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AI Agent Adoption Checklist

The arrival of powerful agentic tools has created a new category of leadership questions that most organizations are only beginning to confront. We aren't just looking for a prototype that works; we're building a durable infrastructure for the next era of work.

The following checklist is designed to move us from curiosity to agent-readiness by addressing the operational, security, and human questions that will define our competitive edge.

Phase 1

Infrastructure & Environment

Where agents will live, work, and play.

- [ ] **Define the Hosting Model:** Decide where agents will execute tasks. Will they run on local employee laptops, a centralized company server, or via a managed cloud service?
- [ ] **Establish a "Hybrid" Routing Policy:** Create clear rules for which tasks stay on-site (high security/low cost) and which go to the cloud (high power/scale).
- [ ] **Audit Hardware & Cloud Readiness:** Ensure our current IT stack can handle the increased compute and connectivity requirements of 24/7 agentic workflows.
- [ ] **Centralize Policy, Not Just Tools:** Shift from individual tool choices to a company-wide architectural standard to prevent unmanaged sprawl.

Phase 2

Security & Governance

Agents act, they don't just suggest. Within boundaries.

- [ ] **Identify No-Go Systems:** Map out the data and systems (source code, HR records, financial data) that agents are strictly forbidden from touching.
- [ ] **Create Agent Identities:** Assign unique IDs and specific permissions to non-human actors so we can track, log, and — if necessary — revoke their access instantly.

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- [ ] **Develop an Integration "Allow-List":** Establish a vetting process for third-party plugins and skills before employees connect them to company data.
- [ ] **Set the Power vs. Security Meter:** Formally decide our risk appetite. Where do we prioritize speed, and where do we require human-in-the-loop intervention?

Phase 3

Skillsets & Capability

Knowledge work is evolving. We need to help our people adapt.

- [ ] **Train Beyond the Prompt:** Move education past "how to talk to AI" and toward "how to manage agents." Focus on task decomposition and objective setting.
- [ ] **Teach "Supervision Literacy":** Train employees to spot "system drift," verify outputs, and know exactly when to intervene.
- [ ] **Distinguish Personal vs. Institutional:** Create a framework to decide when an employee's "personal shortcut" should be turned into an official, shared company asset.
- [ ] **Monitor for Cognitive Overload:** Watch for "leverage fatigue" — where employees are overwhelmed by the sheer volume of parallel work their agents are producing.

Phase 4

Knowledge Management

Shared information and reviews.

- [ ] **Build a Shared Agent Repository:** Create a central library where successful agent instructions and workflows are stored and version-controlled.
- [ ] **Implement Peer Review for AI:** Establish a process where new agent workflows are reviewed for accuracy and safety before being scaled to a team.
- [ ] **Document the Human Exceptions:** Keep a record of where agents fail or require specific human judgment to prevent the loss of institutional tribal knowledge.

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Phase 5

Implementation & Readiness

Start small to learn fast.

- [ ] **Appoint an AI Ops Lead:** Designate a person or small team to own the "Agent Operations" function.
- [ ] **Launch a 90-Day "Controlled Learning" Pilot:** Pick one high-value department to test agents, focusing on gathering data on friction points rather than just "going live."
- [ ] **Define Success Metrics:** Move beyond "time saved" and look at "quality of judgment" and "team throughput."
- [ ] **Set a "No Shadow IT" Policy:** Encourage experimentation, but mandate that all agentic activity happens within approved, visible environments.

About

Vouched Agent Checkpoint

As AI changes how business gets done, intelligent agents are now completing tasks and making purchases on behalf of humans and, increasingly, other agents. This shift brings new efficiency and growth opportunities, but also complex questions about identity, trust, and control.

That's why Vouched, the leader in AI-powered identity verification, built Agent Checkpoint, a family of solutions that allows humans to stay in control of agentic activity through capabilities that build trust without slowing innovation.

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