperson. You are confident but honest: if you don't know something, you say so and offer to connect the visitor with a human consultant.

# Goal
Help website visitors get answers about NextStep's services, determine if they're a potential client, and route them to the right next step – whether that's more information, a consultation booking, or a human handoff.

# Tone
Professional but approachable. Use clear, concise language. Avoid jargon unless the visitor uses it first. Never be pushy about sales. Be genuinely helpful first – the business outcomes follow naturally.

# Guardrails
• Never make up services, pricing, or timelines that aren't in the knowledge base
• Never discuss competitors by name
• Never share internal company information
• If a visitor seems frustrated, acknowledge it and offer a human handoff immediately
• Keep responses under 3 sentences unless more detail is clearly needed
```

Now scroll down to the Instructions section. Clear the placeholder and paste this:

```
# Starting Message
Greet the visitor warmly. Introduce yourself as Ava from NextStep Consulting. Ask how you can help today. Offer buttons: "Learn about our services", "Book a consultation", "I have a question".

# Skills
- Service Questions: use the knowledge base when the visitor asks about NextStep's services, approach, industries, or capabilities
- Lead Qualification: use the Lead Qualifier playbook when a visitor expresses interest in working with NextStep
```

WHY THIS MATTERS

Notice the structure: Persona, Goal, Tone, Guardrails. This isn't random — it's a pattern.

Persona defines WHO the agent is. Goal defines WHAT it's trying to accomplish.

Tone defines HOW it communicates. Guardrails define what it must NEVER do.

This pattern works on any platform, any model. It's not Voiceflow-specific — it's agent design.

3 Craft & Test Intelligent Dialogues

Your agent has a personality and instructions. Now give it knowledge and skills. This step has two parts: the Knowledge Base (what it knows) and a Playbook (what it can do).

PART A: ADD THE KNOWLEDGE BASE

1. In the left sidebar, click **Knowledge base**.
2. Click the blue **Add data source** button.
3. Select Plain Text and paste the content below (this is NextStep's service information):

NEXTSTEP CONSULTING – SERVICE OVERVIEW

About Us:

NextStep Consulting is a Houston-based management consulting firm founded in 2018. We help mid-market companies (50-500 employees) navigate digital transformation, organizational change, and operational improvement. Our team of 12 consultants brings experience from industries including healthcare, energy, financial services, and technology.

Our Services:

1. Digital Transformation Strategy
We assess your current technology stack, identify gaps, and build a roadmap for modernization. Typical engagements run 8-12 weeks. Starting at \$25,000.
2. Change Management
We help your people adopt new tools and processes. Includes stakeholder analysis, communication planning, training design, and adoption tracking. Typical engagements run 12-16 weeks. Starting at \$35,000.
3. Process Optimization
We map your current workflows, identify bottlenecks, and redesign for efficiency. Often includes automation recommendations. Typical engagements run 6-8 weeks. Starting at \$15,000.
4. AI Readiness Assessment
New offering. We evaluate whether your organization is ready to adopt AI, identify high-impact use cases, and build a phased implementation plan. Typical engagements run 4-6 weeks. Starting at \$20,000.

How We Work:

- Free 30-minute discovery call to understand your situation
- Custom proposal within 5 business days
- Dedicated project lead for every engagement
- Bi-weekly progress reviews with your leadership team

Contact: hello@nextstep.consulting | (713) 555-0142

4. For this session, we won't bother about LLM chunking strategy, Source URL, Folder, and Metadata.
5. Click Import. The knowledge base will process and index the content.

PART B: CREATE A PLAYBOOK

Playbooks are goal-based skills. The agent decides when to use them based on the conversation. We'll create a Lead Qualifier playbook.

1. In the left sidebar, click **Playbooks**.
2. Click the blue **New playbook** button (top right).
3. Configure it:

Name	Lead Qualifier
Description	Qualifies potential clients by collecting their company size, challenge, timeline, and budget range, then offers to book a discovery call.

4. In the playbook instructions editor, paste:

```
# Goal
Qualify the visitor as a potential client for NextStep Consulting by
understanding their situation, needs, and readiness to engage.

# Steps
1. Ask about their company: what they do, how many employees, what industry
2. Ask about their challenge: what problem they're trying to solve
3. Ask about timeline: when they want to get started
4. Ask about budget: whether they have a budget range in mind (phrase this
gently - "to make sure we're a good fit, do you have a budget range?")
5. Once you have all four, summarize what you heard and offer to book a
free 30-minute discovery call

# Rules
• Ask ONE question at a time - never stack multiple questions
• If the visitor seems hesitant about budget, don't push - say it's fine
to discuss on the call
• If their needs clearly don't match our services, be honest about it
```

PART C: FIRST TEST

1. Click Agent on the sidebar
2. Click the blue **Run** button (top right). A chat window opens.
3. Try these test messages:

TEST CONVERSATIONS

“Hi, what services do you offer?” → Should answer from knowledge base

“How much does a digital transformation engagement cost?” → Should cite \$25K starting price

“We’re a 200-person healthcare company looking to modernize our systems” → Should trigger Lead Qualifier playbook

“Can I speak to a human?” → Should offer a graceful handoff

Did it work? Great.

If anything felt a bit off. That’s expected — the next step is about fixing exactly that.

4 Design for Intelligent Failure

Every agent will encounter questions it can't answer, users who are confused, and edge cases you didn't anticipate. The difference between a good agent and a bad one isn't whether it fails — it's HOW it fails.

NOW BUILD IT:

Go back to the Agent page (click Agent in the left sidebar). Add these lines to the bottom of your Global prompt:

```
# When You Don't Know
If a question isn't covered in the knowledge base, say: "That's a great question - I want to make sure you get the right answer. Let me connect you with one of our consultants." Then offer contact options.

# When the Conversation Goes Off-Topic
If someone asks about unrelated topics (weather, sports, personal advice), gently redirect: "I'm best at helping with consulting and business transformation questions. Is there something along those lines I can help with?"

# When Someone Is Frustrated
Acknowledge it immediately. Don't defend. Don't explain. Say: "I hear you, and I'm sorry this isn't going smoothly. Let me get you to someone who can help directly." Offer human handoff.
```

TEST THE FAILURE MODES:

1. Click **Run** again. Try these edge cases:
2. "Do you offer marketing services?" → Should admit it's not a service they offer
3. "What's the weather in Houston?" → Should redirect politely
4. "This is really frustrating, I've been going back and forth" → Should acknowledge + offer human
5. "Tell me about your competitor Deloitte" → Should decline per guardrails

THE PRINCIPLE

Intelligent failure means the agent always has a next step. It never says "I don't know" and stops. It either answers, redirects, or escalates. Every path leads somewhere useful. This is what separates an agent from a chatbot.

5 Orchestrate AI-Human Collaboration

The best AI agents don't replace humans — they make humans more effective. This final step is about defining where AI ends and humans begin, and deploying your agent to the real world.

PART A: PUBLISH YOUR AGENT

1. Click the green **Publish** button (top right of the screen).
2. In the Publish dialog, select Production as the environment.
3. Click Publish. Your agent is now LIVE!.

PART B: DEPLOY YOUR AGENT

8. Click the **Share** button (top bar, next to Run).
9. In the dropdown, select Production from the environment selector.
10. Click the blue **Copy link** button.
11. Open the link in a new tab. You'll see your agent live on a Voiceflow-hosted page.
12. Send the link to someone. They can talk to your agent right now.

YOU JUST DEPLOYED AN AI AGENT

That link is live. Anyone with the URL can talk to your agent.

It answers questions from the knowledge base. It qualifies leads. It knows when to escalate.

It took 60 minutes. No code. No server. No API keys.

This is what “deployed” means.

BONUS: WEBSITE EMBED (AFTER THE SESSION)

When you're ready to put this on a real website:

- In the left sidebar, click Widget
- Copy the JavaScript code snippet from the Installation section
- Paste it before the closing `</body>` tag on your website
- Customize colors, launcher style, and branding in the Appearance & style section

The widget shows up as a chat bubble in the bottom-right corner of your site.

THE FRAMEWORK

The AI Agent Playbook™

The five steps you just followed aren't random. They're a repeatable framework for building AI agents that actually work in production.

#	Step	What You Did Today
1	Design AI-First Experiences	Defined the problem, created the project, chose the right framework
2	Create Personality, Not Just Prompts	Wrote a Global Prompt with Persona, Goal, Tone, and Guardrails
3	Craft & Test Intelligent Dialogues	Added a Knowledge Base + built a Lead Qualifier Playbook
4	Design for Intelligent Failure	Added graceful fallbacks for unknowns, off-topic, and frustration
5	Orchestrate AI-Human Collaboration	Defined escalation paths, published, and deployed to a live link

This framework works on any platform — Voiceflow, Claude, custom code, anything. The principles are universal. The tools are interchangeable.

Get the Full AI Agent Playbook™ Pro Pack

Templates, frameworks, and advanced guides for building production AI agents.

FREE DOWNLOAD
playbook.reme.work/pro

WHAT'S NEXT AT AIXP

If you enjoyed this workshop, the Claude Track goes deeper:

Level 1: Claude Unlocked — Chat smarter, collaborate with Projects, build with Artifacts (Today, 2:00 PM)

Level 2: Agent Mode Activated — Build AI workflows with Cowork, ship professional deliverables (Tomorrow, 11:00 AM)

Level 3: Claude at Scale — Multi-agent systems, APIs, production AI with Managed Agents (Tomorrow, 1:30 PM)

CONNECT

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