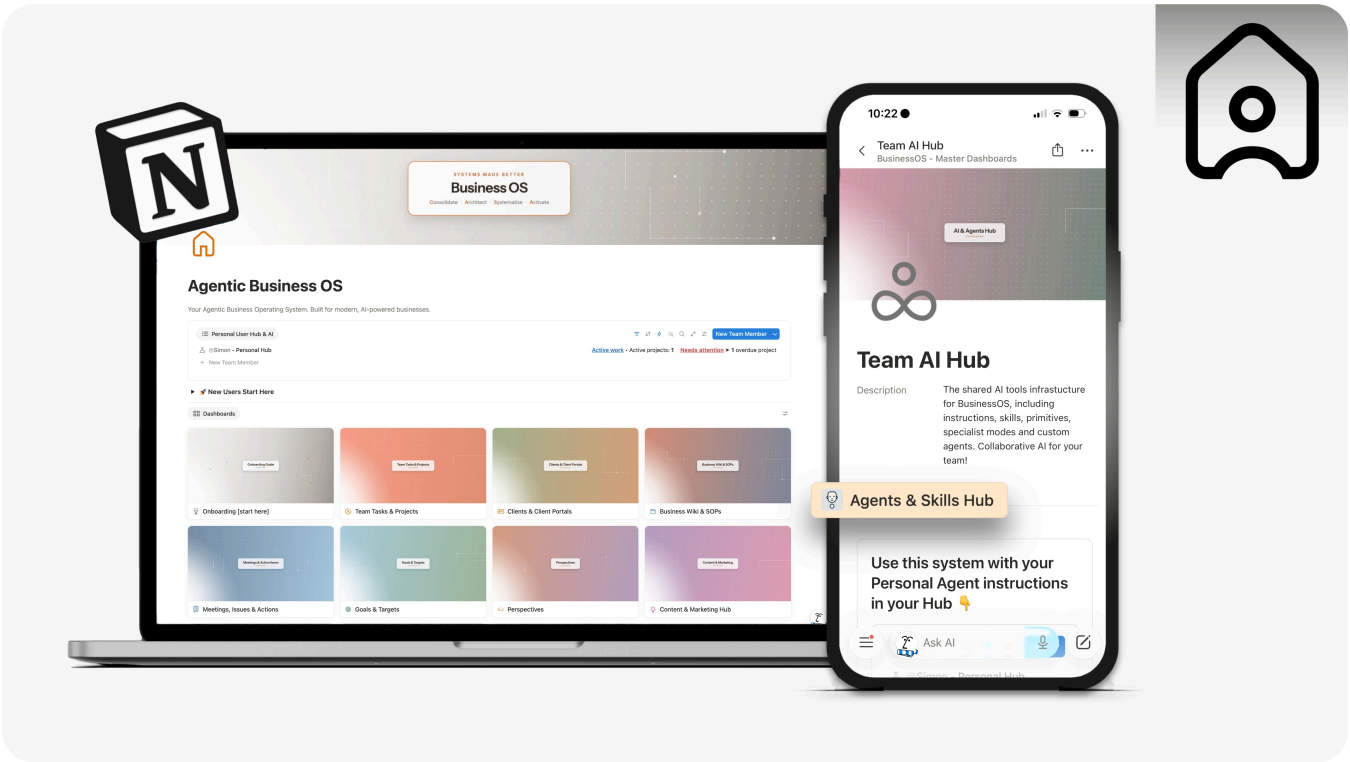


What's included in the Agentic Business OS

The short answer is a Notion workspace, an AI system that runs inside it, and a live guide library your AI can read. This is the longer answer.



Systems Made Better · August 2026 · Describes the private beta build

Everything described here is in the build you get today. Where a part of the system arrives deliberately empty, I have said so. A good deal of this is designed to be filled with your business skills rather than mine, and that is the difference between a workspace you adopt and a template you admire.

01

How the system is put together

Four layers, and the relationship between them is the thing that makes it work.

Home	The front door. Onboarding, the map of what exists, and the button that creates your personal dashboard.
Dashboards	Working views for a job: team work, clients, meetings, goals, content, the AI hub, and one per person.
Master databases	Where every record actually lives. Clients, projects, tasks, meetings, decisions, content, knowledge.
Knowledge	The Business Wiki, specialist knowledge bases, and the shared instructions your AI reads before it does anything.

Dashboards are windows, not containers. A task belongs to the Tasks database and shows up on every dashboard filtered to include it. Nothing is stored twice, so nothing drifts out of date in one place while staying current in another. This single rule prevents most of the mess people end up with in Notion.

Records connect to each other through relations, so a task knows its project, the project knows its client, the client knows its portal, and the meeting that produced the work knows all of them. That network is also what your AI walks when you ask it a question about the business.

02

The dashboards

Nine working areas, each built around a real job rather than a database.

Home & onboarding	Where a new person starts. Creates their personal dashboard and hands them to the onboarding specialist.
Team Tasks & Projects	Active work with its context attached: priority, owner, project, client, goal, blockers and overdue items in one view.
Clients & Client Portals	The client record, the delivery work against it, and a permission-controlled portal you can share with the client as a guest.
Meetings & Action Items	Topics raised between meetings, the notes from the meeting itself, the decision that came out of it, and the tasks that follow.
Goals & Targets	Outcomes and the measures behind them, with projects linked to the goal they serve.
Content & Marketing Hub	Long-form production, the scheduled social and email calendar, and the channels you publish to.
Business Wiki & SOPs	Company knowledge with an owner, a review date and a visible approval state, so people know which page to trust.
Team AI Hub	The shared AI infrastructure: instructions, skills, specialists, agent templates and knowledge bases. Section 05 covers it properly.
Personal dashboard	One per person, generated on demand. Their work, their agent, their voice. Section 04.

Health formulas, so review is not guesswork

Client and project records carry calculated fields — Health Check, Client Attention, Days Stalled, Completion, blocked and overdue counts. They exist so that a weekly review takes ten minutes and surfaces the thing that has quietly stopped moving, rather than requiring someone to read every record.

03

The databases behind them

These are the master databases. Everything you and your agents create lands in one of them.

Running the business

Clients	Relationship context, history and client memory.
Projects	Delivery outcome, state and health.
Tasks	The next action, owned and dated, linked to its project and client.
Goals & Targets	Outcomes and the measures that show movement.

Issues & Topics	Things worth discussing, captured between meetings so the meeting is not a status update.
Meeting Notes	The record of the conversation, its evidence and its follow-through.
Decision Log	Business decisions with the reasoning intact. A separate Personal Decision Log covers private choices.
Assets & Delivery Docs	Deliverables and the main file links against a project.
Client Portals	The client-facing view, with a hard permission boundary between it and your internal records.

Content and marketing

Long-Form Content	Videos, newsletters, articles, podcasts and email sequences, with a production pipeline from idea to published.
Socials & Marketing Calendar	Individual scheduled posts, shorts, sends and promotions, related back to the piece they came from.
Channels & Platforms	Where you publish, who owns each channel and what belongs there.

Knowledge and AI

Internal Knowledge	The Business Wiki and SOP library. Type, owner, summary, status and last-reviewed date on every maintained page.
AI Guides & Primitives	Shared foundations, rules and definitions that several skills and agents all need to read.
Shared Skills Library	Repeatable procedures with a trigger, an outcome and a stopping point.
Shared Sub-Agent Instructions	The specialist modes your personal agent can take on.
Custom Agent Templates	Setup prompts and operating instructions for separate agents that run on a schedule or an event.
Specialist Knowledge Bases	Focused stores of domain knowledge, examples and judgement for one subject.
Personal Dashboards	One row per person, holding their four personal pages.

04

Your personal dashboard and your own agent

Everyone in the workspace gets their own, and it is not a filtered copy of somebody else's.

You press a button, add your name, and set the User property to yourself. Your dashboard then fills with your tasks, your projects, your clients and your meetings, alongside a personal to-do list that never touches the team's work.

Four pages are generated with it, blank and named after you:

Personal Agent Instructions	The page you bind your Notion Agent to. It holds the boot sequence, the router that picks a specialist, and your agent's own working notes.
Who I Am	What you do, who you help, how you like to work. Read whenever the agent acts on your behalf, not only when it writes.
Personal Voice Profile	How you sound, written as instructions rather than adjectives. Deliberately capped at 500–900 words so it can be loaded on every single draft.

Voice Profile Interview	The long version, 24 questions across 7 rounds. Read only when a draft misses and nobody can work out why.
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They are per-person copies with their own URLs, so your voice profile and your colleague's have no relationship to each other. A guided skill runs the voice interview with you — you speak the answers, it writes the profile. Budget 25 to 35 minutes and it changes every piece of writing the system produces for you afterwards.

05

The agent system

One agent as the front door, with eleven specialists behind it.

You do not pick a mode from a menu. You ask for what you want in normal language, and your personal agent reads your request, checks its router and takes on the right specialist role for the job. It names the specialist it chose at the top of its answer, so you can see the routing and override it in a sentence when it gets one wrong. Each specialist arrives with a full instruction set: a stance, a method, boundaries, and a defined stopping point.

MODE	SPECIALIST	USE FOR
Default	Foundation-governed operation	Database work, tidying, email — anything without a specialist stance
0	Business OS Onboarding	Claiming and setting up a personal dashboard
1	Template Guide & Tech Support	Explaining the workspace and the next setup step
2	Essentialist Productivity Coach	Prioritisation, routines, reducing overwhelm
3	Decision Making Coach	Framed decisions, trade-offs, decision frameworks
4	Vision & Goal Setting Coach	Annual reviews, outcome goals, quarterly plans
5	Advanced Notes & Text Transformer	Notes, meetings and transcripts into structured outputs
6	Content Strategist & YouTube Expert	Ideation, packaging, scripting, content strategy
7	Online Business & Marketing Strategist	Business models, offers, positioning, launches, conversion
8	Ticketing & Customer Service Triage	Support inbox triage and spotting gaps in your support knowledge
9	Social Media Repurposing Specialist	An existing script into platform-specific posts
10	Meta-Agent: Prompt Engineering	Reviewing and rewriting your other modes' instructions

Every mode follows the same instruction structure, and every knowledge base shares the same property schema. Learn one and you have learned all of them, which is the point — building your twelfth specialist should feel like filling in a form, not starting again.

Mode 10 is the one most people never open, and I can't recommend it enough. When a specialist keeps underperforming, or keeps losing requests to the wrong router entry, it reads the instructions and tells you what is wrong with them. It is the difference between a system you maintain and a system that maintains itself.

The skills and AI infrastructure

The Team AI Hub is where the AI stops being one person's clever prompting and becomes something the whole team uses.

AI Guides & Primitives	Shared foundations, rules, definitions and reusable standards. Context that several skills, modes or agents all need to read.
Shared Skills Library	Repeatable procedures. A skill has a trigger, an outcome and a point at which it stops.
Shared Sub-Agent Instructions	The specialist modes from section 05, plus any you write yourself.
Custom Agent Templates	Instructions for separate agents with their own remit — recurring, event-driven or scheduled workers.
Specialist Knowledge Bases	Focused databases for one subject or domain, supplying maintained knowledge and judgement to both people and AI.
Quick Guides	The onboarding guide, prompt ideas and the feedback route, for when someone needs the next step quickly.

The Agentic Context Map

One shared page, written for agents rather than people, that answers a single question: where does information live, and where should new information go? It covers the four layers, every dashboard, every master database, which fields are calculated and must never be written to, a routing table of "if the request is about X, the owning database is Y", and the write rules including the client portal boundary.

Agents fail in predictable ways without it. They search blindly, create duplicates, invent new locations for records, or leave something with no relations so it never appears anywhere. The map removes the guesswork, and every agent reads it before it acts.

Three kinds of skill

Skills are split by what they actually do — a reference skill supplies standards, a task skill runs a procedure once, a routine skill runs on a rhythm. The distinction matters because it decides how the agent chooses between them, and getting it wrong is the usual reason a skill does not fire when you expect it to. There is a guide for building your own, and one for converting an existing SOP into the right shape.

The knowledge bases ship empty, on purpose

The structures, properties and retrieval rules are all built. What is not there is content, and that is deliberate: my frameworks in your knowledge base would give you borrowed advice in a borrowed voice. The exception is the content creation and YouTube knowledge base, which arrives populated as a worked example so you can see what a finished one looks like before building your own. Setup walks you through picking the ones you will actually use and adding a real entry, so the habit exists from day one. Your agent can add entries for you afterwards.

Connections to the rest of your stack

Guidance and permission rules are included for connecting email, calendar, Slack, Google Drive, a CRM or another custom MCP into the workspace — including which connections should be personal, which should be workspace-wide, and who should approve them.

The live guide library

The part that is not a Notion page at all. It is a connection your AI makes to a library I keep updating.

You add one custom MCP connector — to your Notion Agent, to Claude, or to anything else that accepts one — and paste the licence key from your purchase. From then on you can ask your AI how a dashboard works, how to build a skill, or how CASA applies to your business, and it answers from the current guides rather than from a guess.

At the time of writing the library holds **66 guides across 636 sections**. You can see the whole index, without buying anything, at app.agenticbusinessmethod.com/library.

Getting started	First session, onboarding routes, the folder and workspace structure, the version change log.
Workspace & dashboards	A guide per dashboard: what it is for, which database owns what, the properties, the views, the workflow, the troubleshooting.
AI agents & skills	Using the included specialists, building your own modes and skills, turning an SOP into the right kind of AI support.
Knowledge & memory	Where memory belongs, how to write pages an agent can actually use, company versus specialist knowledge, identity and voice.
Integrations & connections	Connectors, permissions, safety, scheduled briefings, and connecting the guide library itself.
Method & framework	CASA, the daily and weekly rhythm, the client delivery lifecycle, maintenance, responsible use of AI and data.

The library updates without you doing anything. When I publish a change, the next question your AI asks gets the new answer. You never re-download a template to get current instructions, and your AI is never confidently working from a version that no longer exists.

What the connection reaches

The guides for your template are available through the MCP as standard. Alongside them sit the wider training, strategy and knowledge documents that belong to the Accelerator content — the CASA frameworks and the thinking behind the method rather than the mechanics of the workspace.

Beta users get access to those additional Accelerator guide materials until the end of the year. This is the guide material, not a place on the Accelerator itself. The Business OS and CoWork OS guides stay with you for good.

08

The method it is built on

CASA is the four-stage framework the whole system is organised around. The guide library covers each stage twice: once as a principle, once as the exact moves inside your workspace.

Consolidate	Gather scattered context into one organised knowledge system, and decide what to leave out.
Architect	Design the information and AI architecture. Where knowledge lives, what routes where, what the sources of truth are.
Systematise	Turn processes into SOPs, skills, specialist modes and automations. Decide what stays human.
Activate	Run it on real work, test its limits, stabilise it, then start the next cycle on a different part of the business.

The point of the framework is that you apply it once to a small area, see it work, and then have a repeatable move for the rest of the business. It is the difference between buying a system and learning one.

Getting it running

The first seven minutes	Confirm the plan, connect the guide library, create your personal dashboard, set the User property to yourself, bind your agent to your instruction page, then paste one prompt: <i>"Onboard me to the Business OS — I've just claimed this dashboard."</i> The onboarding specialist takes over and walks the rest one step at a time.
Two routes, not interchangeable	Whoever owns the workspace runs eight steps, including setting the business identity every agent reads on every request. Anyone joining afterwards runs six, and never touches the shared foundations.
A first month that is not overwhelming	A 30-day plan running two tracks side by side: get your personal AI system connected and personalised, and take one real area of the business through all four CASA stages, a stage a week. It also tells you plainly what to postpone.
Rhythms and briefings	A daily, weekly and monthly review routine, and how to build a personal briefer that reports on your tasks, meetings, team and calendar — on demand or on a schedule.

What you need, and what is not included

Notion Business or Enterprise plan. This is a hard requirement, not a recommendation. Notion Agent and Custom Agents are Business-tier features, and the custom MCP connection that reaches the guide library needs the same plan. On Free or Plus the workspace itself works, but the agentic half of the system does not. If you are eligible, Notion for Startups offers up to six months free on the Business plan with Notion AI included, and there is a partner link on the sales page.

Beyond that, a willingness to spend the first half hour on identity and voice rather than skipping to the interesting parts. Those are the steps people skip, and every later specialist degrades without them.

Worth being straight about

- **It does not publish your content.** The Content Hub plans, drafts, reviews and schedules; publishing happens where you publish.
- **The specialist knowledge bases arrive empty,** apart from the content creation and YouTube one, which is populated as a worked example. Structure and retrieval rules are built throughout; the content is yours, for the reasons in section 06.
- **Agents ask before acting on anything that matters.** Rules and approvals are shared foundations, and the client portal boundary is enforced rather than trusted.
- **It is not a course.** The guides teach the system and the method behind it; the Accelerator is where the deeper strategy work happens with a group.

Written for the Agentic Business OS private beta. The library grows, so the guide count above is a snapshot rather than a limit; the current index is always at app.agenticbusinessmethod.com/library.

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