

OMNI BY ENTERPRISE DNA

Build Your Own AI Operating Layer

A practical field guide for owner-led businesses ready to
automate the work around the work.

FRONT MATTER

A note from Sam

This booklet exists because most businesses now need an AI operating layer, but most owners have only been shown disconnected tools, chatbots, and demos.

The shift is simple to state. The interface is no longer the product. The database is. AI agents read the database, reason over it, act on it, and humans supervise. The new shape of business software is an operating layer that runs alongside your team, not another tool your team has to remember to operate.

This brief is a field guide. It shows what you need to put in place, what should be automated first, and what Enterprise DNA can install for you quickly. The goal is not to admire AI from the outside. The goal is to put useful AI into the operating rhythm of the business.

I have spent ten years at Enterprise DNA helping businesses do more with their data. The version of that mission we can now deliver is more useful than anything that came before it. If any of this lands, start with the audit. We will show you the first three places to build your operating layer.

Sam McKay

Founder, Enterprise DNA

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PART 1

Why your business needs an operating layer

Software is moving from human-operated to AI-operated. Your business needs to be built for that shift.

For three decades, the assumption baked into every business application has been the same. A human sits in front of the screen. The software exists to help that human click through a workflow. The business hires people to move data between tools, chase updates, rewrite reports, and remember the next step. That assumption is breaking.

The new assumption is that an AI agent operates the system on behalf of the human. The human supervises. The human approves. The human redirects when needed. But the work itself is done by the agent, against the data, on a loop.

This is not "AI features inside SaaS". Bolt-on AI keeps the old model and adds a chat box. An operating layer is structurally different. It connects to the systems you already use, creates one clean picture of the business, and lets agents do the repeatable work inside clear guardrails.



What you need to be doing now

A firm of fifteen people, today, runs on roughly seven tools and roughly four humans whose job is to hold those seven tools together. The CRM is one thing. The accounting tool is another. The email lives in a third place. The reports get rebuilt in a spreadsheet at the end of the month. The next step on a deal is in someone's head.

The next move is not another app. The next move is a layer above the apps. You need a clean operational database, agents that can read and act across it, and a human approval rhythm for the decisions that still need judgement.

In practice, this starts small. Connect email and calendar. Pull in CRM and project activity. Let the first agent triage the inbox, draft follow-ups, and write a daily owner brief. Then add reporting, project status, knowledge, proposals, and customer updates. You are not trying to automate the whole company in one go. You are building the layer that lets automation compound.

That is what Enterprise DNA installs. The tools you use today can stay. The operating layer goes around them, makes them intelligible, and starts removing the work your team should not still be doing by hand.

PART 2

Stop buying disconnected tools

Once data is centralised and AI can reason across it, the lines between SaaS products dissolve.

When a business has a clean operational database, with contacts, projects, emails, tasks, notes, documents, and history all in one place, an unexpected thing happens. The categories of software that were carefully separated by vendors for the last twenty years stop making sense. CRM, project manager, email client, support tool, reporting tool, knowledge base. They are no longer distinct products. They are just different views over the same operational state, with different filters and different layouts.

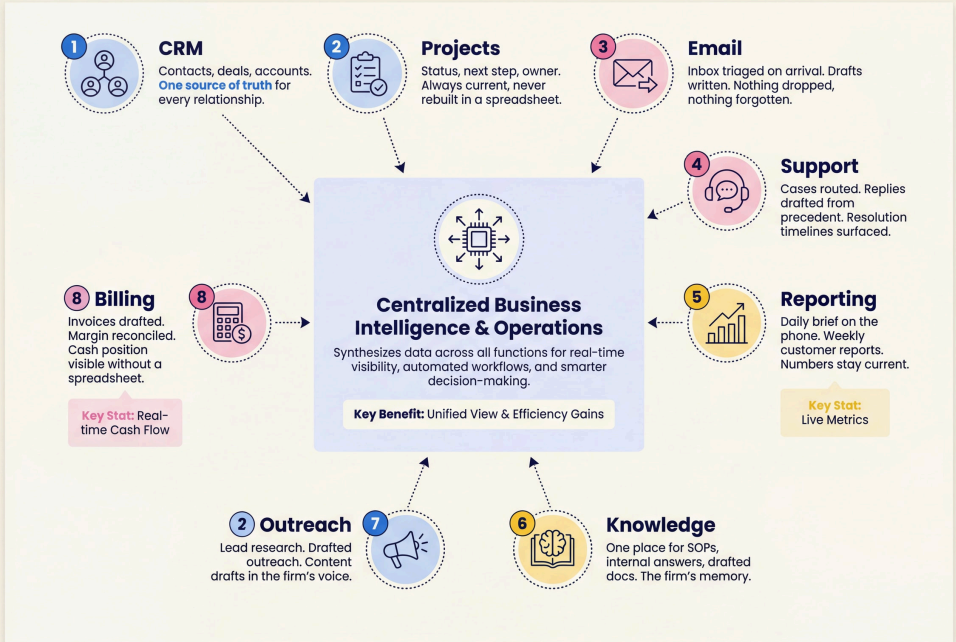
Once your data lives in one place, each of these tools is just a different view on top of it. The expensive part is the database, and you only build it once.

Why the old complexity existed

A lot of what made enterprise software heavy was not the work. It was the human interface around the work. Forms validated input because humans typed wrong things. Workflows enforced order because humans skipped steps. Dashboards surfaced exceptions because humans could not scan a thousand records. Training programs existed because the software was complex enough to need them.

AI agents do not have those constraints. They do not skip steps. They do not fatigue. They do not need a refresher course before quarter end. So the interface complexity that surrounded the work for decades is no longer needed. What replaces it is a thin viewing layer for the human supervisor, plus a much richer set of agents and rules behind the scenes.

Eight categories. One operational brain.



Once your data lives in one place, each of these tools is just a different view on top of it. The expensive part is the database, and you only build it once.

PART 3

The five things that have to happen

Bring it in. Tidy it up. Make sense of it. Do something with it. Show you the result.

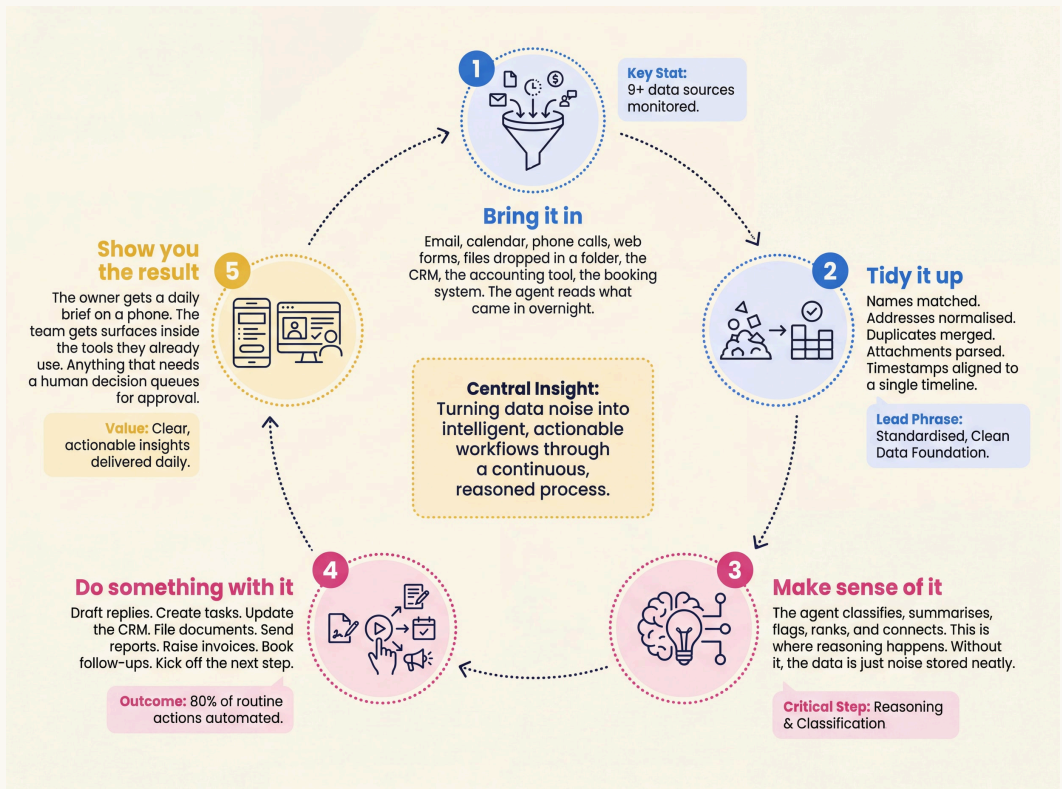
Every operating layer we have built for a customer, regardless of industry, regardless of starting tools, ends up with the same five layers underneath. The shape is universal because the work is universal. Every business takes information in, organises it, decides what to do, does it, and reports back. The only thing that changes between businesses is which tools the information comes from and what gets done with it.

1. Bring it in. Pull your business information in from every system that matters. Email, calendar, your accounting tool, the CRM, the job board, the e-commerce platform, your file storage, your phone system. The tools you already use stay where they are. You do not migrate anything. You do not retrain anyone on a new platform.

2. Tidy up. Take all that raw incoming data and turn it into one clean, consistent picture of your business. Contacts. Deals. Projects. Conversations. Tasks. Notes. Documents. Activity. All sitting in one place that you own.

3. Make sense of it. This is where the AI does the thinking. Agents read everything in your operating layer, work out what matters, what is urgent, what needs a person, and what they can handle on their own. The single most valuable thing AI is good at right now is reading a hundred things and telling you which three matter.

The loop



4. Do something with it. Draft replies, create tasks, update the CRM, file documents, send reports, raise invoices, book follow-ups, kick off the next step.

5. Show you the result. The owner gets a daily brief on a phone. The team gets surfaces inside the tools they already use. Anything that needed a human decision is queued and approved or redirected.

PART 4

What we help you build

A Command Center around your existing tools, powered by AI agents, managed with you every month.

The goal is not to sell you another app. The goal is to build the operating layer your business now needs: one connected business brain, a set of agents doing repeatable work, and a clear place for your team to review what happened.

Connect the tools

Email, calendar, CRM, accounting, documents, website, phone, reporting, spreadsheets, and project tools become inputs to one layer.

Build the AI brain

We use Claude Code, Codex, Cursor, and the latest model tooling, then customise them around your workflows, rules, language, and approvals.

Create the review surface

Your Command Center shows leads, projects, follow-ups, support, reports, approvals, risks, and agent activity in one place.

Run the workflows

We can operate key functions with you: inbox, support, website, socials, reporting, project follow-up, custom apps, and custom agents.

Best fit

Owner-led service businesses with scattered tools, manual reporting, inconsistent follow-up, inbox pressure, support load, and a founder still holding too much of the business in their head.

Voice and phone support

Help Genie is the voice surface on top of the same operating layer. Phone calls can be answered, summarised, routed, and followed up by agents that understand the same business memory your Command Center sees.

PART 5

What we can install first

Six working systems that form the starter pack for your AI operating layer.

Every Command Center starts with practical systems a business owner can feel immediately. We pick the first pillar based on where the hours, missed revenue, or customer friction are loudest today.

Inbox and follow-up: every lead and customer request is triaged, drafted, and tracked.

Sales and contacts: every deal and contact stays current without the team babysitting the CRM.

Projects and work: every job has status, owner, blocker, and next step visible.

Reporting and metrics: owner briefs and customer reports write themselves from live activity.

Knowledge and documents: your business answers questions from its own memory.

Outreach and content: lead research, social drafts, campaigns, and follow-ups move every week.

1 Inbox & follow-up

The owner walks in to a queue, not a pile.

Email triaged. Replies drafted. Nothing dropped.

Daily Triage: 100%

2 Contacts & history

One source of truth for every person and every interaction.

Legacy: Disconnected | New: Unified & Automated

The CRM nobody complains about because nobody has to update it.

3 Projects & work

Always current.

Status, next step, owner. The agent updates the board from the work itself, not from a status meeting.

Agent → Update

4 Reporting & metrics

Daily owner brief. Weekly customer reports.

98% Accuracy

The numbers the business needs, written by the system that owns the data.

5 Knowledge & docs

Internal answers. Drafted documents.

SOPs that stay current because the agent writes them, not because someone schedules a review.

Knowledge base is self-maintaining.

6 Outreach & content

Lead research. Drafted outreach.

Content drafts in the firm's voice.

Top-of-funnel handled by the system that knows the firm.

Part 6 walks the twelve specific automations that ride on these pillars. Part 7 maps the symptoms each pillar removes.

PART 6

Twelve things we can automate tomorrow

Specific, concrete jobs your team should not still be doing by hand.

If your team had a tireless assistant sitting across the business, these are the jobs that would move first. None require a big migration. The agent works against the data and tools you already have.

<p>Inbox triage Sort what matters, draft replies, and route the rest.</p>	<p>Customer support Answer common questions and escalate edge cases.</p>	<p>Project status Write updates from emails, calls, meetings, and tool activity.</p>
<p>Website and socials Prepare updates, posts, and campaign drafts.</p>	<p>Invoices and finance Chase overdue invoices and prepare finance summaries.</p>	<p>Custom workflows Build agents and apps for the work only your business does.</p>

<p>1 Inbox triage  Nothing falls through. Every email classified, ranked, routed. Replies drafted on arrival. 95% Faster Routing</p>	<p>2 Draft replies  First-pass response written in the firm's voice. Manual Start (15 min) vs Owner Edit (2 min)</p>	<p>3 Calendar & invites  Meetings booked from email threads, invites with the right participants, agenda, and dial-in attached. Email Thread > Extraction > Calendar Event</p>	<p>4 CRM updates  No more manual data entry. Every conversation, call, and email logged against the right contact and deal. 100% Auto-Logged</p>
<p>5 Status reports  The owner reviews. Project status drafted weekly. Customer-facing language. Writing from scratch (1 hr) vs Review & Send (5 min)</p>	<p>6 Lead research  Inbound and outbound lead context pulled, summarised, and dropped into the CRM before the first call. Context in <30 Sec</p>	<p>7 Outreach drafts  Personalised outreach. Written for the next ten prospects, and dropped into the CRM before the first call. Not template spam — specific to the firm and target. 10x More Targeted</p>	<p>8 Document drafts  Engagement letters, proposals, statements of advice drafted from intake notes and firm precedent. Intake > Firm Precedent > Draft Document</p>
<p>9 Knowledge answers  The team asks the system. Internal Q&A answered from SOPs and past matters. Instant Answers</p>	<p>10 Internal Q&A  Staff questions answered without interrupting a senior. Source of Truth</p>	<p>11 Task assignment  Action items extracted from calls and emails. Assigned, scheduled, tracked. Communication > Action Extraction > Task Assigned</p>	<p>12 Weekly summaries  One screen, not five tools. Owner gets a Monday brief. What moved, what stalled, what needs you. Weekly Brief: 5 Min Read</p>

This list grows. Every operating layer adds three to five more automations specific to the firm in the first ninety days.

PART 7

The symptoms it removes

Six complaints we hear in every audit. Six pillars that make them stop.

Most owners we sit down with describe their business in symptoms, not in tools. The Command Center is built around those symptoms. They are not technology problems. They are operational glue problems. Every one of them is what happens when a business has grown beyond what one or two people can carry in their heads.

The map below shows the symptom we hear on the left, and the state the operating layer puts the business in on the right. The diagonal is not a coincidence. The Command Center is designed around removing those six symptoms, in that order.

BEFORE	AFTER
 <p>Inbox out of control, nothing replied to before noon.</p>	 <p>Inbox triaged on arrival, replies drafted.</p>
 <p>Reports rebuilt every month from scratch.</p>	 <p>Reports always current, brief writes itself.</p>
 <p>Next step lives in someone's head.</p>	 <p>Next step visible in the system, no meeting needed.</p>
 <p>Repeating the same answer every week.</p>	 <p>One source, AI answers from SOPs and past work.</p>
 <p>Lead follow-up patchy, things drop.</p>	 <p>Every lead followed up, nothing forgotten.</p>
 <p>Owner doing the admin every night.</p>	 <p>Owner growing the business, week back.</p>



WEEK BACK, BUSINESS GROWING
Shift from night admin to strategic growth and freedom.

PART 8

What this means for your business

Hiring decisions shift. New services open. New customers become reachable. Owner time returns. A business you could actually sell.

The Command Center is not a productivity tool. It is a different operating shape for the business. The effects compound. The most useful way to read this part is to pick the two outcomes that would change the most for your firm in the next twelve months. Those are the outcomes the engagement is built around.

Hiring decisions shift. Roles that exist to hold things together are not the next hire. The next hire is someone who grows the business, because the holding-together is done by software.

New services open inside existing customers. The retained reporting service you could not staff before is now a viable line. The quarterly review your customers always asked for is now a service you sell. Existing customers are the easiest customers to grow.

New segments become reachable. Smaller customers, more remote customers, customers whose unit economics never worked because the admin overhead was too high. The operating layer absorbs the admin. Segments that used to be unprofitable become profitable.

Speed becomes the competitive advantage. The work your team takes a week to ship goes out in two days. Same team, more throughput. Customers feel it. Word travels.

Owner time returns. The owner spends less time being the operational glue and more time on the work only the owner can do. New customers, partnerships, the next chapter.

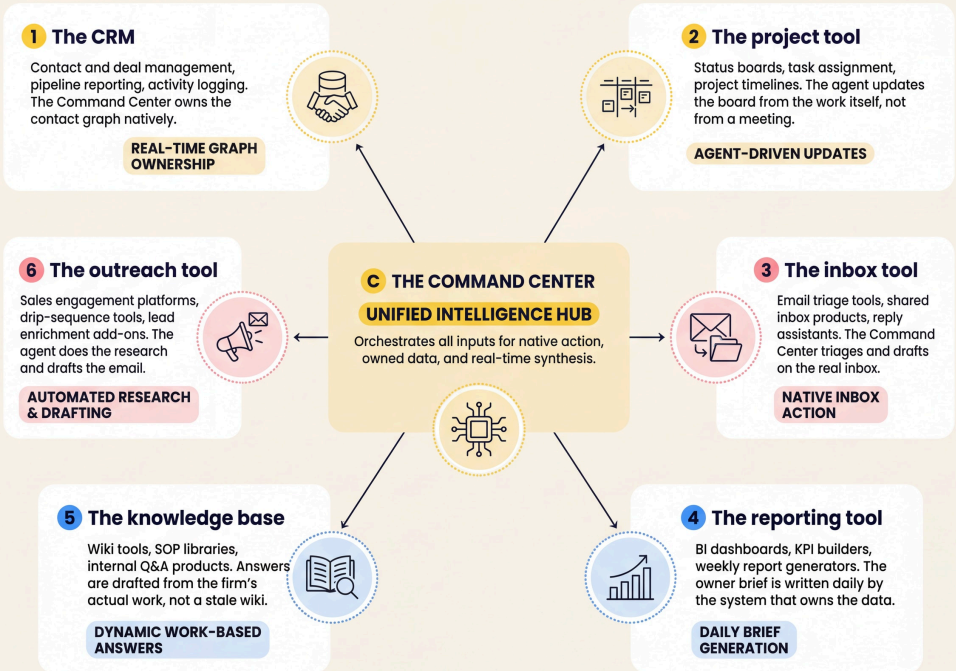
A business you could actually sell. A firm that runs in the founder's head is the founder's job. A firm that runs on an operating layer is an asset. Capacity, IP, systems, repeatable revenue. The buyer can see what they are buying.

PART 9

The subscriptions you could stop paying for

Most owner-led firms are paying for fifteen to forty separate subscriptions. Most do not know the total when we ask.

Every audit produces a list of subscriptions the firm is paying for whose primary job is replaced by the Command Center. The total monthly bill for the average firm we sit down with sits between two and ten thousand dollars. We do not insist on retirement. Some customers keep tools they already love. Most stop paying for at least four in the first quarter.



PART 10

What this looks like in your industry

Same operating layer. Different first workflows. Six everyday examples.

Accounting firms

Client queries triaged, document chasing drafted, monthly reporting prepared, tax deadlines surfaced before they become fire drills.

Law firms

Matter intake routed, client updates drafted, deadlines surfaced, document drafts prepared from precedent, partner time protected.

Financial advisers

Meeting prep assembled, annual reviews tracked, client comms drafted, compliance evidence collected as the work happens.

Agencies

Briefs classified, project status written, client reports prepared, social and campaign drafts kept moving every week.

Property businesses

Tenant and owner queries triaged, maintenance follow-up tracked, arrears chased, property reports prepared automatically.

Healthcare and education

Admin requests routed, support replies drafted, policy questions answered, reporting and follow-up handled without more coordination meetings.

Save hours

Fewer admin loops, fewer status meetings.

Protect revenue

Follow-up, support, and reporting stop slipping.

Create capacity

The same team can serve more customers.



① Law firms

Matter intake triaged on arrival.
 Client correspondence drafted into the right matter.
 Deadlines surfaced before they slip.
 Conflict checks automated.

The partner spends time on advice.



② Financial advisers

Client meeting prep auto-prepared.
 Statements of Advice drafted from intake notes.
 Annual review cadence run by the system.
 Compliance evidence collected as a side-effect of operations.



③ Agencies

Inbound briefs classified and routed.
 Status reports drafted weekly.
 Time and margin reconciled.
 Client portal answers handled.

Monday morning gets back to creative direction.



④ Admin-heavy businesses

Property managers, recruiters, accountants, training providers.
 The pattern is the same.



The volume of operational glue is high. The agent eats most of it.



⑤ Professional services

If that is you, you are the pattern.

Five to fifty people.
 An owner who is also the operator.
 At least four tools that do not talk to each other.

The pattern is the same. If your business has five to fifty people, an owner who is also the operator, and at least four tools that do not talk to each other, you are the pattern.

The first workflow changes by industry. The destination does not: one operating layer, agents doing the repeatable work, and a Command Center where the owner can see what needs a decision.

PART 11

How we work

Audit, first agent, operating rhythm, expansion. Useful work starts immediately.

We do not ask you to replace your business systems. We connect them, build the AI brain around your workflows, and give the owner a clear review surface.

Connect: email, CRM, calendar, accounting, documents, phone, website, reporting, and project systems.

Customise: workflows, prompts, rules, approvals, customer language, escalation paths, and business memory.

Review: leads, projects, support, reports, risks, agent activity, and decisions waiting for a human.

Operate: we run and improve the workflows with you every month, instead of leaving you with another tool.



Behind the Command Center sit the agents and workflows. In front of it sits the owner or team lead, supervising the business instead of chasing it.

PART 12

Why us

We run our entire business on this same Command Center.

Enterprise DNA serves customers across three continents with a small team. Every agent, dashboard, and workflow we sell is one we use ourselves every day. We are not selling a theory. We are selling our own operating manual.

We run on this stack ourselves. The Enterprise DNA Command Center is the system we use to run Enterprise DNA. Our CRM, our follow-ups, our reporting, our project tracking, our weekly briefs all sit on the same operating layer we are offering you. If it stops working for us, we feel it before you do. If we improve it for us, you get the improvement.

Real working AI, not slide decks. No proof-of-concept demos that never ship. Every engagement produces working AI handling real tasks inside your business from week one. If we cannot install something useful in week one, we tell you, and we do not start.

One team, end-to-end. Need CRM intelligence, email automation, reporting, project tracking, and voice agents? You work with one team that knows your business. No handoffs. No lost context. No duplicated effort.

You can cancel any month. No multi-year contracts. Thirty days notice and you are out. The control stays with the customer because the value has to keep showing up. We earn the next month every month.

The technology is finally ready. In 2024 the models could draft. In 2025 they could use tools. In 2026 they can hold a job. Cheap enough to run all day, smart enough to make a real call, integrated enough to live inside your stack. This is the window we are in.

PART 13

Ways to work with Enterprise DNA

Audit, advisory, build, run, website, socials, inbox, support, voice, analytics, custom agents.



1 Strategy Audit

Free. Thirty minutes. Three places AI removes work this quarter. You leave with a map whether we work together or not.



2 Fractional Advisor

Monthly retainer. You lead, we steer the AI rollout. For firms that want a hand on the wheel without hiring a head of AI.



3 Command Center Build

Working pilot in week one. → **Full system live in ninety days.** We install the six pillars and the first round of automations.



4 Command Center Run

Ongoing. We operate the layer alongside your team. Tuning, expanding, adding automations as the firm changes.



5 Voice & Phone

Booked → Triaged → Transcribed → Routed. Help Genie voice agent for inbound and inescrutrive outbound calls. Plugs into the Command Center.



6 Analytics & Power BI

Reporting layer on top of the data the Command Center centralised.

- Custom dashboards
- Executive reports
- KPI tracking



7 Custom agent builds

Industry-specific agents on top of the Command Center.

Contract review, conveyancing, financial advice, agency reporting.

How to choose

If you are not sure, start with the audit. Thirty minutes. Three places AI removes work in your firm this quarter. The audit tells you, and us, which shape is right.

The shapes we see most often

Full Command Center install and run

The whole operating layer. First agent quickly, monthly operation after that.

Managed business operations

We run repeatable workflows around website, socials, inbox, support, reporting, and project follow-up.

Custom agent first

One specific workflow automated first, then the wider Command Center if the model lands.

Custom app or workflow

Review screens, approval queues, customer portals, reporting apps, and internal tools.

The thirty minutes that starts any of the above is on the next page.

PART 14

What to do next

The audit is free. The decision is yours.

Thirty minutes with Sam. We identify the first three places your business can save time, improve follow-up, or unlock capacity with an AI operating layer.

1. One firm moves first

They grow without hiring, respond faster, and quietly improve margin.

2. Most firms bolt AI on

They buy features inside old tools and wonder why the business did not change.

3. Early compounds

The first customers will not pay the least. They will start learning earliest.

The audit gives you the map: what to connect, what to automate first, what should stay human, and which operating workflows Enterprise DNA can run with you.

You leave with: three practical AI opportunities for this quarter.

If it is a fit: we install the first agent and build from there.

If it is not: you still have the roadmap.

No pressure: the decision is yours.

BOOK THE AUDIT

Thirty minutes. Free.

Three places in your business where AI could remove work this quarter.

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WEB enterprisedna.co/omni
BOOK calendly.com/sam-mckay/discovery-call

If paper is more your speed than calendar links, the phone number on the cover letter inside this booklet reaches us directly. The number on the letter is not a switchboard.

A NOTE IN CLOSING

The interface is no longer the product. The database is. AI agents read it, reason over it, act on it. Humans supervise. That is the operating layer your business needs to build.

FROM THE BRIEF INSIDE THIS BOOKLET.

Build the AI operating layer your business can run on.