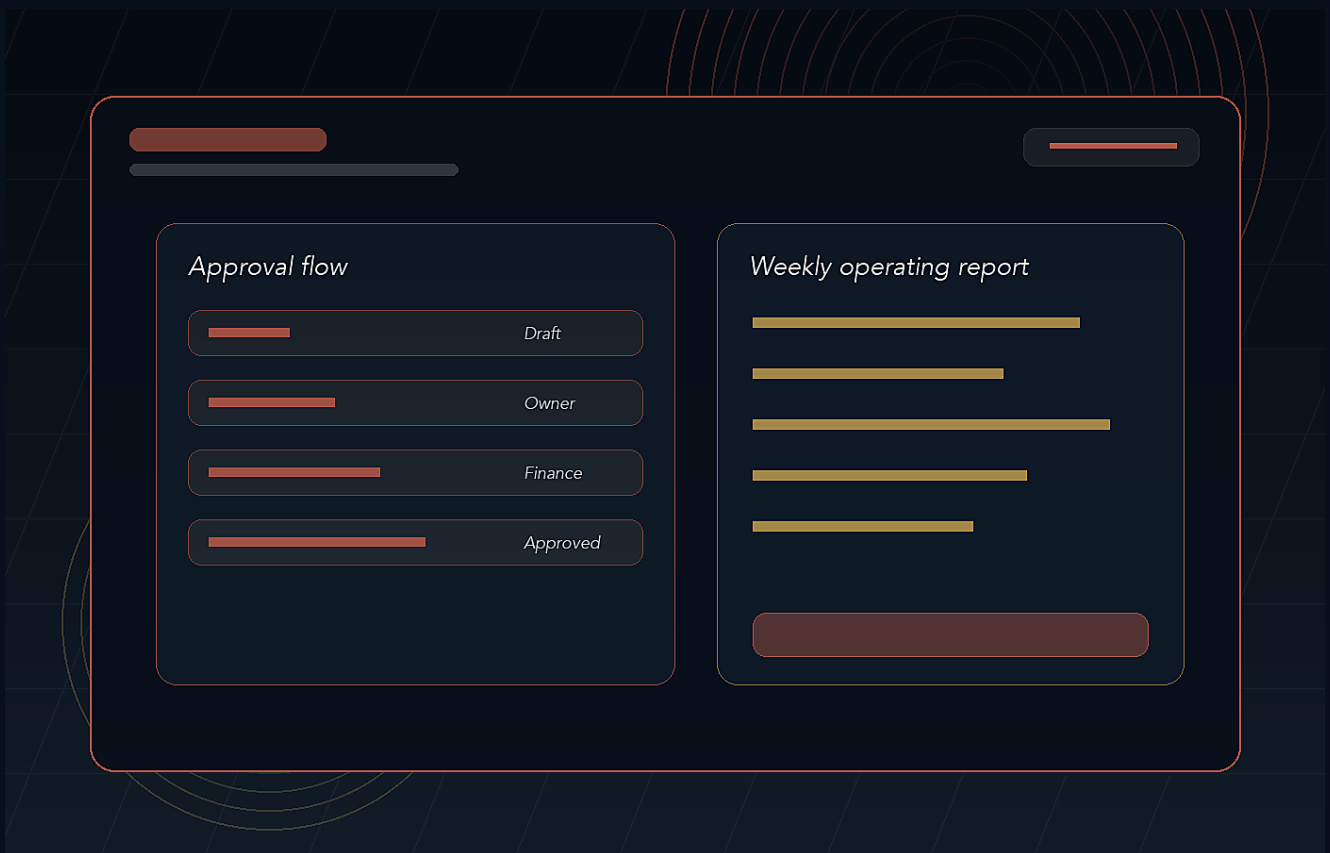


Operations Agent

Convert recurring operating routines into visible workflows with summaries, owners, approvals, and risk flags.



Pilot scope and deliverables

Start with one weekly management rhythm and one approval workflow.

Expected outputs

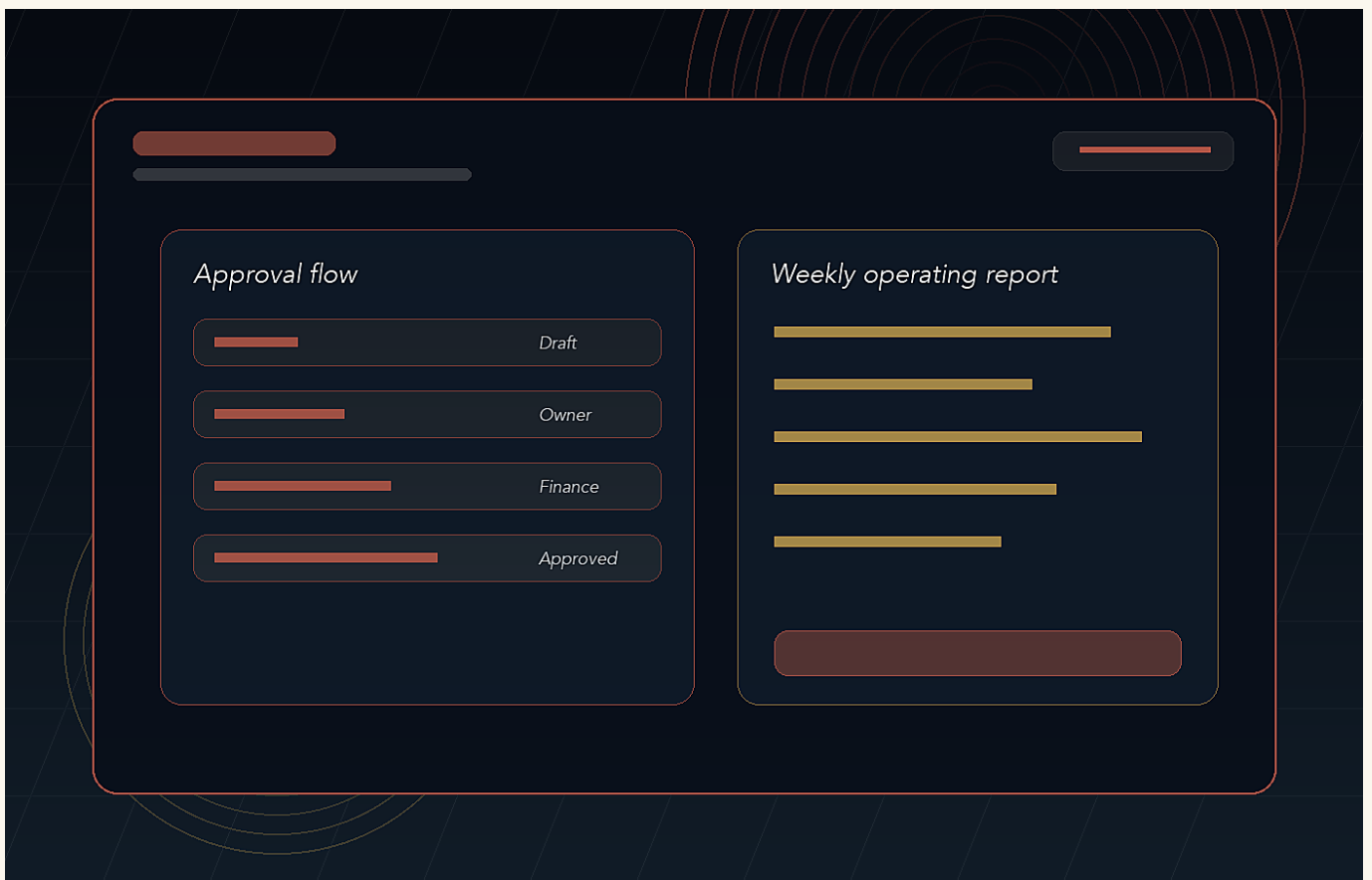
- Meeting-to-task summaries
- Approval routing map
- Weekly operating report
- Risk and blocker register

Required inputs

- Workflow map
- Approval rules
- Meeting notes or transcripts
- Report templates

Product workspace view

Executive workflow command center. Convert recurring operating routines into visible workflows with summaries, owners, approvals, and risk flags.



System architecture

01 Meeting and task intake

02 Approval rule engine

03 Owner and deadline tracker

04 Executive report workspace

Workflow and acceptance checklist

01 Meeting-to-task summaries

02 Approval routing map

03 Weekly operating report

04 Risk and blocker register

Deployment timeline

01 Week 1: operating rhythm and approval map

02 Week 2: summary and task extraction prototype

03 Week 3: approval review and reporting workspace

04 Week 4: live management meeting pilot and rollout playbook

Implementation milestones

- Discovery decision memo
- Prototype review
- Human approval workflow
- Pilot acceptance and scale recommendation

Customer preparation checklist

- Meeting notes or recordings
- Approval policy
- Report template
- Department owner map
- Existing task or spreadsheet examples

Questions before pricing

- How many recurring meetings or approvals?
- Which collaboration tools matter first?
- Who owns final approval?
- What report format does leadership already use?

Best-fit customers

- Founder or COO-led teams with recurring coordination work
- Organizations using Feishu, Lark, email, or spreadsheets for approvals
- Managers who need visible follow-up without hiring more coordinators

Required inputs

- Workflow map
- Approval rules
- Meeting notes or transcripts
- Report templates

Operating playbook and handover

- Workflow blueprint with owner, reviewer, data source, and failure path
- Agent behavior rules, approval prompts, escalation policy, and source whitelist
- Review routine for weekly quality checks, gap analysis, and expansion decisions
- Handover notes for the client-side owner who will operate the pilot after launch

Acceptance table

Ownership

Every task has owner and due date

Approval

Human owner confirms external or financial actions

Reporting

Weekly report matches leadership template

Visibility

Risks are visible before review meetings

Acceptance criteria

- Owners and deadlines are explicit
- Approvals remain human-controlled
- Reports follow your template
- Risks are visible before review meetings

Risk boundaries and human review

- Approval authority stays with people
- Tasks include owner and due date
- Reports show source and uncertainty
- Sensitive decisions escalate to leadership

Approved source material only

Agents answer from a documented whitelist of files, pages, tables, and policies. Anything outside the scope is treated as unknown until approved.

Role and permission boundaries

We map who can ask, view, approve, export, or escalate. Restricted material is tested with role-based review cases before launch.

Human review before external actions

Email sends, CRM updates, approvals, customer promises, and finance-related actions stay in draft or approval mode until rules are signed off.

Security, governance, and FAQ

Can it connect to Feishu or Lark?

Yes, the workflow can be designed around Feishu, Lark, email, or spreadsheet routines.

Can it run management reports?

Yes, if the report source and approval owner are defined.

Questions before pricing

- How many recurring meetings or approvals?
- Which collaboration tools matter first?
- Who owns final approval?
- What report format does leadership already use?

Start the first workflow review

Share your website, process description, or a small document set. We will reply with a recommended pilot scope, required materials, and a practical deployment path.

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