AI BASICS // GETTING STARTED

Getting into AI: the first thing to learn

Most useful AI systems boil down to just a few core types. Once you can spot them, you start seeing them everywhere.

> **Travis's short version:** you don't need 20 agents doing 20 different things. Most useful systems come down to four simple roles: chat, insight, content and workflow agents. Learn what job each one does and how they connect, and AI stops feeling too technical or miles ahead of you.

Where to start

A lot of people tell us they want to get into AI but don't know where to start, and that's totally fair. This world can feel either way too technical or like it's already miles ahead of you. So we're taking a step back from *how to build* an agentic system and looking at how it actually shows up in the real world. Once you start spotting the patterns, it's much easier to see where it all fits: in your work, your team space or your next big idea.

The four core agent types

1. **Chat agents.** Your front liners. They answer questions, guide users and handle quick requests. Think chatbots, help desks and simple guided flows.
2. **Insight agents.** Your in-house research assistants. They pull in data, spot patterns and surface the insights that really matter, with really good context.
3. **Content agents.** Your writers. Give them some data and some insights and they turn it into reports, blog posts, summaries, whatever the question in front of you needs. This one is my personal favourite.
4. **Workflow agents.** The glue that keeps it all together. They connect the dots, route tasks, escalate when needed and make sure the right agent does the right job.

Put these together in the right way and you've got a smart agentic system that works for every single case.

What each one is for

Front of house and research	Writing and glue
Chat agents make interactions simple and contextual.	Content agents help you scale content without losing quality or accuracy.
Insight agents cut through the noise and deliver a signal you can actually act on.	Workflow agents turn individual agents into one smooth, intelligent system.

Where they show up in the real world

Here is how the same four roles look across different sectors.

Sector	Chat	Insight	Content	Workflow
Retail	A product recommender chatbot that helps shoppers pick the right size or style bundle.	Watch competitors and monitor customer sentiment.	Whip up product descriptions from specs or reviews.	Hand customer issues from chatbots to support teams or managers.
Finance	A chatbot that explains policies to staff or customers, eliminating back and forth emailing.	Track regulatory updates and highlight what's really relevant.	Draft investor updates or internal reports.	Route documents to the right departments and escalate urgent issues to managers.
Healthcare	A patient intake assistant that collects symptoms and helps triage next steps.	Summarise the latest research papers for staff.	Generate patient summaries and prep notes.	Triage patients, assign the correct specialists and schedule upcoming appointments.
Education	A student support agent that answers frequently asked questions and helps with scheduling.	Scan feedback and performance for students and teaching teams.	Create lesson plans, quizzes and summaries.	Automate grading and flag responses for human review.
Internal ops / SaaS	A chatbot that guides new hires through onboarding or IT requests.	Keep tabs on customer satisfaction and support trends.	Create onboarding documents and release notes for new products.	Support tickets, notify teams about bugs and trigger onboarding flows for new employees.

The bottom line

The real power of AI agents is that they're not some magic all-in-one bot. They're **simple roles working together**. The best part is that you don't need to be a hardcore coder to get started. You just need to understand what job each piece plays in the puzzle and how to connect them all together to solve real problems.

Want to talk this through for your business?

Book a free 15-minute call. We'll look at your situation and give you a straight answer, with no jargon and no sales pitch.

Let's Chat

Opens the request form on our website. Free, no obligation.