



REVOPS AGENT READINESS CHECKLIST



PROCESS MAPPING

- ☐ Have we mapped workflows across teams for agent use?
- ☐ Are lifecycle stages and segmentation logic clear for agents?
- ☐ Do agents understand business rules and triggers?
- ☐ Are we capturing data (calls, emails, meetings) for context?

AGENT ENABLEMENT

- ☐ Have we trained agents on terminology and task flow?
- ☐ Are prompts, workflows, and fallbacks standardized?
- ☐ Can agents update CRM or project data directly?
- ☐ Are agent actions traceable to logic or decisions?

EXECUTION & FUNNEL OPTIMIZATION

- ☐ Can agents generate tasks from pipeline behavior?
- ☐ Are handoffs aligned with sales and marketing?
- ☐ Is agent performance tracked in dashboards and logs?
- ☐ Do agents adapt to campaign inputs and results?



REVOPS AGENT READINESS CHECKLIST



VISIBILITY & REPORTING

- ☐ Are activities logged with time and outcomes?
- ☐ Do dashboards show agent and human actions?
- ☐ Is there a feedback loop for agent learning?
- ☐ Can we audit agent decisions for review?

RISK & GOVERNANCE

- ☐ Are outputs clearly labeled as AI-generated?
- ☐ Do agents follow role-based permissions and rules?
- ☐ Are compliance checks and flags in place?
- ☐ Do we audit decisions for bias and accuracy?

KNOWLEDGE SYSTEMS

- ☐ Is there a versioned knowledge base for agents?
- ☐ Are playbooks and FAQs structured for access?
- ☐ Can agents suggest edits to docs as needed?
- ☐ Do we test, refine, and govern shared knowledge?