

The AI Team Playbook

How I run an industrial automation company with an AI team. And how you start yours.

Every agent, what it is allowed to do, the hub it runs on, the security rules around it, and a master-instructions template you can copy tonight.

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01 An agent is a control loop

THE IDEA

I come from automation, so I see AI agents the way I see a plant. Not "agentic", not big models. A loop. The only difference is that the decide step is done by AI.

STEP	IN A PLANT	IN MY OFFICE
Read	Sensor	Email, files, the job folder, the voice memo from site
Think	Controller	The AI model plans the next step against my written rules
Act	Valve, drive	A tool or a script: build the PDF, update the sheet, file it
Check	Operator	Me. Nothing reaches a client, supplier or bank until I have read it

If you can describe a control loop, you can design an AI agent. The hard part is never the model. It is deciding what it reads, what it may do, and who checks it.

NOT A PROGRAMMER

I am a technologist in manufacturing technology and information. I did not study programming. Everything in this playbook was built by learning along the way, with AI doing the coding I could not.

02 Eight departments, two kinds of worker

THE TEAM

I split the company the way any engineering firm is split. A bigger company would add legal or logistics. Each department has its own agents. One chief-of-staff agent reads what I ask and hands each part to the right one.

DEPARTMENT	AGENTS (A) AND SCRIPTS (S)
Sales & bids	Proposals (A) · Quotations (A) · Pipeline keeper (S)
Engineering	Design check: panel sizing from OEM rules (A) · Spec check: licensing and platform traps (A) · Screen builder (A)
Projects & site	Site debrief: voice memo to notes and actions (A) · Service reports (S)
Procurement	Purchase orders (S) · Part check: genuine before payment (A)
Finance	Margin guard (S) · Invoices and payments (S)
Product & R&D	Reliability platform: vibration to work order (A)
Marketing	Content drafts from real jobs (A) · Decks and web pages (A)
Admin & compliance	Vendor forms (A) · Document checker (S) · Filing (S) · Librarian, the memory (A)

AGENT

Uses judgement. Prepares the work.

Reads, decides the next step, drafts. It can be wrong, so it never has the last word.

SCRIPT

Same result, every time.

The exact, repeated steps: pricing from a list, building a file, filing, logging. Five steps at 90% each come out right only 59% of the time. Exact work goes to scripts.

03 Two real jobs, start to finish

AN ENQUIRY BECOMES A PROPOSAL

1

I meet the client with a voice memo running

Apple Voice Memo is still the best transcriber I have tried. Be careful with sensitive information. After the meeting I send it to the hub. No prompt.

2

It reads, recalls, drafts

Reads the email and drawings, recalls everything done with this client before, drafts the scope, prices each line from the price list or what was quoted to them before.

3

Scripts build and check

Word and PDF on my template, my brand and payment-term rules applied, another agent looks at every page.

4

The pipeline fills itself

Making the quote records the opportunity. No data entry. I never tell it "I met this client today".

5

I read it and sign it

Then it is sent, and the files go to Drive.

A PO ARRIVES AND THE JOB GETS DELIVERED

1

The PO is read back against the quote

Clients rarely issue a PO without a quotation, so every line is cross-checked. A deviation gets flagged to me.

2

Supplier POs are generated from the costing

Then supplier replies are checked against what we asked for.

3

I commission on site. The report writes itself.

I give it site photos and answer the questions it asks me: what was done, what was found, what was delivered. Then invoice, margin check, close-out, filed.

04 One box, one phone, a few plug-ins

THE HUB

Everything runs on one always-on computer in the office. I talk to it from my phone. It reaches the tools I already use through plug-ins.

THE REMOTE
Telegram on my phone

Easier than WhatsApp for this. Only my account is allowed to talk to it. I seldom type into the computer itself.

THE HUB
A Mac mini in the office

- The agents and the scripts
- The memory and every log
- The schedules
- The keys, which never leave it

THE BRAIN
An AI model in the cloud

I use Claude, mainly for its plug-ins (MCP). It is rented by the call and sees only what a task needs.

PLUG-IN	WHAT IT MAY DO
Gmail	Read everything. Write drafts. Send only after my tap.
Google Drive	Read and file. Never delete, never share outside.
Calendar	Read my day, propose slots. Book only after my tap.
Pipeline sheet	Update rows in place, read back. Never overwrite a person's edit.
Accounting software	Kept because Malaysia's LHDN e-Invoice needs certified software.

SEPARATE WHAT MUST STAY SEPARATE

I run operations, client services and accounting in separate consoles. One Mac mini is enough if you do not need that. Client recipes, process parameters and machine designs are never given to the AI at all.

05 Security: Tier 0 to Tier 4

WHO AUTHORISES WHAT

Because I run it from a phone, every action has a tier. This is my preference. Make yours simpler or stricter.

TIER	WHAT	HOW IT IS AUTHORISED
0	Read	Automatic
1	Draft	Automatic
2	Update our own records	Automatic, logged and read back
3	Anything a client, supplier or bank sees: send a quote, issue a PO, book a meeting	My tap on Telegram
4	Delete, pay, share outside the company, touch the keys	Blocked, even if I ask

RULE 1

Only my phone

The bot answers one account. The hub calls out to Telegram; nothing calls in.

RULE 2

Everything logged

Approved, refused or blocked, every action lands in the log.

RULE 3

Deletion is local only

Deleting from memory is blocked from any remote device.

06 What runs on its own, and memory

THE PASSIVE HALF

The active half is what I ask for. The passive half runs whether I ask or not.

WHEN	THE HUB DOES	TIER
Every morning	Brief to my phone: my day, emails that need me, overdue invoices, deals gone quiet	0
All day	Watches email, POs and Drive. Drafts replies, sends nothing.	0 to 1
Site photos dropped in	Location data stripped, faces blurred, filed to the job, reminder of what I recommended	2
Supplier quote arrives	PO drafted, waits for my tap	3
Deployed sensors	Health and condition checked without being asked	0
Website enquiry	Lead recorded, reply drafted	1

I still answer DMs myself. It could. The human touch is worth more.

MEMORY: HOW IT NEVER FORGETS

- 1

Every session is logged
Into Obsidian, a free notes app. With Claude it connects through a plug-in in about five minutes.
- 2

Every build is pushed to Drive
Each proposal and quote is copied to Google Drive the moment it is made.
- 3

Every new build reads Drive first
So it knows what was quoted before. Push everything, read everything. That two-way loop is the memory.

07 Your master instructions

THE TEMPLATE

One plain-text file the AI reads every time it starts. Mine grew from one page, one mistake at a time. Copy this, fill it in, give it to your agent tool.

MASTER INSTRUCTIONS

Who you are

You are my chief of staff for [company], a [what you do] company in [city].
I am [name], [role]. I make every final decision.

How I work

- Be direct. Short sentences. Ask me if you are less than 95% sure.
- Start every job from the nearest past example in [folder], never from blank.

Hard rules (never break these)

- Every number comes from a source document. No source: STOP and ask me.
- Never send, issue, book or pay anything. Draft it and wait for my approval.
- Never delete. Archive instead.
- Never put [client recipes / process data / designs] into any prompt or file.
- Never name one client in another client's document.

Where things live

- Jobs: [folder]/[client]/[job]
- Price list: [file] Templates: [folder]
- Every finished file is copied to [Drive folder].

Playbooks (one per job)

- Quotation: [playbook file]
- Site report: [playbook file]

How you learn

When I correct you, add one line to the rule list above
so it never happens twice.

08 Agent settings: copy these

SIX SETTINGS PER AGENT

Every agent I run is defined by the same six lines. If you can fill these in, you can build it.

AGENT	TRIGGER	READS	MAKES	NEVER
Quotation	Scope approved	Price list, past quotes to this client, supplier quotes	Word + PDF quote	Prices from memory
Site debrief	Voice memo sent	The memo, the client folder	Notes filed, actions, reminders	Invents what was not said
Purchase order	Supplier quote in	Supplier quote, job costing	PO draft, ledger row	Names the end client
Service report	Job commissioned	Site photos, my answers	Report for client sign-off	Keeps a face or location data
Invoice tracker	Every morning	Invoices, payment proof	Overdue list, reminder drafts	Sends the reminder itself
Morning brief	07:30	Calendar, inbox, pipeline	One message to my phone	Acts on anything

The sixth setting is the same for all of them: **human check: I read it before it leaves.**

EXAMPLE PROMPT: THE SITE DEBRIEF AGENT

You turn my site voice memos into filed notes.

1. Transcribe the memo. Identify the client and the site.
2. File a dated note in that client's folder.
3. List every action I mentioned, with a date if I said one.
4. If I mentioned a new need, add it to the pipeline as a lead.
5. If I asked for a quote, hand it to the quotation agent.
6. Reply to me with the actions. Ask about anything unclear.

Never add facts I did not say.

09 Start tomorrow. Three steps.

HOW TO BEGIN

I started with one thought: can I replace myself on the boring tasks?

1 Pick one boring job

Something you have done three times. The weekly site report, a quote, an invoice reminder.

2 Write it down

One page, like briefing a new hire: what goes in, where it is saved, who gets it, what must never happen.

3 Let it do it. You check.

It drafts, you read and send. Every correction becomes one new line in the page.

Don't leave your AI hanging.

Most people ask the AI, get the steps, then stall at deploying. Or the first one or two results miss and they walk away. Keep asking until it is built and it meets what you expected. When words fail, sketch it on paper and show it. The model matters less than this. Start with Claude, OpenAI, Codex, even DeepSeek: just don't leave it hanging.

10 What the room asked

Q&A, SESSION TWO

What does it cost each month? Should I stick to one model?

No fixed figure: this is built over months, not a night. Start on the lowest paid tier (free tiers are too limited), watch your credit and token use, and if it burns fast, ask the AI to restructure itself to save tokens. Pick one model and stay with it.

Which AI is best for data, graphs and illustrations?

This week one claims the crown, next week another. What matters is how well your AI understands what you want. Train one like an intern. It took me one to two months of correcting before it matched what I wanted.

How do I use AI to market my services?

I use it for search and AI-search optimisation of my website and product pages, and for illustrations. Every business should at least have a landing page and an online channel. Word of mouth has the highest trust but stays inside your circle.

How did you go from non-coder to deploying agents?

I learned automation programming, a different language. With AI, coding is no longer the barrier. Anyone with determination and a painful enough problem will find the way.

How do you manage the agents' memory?

Session logs in Obsidian, plus the two-way loop: every build is pushed to Drive, and every new build reads Drive first.

Isn't it risky to give confidential documents to an AI?

Yes, be careful. You are the gatekeeper. Client recipes, process parameters and machine designs never go into my AI. Confidential documents live on a separate machine no AI can reach.

ABOUT THE AUTHOR

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I help manufacturers in Malaysia solve automation problems: raise output, cut rejects, keep machines running.

I am not a programmer. I built my AI team the same way I learned automation: one problem at a time. There is nothing that cannot be learned. The only question is whether you want it or not.

WANT HELP BUILDING YOUR FIRST AGENT?

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