

Find Your First Agent

Find the work you could hand to an AI agent, and the work that needs a clearer process first.
Takes about 10 minutes.

☐ I do this work ☐ I lead the team that does it

Leaders: name the task, then ask the person who does it for the minutes.

STEP 1 • THE TASK			
Name a task you repeat Example: weekly sales report	Task A	Task B	Task C
Times a year Daily about 250 · weekly 52 · monthly 12			
Minutes each time Your honest best guess			
Hours a year Times a year × minutes ÷ 60			
STEP 2 • AGENT FIT • WRITE 2, 1 OR 0			
It repeats weekly or more Yes 2 · about monthly 1 · less often 0			
Result can be checked in 2 minutes Yes 2 · sometimes 1 · no 0			
Cost if a mistake slipped through Small 2 · a hassle 1 · money, safety, people 0			
Agent fit total Add the three. Out of 6.			
STEP 3 • PROCESS CLARITY • WRITE 2, 1 OR 0			
The information it needs is One system 2 · spread around 1 · in a head 0			
The steps are Same 2 · some judgment 1 · always different 0			
Process clarity total Add the two. Out of 4.			

Turn over to see what your two totals mean.

What your two totals mean

For each task, find its Agent fit row, then its Process clarity column.

	PROCESS CLARITY 3 OR 4	PROCESS CLARITY 0 TO 2
AGENT FIT 5 or 6	Start here A strong first agent. It repeats, it is easy to check, and the steps are clear. Peel AI Automation	Fix the process first Worth automating, but the steps are messy. Make them visible first. PeelForward
AGENT FIT 3 or 4	Automate with a checkpoint A good fit if a person reviews every result before it goes out. Peel AI Automation	Map it before adding AI Write down how the work really happens. That alone often saves time. PeelForward
AGENT FIT 0 to 2	Use AI as a helper Not worth an agent. A person using AI to draft or research is enough. No agent needed	Keep it with people Too much judgment or risk for now. Revisit once the process settles. Revisit later

Peel AI Automation

We design, build and keep improving agents in the tools you already use. Each one has a written job, clear rules, and a person who approves the result.

PeelForward

Software that shows where a process slips, stalls or breaks, using data you already have, so you know what to fix before you automate it.

Jason Greer

Founder

Jason@peelbusinessdesign.com

515.360.3860

Joy Greer

Co-founder, CEO

Joy@peelbusinessdesign.com

515.282.7679



Scan to contact us