

AI Agents Got Into Finance. Nobody Built the Operating Layer.

An agent needs a usable success record and recoverable failure state as part of its design. Build those alongside the task, then test the whole run.

HINTS, TIPS & TRICKS

- Capture state before consequential writes.
- Measure runtime through the agent and its tools.
- Make partial completion visible before retrying.

OPERATOR CHECKLIST

1. Define the success artifact
2. Name partial-failure ownership
3. Preserve pre-change state
4. Test timeout and recovery behavior
5. Confirm authorization and audit evidence

COPY-READY PROMPT

Design the operating layer for [workflow]. Define completion proof, allowed scope, backup strategy, partial-state record, timeout behavior and recovery owner. Simulate an interrupted run and show how the next operator determines what already happened.

SOURCE & PROVENANCE

Article claims: The edition uses timeout, state-write and monitoring failures to explain why recovery and auditability belong in initial implementation.

Guidance: This is an adaptation of its operating checklist. Passing a checklist alone does not authorize unattended production use.

Companion to: The AI Operator · 2026-04-03 · <https://www.linkedin.com/pulse/ai-agents-got-finance-nobody-built-operating-layer-dave-glaser-yffhe>

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