

OWNED INTELLIGENCE FOR ENERGY SERVICES · PLAYBOOK

The Owned Intelligence Playbook for energy services contractors

Every job's margin before the month closes, the right answer for every employee and one place for the owner to ask, on the systems you already run. You own every line of it.

For owners, controllers, HR leads and heads of IT at utility and energy services contractors

NineTwoThree AI Studio
Boston, MA · 2026 edition

SECTION 1

Keep your systems. Own the intelligence.

Your accounting system knows what every job cost. Your people know why. NineTwoThree builds the layer that connects them across every company you run, inside your own Microsoft tenant.

1 Every job's margin before the month closes

TODAY Month-end runs on a workbook per PM, merged before the board meeting. A margin problem shows up after the month has closed.

YOU GET One review across every company, with jobs that break a margin rule flagged mid-month. It reads your accounting system and never writes over it.

No AI inside, by design.

2 The right answer for whoever's asking

TODAY Crews call HR or their supervisor to ask how much sick time they have left. Every local has its own rules.

YOU GET Live balances and policy answers by company, role, union and location, inside the Microsoft sign-in people already have. Nobody sees another local's contract or another person's pay.

3 One question across every company, with the source rows attached

TODAY There's a report for everything and nobody knows which one to open. A question that spans companies means asking each one and waiting.

YOU GET Ask across the job tracker, billing, payroll and the approved month-end numbers. A map of how every record connects tells the AI where to look.

Proof: this is what we build, not a case result (status in Section 4).

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

TODAY IT is small and has become the AI department by default. Everyone wants AI, nobody specifies it, and work drifts into personal chatbot accounts.

YOU GET An AI team run by NineTwoThree on a managed-outcome contract, until your engineer takes it over. We're an AI company, not a software consultancy.

Proof: 150+ AI projects delivered since 2012.

MORE WORK THAN PEOPLE

$239 billion

America's investor-owned electric companies are projected to invest $239 billion in 2026 alone and $1.4 trillion through 2030.

Edison Electric Institute, July 2026

349,000

The U.S. construction industry needs an estimated 349,000 net new workers in 2026 and 456,000 in 2027, and a majority of 2026 demand comes from retirement.

Associated Builders and Contractors, Jan 15, 2026

The truth about AI: some of this shouldn't be AI. Exact numbers come from your accounting system, never from a model. The month-end review is rules and approvals. AI answers questions on top of numbers your accounting team already approved.

SECTION 2 · BENEFIT 1

Every job's margin before the month closes

Month-End WIP Review is the foundation the AI answers from: approved, job-level numbers for every company.

WIP REVIEW — ILLUSTRATIVE

Which jobs need a look before close?

JOB	MARGIN	STATUS
3102 Service line renewals	21.4%	Approved
3108 Gas main replacement	**7.4%**	Below 10%
3115 Regulator station	17.9%	Ready
3121 Underground feeder	18.6%	Locked

How it works

- PMs enter cost and revenue accruals per job, each with a category and a note.
- It reads the accounting and billing systems every 15 minutes and never writes over them. Accounting gets an export file at lock.
- Flags point reviewers at jobs that broke a margin rule, mid-month, while there's still time to act.

Why there's no AI in it

A month-end review is fixed rules and approvals, so your controller can check every number back to the source. AI comes after, on top of the approved numbers (Sections 4 and 5).

One path for every job

Open → Ready · PM → Approved · reviewer → Locked · accounting

Each company locks on its own schedule, so one late company doesn't hold up the rest.

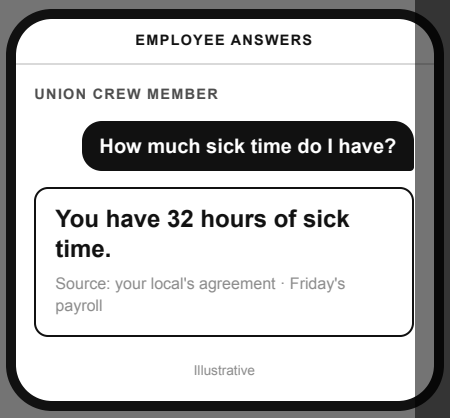
The Month-End WIP Guide covers the process step by step, including what to measure first.

SECTION 3 · BENEFIT 2 · EMPLOYEE ANSWERS

The right answer for whoever's asking

What employees ask

- Sick time and PTO balances
- Tomorrow's job assignment and address
- Payroll dates and W-2s
- Handbook and safety policies





Guardrails

Harassment and discrimination questions go straight to HR. Injuries go to your safety portal, with a reminder to call 911 in an emergency. No financial advice.

Where answers come from

Live balances and job assignments come through Power BI, run as the person asking, so row-level security applies. Handbooks, benefits guides and union contracts come from SharePoint, filtered by company, role and union before the AI reads them.

Rollout, honestly

Company by company. People are used to calling, so we plan adoption with you: supervisors point crews to it and HR answers with a link.

Same question, different correct answers

WHO'S ASKING	"HOW MUCH SICK TIME DOES MY CREW HAVE?"	"WHAT'S THIS EMPLOYEE'S PAY RATE?"	"SHOW ME THE LOCAL A AGREEMENT"
HR and payroll	Any crew, every company	Yes, every company	Yes
Company manager	Any crew in their company	Their company only	If their company has Local A crews
Field supervisor	Their direct reports	Never	The locals on their crews
Union employee, Local A	Their own balance	Their own	Yes, their local only
Non-union employee	Their own balance	Their own	No

Illustrative rules. Your Company Map holds your own, signed off by HR, and the Who's Asking Test (Section 10) checks them.

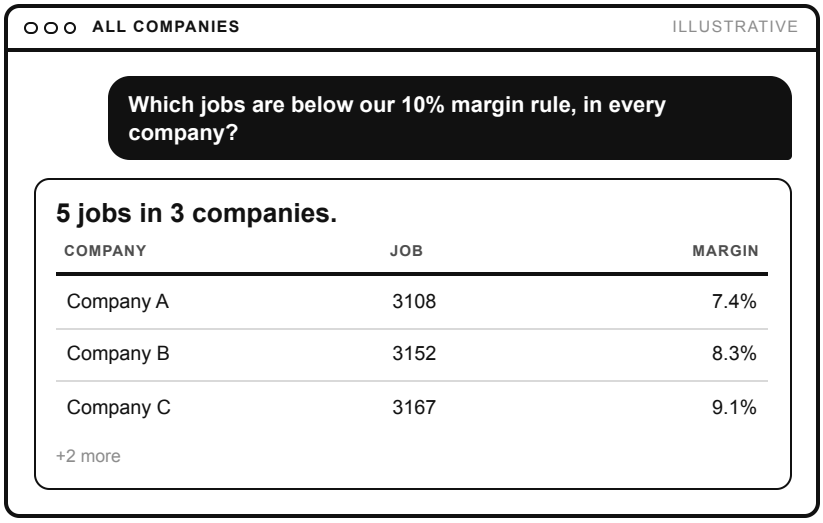
SECTION 4 · BENEFIT 3 · THE OWNER'S VIEW

One question across every company, with the source rows attached

What an owner asks

- Which jobs, across all companies, fell under a 10% margin this period, and why?
- Which customer POs are within 10% of their limit?
- How many crew hours did Company B charge to Company A's jobs last month?

Illustrative questions.



Why the data is the hard part

- Payroll, billing and hours tables don't share one customer ID.
- Fiscal periods and calendar months disagree.
- Two systems hold different invoice totals for the same job. The answer says so.
- Reports refresh overnight, so yesterday's number can pass for today's.

When the question is unclear, it asks

"Last month" could mean period 10 or October. The Owner's View asks which one you mean before it answers.

Who can use it

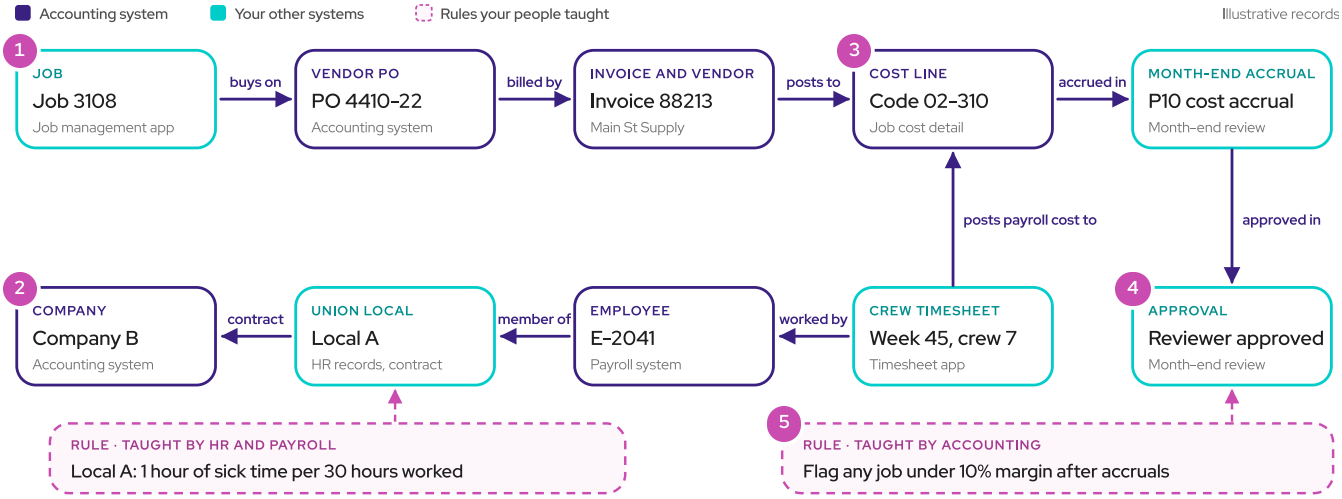
The owner and the people your Entra groups allow. A company manager asking the same question sees only their own company's jobs.

Honest status This is what we build, not a case result. It sits on the month-end review and permission-scoped answers, so those come first.

SECTION 5

AI can't use data it can't connect. The Company Map connects it.

The model knows construction. It doesn't know which local a crew belongs to, or which accruals your reviewer approved. The Company Map holds that: a semantic graph model of how every record connects, with your people's rules on top.



Each link is defined once, checked against your own history, and used by every answer.

The walk: "Why did job 3108 drop below a 10% margin this period?"

1. **Find the anchor.** Job 3108, Company A, period 10.
2. **Resolve the scope.** Fix which jobs, periods and companies are in play, so the model can't drop a filter or join the wrong records.
3. **Follow the links.** Job to cost lines, cost lines to invoices and crew timesheets.
4. **Check the approved numbers.** The period 10 accruals your reviewer approved.
5. **Apply your rules,** then stop where the answer lives.

Same path every time, each step with its source.

The AI never writes database code

Every read goes through a governed gateway:

- Named actions only, with allowed fields and limits
- Run as the person asking, so their Microsoft and Power BI permissions apply
- A person approves anything that writes
- Every call logged with who asked and what came back

SECTION 6

Your people teach it. We build the Harness around what they teach.

The Harness is the system we build on top of your systems. It holds your Company Map, runs the gateway and records what happened. Each stage ends with something you keep.

1

Map where the answers live

Align · weeks 1 to 4

In harness sessions with your people, we map where each answer lives and find the AI already in use. Then we pick the first thing to prove.

YOU KEEP Company Map v1, a written AI policy, a shadow-AI inventory and a scored list of workflows

2

Prove it on your data

Validate · weeks 5 to 8

A working pilot on your real data. We score 25 to 50 of your people's real questions for correctness, source and scope. We record a baseline your controller can check, such as time from cost cut-off to locked period.

YOU KEEP The pilot, the scorecard, the baseline and a build plan, even if you stop here

3

Put it in front of your people

Build · months 3 to 6

The month-end review, Employee Answers or the Owner's View in production, company by company.

YOU KEEP The code, prompts, evaluations, Company Map and documentation, in your repositories

4

Keep it right

Maintain · ongoing

We re-test the answers after every system change and model update, and every correction becomes a rule.

YOU KEEP A Company Map that is worth more every month it runs

There's no shortcut. The real work is mapping where your data lives and how your people find it, then teaching the system to do the same.

56%

of U.S. energy industry workers have fewer than 10 years of service.

Center for Energy Workforce Development 2023 survey of 41 utilities, reported by APPA, Feb 2024

Who joins: HR and payroll, the controller, an accounting lead, two or three PMs, a field supervisor and the head of IT. Each gives two to five hours. Align is optional when you already know the first problem; every engagement includes Validate.

SECTION 7

Every rule your companies run on, written down, tested and yours

On top of the graph sit the rules your people apply every day. Each one is a plain document in your repository.

COMPANY MAP ENTRY — ILLUSTRATIVE

How much sick time do I have?

ASKED BY	A union crew member
WHERE IT LIVES	Payroll, read under the employee's own sign-in, and the local's agreement
THE RULE	1 hour of sick time for every 30 hours worked. Unused hours carry over.
TAUGHT BY	The HR and payroll manager
TESTED ON	12 months of payroll history

COMPANY MAP ENTRY — ILLUSTRATIVE

Who may see an employee's pay rate?

WHERE IT LIVES	Microsoft sign-in groups and Power BI roles
THE RULE	HR and payroll see pay in every company. Company managers see their own company. Supervisors see their crew's hours, never pay. Employees see their own.
TAUGHT BY	The HR lead and head of IT
TESTED ON	Who's Asking Test questions, asked as six people

COMPANY MAP ENTRY — ILLUSTRATIVE

Which jobs should a reviewer look at first?

WHERE IT LIVES	Job cost and billing in the accounting system, plus month-end accruals
THE RULE	Flag any job under 10% margin after accruals, or below zero.
TAUGHT BY	The controller
TESTED ON	Three past month-ends, against the jobs reviewers raised by hand

Why it's worth owning

- When your most experienced people retire, their rules stay with the company.
- It works with whichever AI model you run next, because the rules live in your repository.

Example entries. Names and numbers are illustrative.

SECTION 8 · BENEFIT 4

You own every line of it. We run it until your team can.

What you own

- Your Azure tenant and everything deployed in it
- The code, in your repositories from day one
- The Company Map: the graph and every rule
- Prompts, evaluations and logs of every request

No licence fee and no token markup. You pay model providers directly.

Your AI team, run by NineTwoThree

- A managed-outcome contract: a fixed monthly fee, and we carry the delivery risk.
- A NineTwoThree product manager and engineers, working with your head of IT.
- Your engineer pairs with ours and takes over the code, the monitoring dashboards and the runbooks.

Hiring? Hire your engineer. We'll build the first system with them and hand it over.

SECTION 9

Use the AI you already pay for. Bring us for what only your companies know.

Use your vendors' AI for

- Email, documents, meeting notes and Teams: Microsoft Copilot
- Questions about one report: the Q&A and Copilot features built into Power BI
- Standard work inside one product: the AI your accounting, project or field-service vendor ships

45%

of construction firms already deploy AI for office and administrative functions.

AGC and Sage 2026 Construction Hiring and Business Outlook, 951 firms

A rule we follow: on every Job Trace we check which of your questions the tools you already own can answer, and we say so. An AI budget should be able to say no.

SECTION 10

Ready for IT review from day one, inside your Microsoft tenant

Runs in your tenant

Your Azure subscription and your code repositories. Read-only to your accounting system.

Permissions from Entra

Security groups map each person to company, role and union. Offboarding in Entra removes access.

Models you can swap

Used under business terms that exclude training on your data, and replaceable without a rebuild.

SOC 2 Type II compliant development. Every request is traced, and your auditor can export the log. The IT Review Kit covers the architecture, data flow and the questions your own SOC 2 auditor asks.

THE WHO'S ASKING TEST



Results in progress No tests have finished yet, and there are no projected numbers. Results are published only when a test is complete and the contractor approves.

SECTION 11

How to start: a 45-minute Job Trace

1. **Pick one job**
   A recent one with a crew, a few vendors and a month-end review behind it.
2. **We trace it with you**
   Where its cost, its crew's hours and its review live, from the field to the owner's question.
3. **You get an honest answer**
   What your tools already answer, what's worth building, and a fixed-price first step if it is.

Book a Job Trace

45 minutes with a NineTwoThree product lead and engineer. ninetwothree.co

Book a Job Trace

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Keep your systems. Own the intelligence.

Your accounting system knows what every job cost. Your people know why. NineTwoThree builds the layer that connects them across every company you run, inside your own Microsoft tenant, and you own it.

2012
building AI that people use

150+
AI projects delivered

97%
project success rate

24/27
recent projects with positive ROI

SOC 2 Type II compliant development · Boston, MA · ninetwothree.co



AI models
Swappable, under business terms that exclude training on your data

Where work happens	Month-End WIP Review, Employee Answers, the Owner's View, Teams, your intranet
Company Map YOURS	The semantic graph, your rules, who taught them, how they were tested
Governed gateway	Named actions only, run as the person asking, every call logged
Your systems of record	Accounting system, Power BI, SharePoint, Entra ID, your own apps. Unchanged.

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