

Most Attio builds start with the same three agents. From here we customize to fit how your business actually runs.



01

Workspace Audit

- Reads every object, attribute, list, and automation. Read-only.
- Flags dead fields, duplicates, and automations misfiring: loops, drifting statuses, sequences sending without approval.
- Writes the data dictionary you never had.

What you get

A written teardown, and the three fixes worth making first.



02

Migration & Hygiene

- Takes exports from any CRM, spreadsheet, or private list a rep is keeping.
- Dedupes across all of them at once, normalizes the fields, flags what is dead.
- Returns a short keep-or-cut list. The judgment calls are yours.

What you get

Clean companies, people, and deals, imported and verified.



03

Daily Focus

- A brief for each person before the day starts.
- What is due, what has gone quiet, yesterday's commitments, follow-ups owed.
- Ranked by what moves revenue. Arrives by email at 7am. No login required.

What you get

A CRM the team keeps current, because the brief only knows what is in it.

Built inside Attio

Runs on Attio's own workflow engine. No second platform to buy or babysit.

You own all of it

Your workspace, your data, your automations, documented on the way out.

A human always sends

Agents draft, score, and flag. They do not email your customers on their own.

How to start



Workspace Audit

Agent 01 against your current setup. Written teardown, no obligation either way.



Landing

Data model, migration, all three agents installed and documented, team trained.



Operating layer

Monthly health checks, new automations, and agent tuning as the business changes.