Pencil

the brandtech group

Agent Builder Playbook

Turning Custom Agents into Scalable Workflows

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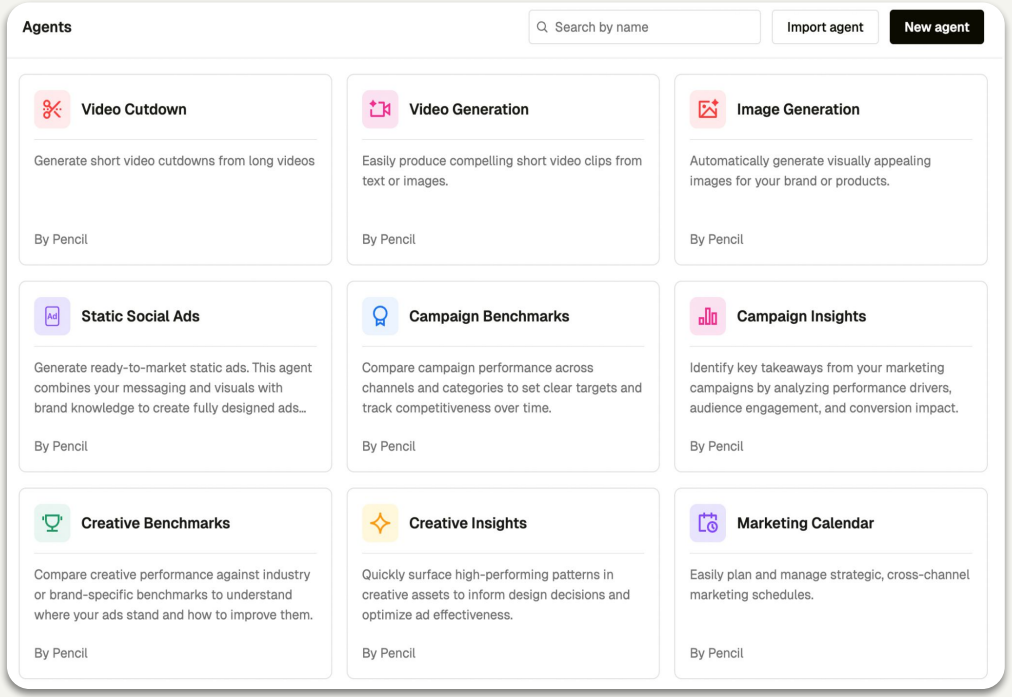


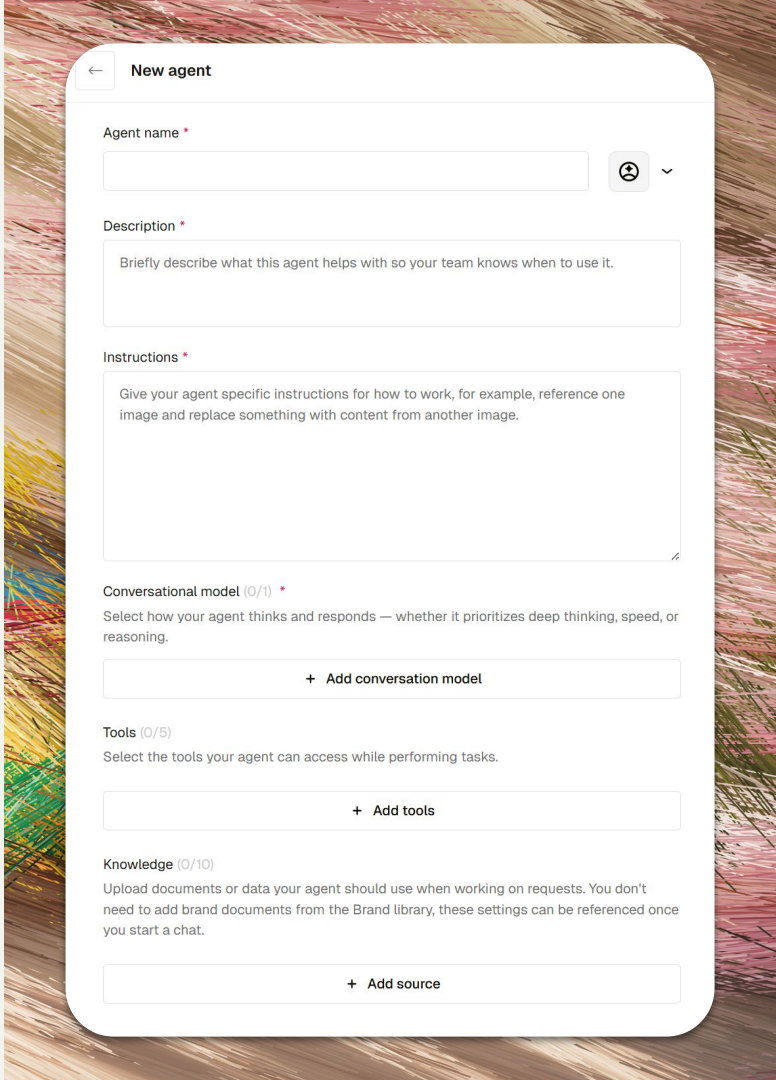
Welcome to the playbook

As teams scale their use of AI, the challenge shifts from *creating outputs* to *creating reliable systems*. The Agent Builder is designed to move organisations beyond one-off prompts and single-purpose tools, and toward **repeatable, governed AI workflows**.

With the Agent Builder, teams can:

- Design AI agents that mirror real operational workflows, not isolated tasks
- Combine research, reasoning, creation, and distribution in a single assistant
- Reduce long-term maintenance through automatic model upgrades
- Enable organisation-wide reuse through centralised governance

This shift matters because AI value compounds when workflows are standardised. Instead of rebuilding prompts, reconnecting tools, or re-training teams, high-quality agents can be built once and scaled safely across teams, markets, and use cases.



- The goal of this playbook is to provide clear, reusable, and practical guidance for designing, building, and governing AI agents using the Agent Builder. It offers recommended frameworks, best practices, and guardrails. This gives teams the flexibility to adapt agents to their specific workflows, tools, and organisational needs, so they can fully unlock the value of scalable AI within Pencil.

The agent builder

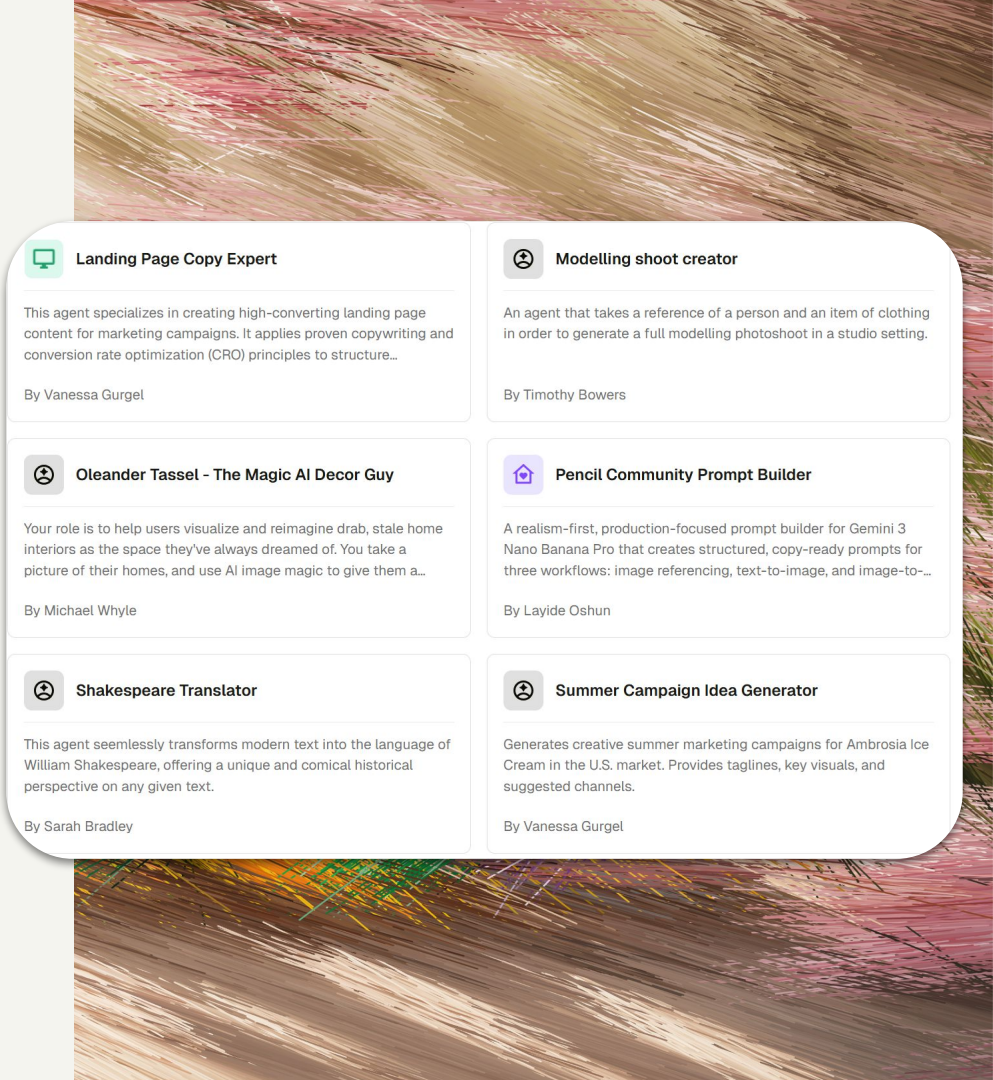
An overview

What is agent builder?

The Agent Builder is a powerful, upgraded experience that allows you to create custom, multi-functional AI agents tailored to your exact workflow needs.

While pre-built agents (such as Image Generation or Video Generation agents) are useful starting points, the Agent Builder is where production-grade agents live.

It allows you to move beyond single-purpose tools and design assistants that handle entire workflows end to end.



What is agent builder?

With the Agent Builder, you can:

- Mix up to **5 different capabilities** in a single agent
- Combine **text, image, video, web, and 3rd-party tools**
- Build agents that research, create, and act in one continuous flow

Example: One agent that:

✓ Searches the web for trends
✓ Writes a relevant, timely blog post
✓ Generates a matching header image

All within a single conversation.

This ensures:

- Fewer broken workflows
- Consistent outputs
- Controlled access to sensitive integrations

Core components of an agent

Every agent is built from the same foundational components.

A. Basic Identity

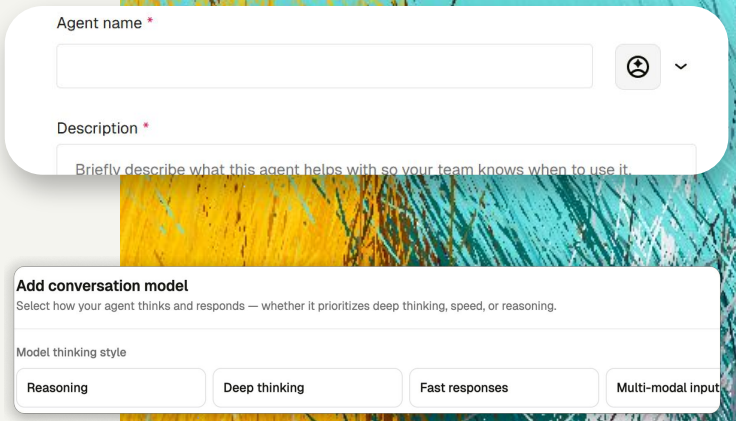
- **Name**: Clear and recognisable (e.g. *SEO Blog Writer*)
- **Description**: A short explanation of what the agent does and who it's for

Keep this simple—users should understand the agent's purpose instantly.

B. Conversational Model

You control the "brain" of your agent by selecting a model category:

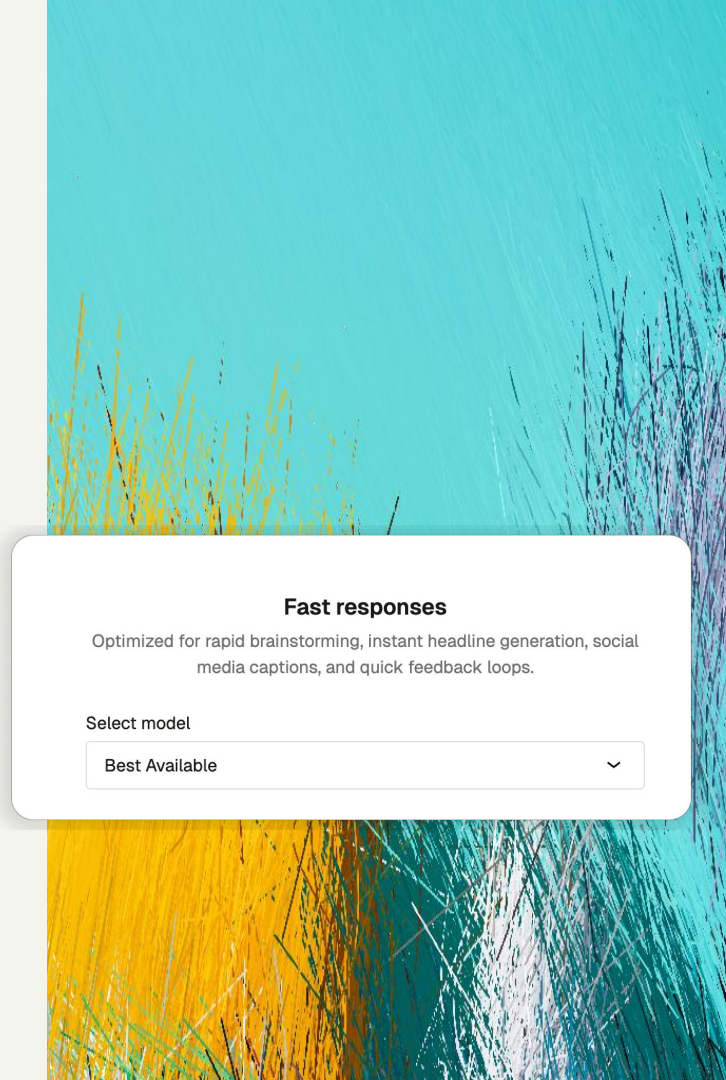
- **Reasoning** – Complex logic, problem solving, coding
- **Deep Thinking** – Strategy, nuanced analysis, creative writing
- **Fast Response** – Quick Q&A, summaries, support
- **Multi-modal** – Tasks involving text + images/files



Best Practice: Use "Best Available"

Each category includes a **Best Available** option. This automatically upgrades your agent as better models are released—no manual updates required.

Model Type	Best Used for
Reasoning	Complex problem solving, coding, logic and planning.
Deep Thinking	Nuanced analysis, strategy formulation, and creative writing.
Fast Response	Quick Q&A, customer support, and summaries.
Multi-modal	Tasks requiring images/files and text outputs.



Instructions & knowledge

Instructions

This is the system prompt that defines:

- The agent's task
- Tone and personality
- Rules and constraints

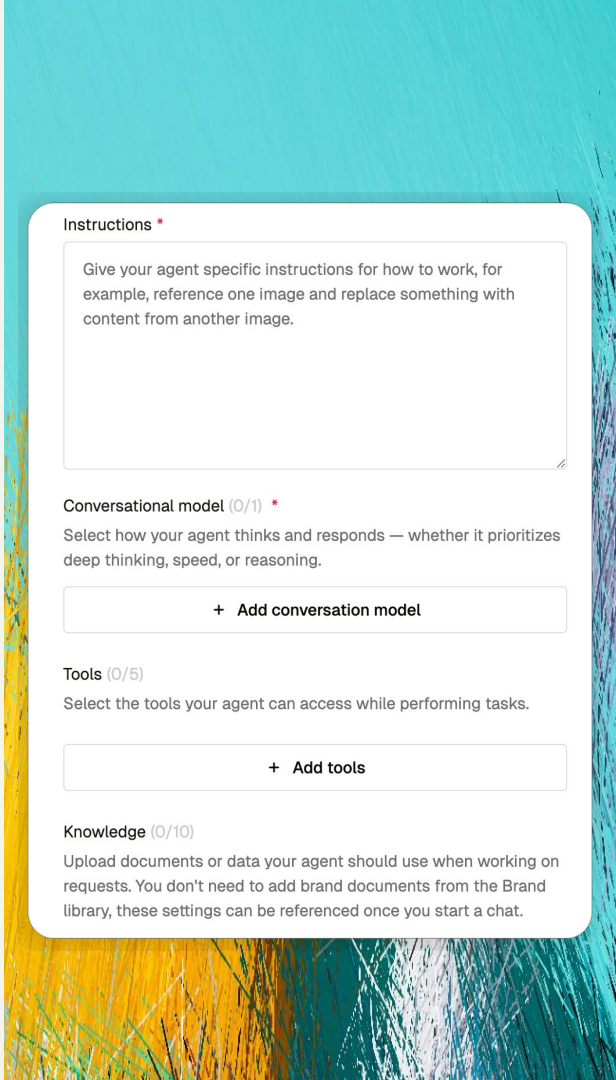
```
Agents follow instructions literally! Be explicit about:
  • Format
  • Length
  • Tone
  • Dos and don'ts
```

Knowledge Base

Upload documents the agent should reference *before* responding, such as:

- Brand guidelines
- Product documentation
- Internal playbooks

This ensures outputs stay grounded within approved contexts.



The tool ecosystem (new feature)

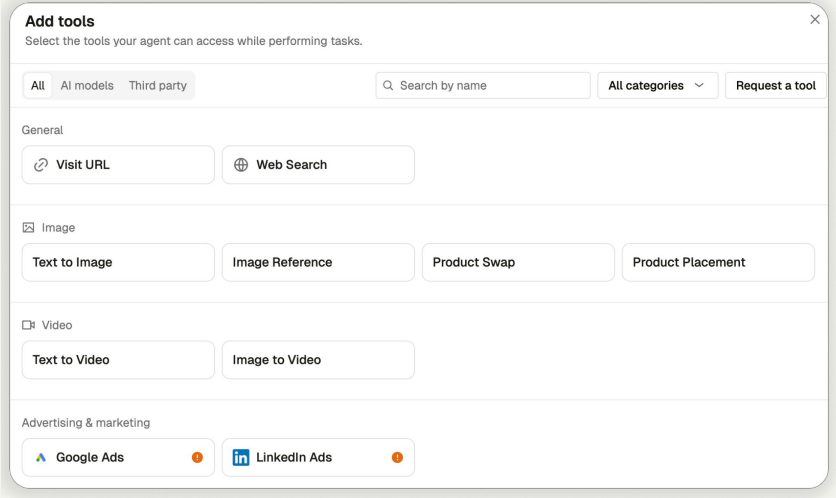
The Tool Ecosystem is the **biggest upgrade** in the new Agent Builder.
You can now add **up to 5 tools** to a single agent.

Category 1: Native AI Tools
Previously locked to pre-built agents, these are now modular:

Image Tools
- Text-to-Image
- Image Reference
- Product Swap
- Packshot to Image

Video Tools
- Text-to-Video
- Image-to-Video
- Video Cutdown

Utilities
- Web Search
- Visit URL & Crawl



Just like when selecting a model, the tool selectors also default to **Best Available** model for each tool class.

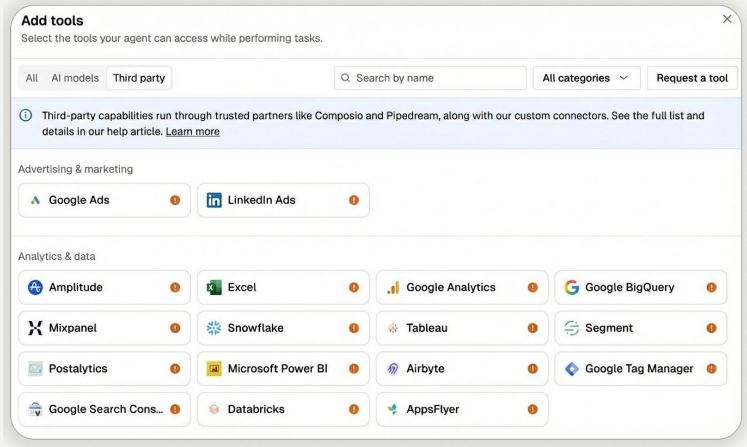
The tool ecosystem (new feature)

We'll be adding a slew of powerful new tools to our tool ecosystem in the coming weeks. As such, the list of available Native AI tools will change as we upgrade and expand the arrays of tools that your agents can utilise.

Category 2: 3rd Party Tools

Connect agents directly to your existing software stack, including:

- Salesforce
- HubSpot
- Semrush
- Slack
- Google Drive



You select:

1. The external service
2. The specific actions/tools available

Behind the scenes, integrations are securely powered by Composio and Pipedream.

Connecting & authenticating tools

Adding a tool is **not** the same as connecting it.

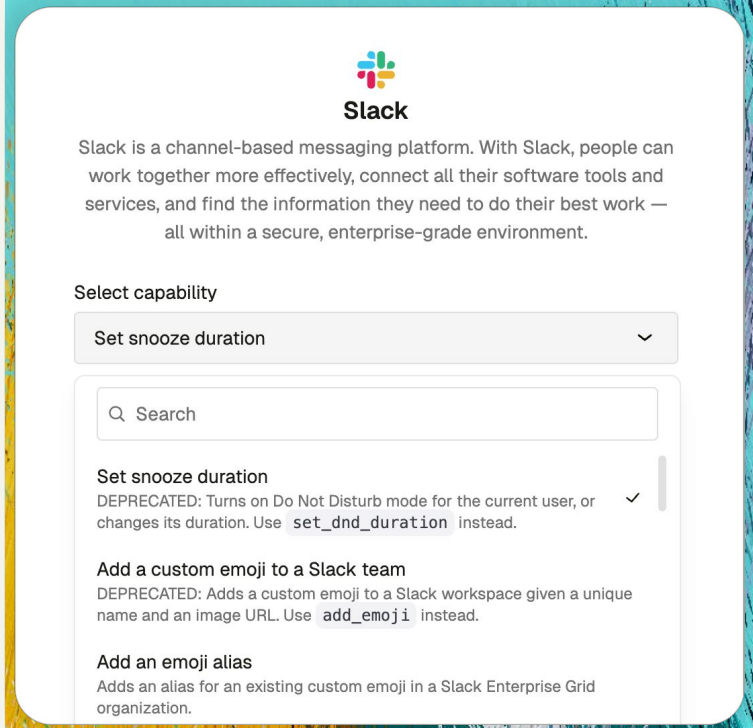
By default, 3rd party tools are disconnected.

How to Connect

You can connect tools via the **Integrations Page** or directly inside the **Builder**.

- **One-Click Auth (OAuth):** For some tools like Gmail or Slack, simply click "Connect," log in to the service, and authorize access.
- **API Key/Token:** For some tools like Semrush or Asana, you may need to paste an API key provided by that service.

Important: If any tool is disconnected, the agent chat will be disabled until setup is complete. Please complete all your agent's tool integrations before conversing with your new agent.



Publishing & sharing agents

Once tested, agents can be published.

Who Can Publish Agents?

- **Admins / Subscription Admins**: Publish to one or multiple workspaces
- **Standard Users**: Publish only to their own workspace

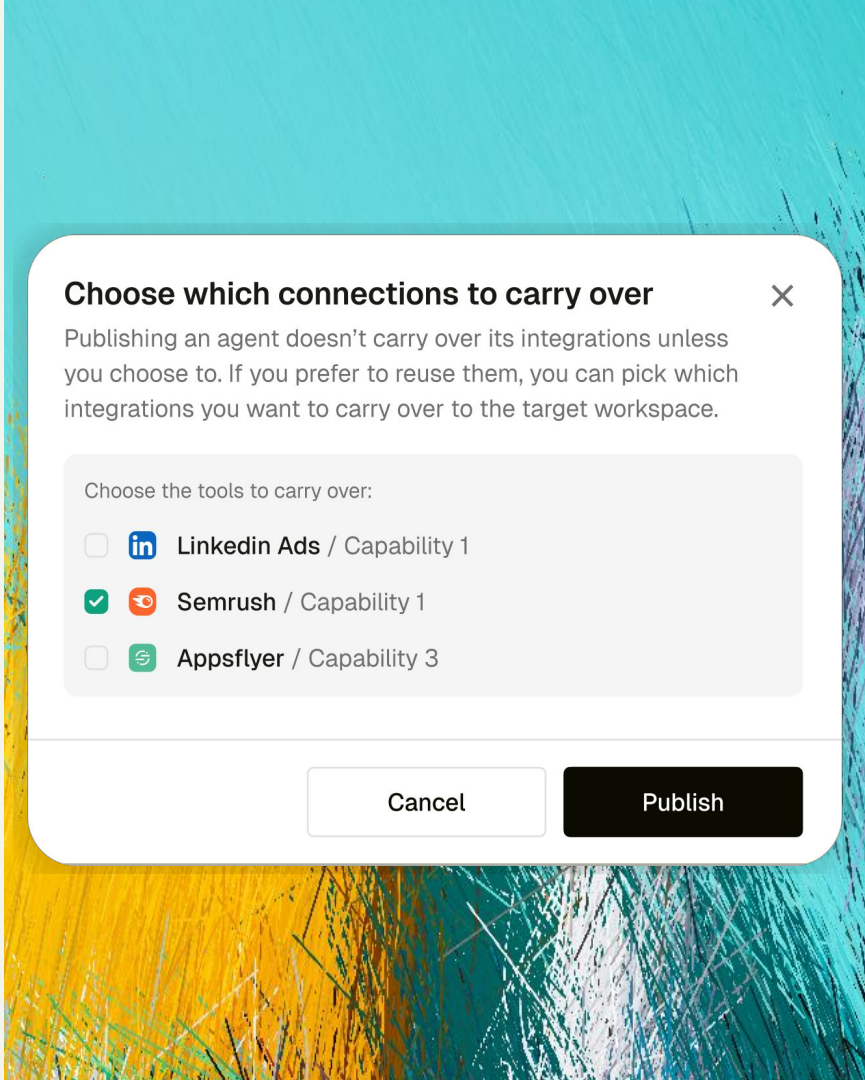
Connection Carry-Over (Admins Only)

When publishing agents, admins can decide how **tool credentials** are shared:

- Carry over **All** connections
- Carry over **None**
- Carry over only **Specific** connections

Admins should therefore be mindful about whom they are sharing access to any sensitive authentication or API tokens with.

If a workspace already has an existing connection, that existing connection takes priority to avoid conflicts.



How it works at a a glance

This table summarises how **native AI tools** vs **3rd party tools** behave across building, setup, publishing, and usage.

This distinction is critical when designing agents.

Native tools provide instant creative power, while 3rd party tools introduce automation and system integration, requiring stronger governance.

Scenario	**Native AI Tools (Image / Video / Web)**	**3rd Party Tools (Salesforce / Slack / Semrush)**
Building	Add and use immediately	Add now, connect later
Setup	No setup required	Admin authentication required
Publishing	Works instantly for all users	Admin can choose to carry over connections
Chatting	Always available	Chat locked until tools are connected

Summary of UX scenarios

Scenario	User Experience
Building	You can now combine up to 5 tools. You can mix **Native AI tools** (like Image Gen) with **3rd Party tools** (like Slack). Native tools work instantly; 3rd party tools need connection.
Chatting	Chat is locked until all selected tools are authenticated.
Publishing (Admin)	You can choose to share your tool login with the team (Carry-over).
Publishing (User)	You share the Agent "blueprint." Teammates must log in to tools themselves.
Importing	You can copy an Agent ID from another workspace. You must check whether the agent’s tools need to be reconnected (if they haven’t been carried over).

Third party integration

For connecting tools and apps

Third party integrations: What & Why

Purpose

3rd-party integrations allow agents to **take real-world actions**, not just generate responses — securely connecting Pencil agents to the tools your teams already use.

What They Enable

- Read & write documents
- Fetch live data
- Update CRM records
- Trigger workflows
- Save outputs directly into business systems

How It Works

- Pencil uses two authorised integration partners — **Composio** and **Pipedream** — as secure bridges between agents and external tools
  These partners act as the agent's "hands," translating requests into governed API actions
- All actions:
  - ✓ Run only when explicitly requested by the agent
  - ✓ Respect workspace permissions and admin controls

Third party integrations: Using & governing integrations

Integration Roles

- **Composio** → Enables real-time agent actions (e.g. updating docs, sending messages, or modifying records)
- **Pipedream** → Powers workflow-driven and automation-based integrations across broader platforms

Supported Ecosystem

Pencil supports a growing range of tools across:

- Marketing & advertising
- Analytics & data
- CRM & business management
- Communication & collaboration
- Documentation, design & commerce

Examples include Google Workspace, Salesforce, HubSpot, Jira, Slack, Meta Ads, Shopify, Tableau, and more.

Using Integrations in Agents

- Integrations can be added directly inside the Agent Builder
- Best practices:
    - Add integrations **only when live data or actions are required**
    - Keep agents focused by limiting connected tools
    - Test thoroughly before sharing your agents

Best practice

This section shows how teams can work with the Agent Builder in practice – from first input to collaborative execution.

Start with a brief

Principle: Always anchor agents to a clear input. A brief provides shared context, reduces ambiguity, and allows agents to act immediately without manual setup.

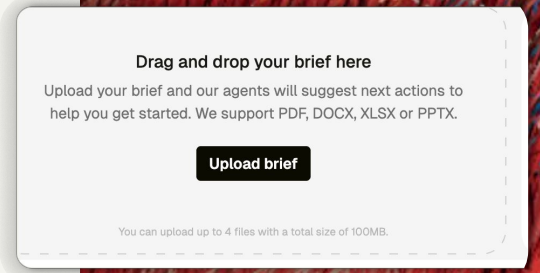
How it works:

- Upload an existing brief (PDF, document, or deck) directly into Pencil.
- The platform automatically analyses the content and surfaces **suggested agents** that are best suited to the task.
- Agents begin generating relevant outputs (documents, images, videos) without requiring prompts or configuration.

Best practices:

- Use real working briefs whenever possible — agents perform best with concrete inputs.
- Keep briefs focused on objectives, audience, and deliverables rather than process.
- Treat the brief as a living reference that agents can continuously refer back to.

Key takeaway: You don’t need to prompt or configure anything upfront. Start with the work you already have.



Choose your team of agents

Principle: Complex work is best handled by multiple specialised agents rather than a single generalist.

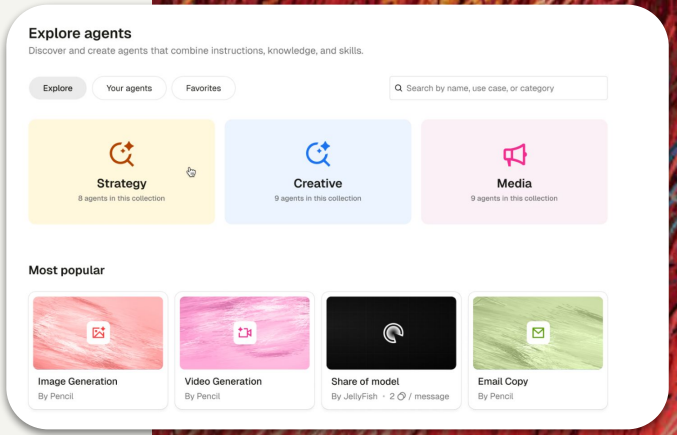
How it works:

- Browse agents by category (e.g. Strategy, Creative, Media).
- Select agents based on the role they play in the workflow, not just the output they produce.
- Activate agents individually as needed — context carries across automatically.

Best practices:

- Think in roles: strategist, creator, optimiser, distributor.
- Start with the most upstream agent (e.g. Strategy) before moving into execution.
- Reuse proven agents across projects to maintain consistency.

Key takeaway: Agents work best as a connected team, each focused on a single responsibility.



Give agents the capabilities you need

Principle: Tools define what agents can *do*, not just what they can *say*.

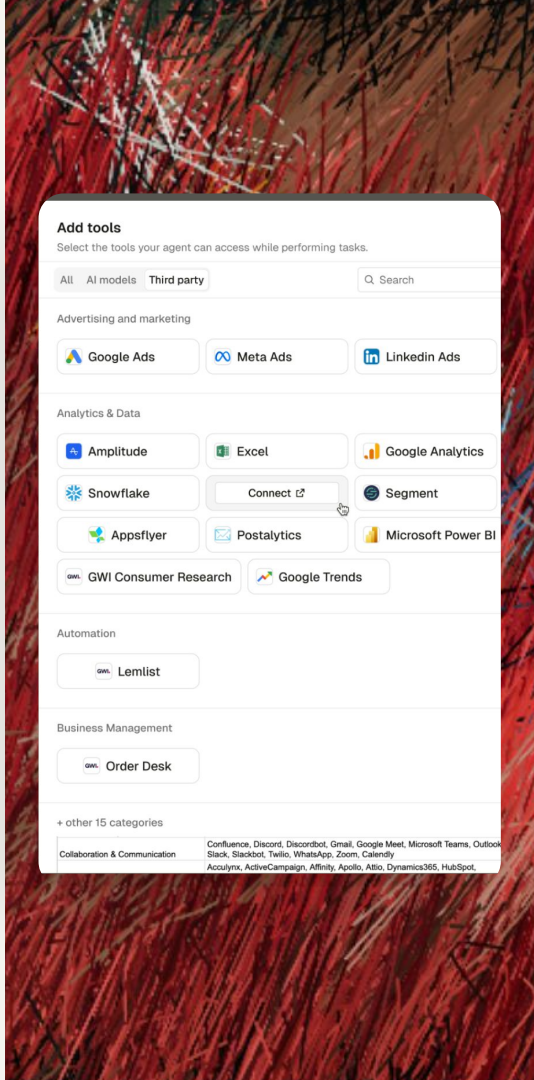
How it works:

- Add native AI tools (image, video, web) for instant creative capabilities.
- Connect 3rd-party tools to extend agents into your existing data and media stack.
- Combine up to five tools per agent to support end-to-end workflows.

Best practices:

- Add only the tools required for the job — more tools increase complexity.
- Use native tools for speed; use 3rd-party tools for automation and activation.
- Ensure all required tools are authenticated before sharing the agent.

Key takeaway: Powerful agents are defined as much by the capabilities you give them, as by how you prompt them, both during initial set up and conversational usage.



Bring humans and agents together

Principle: The strongest workflows keep humans in control while letting agents do the heavy lifting.

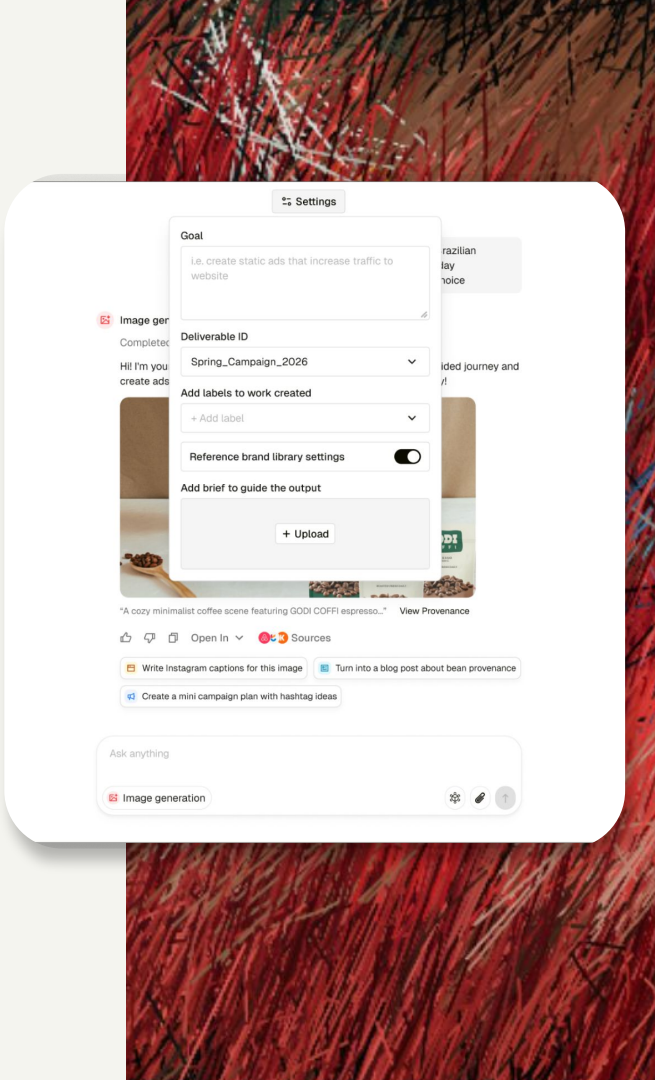
How it works:

- Set a clear goal that agents can align around.
- Agents propose ideas, assets, or next steps proactively.
- Tasks are handed off between agents as the workflow progresses.

Best practices:

- Use goals to guide agents, not micromanage them.
- Review and approve outputs at natural checkpoints.
- Encourage agents to collaborate — one agent's output should become another's input.

Key takeaway: Designing strong human-in-the-loop agentic workflows means giving your agents clear instructions on when to act — and when to pass the baton back to humans.



Practical examples

Read on to see some examples of how we can use agent builder in the real world

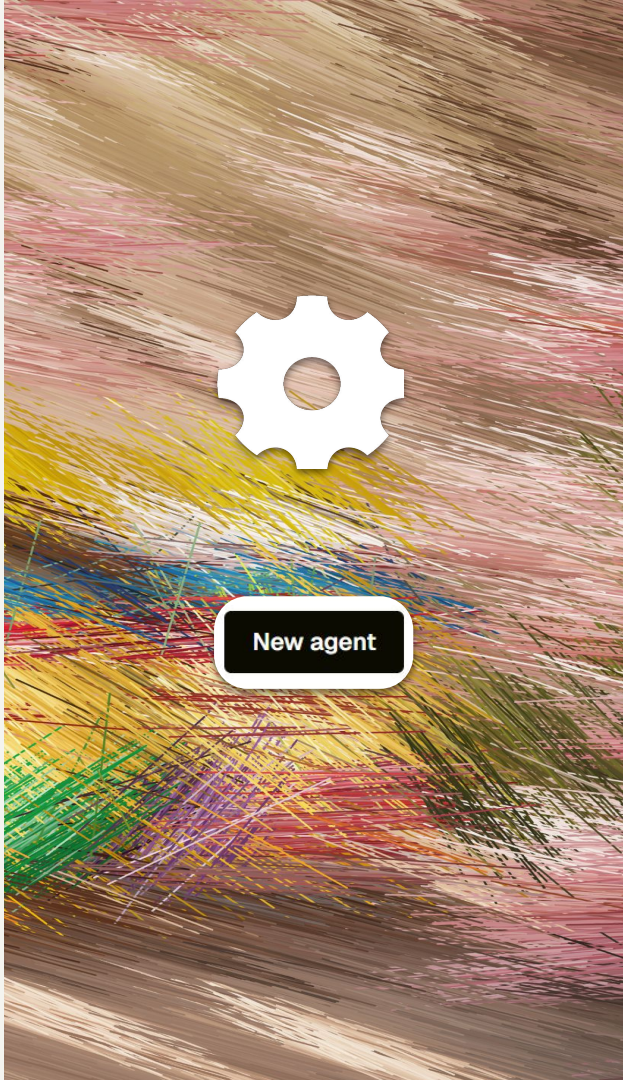
Building a specialised custom agent from scratch

This section shows how teams can work with the Agent Builder in practice — from first input to specialised execution.

Scenario: You want to create a focused, reliable agent that performs a specific job well — rather than relying on a generic, pre-built agent.

This example walks you through the full process, from accessing the Agent Builder to publishing the agent for others to use.

Why this step matters: Starting in the Agent Builder gives you full control over how the agent behaves, which tools it can use, and how it’s governed.



Building a specialised custom agent

Step 1: Access the Agent Builder

Action:

- Open Pencil and navigate to **Agents** from the left-hand menu.
- Click **New Agent** to begin creating a custom agent.

Step 2: Define the Agent Basics

Action: Complete the core setup fields:

- **Agent name:** Choose a clear, task-focused name.
- **Description:** Briefly explain what the agent does and when it should be used.
- **Instructions:** Write clear guidance describing the agent's role, expected behaviour, and any rules it must follow.

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√  Describe the desired outcome, not every step.
√  Be explicit about tone, format, and constraints.
√  Keep instructions concise to avoid confusion
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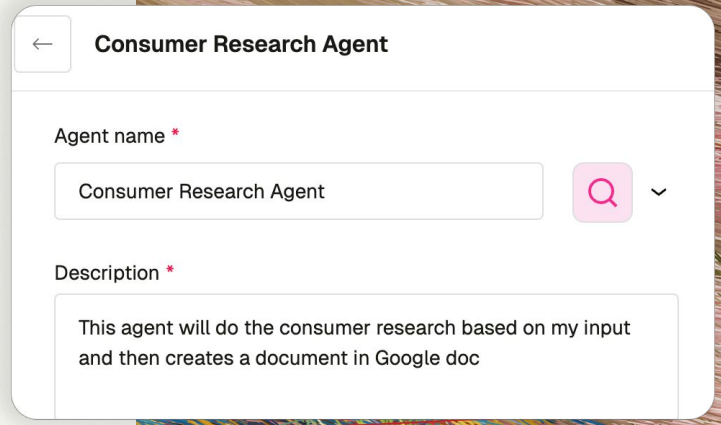


Building a specialised custom agent

Step 3: Choose a Conversation Model

Action: Select the most appropriate **conversation model category** based on the task:

- **Fast responses:** Best for copywriting, summaries, and quick iterations.
- **Reasoning:** Suitable for structured problem-solving and logical tasks.
- **Deep thinking:** Ideal for strategy, analysis, and complex reasoning.
- **Multimodal input and output:** Required when working with text, images, and video together. Excels at visual analysis.

Best Available option:

- Enable **Best Available** to ensure the agent automatically upgrades to the strongest model chosen by Pencil over time.

Why this step matters: Choosing the right model ensures the agent's responses match the complexity, speed, and modality of the task

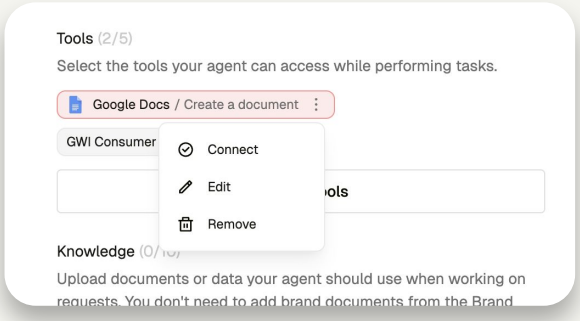
Building a specialised custom agent

Step 4: Add Tools to Give the Agent Capabilities

Action: Add tools that allow the agent to act, not just respond. Each agent can include **up to five tools**.

Tool categories:

- **All:** Browse the full tool library.
- **AI Models:** Native capabilities already available within Pencil, such as:
  - Text-to-image generation
  - Image generation using image reference
  - Product swap and product placement
  - Text-to-video and image-to-video
  - Utilities like Visit URL or Web Search
- **Third-party tools:** External applications across areas such as advertising, analytics, automation, CRM, communication, design, and documentation.



- Add only the tools required for the job.
- Fewer tools help keep agents specialised and reduce hallucinations.
- For image and video tools, select **Best Available** unless governance requires a specific model.

Building a specialised custom agent

Step 5: Connect Third-Party Tools (Admin Step)

Action:

- Authenticate any third-party tools added to the agent.
- Connections can be completed directly in the Agent Builder or via **Settings → Integrations**.

Important rules:

- Integrations are an admin-level function.
- Some tools connect via account logins (e.g. Google Docs).
- Others require API keys (e.g. Semrush).

Why this step matters: Agents can't function unless their tool stack is fully connected and authenticated. Without authentication, third-party tools can't be used and the agent chat will be locked.

Building a specialised custom agent

Step 6: Test the Agent

Action:

- Run test prompts or tasks.
- Confirm that instructions are followed correctly.
- Verify that all tools behave as expected.

Best practices:

✓ Test edge cases.
✓ Adjust instructions or tool selection if outputs are inconsistent.

Step 7: Publish the Agent

Action: Choose where to publish the agent:

- **Current workspace only**, or
- **All workspaces under the subscription** (Subscription Admins only)

Connection carry-over:

- When publishing broadly, Admins can select which third-party connections to carry over.
- If a target workspace already has an existing connection, it will be used instead, and will not be overridden by the new agent's one.
- If a required tool is not connected, users will be prompted to contact their Admin.

Examples of Specialised Agents

Consumer Research Agent

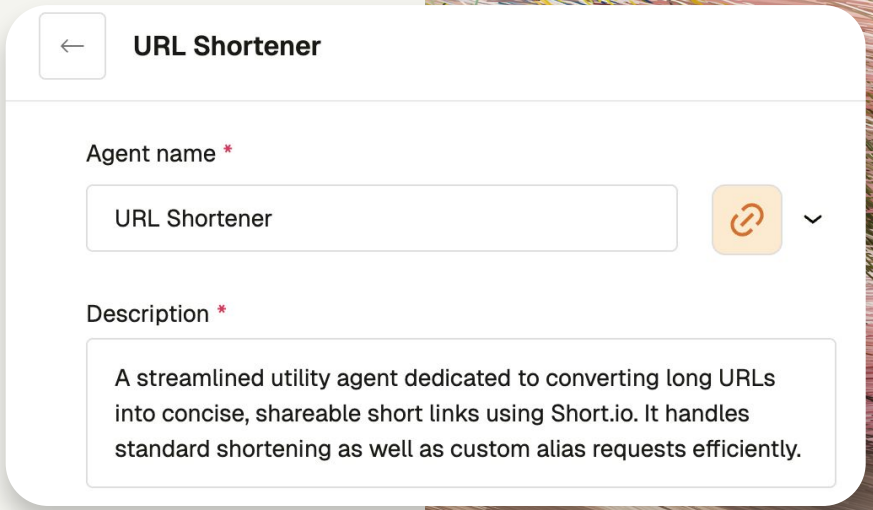
- Combines a Pencil-enabled consumer research tool with a connected Google Docs integration.
- Automatically finds insights and saves them into a document.

Image Retouch Agent

- Uses native image tools such as Text-to-Image and Image Reference.
- Runs on a Multimodal conversation model to modify product imagery (e.g. changing colours or placing products in scenes).

URL Shortener Agent

- Uses a third-party URL shortening tool.
- Converts long URLs into short, shareable links instantly.



Examples of Specialised Agents

Modelling Shoot Creator

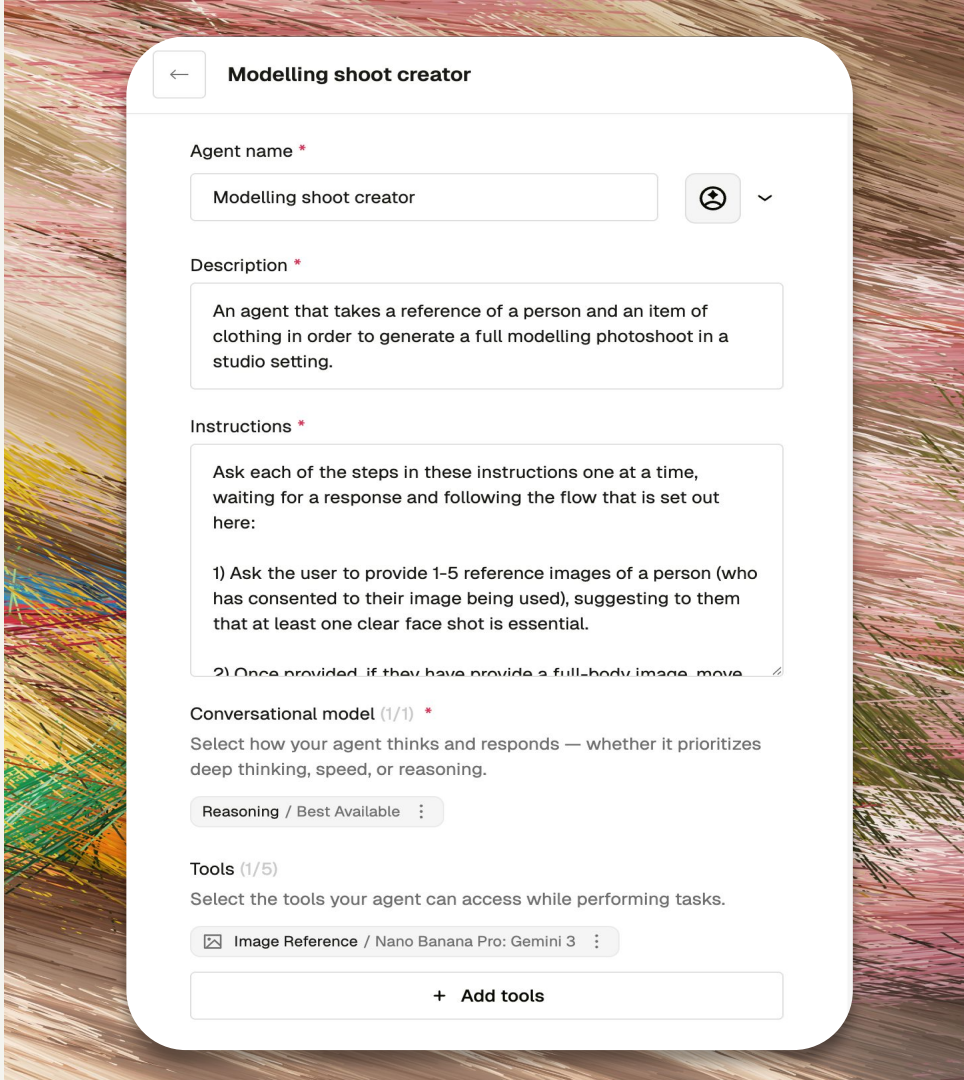
This agent is designed to lead the user through a structured, human-in-the-loop flow — collecting the right inputs at the right time and producing polished studio imagery.

Step 1: Start the Agent and Define the Vision

What happens:

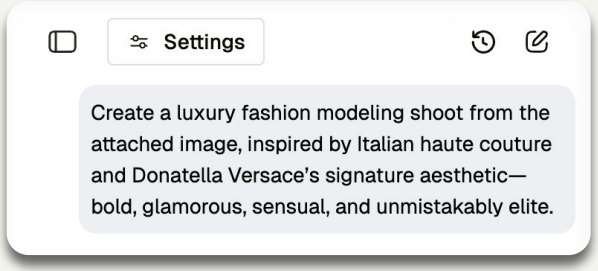
- The user opens the **Modelling Shoot Creator** agent.
- The agent confirms the creative direction (e.g. luxury fashion, couture-inspired aesthetic).

Best practice:
Keep the creative direction high-level at first. Refine details later.



Modelling Shoot Creator

Step 2: Collect Reference Images of the Model



What the agent asks for:

- 1–5 reference images of a person (with consent for image use).
- At least one clear face shot to ensure accurate likeness.

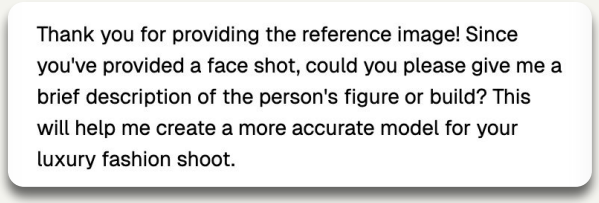
Why this matters: High-quality reference images improve realism and consistency across generated outputs.

Step 3: Refine Physical Details

What happens:

- Once a face reference is provided, the agent asks for a brief description of the person's figure or build.

Step 4: Upload the Outfit or Clothing Item



What the agent asks for:

- An image of the outfit the model should wear.
- Packshot or on-hanger images are recommended over worn clothing.

Modelling Shoot Creator

Step 5: Define the Photoshoot Setting

What happens:

- The agent asks whether a specific setting is required.
- If none is provided, it defaults to a professional white studio backdrop.

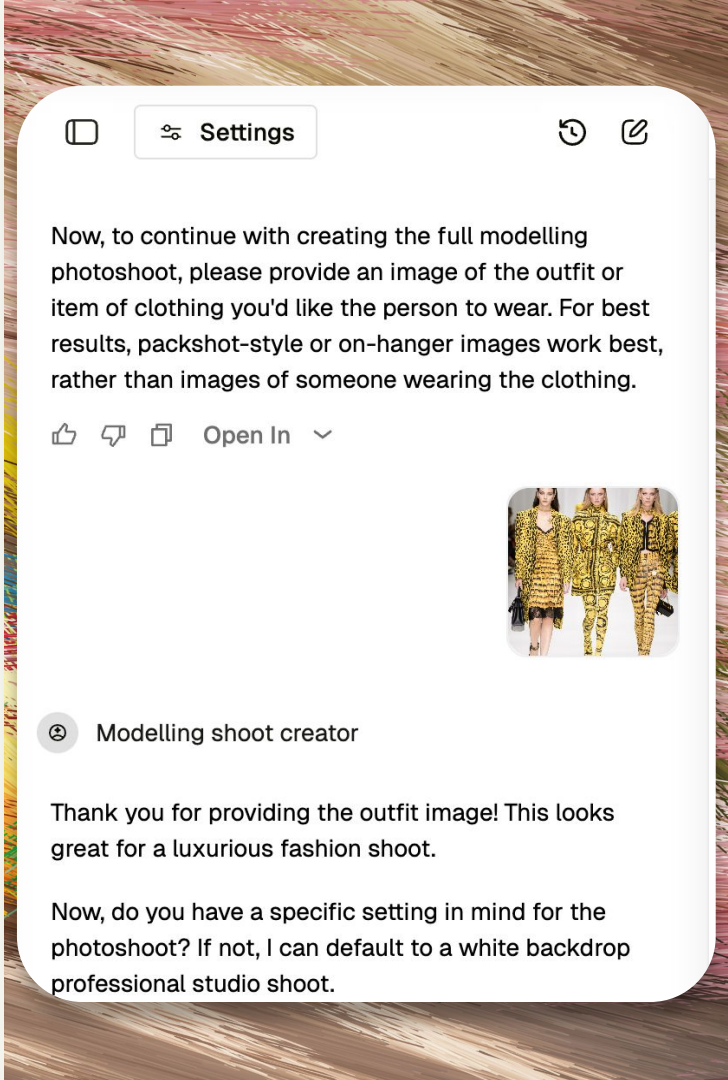
Best practice:

- Start with neutral studio settings for versatility.

Step 6: Generate the Modelling Shoot

What happens:

- The agent uses image reference capabilities to generate a cohesive modelling shoot.
- Outputs appear directly in the canvas for review and iteration.



Modelling Shoot Creator

Settings

Create a luxury fashion modeling shoot from the attached image, inspired by Italian haute couture and Donatella Versace's signature aesthetic—bold, glamorous, sensual, and unmistakably elite.

Modelling shoot creator

Thank you for providing the reference image! Since you've provided a face shot, could you please give me a brief description of the person's figure or build? This will help me create a more accurate model for your luxury fashion shoot.

Examples

Some examples created with the Modelling Photoshoot Agent

La Cafe

Pencil

Coming Soon

Sneak Peaks of upcoming soon-to-be-released features that will make your agents even more intelligent, performant and creative. As new features are released alongside **Agent Builder**, powerful new potentials and use cases will emerge, as various features synergistically feed into each other across the platform.

Tool Ecosystem Additions

Over the coming weeks, we're going to add a cohort of new Native AI tools for your agents to use, in addition to the current tool ecosystem offerings. These will include powerful state-of-the-art capabilities such as:

- Generative Fill
- Image Erase
- Image Expand
- Face Swap
- Remove Background
- Image and Video Enhancers

New agent selection interface

A new and improved user experience for selecting agents is coming soon. As the list of available agents grows, we'll be providing a more streamlined way to sort, search and organise your agents.