

A FIELD GUIDE FROM ENTERPRISE DNA

The Five Jobs

A field guide to handing work to an AI agent you direct:
reporting, research, drafting, monitoring, and data
cleanup.

FRONT MATTER

A note from Sam

You already have the skill this guide asks for. If you can define a metric precisely, spot a number that looks wrong, and say what a good result should contain, you can direct an AI agent. That is the whole job.

For years, doing the work meant doing it by hand. You wrote the query, built the report, chased the sources, and typed every line yourself. That is changing. Now you describe the outcome, an agent does a first pass, and you check it and approve. You move from operating the tools to directing the work.

Your data judgement is exactly what steers it. An agent is fast, tireless, and occasionally confident and wrong. The person who knows what "active customer" means, and whether the total reconciles, is the one who keeps it honest. That person is you.

This guide hands you five boring jobs to give away first, a copy-paste brief for each, and the one habit that keeps it all safe. You keep a hand on approval. We run our own company this way. An agent drafts our Friday client reports, sorts the inbox, and files the work. A person signs off before anything leaves the building.

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CONTENTS

What is inside

- 1 Why this guide.** The shift from operating tools to directing agents, and why you start with one boring job.
- 2 The universal method.** The one-page brief, the single sign-off point, and the review loop that keeps it safe.
- 3 The five jobs.** Reporting, research, drafting, monitoring, and data cleanup. A copy-paste brief for each.
- 4 Your first week.** Pick one job, run the loop, keep the brief, and compound to the next.

Each chapter follows the same shape. What the job is, a before and after, the brief you can lift, the pitfalls, and where you sign off.

WHY THIS GUIDE

From operating to directing

The change underway is not that AI writes your reports for you. It is that the work moves from your hands to your judgement. You stop typing every step and start directing the one who does.

Think of it as a shift in role. The operator runs the tool. The director states the outcome, checks the result, and decides what happens next. The same move is happening across every kind of knowledge work, and analytics people are unusually well placed for it. You already think in precise, testable terms.

Your data skills just became agent skills.

Defining a metric so there is no ambiguity. Knowing the shape of a good answer. Catching the figure that does not reconcile. Structuring a messy problem into clear steps. Those habits are the exact habits that direct an agent well. Nothing you learned is wasted. It is the part that does not automate.

This guide is practical, not theoretical. The next pages give you a repeatable method and five jobs to try it on. Read it as a field guide you keep on the desk, not a manifesto you read once.

Hand over one boring job

The mistake is to reach for the hardest, most interesting problem first. Start at the other end. Pick the most boring, most repetitive job you already do by hand and understand well.

Boring is the point. A job you do every week has a known good answer, so you can check the agent against something you already trust. It is low risk, high volume, and the payoff is immediate. You get time back, and you learn how the agent thinks on work where a mistake costs you nothing.



These five jobs are where most analysts get their first real win. None of them need code. Each one follows the same method, which you learn once and reuse. And through all of them runs a single rule. **You keep a hand on approval.** The agent does the work. You decide what is good enough to ship.

THE UNIVERSAL METHOD

The one-page brief

The brief is the real work. An agent cannot read your mind, and a vague ask forces it to guess at a hundred things you never said. A clear one-page brief is the difference between a useful draft and a confident mess.

Write it the way you would brief a capable new hire. Not more formal, not more technical. Just clear and complete. Every good brief has the same six blocks, and they fit on one page.



1 Goal

Achieve a clear, one-sentence definition of the objective and the intended audience for the project.

Target: Shared understanding across all stakeholders.



2 Inputs

Data sources include:
Customer Database (SQL),
Q3 Sales Reports (XLSX),
Competitor Analysis (PDF), and
Market Trends API.

Source: Certified Data Only.

3 Steps

1. Data Extraction.

2. Cleaning & Transformation.

3. Analysis & Modeling.

4. Visualization Design.

5. Report Compilation.

Process: Follow the defined sequential flow for consistency.

4 Format

Output structure: 5-page PDF report with Executive Summary, Detailed Analysis, Visuals, and Recommendations.

Tone: Professional, data-driven, and actionable.

Length	Tone
• Short & Focused (Max 5 pages)	• Direct & Concise (No jargon)

5 Guardrails

Never invent data, use unverified sources, or include subjective opinions. Flag incomplete data instead of guessing.

Warning: Data Integrity is paramount; zero tolerance for invented figures.

6 Sign-off

Final review by Senior Analyst for accuracy and clarity. Approval required from Department Head before distribution.

Approval: Must have explicit sign-off to release.

Goal is one sentence on what good looks like and who it is for. **Inputs** name exactly where the data and sources live. **Steps** lay out the work in order. **Format** sets the shape of the output. **Guardrails** say what to never do and what to flag instead of guessing. **Sign-off** is what you will check before it goes out. Fill the six blocks and the agent knows the job.

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enterprisedna.co · 6 of 20

The gate and the loop

A good brief gets you a good first draft. It does not get you a finished result on its own. What turns a draft into something you can ship is the loop, and the one place a person always stands in it.

Run the same five steps every time. You direct with the brief. The agent drafts. You review the draft against something you already trust. You say what was wrong, and the agent refines. Then you approve. Nothing goes out until you do.



Approve what matters, not every keystroke

The gate is not about rubber-stamping every action. That just trains you to click yes without looking. It is about being in a position to catch the things that count. Hard-gate anything you cannot undo. A sent email, a written-back table, a published number. Watch the rest, and step in when it looks wrong.

JOB 1 · REPORTING

Reporting

The recurring report is the perfect first job. The numbers already live in a source you trust. The work is turning them into the same clear narrative, on the same schedule, in the same shape as last time.

Why an agent is good at it

Reporting is mostly turning numbers into words. The hard part, the figures, comes from your system, not the agent. Writing the commentary around them is close to summarizing, which agents do well. You define the report once, and the agent runs it every period without getting bored or skipping a section.

The manual way

You copy figures from a dashboard into a template and hand-write the same commentary every week.

The directed way

You hand over the figures and the last report. The agent drafts the narrative. You interpret and approve.

You stop writing the report and start owning what it says.

Reporting: the brief

Lift this, fill the brackets with your own report, and run it. It is the same six blocks as the universal method.

REPORTING BRIEF

copy, fill the brackets, run

Goal. Draft the [weekly sales] report from the numbers in [source], for [the leadership team].

Inputs. The figures in [this dashboard or file]. Last period's report as the model to match.

Steps. Pull each figure from the source. Write the commentary section by section. Call out what moved and by how much.

Format. [One page]. Same sections as last time. Plain sentences, no hype, no filler.

Guardrails. Never invent, estimate, or round a number. If a figure is missing, leave a [gap] and flag it.

Sign-off. I reconcile every number to the source before it goes out.

Watch for

- Fabricated figures:** a specific number with no support in the source, written just as confidently as a real one.

Confident wrong math: a total that reads clean but was never checked against a known-good number.

Where you sign off. Every figure must trace to the source before it ships. The agent writes the prose. You own the numbers and reconcile them, by total and by segment, because an error often hides under a total that looks right.

JOB 2 · RESEARCH

Research

The scan-and-summarize job is where an agent saves you the most raw hours. A question that would cost you an afternoon of open tabs comes back as a sourced brief you can check in minutes.

Why an agent is good at it

Research breaks into many small, independent lookups, and an agent can run them in parallel. It reads far more, far faster than you can, then pulls the findings into one place. Your job shifts from gathering to judging. You decide what is credible and what actually answers the question.

The manual way

Thirty open tabs, read one by one, collated by hand into a document you hope is complete.

The directed way

The agent gathers in parallel and returns a grouped, linked summary. You verify and decide.

The agent gathers the sources. You judge them.

Research: the brief

The most important line in this brief is the guardrail. It is the one that keeps invented sources out of your work.

RESEARCH BRIEF

copy, fill the brackets, run

Goal. Answer [the question] with a short, sourced brief I can act on.

Inputs. Start from [these sources or this list]. Prefer primary, named, and recent sources.

Steps. Gather, then group findings by theme. Note clearly where sources disagree with each other.

Format. [One page]. Findings as bullets, each with a working link and a one-line takeaway.

Guardrails. Only cite sources you actually opened. Never invent a source, quote, or figure. Flag thin areas.

Sign-off. I open every link and confirm it says what the brief claims.

Watch for

Invented citations: sources, quotes, or figures that do not exist but are written with total confidence.

Missing the disagreement: a tidy summary that hides the sources that contradict its own conclusion.

Where you sign off. Open every source before you use the brief anywhere that matters. Agents have confidently cited things that were never real. A summary is a lead, not a fact, until you have seen the source with your own eyes.

JOB 3 · DRAFTING

Drafting

The blank page is the slowest part of most writing. An agent removes it. You go straight from a rough intent to a structured first draft you can edit, which is a far faster place to start.

Why an agent is good at it

Turning a short brief into a competent first draft is the model's core strength. The value is not that it writes better than you. It is that it gets you off zero. The work moves from drafting to editing, and editing an existing draft is quicker and easier than facing an empty screen.

The manual way

You stare at an empty message, write from scratch, and lose momentum on the wording.

The directed way

The agent hands you a structured draft. You edit for accuracy and voice, then send.

The agent gets you off the blank page. You keep the voice.

Drafting: the brief

Feed the agent your own past writing as the voice to match, and keep the send button on your side of the line.

DRAFTING BRIEF

copy, fill the brackets, run

Goal. Draft [the email or update] to [the recipient] about [the topic].

Inputs. The [thread, facts, or last version]. A few pieces of my own writing as the voice to match.

Steps. Make one clear ask or update. Keep it to [length]. Match my tone, not a generic one.

Format. [Short email]. A clear subject, plain language, and a single call to action.

Guardrails. Never state a fact, date, price, or promise I did not give you. Ask if you are unsure.

Sign-off. I read and edit every draft before it sends. I press send, not you.

Watch for

Voice drift: fluent, generic prose that sounds like everyone and no longer sounds like you.

Confident errors: a wrong fact or an implied promise, buried in writing that reads perfectly well.

Where you sign off. You own the voice and any external claim or commitment. A sent message cannot be unsent, so drafting is where the agent stops and you take over. It proposes the words. You approve them and you send.

JOB 4 · MONITORING

Monitoring

Watching is tedious and never-ending, which is exactly why it suits an agent. It can keep an eye on a feed, an inbox, or a dashboard around the clock and tap you only when something real happens.

Why an agent is good at it

Monitoring is high-volume triage. Most of what streams past is noise, and an agent does not tire of sorting it. It watches continuously, compares against the rule you set, and escalates the few things that cross the line, with a short note on why. You get the signal without sitting on the stream.

The manual way

You glance at the dashboard when you remember, and miss the thing that happened overnight.

The directed way

The agent watches without stopping, triages the noise, and flags only what crosses your threshold.

The agent watches everything. You decide what deserves a flag.

Monitoring: the brief

The trick with monitoring is telling the agent to under-alert. A stream of false alarms is worse than none, because you learn to ignore it.

MONITORING BRIEF

copy, fill the brackets, run

Goal. Watch [the feed, inbox, or dashboard] and flag only [what matters to me].

Inputs. Access to [the source]. A clear rule for what counts as worth my attention.

Steps. Check [how often]. Compare against the threshold. Summarize what changed and why it matters.

Format. One short alert per real event. A quiet "nothing to report" the rest of the time.

Guardrails. Do not act on anything. Propose and wait. Under-alert rather than cry wolf.

Sign-off. I set the thresholds and I decide what happens after a flag.

Watch for

Alert fatigue: so many low-value flags that you stop reading them, and the real one slips past.

Silent gaps: a quiet screen that looks like calm but is actually a missed event.

Where you sign off. You set the thresholds and own the decision about what happens next. The agent proposes, it does not act. Tuning it to stay quiet without going blind is your calibration job, and you revisit it as you learn what a real signal looks like.

JOB 5 · DATA CLEANUP

Data cleanup

The messy table that quietly breaks a report is a job you keep meaning to get to. An agent is good at the grind of it. Finding the duplicates, the blanks, and the broken keys, and proposing the fix.

Why an agent is good at it

Cleanup is semantic pattern-matching. Are these two records the same customer. Is this address in a standard form. What likely belongs in this blank. An agent brings world knowledge that plain rules lack, so it can profile a table, spot the breakage, and suggest a repair, faster than you could write the rules by hand.

The manual way

Hand-written rules and slow reconciliation of near-duplicates you find one at a time.

The directed way

The agent profiles a copy, flags the problems, and proposes fixes as a change log you review.

The agent proposes the fix. You approve it before it is written.

Data cleanup: the brief

This is the one job where a careless agent can do real damage, so the whole brief is built to keep it non-destructive.

DATA CLEANUP BRIEF

copy, fill the brackets, run

Goal. Clean [the table] so [the report it feeds] stops breaking.

Inputs. A copy of [the table], never the live one. The rules for what a valid record looks like.

Steps. Profile the columns. Flag duplicates, blanks, and broken keys. Propose a fix for each.

Format. A change log. Every proposed edit shown as a before and after I can read.

Guardrails. Never write back to the source. Mark any filled-in value as a guess, not a fact.

Sign-off. I review the change log and approve before anything is written back.

Watch for

- Silent corruption:** a plausible but wrong fix that overwrites good data and leaves no error behind.

Guesses dressed as facts: an imputed value that fills a blank but was never really known.

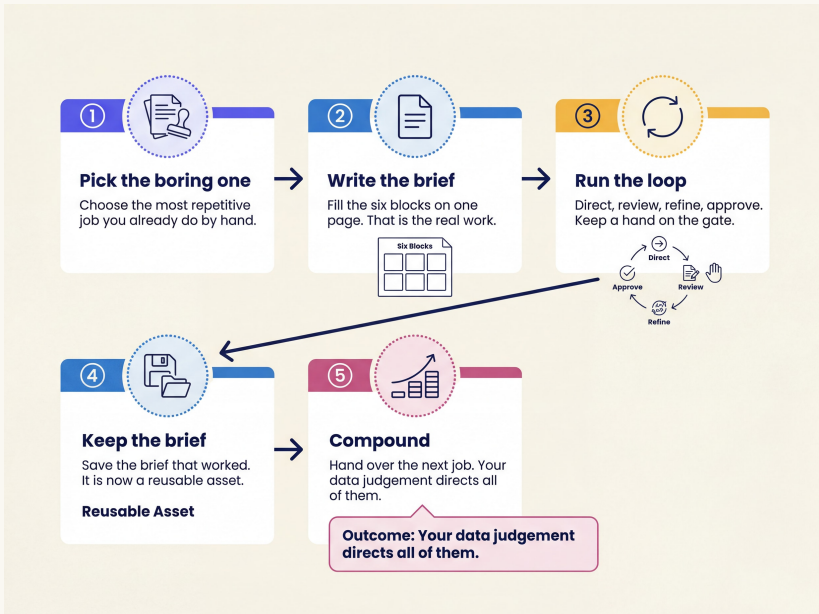
Where you sign off. Cleanup changes your source of truth, so it runs on a copy and produces a change log you approve before anything is written back. A bad merge or an invented value propagates into every report downstream. You read the diff, and you own the write-back.

YOUR FIRST WEEK

Start with one job

You do not need a project, a budget, or permission to begin. You need one boring job and thirty minutes. Pick the most repetitive thing on your list and hand it over this week.

Write the brief first. Fill the six blocks on one page. That page is the real work, and it is the part that carries over. Then run the loop. Direct, review, refine, approve. Keep a hand on the gate the whole way.



When a brief works, save it. It is now a reusable asset, not a one-off prompt. The next time that job comes around, you run the same brief and it takes minutes. That is how the time saving compounds instead of resetting every week.

Then compound it

One job becomes two. The brief you kept for reporting teaches you how to brief research. The review habit you built carries to every job after it. Your data judgement is what directs all of them.

Your data skills are already agent skills. This is you using them.

Keep learning as the tools move. This is early, and the good habits are being written right now. Enterprise DNA is here to help you build them. Everything in this guide is something we practice ourselves, and we keep it current as the tools change.

Learn

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MENTOR

Ask your data and agent questions and get an answer grounded in the way we work.

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Follow how we run our own company on agents, with a person always holding the gate.

Pick one job. Write the brief. Run the loop. You already have what it takes to direct the work.

A NOTE IN CLOSING

You no longer do every job by hand. You hand one over, you direct the work, and you sign off what ships. The analysts who learn to direct agents, and to check their work, will run circles around the ones who kept doing it all themselves.

FROM INSIDE THIS GUIDE.

Hand over the first job this week.