Agentic AI team management checklist

CATEGORY	CHECKLIST ITEM	RECOMMENDED STEPS
1. REDESIGN WORKFLOWS	Decompose workflows	• Assign tasks to the most appropriate actor. • Create categories, such as traditional automation, AI agents and humans.
	Determine areas of human intervention	• Decide when agents can act independently, provide recommendations or require human approval. • Establish clear handoff points and feedback loops. • Ensure human corrections to agent errors loop back for system improvement.
2. DEFINE OBJECTIVES	Establish definitions of success	• Provide specific and measurable objectives.
	Measure performance	• Include task success and error rates, as well as escalation frequency and human override rates. • Collect metrics on the performance of the entire human-AI system.
3. MONITOR AGENTS	Ensure continuous oversight	• Observe agent decisions, tool use, confidence levels and deviations from normal patterns. • Use dashboards, alerts, sampling reviews and regular audits.
	Avoid unseen errors from agent degradation	• Collect user feedback. • Flag questionable outputs for analysis.
4. MANAGE ERRORS	Onboard and supervise agents	• Establish clear escalation paths. • Perform regular structured reviews of AI incidents.

	Address coordination failures, loops and conflicts	• Use clear scopes, orchestrators and escalation rules to reduce errors.
5. CALIBRATE ACCESS	Restrict agents to only access the data they need	• Implement role-based access controls and the principle of least privilege. • Define tiers of autonomy for agents. • Incorporate approval mechanisms into systems.
	Maintain audit trails	• Audits must detail what agents did, why and who directed them.
6. ENSURE HARM PREVENTION	Counter bias	• Ensure there's transparency in AI-driven decisions. • Implement bias audits. • Disclose when AI is used.
	Plan for misuse	• Use security controls, resource limits and monitoring. • Prioritize explainability and traceability of agent actions.
7. ADAPT ORGANIZATIONAL ROLES	Evolve with technology	• Treat AI as a managed asset, with lifecycle management and versioning. • Create dedicated governance functions. • Identify AI agent owners within business units.
	Training	• Ensure employees are trained on how to work with AI agents.