DIGMATIX

PERSONAL READ | SAMPLE RESPONSE, FOR ILLUSTRATION

Your Finance team is almost ready

Team Finance
Task Preparing reports, data or information as part of a process
Wants the agent to Act: do tasks in the systems

YOUR SCORE

26 / 35

ALMOST

OUR READ

The organizational side is strong: you can measure the task, it has a named owner, you know where the agent should live and what it may see. That is the hard part, and most teams are not there.

The gap is the data under the report. Its inputs sit in spreadsheets and shared folders, and reports only sometimes agree. An agent that acts on those numbers would act on the disagreement too. So start one step lower: let it prepare the report and explain the variances while a person approves, and move to Act once the numbers agree.

Area	Your answer	Level	Points
Purpose	Know the outcome, quality metrics, time and cost today	■■■■	4 / 4
Owner	A named person in the team, with time set aside	■■■■	4 / 4
Context	In spreadsheets and shared folders	■■□□	2 / 4
Workplace	Exactly where the work happens: Teams, Outlook, ERP	■■■■	4 / 4
Security	Yes, the agent could get its own account with just those rights	■■■■	4 / 4
Autonomy	Read and suggest now, with clear rules to earn more	■■■■	4 / 4
Skills	2 out of 5	■■□□□	2 / 5
Numbers agree	Sometimes; depends on who built the report	■□□	1 / 3
What AI would read	A mix of files and some systems	■□□	1 / 3

Already in place

- Purpose and Owner: a measured task with a named owner is the best base for a first agent.
- Security and Autonomy: an own agent account plus rules for earning more is the safe pattern.

Fix these first

- Numbers agree: pick the three to five numbers this report uses and agree one definition and one owner for each.
- What AI would read: a small governed data layer for this one report, so the agent reads trusted data, not copies of files.

YOUR FIRST THREE STEPS

1. **Pick the one report.** Write down how many hours a month it takes today; that is your baseline.
2. **Agree its numbers.** Three to five figures, one definition and one owner each, read from one source instead of copies.
3. **Start with Explain, earn Act.** An agent in Teams prepares the report and flags variances; a person approves. After a few clean cycles, let it post the routine steps.

How to read the score 7 to 17 Not yet: start with one task and one owner. 18 to 27 Almost: close the gaps while you build. 28 to 35 Go: start with one team, go narrow and deep, then scale.

Talk it through Kaspars Salenieks, Digmatix. Reply to this email for a 30-minute call, no slides.