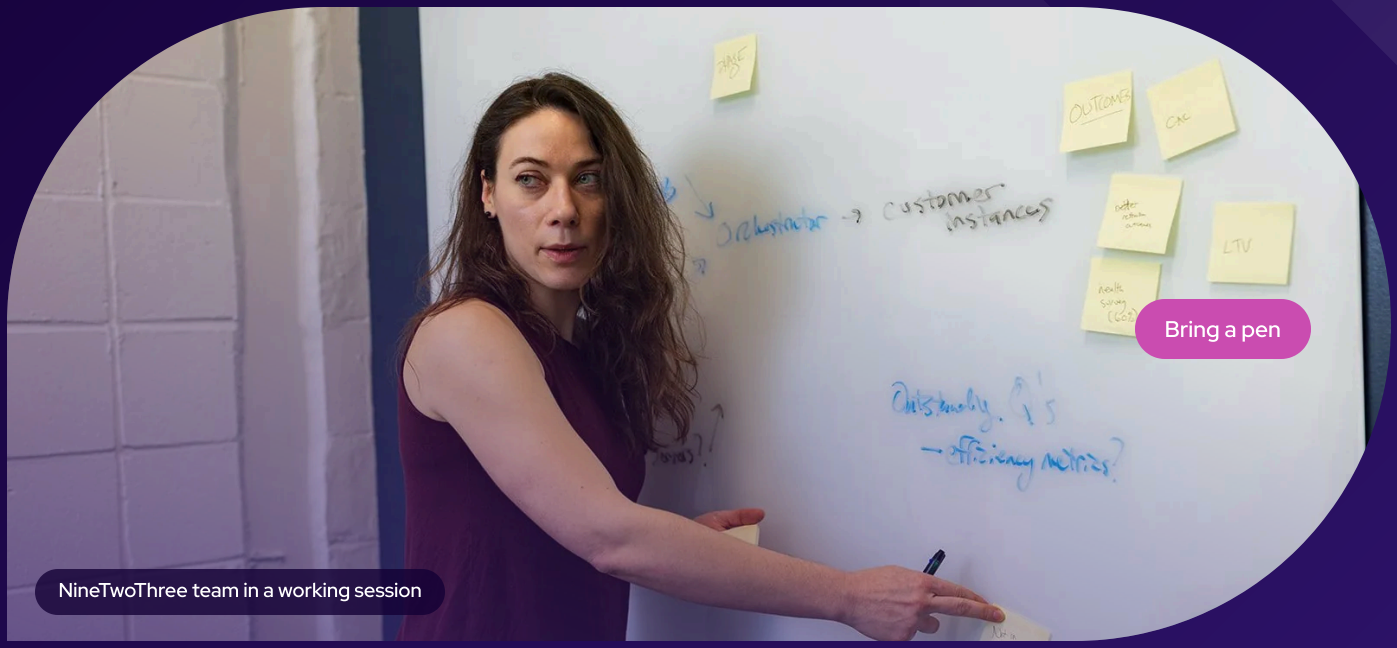
nine twothree



NineTwoThree team in a working session

OWNED INTELLIGENCE FOR ENERGY SERVICES · WORKBOOK

The Company Map workbook

Worksheets for the harness sessions where your people show where every answer lives, how they find it and what the rule is. Print it, bring a pen and fill it in together.

Includes: session plan · five role capture sheets · systems list
graph-mapping sheet · entry template · permission matrix · month-end map · scoring

NineTwoThree AI Studio
ninetwothree.co

WHAT THESE SESSIONS BUILD TOWARD

BENEFIT 1

Every job's margin before the month closes

The month-end review your controller signs off on

BENEFIT 2

The right answer for whoever's asking

Balances and policies by company, role, union and location

BENEFIT 3

One question across every company

The owner's questions, with the source rows

BENEFIT 4

Your IT team runs your systems. We bring the AI.

A team that hands it over

How to run a harness session

A harness session is a working conversation with one person about the questions they answer every week.

Who

One person who answers questions all day, one facilitator, one note-taker. Add the head of IT for the system portions.

How long

60 to 90 minutes per session. Two or three sessions per role across four weeks, roughly two to five hours per person in total.

Where

At their desk with the accounting system, Power BI or the timesheet app open, so you watch them find the answer.

Ground rules

1. Use their words. Write the question the way they say it, before you translate it.
2. Follow the click path. Note every report, export, workbook, folder and phone call it takes to reach the answer.
3. Ask why twice. The rule behind an answer usually comes out on the second "why".
4. Nothing is wrong. Workarounds kept the companies running. Nobody is being audited.

Suggested four-week plan

Week 1	Week 2	Week 3	Week 4
Kickoff with the owner, controller, HR lead and head of IT. First sessions with HR and payroll and the controller	PM and field supervisor sessions; IT joins to confirm systems, Entra groups and Power BI roles	Map the records and links; follow-ups where rules were unclear; AI tool inventory with each lead	Check draft rules against history; map the month-end; score candidate workflows together
The questions each role answers most	Capture sheets for four roles; systems list	Graph-mapping sheet; draft entries and permission matrix	**Company Map v1** and one workflow chosen to prove

OUTPUT

HR and payroll

NAME _____ DATE _____

- ? Which questions do you answer most every week?
- ? Which locals' rules differ, and how?
- ? How do you look up a sick-time or PTO balance?
- ? Where do handbooks and union contracts live?

QUESTION, IN THEIR WORDS	WHERE THE ANSWER LIVES	HOW THEY FIND IT	THE RULE BEHIND IT	RECORDS TO PROVE IT

Accounting and controller

NAME _____ DATE _____

- ? Which accruals do you question most?
- ? Which reports do you rebuild every month?
- ? Where do billing and accounting totals disagree?
- ? What does the owner ask you most?

QUESTION, IN THEIR WORDS	WHERE THE ANSWER LIVES	HOW THEY FIND IT	THE RULE BEHIND IT	RECORDS TO PROVE IT

Project managers

NAME _____ DATE _____

- ? How do you find out what hit your job this month?
- ? Which vendors or customer POs do you watch?
- ? When do you know a job's margin is slipping?
- ? What do you wait on accounting for?

QUESTION, IN THEIR WORDS	WHERE THE ANSWER LIVES	HOW THEY FIND IT	THE RULE BEHIND IT	RECORDS TO PROVE IT

Field supervisors and superintendents

NAME _____ DATE _____

- ? What does your crew ask you about time off?
- ? Where does tomorrow's job assignment come from?
- ? How do crew hours get from the field to payroll?
- ? What would a new foreman get wrong?

QUESTION, IN THEIR WORDS	WHERE THE ANSWER LIVES	HOW THEY FIND IT	THE RULE BEHIND IT	RECORDS TO PROVE IT

Head of IT

NAME _____ DATE _____

- ? Which Entra groups say company, role, union?
- ? How does a new vendor pass security review?
- ? Which Power BI datasets have row-level security?
- ? Which AI tools are people using today?

QUESTION, IN THEIR WORDS	WHERE THE ANSWER LIVES	HOW THEY FIND IT	THE RULE BEHIND IT	RECORDS TO PROVE IT

Systems list

FILLED IN WITH IT

SYSTEM	PRODUCT AND VERSION	WHAT IT HOLDS	CONNECTION YOU ALREADY HAVE	WHO APPROVES ACCESS
Accounting and job cost				
Payroll				
Billing				
Job tracker				
Timesheets				
Employee records				
Power BI				
SharePoint				
Microsoft Entra ID				
Workbooks and own apps				

We read through connections you already have, like the reporting database or a Power BI model. We don't build new ones.

WEEK 3 · THE SEMANTIC GRAPH MODEL

AI can't use data it can't connect. List the records, then the links.

The core of your Company Map is a semantic graph model: how each record connects to the next. Fill in where each record lives and the ID people use, then every link and the field it's matched on.

RECORD	LIVES IN (SYSTEM, TABLE OR REPORT)	ID PEOPLE USE	EXAMPLE
Job			3108
Customer and customer PO			
Vendor PO			
Invoice and vendor			
Cost line			
Month-end accrual and approval			
Crew timesheet			
Employee			
Union local			
Company			

FROM	LINK	TO	MATCHED ON	CHECKED AGAINST	BREAKS WHEN
Crew timesheet	posts payroll cost to	Cost line	Job number and cost code	Last quarter's payroll	Hours charged to a closed job
Employee	member of	Union local	Union code in employee records	Current roster, checked by HR	Code missing for new hires

Watch for four things that break answers: mismatched IDs across systems, fiscal periods that differ from calendar months, two totals for one invoice, and reports that refresh overnight. Write each one down where you find it, so the AI can resolve the scope around it.

AFTER EACH SESSION

Turn each answer into a Company Map entry

One entry per question. An entry is finished when the rule has been checked against real records and someone other than the person who taught it agrees it holds.

Company Map · entry no. _____ DRAFT / CHECKED / VERIFIED

QUESTION

LIVES IN

THE RULE

TAUGHT BY

TESTED ON

POWERS

Company Map · entry no. _____ DRAFT / CHECKED / VERIFIED

QUESTION

LIVES IN

THE RULE

TAUGHT BY

TESTED ON

POWERS

Grey rows on the graph-mapping sheet are illustrative examples. Lives in: the system and report or table, plus any workbook, folder or person. Tested on: the records and dates checked, such as twelve months of payroll history. Powers: Month-End WIP Review, Employee Answers or the Owner's View.

WITH HR, PAYROLL AND IT

Who may see what: roles, companies, union status and data

Fill one cell per role and data type with a scope code. Then list each company's locals and the Entra group and Power BI role that carry the rule. HR signs off the matrix before anything goes live.

A all companies C own company D direct reports L own local only S self only N never

ROLE	SICK TIME AND PTO BALANCES	PAY RATES	HOURS AND JOB ASSIGNMENTS	JOB COST AND MARGIN	POLICIES AND HANDBOOKS	UNION CONTRACTS
Owner						
HR and payroll						
People operations						
Company manager						
Project manager						
Field supervisor						
Union employee						
Non-union employee						
Out-of-state employee						

COMPANY	LOCALS WITH CREWS	ENTRA GROUP	POWER BI ROLE

Test it before it's live with the Who's Asking Test. Ask ten questions from your capture sheets as six people, from the owner to a non-union employee. A correct answer that shows more than the matrix allows fails.

WITH THE CONTROLLER

Map one month-end, step by step

STEP	WHO	WHERE IT HAPPENS	DAY OF CLOSE	HOURS	WHAT GOES WRONG
Cost cut-off					
Job data to PMs					
PMs enter accruals					
Review and questions					
Accounting merges and locks					
Board package					

Time from cost cut-off to locked period, last three closes: _____ _____ _____

Score the candidate workflows together

WORKFLOW	RUNS (1 TO 5)	PEOPLE (1 TO 5)	COST KNOWN TODAY (Y/N)	RIGHT ANSWER (Y/N)	DATA REACHABLE (Y/N)	A PRODUCT YOU OWN DOES IT (Y/N)	DECISION

The four decisions

- Buy: a product you own or can buy does it
- Simplify: a process change fixes it
- Build: it depends on your companies' rules
- Wait: not yet, with a date to look again

Want help running the sessions?
Book a Job Trace at ninetwothree.co: one real job, traced in 45 minutes.

Book a Job Trace

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