

BRIEF

Task

1 Goal

What it is to achieve, why, and by when.

2 Done looks like

The finished thing: format, length, where it lands.

3 Context

The files, links and examples to use, and which to trust.

4 May touch, must not

What it may read, use and change, and what is off limits.

5 Limits

Time, steps, pages or spend: when to stop anyway.

6 Stop and ask

The moments it must come back to you first.

Level ☐ 1 Read ☐ 2 Draft ☐ 3 Ask first ☐ 4 Alone

Check ☐ The job ☐ The facts ☐ The steps ☐ The changes ☐ The sign-off

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01

Made-up task / exercise 2

Rewrite one paragraph of the team newsletter so it's easier to read.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

02

Made-up task / exercise 2

Find what has been published this year about a new rule in our sector, with a link for every claim.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

03

Made-up task / exercise 2

Every Friday at 4 pm, post the same timesheet reminder in the team channel.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

04

Made-up task / exercise 2

Draft replies to the routine questions in the shared customer inbox, for a person to check and send.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

05

Made-up task / exercise 2

Book one of our own meeting rooms and invite the team to next month's planning day.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

06

Made-up task / exercise 2

Tidy the team's shared folder: move old files into the archive and delete duplicates.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

07

Made-up task / exercise 2

Pay the supplier invoices that arrive by email this week.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

08

Made-up task / exercise 2

Every Monday at 8, read the project tracker and list what's overdue, for me to read.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
 If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
 Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

09

Made-up task / exercise 2

Score the 30 applications for the new role and turn down the weakest ten.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

10

Made-up task / exercise 2

Copy each new entry from the event sign-up form into the team spreadsheet.

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
Level ☐ 1 ☐ 2 ☐ 3 ☐ 4

TOOL CHOOSER

Pick the simplest that fits

- 1 **Chat.** One answer, draft or idea that you use yourself.
- 2 **Deep research.** A question that needs many sources, read and cited.
- 3 **Agent.** The next step depends on what it finds, in your files and apps.
- 4 **Automation.** You can write every step down in advance, the same each time.

THREE QUESTIONS

For agent cards

- 1 **Can it be undone easily?** If not: level 3 at most, and you approve each step.
- 2 **Does it leave the team?** A customer, a supplier, the public, money. If so: level 3 at most, and a person presses send.
- 3 **Does it read outside content?** If so: it must not also send, pay or delete without asking.

Set each agent's level: the lowest level that does the job, never above what the three questions allow.

FOUR LEVELS

Start low

- 1 **Read.** It looks and reports. It changes nothing.
- 2 **Draft.** It drafts. Only you send or share.
- 3 **Ask first.** It acts, and asks before each send, pay, delete or change.
- 4 **Alone.** It acts inside fixed limits. You review after.

Up one level after five clean runs. Down at once after a surprise.

YOUR OWN TASK

Exercise 2

Tool ☐ Chat ☐ Deep research ☐ Agent
☐ Automation ☐ None
If agent Q1 ☐ Y ☐ N Q2 ☐ Y ☐ N Q3 ☐ Y ☐ N
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YOUR OWN TASK

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