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JOSHUA AGUIRRE · CEO, CRESSIO

THE HIVE
Virginia Beach Business Resource Center

Cressio

THE HIVE × CRESSIO · HANDS-ON WORKSHOP

Beyond ChatGPT

AI Agents for Business Operations

THURSDAY, NOVEMBER 5 · 9:30 TO 10:30 AM · THE HIVE, VIRGINIA BEACH

BBB ACCREDITED BUSINESS

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Welcome. Let's meet.

Open your laptop and sign in to the AI assistant you already use. ChatGPT, Claude, Gemini or Copilot all work today.

> **Your name, your business, and the one task you would hand to a new hire tomorrow morning.**

WHO IS TEACHING

Joshua Aguirre

CEO, CRESSIO · AI SYSTEMS ARCHITECT

An AI systems firm serving 500+ organizations since 2012. Clients own their agents outright. No vendor lock-in.

BBB AI HUB TRAINER

Teaches Mastering ChatGPT and the owner-level AI classes for the Better Business Bureau's AI Hub.

OPERATOR FIRST

Automation since 2014, AI since 2022. Over $5M saved or generated for clients in construction, real estate, nonprofits and finance.

SoCo Business Digest 40 Under 40, 2026.

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THE PROMISE

One hour. Three things you take back to the office.

ONE WORKFLOW WORTH AUTOMATING

Scored, not guessed. You will rate two real jobs from your business and pick the one that pays off first.

ONE WORKING AGENT

Built in the assistant you already use: a job, standing instructions, one real example, and a gate.

ONE SET OF GUARDRAILS

What it may read, what it may send, and who approves. Written down before it touches customer data.

Move from AI experimentation to practical implementation.

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WHAT BEYOND CHATGPT MEANS

A chat answers. An agent does a job.

CHAT

You type, it answers

Starts from zero every time

You do the remembering and the checking

VS

AGENT

Has a job and standing instructions

Keeps your examples and your rules

Runs from a trigger to a result

Stops at a gate you set

Beyond the chat window, not beyond the tool you already pay for.

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ANATOMY OF AN AGENT

Five parts. Every agent you will ever use has them.

01

Trigger

What starts it. A new email, a form, a calendar event, or you pressing go.

02

Agent

The job and the standing instructions. Who it is, what good looks like.

03

Tools

What it may touch. Your files, the web, a spreadsheet, your inbox.

04

Result

What comes out. A draft, a sorted list, a filled form, a summary.

05

Human gate

Who looks before it leaves. In your business, that is you or someone you name.

If it has no gate, it is not ready for your business.

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PART 1 · 8 MINUTES

Identify workflows worth automating

Not the flashiest idea. The one that pays off first.

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THREE FILTERS

Pick the first win with three filters.

IMPACT

Does it save hours, protect revenue, or make a customer happier this month?

REPETITION

Does it happen often enough that a fix compounds? Weekly beats quarterly.

REVIEWABLE RISK

Can a person check the result before anything consequential happens?

HIGH IMPACT × HIGH REPETITION × REVIEWABLE RISK

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SCORE IT · HANDOUT, TOP SECTION

Score two workflows before you build one.

01	Urgent: it costs you time this week, not someday.
02	Repetitive: you have done it the same way at least ten times.
03	Clean inputs: the facts live in an email, a form, or a document you can hand over.
04	Low risk: a wrong draft is embarrassing, not expensive. A person reviews before it leaves.
05	Measurable: you can say how long it takes now and what done looks like.

Score two workflows, 1 to 5 each. The higher total is the one you build today. Five minutes.

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WHERE AGENTS PAY OFF FIRST

Three places most owners find their first agent.

CUSTOMER FOLLOW-UP

Trigger: a lead goes quiet or an invoice ages.
Job: draft the next touch in your voice.
Gate: nothing sends until you read it.

INTAKE AND TRIAGE

Trigger: a new inquiry lands.
Job: pull out what matters, score it, draft the first reply.
Gate: you decide who gets a call.

NOTES AND REPORTING

Trigger: a meeting ends or the week does.
Job: turn notes into decisions, owners and dates.
Gate: you approve before it goes to the team.

Real inputs only. A made-up example teaches you nothing you can use tomorrow.

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PART 2 · 25 MINUTES

Get hands-on with AI agents

Watch one get built. Then build yours.

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BUILD IT IN 20 MINUTES

Five steps, same in every assistant.

01

Name the job

One sentence. Quiet-lead follow-up. Inquiry triage. Meeting notes to actions.

02

Instructions

Who it is, what it is for, the rules. The template is on your handout.

03

One example

Upload one real file: your best past email, proposal or set of notes.

04

Set the gate

Draft only. It never sends, posts or pays. You approve every result.

05

Test it

Run one real input. Fix one instruction. Run it again.

Custom GPT in ChatGPT · Project in Claude · Gem in Gemini · Agent in Copilot. Same five steps.

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THE INSTRUCTIONS MAKE THE AGENT

Same job, two sets of instructions.

THE USUAL WAY

"Help me follow up with customers."

Generic. Sounds like every other vendor.

You rewrite most of what it gives you.

VS

STANDING INSTRUCTIONS

You are the office manager at a six-person HVAC company.
When I paste a thread, draft the next follow-up in our voice, under 100 words, one clear next step, no discounts.
Use the attached examples as the standard.
If anything is missing, ask me before you draft.

Persona, context, job, rules, and permission to ask. Write it once, reuse it every day.

20 MINUTES · BUILD

Your turn.

Use the agent worksheet on your handout. Build the workflow you scored highest.

> **Name it. Paste the instructions. Add one real example. Set it to draft only. Run one real input and fix one thing.**

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PART 3 · 7 MINUTES

Protect business data with human oversight

The rules that let an agent into your business without giving it the keys.

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THREE GATES

Decide these before it touches a customer.

WHAT IT CAN READ

Only the files you hand it. Never customer financials, health details, passwords or anything under contract.

WHAT IT CAN SEND

Nothing, until it has drafted twenty in a row you would have sent unchanged. Then one channel at a time.

WHO APPROVES

A named person, every time. If the approver is nobody, the answer is not yet.

Human oversight is a setting you choose, not a hope.

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ETHICS AND GUARDRAILS

Five rules before it leaves the building.

01 Privacy first: no customer financials, health details or passwords in a prompt or a file.

02 Responsibility: a human names the goal and judges the result. Every time.

03 Intent: tell people when AI drafted it, if they would want to know.

04 Model fit: the right size tool for the job. Not every task needs the biggest model.

05 Equity: check the draft for who it leaves out or talks down to.

That is the PRIME policy. It is on your handout.

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AVOID VENDOR LOCK-IN

Before you subscribe, make sure you can leave.

EXPORTABILITY

Can you take your instructions, examples and history with you, in a format another tool reads?

PRICING CLARITY

Do you know what next month costs before next month?

30-DAY EXIT

If you cancelled today, what breaks in your business a month from now?

If it is not portable, it should not be a core tool.

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6 MINUTES · SHARE

Show us your agent.

Two volunteers, two minutes each.

> **The workflow. The agent. What it got wrong on the first run. The gate you set.**

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THE NEXT-MORNING PLAN

Make it work tomorrow.

01 Run it on the first real one tomorrow at 8 AM. Fifteen minutes on the calendar.

02 Keep it on draft only for twenty runs. Count them on the worksheet.

03 Log every miss. The misses are your next instruction.

04 Fix one instruction at a time, then run it again.

05 Name the approver and tell your team where the agent lives.

> **An agent is a workflow you have reviewed twenty times.**

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TAKE IT WITH YOU

Get the templates.

The agent worksheet, the AI Fit Finder, the PRIME policy and the vendor scorecard. Scan, enter your email, and they are yours.

forms.cressio.ai/ai-toolkit

