



Agentic Automation Deployment Worksheet

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1. Target Workflow Name:

2. Key Business Problem to Solve:

3. Main Trigger/Entry Point:

4. List of Required Data Sources:

5. AI Task or Decision Points:

6. Escalation/Exception Handling Plan:

7. Success Metric(s) to Track:

8. First Draft of Automated Message/Response:

9. Platforms/Channels to Cover:

10. Review & Test Checklist: