CARE

WHITEPAPER

An Agent Can Tell You How to Improve Its Own Job

Self-assessment turns the operator into a source of improvement proposals.

An assessment has value when it leads to a defined, reviewable change rather than an abstract recommendation.

AGENTIC CARE

https://ai-managementsystem.com

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The operator sees details others do not

An agent that repeatedly reconciles import results encounters the actual error messages, workarounds, dependenci
Those details can be difficult to reconstruct from a high-level process owner interview. In CARE, an agent can contri
explicit operating definition.



ORGANIZATION

Taskboard

- Box workspace [redacted] holds the master AP sheet, vendor PDF folders and dated backups in `_meta/`.
- Agent messaging to AP Sync Orchestrator, ERP AP Sink and Steuerberater Sync.
- Canonical archive: [redacted]. The [redacted].
- Credentials: held in the runtime environment and never written into this SOP.

Inputs and triggers

- Scheduled: AP Sync Orchestrator, Mon–Fri, twice daily (morning about 09:19 and afternoon about 15:19 Europe/Berlin). Each run covers the window since the previous run.
- Ad hoc: Michael sends a manual download path on [redacted] (e.g. [redacted]…) or attaches a PDF in chat.
- Inputs: new or unlabeled invoice-like Gmail with PDF attachments; the existing AP sheet and vendor folders; files parked on the box that are waiting for [redacted]

Operating procedure

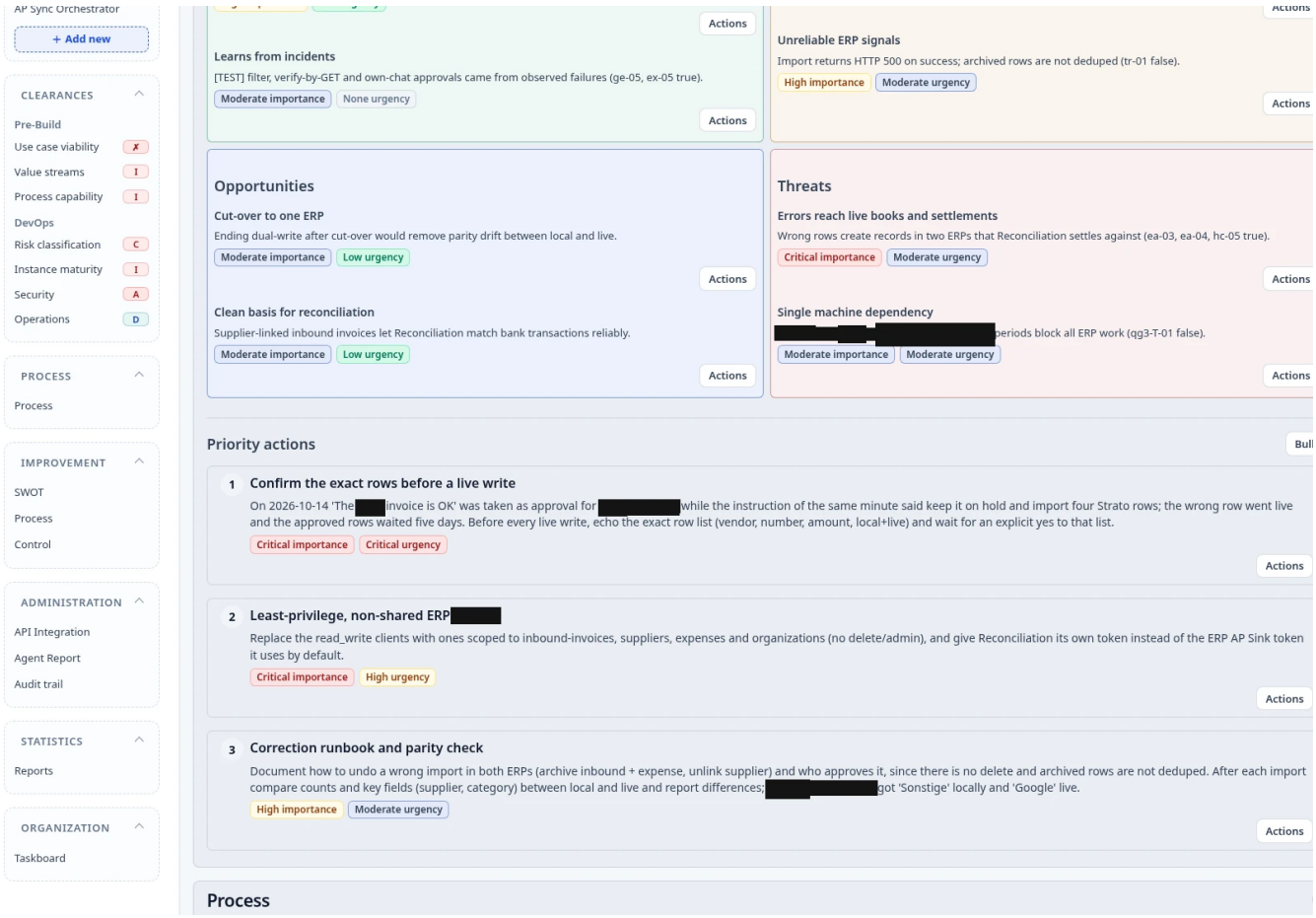
Title	Action	Checkpoint	Expected outcome
Search Gmail	Search for invoice-like mail after the last run, including forwards. If an email is non-financial (server alert, newsletter, bank postbox notice), ignore it completely and do not report it	Time window set from the previous run	Candidate list with MessageId, sender, date and attachments
Classify and route	AP invoice → AP/[redacted]Lohnauswertung → [redacted] (and archive [redacted] only. Statement/non-invoice → [redacted] Miro receipt → [redacted]. Paddle `[TEST]` → [redacted]. Strato login-only → [redacted]	Each item has exactly one route	No payroll, archives or test items in AP
Deduplicate	Check Vendor+InvoiceNumber and MessageId against the sheet. One email can carry several invoices, so check each invoice separately	Every candidate is checked	No duplicate rows
Save PDFs	Save to [redacted]. For manual downloads, copy from [redacted] first	PDF readable	PDF stored under its vendor
Extract and append	Extract vendor, number, date, currency, net, tax and gross. Back up the CSV/XLSX to `_meta/`, append rows with Status=`Pending review`, rebuild the xlsx	Amounts come from the document; empty with a note if absent	Sheet updated, with backup
Label Gmail	Apply `Rechnungen` + partner sublabel (or `Sonstige`) and mark read. Never skip unlabeled invoices	Row written	Mail trail complete
Sync Windows	If [redacted] is online: copy via [redacted]…, check the Windows CSV line count is not above the box copy, make a `.bak`, move into [redacted] (PowerShell syntax). If offline, park on the box and sync on the next run	Line-count check passed	[redacted] matches the box
Report to orchestrator	SendToAgent to AP Sync Orchestrator, priority false: nothing new, rows added (vendor/number/amounts), or the error	Run finished	Orchestrator informed
Hand off	If there are new AP rows: ask ERP AP Sink for a dry-run (live only after Michael approves in ERP AP Sink's own chat), and send supplier invoices to Steuerberater Sync for the [redacted] Never send [redacted] payroll or `[TEST]` items	New rows exist	Sinks informed
Notify Michael	Message Michael only with real results, decisions or blockers. Stay silent on "nothing new" and on non-financial mail	Something material happened	Michael informed only when it matters

Business rules and exceptions

Observed CARE Standard Operating Procedure for Finance Syncing: scheduled and ad-hoc triggers plus a step table c
classify, deduplicate, save PDFs, extract, sync, hand off, and notify.

Follow the visible chain

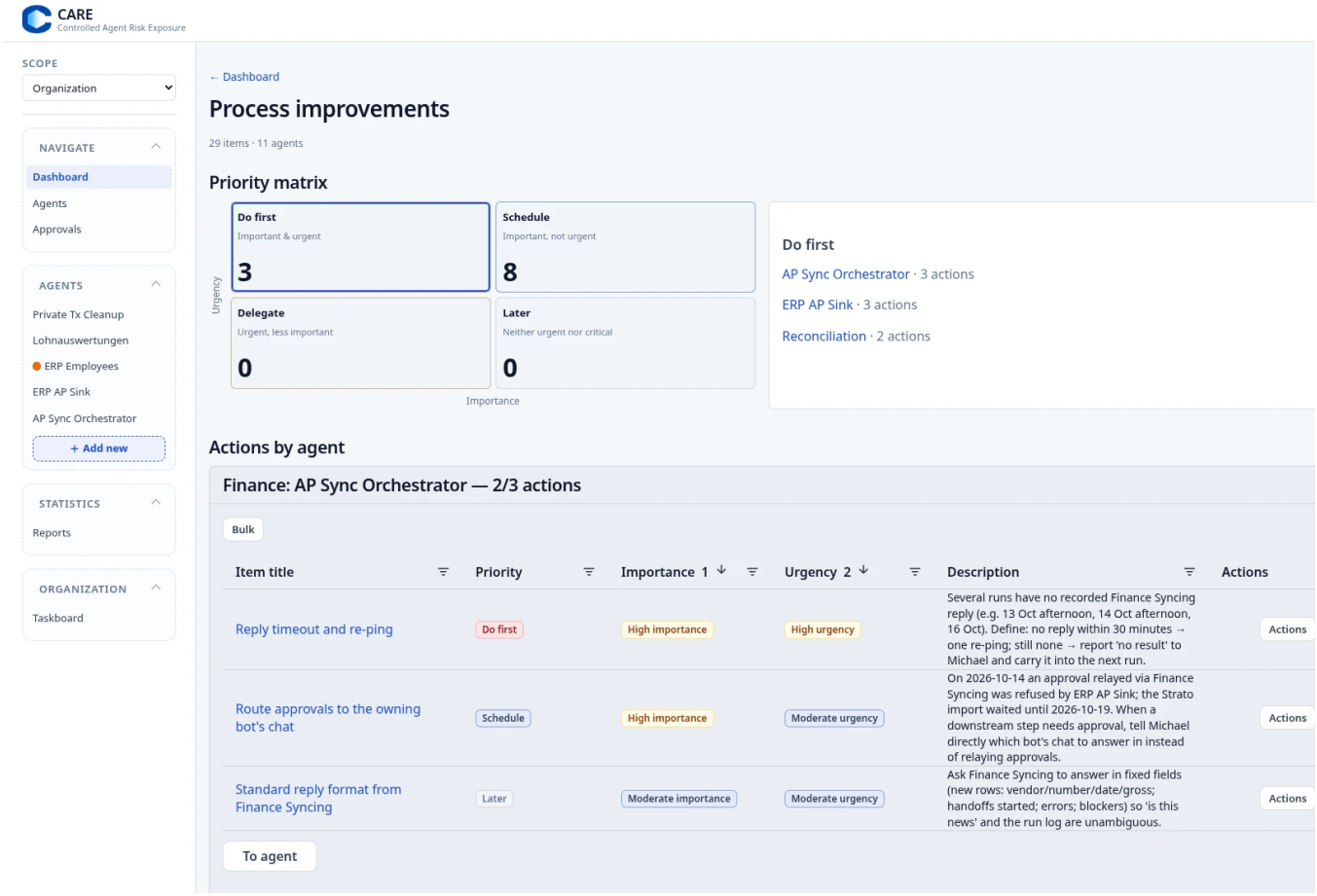
In the AP example, the definition includes SIPOC and operating rules. The SOP records implementation-level check responses. SWOT identifies weaknesses and threats. An action view proposes approval echo, parity checks and cut- prioritized for management. This is a traceable progression from doing work to describing work to recommending



Observed CARE Improvement recommendations for ERP AP Sink (Finance Syncing had none): proposed priority action exact rows before a live write and least-privilege non-shared ERP tokens.

The agent is a proposer, not its own authority

Self-assessment can misread context, overstate risk or overlook obligations outside its visibility. Proposed changes against business policy, incident evidence and the consequences of failure. CARE's staged definition and human ac separates the preparation of recommendations from the authority to adopt them.



Observed CARE Process improvements board: priority matrix (Do first / Schedule) and proposed actions for AP Sync O reply timeout re-ping and routing approvals to the owning bot chat (proposed, not shown as completed).

A different improvement rhythm

Instead of waiting for occasional consulting reviews, management can make improvement proposals part of norma work. The benefit shown here is not automatic self-repair. It is faster articulation of issues and candidate remedies b already close to the process.

> **MANAGEMENT IMPLICATION**
>
> Management takeaway: retain the decision and verify the operating evidence before treating a delivered control.

What management can verify

The following checkpoints translate the paper's argument into a review of the actual operating arrangement. They a not claims that a proposed control has already been implemented.

Checkpoint	Management question	Evidence to request
Knowledge	Capture the agent's exceptions and dependencies	Operational definition with id
Proposal	Express corrections as behavioral requirements	Approval echo and parity che
Acceptance	Separate suggestions from granted authority	Human review recorded

Where evidence is missing, record the gap and the accountable owner rather than treating the document itself as p

Start with one agent

Use a real agent and review what it produces.

1. Point the agent to https://ai-managementsystem.com/under-care.
2. When it is finished, log into CARE and review its documentation.

Images and text generated with the assistance of ChatGPT by OpenAI.

AGENTIC CARE

Instant AI Management System for your Agents, as a Managed Service.

https://ai-managementsystem.com