AI AGENT READINESS CHECKLIST

7 questions before you build

A practical scoring tool for deciding whether a workflow is ready for an AI agent, Copilot agent, or custom workflow assistant.

Most AI agent projects do not fail because the model is weak. They fail because the business process underneath it is unclear.

Use this checklist before you build. If the process is not ready, the agent will only expose the mess faster.

0 = Not clear	1 = Partially clear	2 = Ready
Undocumented, inconsistent, or dependent on memory	Known by the team, but not fully documented or owned	Clear, documented, measurable, and owned

1. Who owns the process?

An AI agent needs an accountable human owner. If nobody owns the workflow, nobody owns the agent output.

Check yourself	
■ Who is responsible for this process today? ■ Who updates the process when it changes? ■ Who decides whether the agent is working correctly? ■ Who reviews failures, exceptions, and escalations?	
Score	**Your score: _____ / 2**
0: No clear owner 1: Informal owner, but not documented 2: Named owner with decision authority	Notes: _____ _____

2. Where does the data live?

Agents are only useful when they can access the right information at the right time with the right permissions.

Check yourself	
■ What systems does the agent need to read from? ■ What systems does the agent need to write to? ■ Is the data structured, searchable, and current? ■ Are there privacy, compliance, or permission constraints? ■ Does the data live in email, spreadsheets, shared drives, CRMs, ERPs, or someone's head?	
Score	**Your score: _____ / 2**
0: Data location is unclear or scattered 1: Data sources are known, but messy or inconsistent 2: Data sources are clear, accessible, and permissioned	Notes: _____ _____

3. What counts as success?

“Save time” is not a success metric. A useful agent needs a measurable business outcome.

Check yourself	
■ Response time ■ Error rate ■ Cost per transaction ■ Number of manual touches ■ Follow-up completion rate ■ Revenue recovered ■ Customer satisfaction ■ Employee hours saved	
Score	**Your score: _____ / 2**
0: Success is vague 1: Success is directionally clear but not measured 2: Success is specific, measurable, and tied to business value	Notes: _____ _____

4. What exceptions happen often?

The happy path is easy. Exceptions determine whether the agent is safe to use.

Check yourself

■ What edge cases happen regularly?
■ Which exceptions stop the process?
■ Which exceptions require judgment?
■ Which exceptions can be resolved with rules?
■ Which exceptions should always go to a human?

Score	Your score: _____ / 2
0: Exceptions are not documented 1: Common exceptions are known but not mapped 2: Exceptions are documented with clear handling rules	Notes: _____ _____

5. Who approves final decisions?

Not every workflow should be fully autonomous. Many of the best first agents prepare, recommend, draft, summarize, or route work while a human approves the final action.

Check yourself

■ What can the agent do without approval?
■ What can the agent draft but not send?
■ What can the agent recommend but not decide?
■ What dollar amounts, risks, or customer situations require approval?
■ Who gives the approval?

Score	Your score: _____ / 2
0: Approval authority is unclear 1: Approval is understood informally 2: Approval rules are explicit and risk-based	Notes: _____ _____

6. When should a human step in?

Good agents do not pretend to know everything. They know when to stop.

Check yourself

■ What should trigger escalation?
■ Who receives the escalation?
■ How quickly should they respond?
■ What context should the agent include?
■ Where should the escalation happen — email, Teams, CRM, ticketing system, or dashboard?

Score	Your score: _____ / 2
0: Escalation rules are undefined 1: Escalation paths exist but are inconsistent 2: Escalation triggers, owners, and context are documented	Notes: _____ _____

7. What should the agent never do?

Guardrails are not optional. The fastest way to create risk is to give an agent authority before defining its limits.

Check yourself

■ Send customer-facing messages without review
■ Change financial records directly
■ Approve refunds, discounts, or credits
■ Share sensitive data
■ Delete records
■ Override employee judgment
■ Make legal, medical, HR, or compliance decisions
■ Act outside documented policies

Score	Your score: _____ / 2
0: No explicit guardrails 1: Some limits are understood, but not documented 2: Clear prohibited actions are documented and enforced	Notes: _____ _ _____

Your Readiness Score

Add your scores from all 7 sections. Total score: ____ / 14

0–5	**Do not build yet**	Map the workflow, assign ownership, document exceptions, and define success.
6–10	**Cleanup needed**	Close documentation, data access, approval, and escalation gaps before building.
11–14	**Ready with guardrails**	Start with a narrow pilot, human review, measurable outcomes, and clear escalation.

Best First AI Agent Candidates

Start with workflows that are repetitive, rules-based, high-volume, low to medium risk, easy to measure, and clear about inputs, outputs, owners, and escalation points.

Good first candidates	Bad first candidates
• Customer inquiry triage • Invoice follow-up drafts • Meeting summary and action-item routing • Internal policy Q&A with citations • Lead intake qualification • Proposal draft assembly • Field service appointment preparation • Report generation from structured data	• Final hiring decisions • Legal or compliance determinations • Medical, financial, or HR advice • Customer refunds without review • Autonomous accounting changes • Sales commitments or contract changes • Anything nobody currently owns

The Simple Rule

If a human cannot explain the workflow clearly, an AI agent cannot run it safely.

Map the process first. Automate the repeatable parts. Keep humans in the loop where judgment matters. Measure the outcome in business terms.

AIA Copilot helps small and midsize businesses design, build, and manage practical AI solutions with measurable ROI. Visit aiacopilot.com or message Scott Hay on LinkedIn with AGENT.