

The Jonesi Consultancy | Houston, TX

AI LITERACY · RESOURCE HANDOUT FOR LEADERSHIP

WHAT IS AN AI AGENT?

From Answering Questions to Getting Work Done

Agents do not just answer questions; they take action. This makes scope and oversight matter significantly.

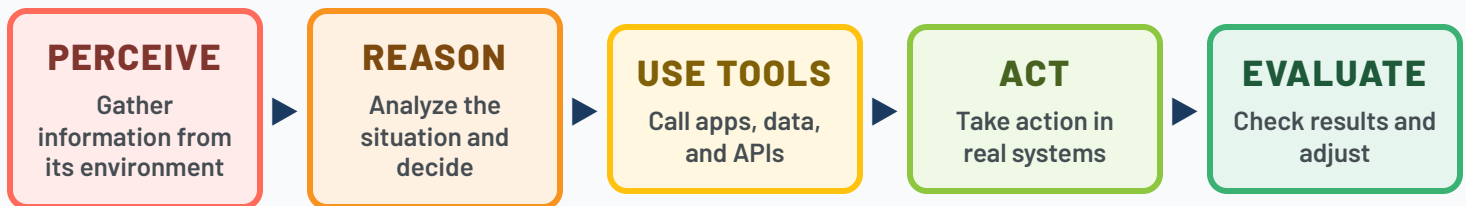
1 What Is an AI Agent?

An AI agent is a system given a goal rather than a single instruction. It perceives the situation in front of it, reasons about what needs to happen, reaches into real tools and data to do the work, takes action, then checks its own result and tries again if the result falls short.

The same underlying model powers both an assistant and an agent; what separates them is initiative and permission to act. An assistant waits for you, completes the task you named, and hands the output back. An agent carries a multi-step job forward on its own, deciding the order of operations and adjusting as conditions change. That is useful precisely because it removes you from the loop, which is why scope, access, and oversight matter more here than with any other AI tool.

2 How an Agent Works

The Cycle Repeats Until The Goal Is Met



ASSISTANT VS AGENT

The difference is initiative, not intelligence.

- › **Assistant:** waits for your instruction, helps with a specific task, returns output for you to use.
- › **Agent:** takes initiative, plans and executes multi-step work, and pursues a defined goal.
- › Every agent is still built on an assistant. What changes is the permission to act.

KEY CHARACTERISTICS

Five traits separate an agent from a chatbot.

1. **Autonomous:** works with minimal human input inside set boundaries.
2. **Goal oriented:** measured on the outcome, not the response.
3. **Adaptive:** adjusts based on feedback and results.
4. **Tool using:** reaches into applications, data, and systems.
5. **Proactive:** anticipates the next step rather than waiting for it.

3 Where Agents Earn Their Keep

Common Early Use Cases

EMAIL TRIAGE

- › Reads and categorizes
- › Prioritizes by urgency
- › Drafts replies for review
- › Follows up on threads

RESEARCH

- › Interprets the question
- › Searches multiple sources
- › Summarizes findings
- › Cites what it used

DATA ANALYSIS

- › Collects the data
- › Finds patterns and outliers
- › Builds charts
- › Explains the result

CUSTOMER SUPPORT

- › Understands the issue
- › Checks the knowledge base
- › Resolves or routes
- › Confirms resolution

PROJECT COORDINATION

- › Tracks tasks and owners
- › Sends reminders
- › Adjusts timelines
- › Reports progress

4 What Powers an Agent *The 6 Components Under The Hood*

REASONING MODEL

Interprets the goal and decides the next move.

MEMORY

Holds context and history across the run.

TOOLS & INTEGRATIONS

Connections into applications, data, and APIs.

PLANNING

Breaks a goal into ordered, checkable steps.

GUARDRAILS

Permissions, limits, and approval gates on every action.

HUMAN FEEDBACK

Review and correction that improves the next run.

AGENTS DO NOT JUST RESPOND. THEY ACT.

That is exactly why scope, permissions, and oversight have to be settled before deployment, not after the first surprise. Start with one narrow, low risk workflow and expand from proof, not enthusiasm.

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AI should elevate people, not replace them.

A human-centered approach to AI training.

