

An AI agent in your company: the first 30 days

Where to start, what to measure and when not to build an agent. A four-week plan with a worksheet.

For owners, operations people and CTOs who want to hand boring work to software. Customer emails, orders or invoices, for example. The worksheet takes 30 minutes, before your first conversation with a vendor.

Since 2023 we have delivered 15+ production projects. We run agents and automations for clients and in our own company.

1. An agent, an automation, or nothing?

Most companies that want an AI agent need an automation. An agent makes sense where free text has to be read and decisions made within limits.

	Assistant	Automation	Agent
Who decides	A human at every step	A rule, a human for exceptions	The agent, within limits
Example	A draft text in an AI chat	An invoice from email into accounting	A reply to a customer's question about an order
What you need	An account	A described process and examples	Process, examples, rules and who takes the exceptions
Worst mistake	A bad text in one document	The mistake repeats until someone stops it	The agent tells a customer something wrong in your name

An agent only works with an automation underneath. Without one it has nothing to read from.

2. When not to build an agent

If even one of these applies, start somewhere else.

- ☐ You need 100 % accuracy without any human check.
- ☐ You can't describe the process in one paragraph.
- ☐ You have no examples of the right result outside one person's head.
- ☐ Nobody has time to approve drafts in the first weeks.

- ☐ You can't say where the saved time will go.
- ☐ The agent wouldn't have access to the data it needs to answer (orders, stock, price list).

Sometimes the best answer is to tidy a spreadsheet, or to do nothing. That's a result too.

3. Choosing the first process: a worksheet

Write down 2 or 3 candidates. Give one point for every "yes".

Question	Process A	Process B	Process C
Does it happen every day?			
Does the input have a similar shape (email, invoice, order)?			
Do you have examples of correct replies or results?			
Can you name the exceptions and who gets them?			
Can a mistake be fixed before the customer sees it?			
Will the saved time go to sales or to customers?			
Total (out of 6)			

Start with the highest score. On a tie, pick the one where a mistake is cheaper.

Three questions we ask before every project: Will it make money? Will it save money? Will it save time, for whom, and what will that person do with it? If you can't answer any of them, you don't need an agent yet.

4. The 30-day plan

Day 0: measure today

Without a baseline you won't know whether the agent helped. Time 10 typical cases with a stopwatch. How long one takes, who does it, how many there are each week.

Week 1: understand the work

- ☐ Collect real cases from recent weeks, not made-up ones.
- ☐ Sort them: what comes in, from whom, how often, what people did with it.
- ☐ Pick the single most common type. Only that one.
- ☐ Write down the exceptions and the name of the person who gets them.

Week 2: the agent drafts, a human approves

- ☐ The agent sends nothing on its own. A human sees and confirms every draft.
- ☐ Every correction goes back into the agent's material.

- ☐ Write the material in your people's words, from their real replies.

Week 3: measure and fix

- ☐ Track the numbers from part 5 every day.
- ☐ Add a rule: when the agent doesn't know, it hands over to a human.
- ☐ Check that the agent doesn't promise what it mustn't (prices, dates, discounts).

Week 4: decide

What you see	Decision
You approve most drafts without changes and approving has become boring	Let this type run on its own. Everything else still goes through a human.
You correct often, but less than in week 2	Another month in draft mode. Keep fixing the material.
You correct more than the agent saved	Stop. Go back to choosing the process, or to an automation.

5. What to measure

Number	How to get it	Why
Time per case	Stopwatch on 10 cases, before and after	The main proof that it helps
Share of drafts approved unchanged	Approved / all drafts	Tells you when to let a type run on its own
Share of cases handed to a human	Escalations / all cases	Too low is suspicious, not good
Mistakes the customer saw	Write down every one	The only number that has to be zero
Time spent approving	Estimate from the person who approves	If it's higher than the saving, something is wrong

6. What it looks like in practice

A client with an online shop: customer support. The founders spent 2 to 3 hours a day on emails. Today it's 15 minutes. Customers get a reply within 5 minutes and nobody sits on support. The first version, though, answered like a marketing flyer. What helped was rewriting the material in the founders' words and one rule: "when you don't know, hand it to a human".

Our own accounting: invoices. No agent, just automation. One invoice took 10 to 15 minutes; today it takes under a minute. 70 % go through without a human. The rest goes through a human on purpose: scans, new suppliers, several VAT rates.

7. Limits that apply from day one

- ☐ The agent never promises a price, a date or a discount on its own.
- ☐ When it isn't sure, it hands the work to a specific person.
- ☐ Every action is logged: what it received, what it did, who approved it.
- ☐ The agent only has the access the task needs. Nothing more.
- ☐ Personal data only goes into tools you have approved for it.
- ☐ The agent has one owner in the company.
- ☐ The agent, its material and the data belong to you, even if you change vendors.

Not sure which process to start with?

In 15 minutes with Filip we go through your worksheet from part 3. We'll also tell you if an automation, or nothing, is enough.

Book 15 minutes with Filip: digitaliko.com/contact

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