

## IMPLEMENTATION CHECKLIST

# Marketing AI-agent workflow checklist

One copy per workflow. The goal is a governed path from signal to owned action, not more agent activity.

Use one copy of this checklist for each workflow. The goal is a governed path from signal to owned action, not more agent activity.

## Workflow contract

- Workflow name: .....
- Business objective: .....
- Business owner: .....
- Operating owner: .....
- Eligible population: .....
- Exact trigger: .....
- Exclusions: .....

## Context and data

- Systems of record: .....
- Required account, contact, opportunity and campaign context: .....
- Identity and deduplication rules: .....
- Fit, ownership and routing definitions: .....
- Freshness requirements: .....
- Missing-data behavior: .....

## Agent action boundary

- Agent may read: .....
- Agent may prepare: .....
- Agent may recommend: .....
- Agent may write without review: .....
- Actions that always require approval: .....
- Prohibited actions: .....

## Human approval

- Decision owner: .....

- Evidence shown with the decision: .....
- Approval service level: .....
- Escalation path: .....
- Customer-facing communication owner: .....

## Trustworthy completion

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- Completion definition: .....
- Required evidence: .....
- System-of-record update: .....
- Reason codes: .....
- Failure and retry behavior: .....
- Manual fallback: .....
- Recovery owner and service level: .....

## Measurement

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- Eligible and excluded volume: .....
- Acceptance, edit and rejection rates: .....
- Completion and recovery rates: .....
- Approval latency: .....
- Existing business KPI: .....
- Review cadence: .....
- Evidence required before making any causal claim: .....

RevTech runs fully managed AI agents for GTM. The customer governs scope, permissions, approvals and business decisions.

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RevTech provides fully managed AI agents for GTM: RevTech runs the agents, your team governs them. This worksheet accompanies [revtech.ai/solutions/marketing](https://revtech.ai/solutions/marketing) and is an operating template, not legal, regulatory or security advice.