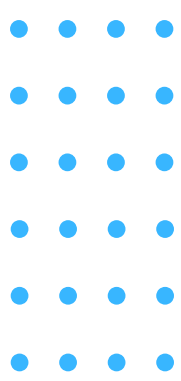# EXECUTIVE GUIDE TO AGENTIC READINESS

STRATEGY & READINESS

- ☐ Is there alignment on adopting AI-driven workflows?
- ☐ Have we identified where agents impact KPIs (efficiency, scalability)?
- ☐ Do we have a roadmap for agentic integration over 6—18 months?
- ☐ Have we defined success metrics and adoption checkpoints?
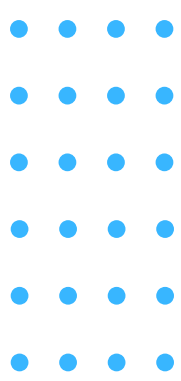
DATA & INFRASTRUCTURE

- ☐ Are systems integrated or integratable via APIs, webhooks, RPA?
- ☐ Is data clean, structured, and accessible across teams?
- ☐ Are there standards for managing and labeling unstructured data?
- ☐ Have we documented governance, privacy, and compliance?

PROCESS & AUTOMATION

- ☐ Have we mapped workflows to spot automation-ready steps?
- ☐ Do we know where agents augment vs. fully automate?
- ☐ Are we using tools for testing and refining workflows?
- ☐ Have we assigned ownership for automation logic?

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EXECUTIVE GUIDE TO AGENTIC READINESS

PEOPLE & CULTURE

- [ ] Do teams understand agent roles vs. human oversight?
- [ ] Are staff trained in prompt engineering and supervision?
- [ ] Is there safety to surface issues with AI decisions?
- [ ] Have we clarified how AI supports—not replaces—humans?

TOOLS & PLATFORMS

- [ ] Have we picked platforms for orchestration and monitoring?
- [ ] Can we track agent activity, output, and resolution time?
- [ ] Are we avoiding lock-in with modular tech stacks?
- [ ] Do we have infrastructure to handle automation load?

FEEDBACK & ITERATION

- [ ] Is there a loop for users to report agent performance?
- [ ] Are we collecting quantitative and qualitative feedback?
- [ ] Do we review and refine prompts and workflows regularly?
- [ ] Are learnings from pilots shared across the org?

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