

SELECTION WORKSHEET

Revenue AI agents vs. automation

Complete one worksheet per recurring workflow, and choose the least complex operating model that can finish the work safely.

Workflow

- Name:
- Objective:
- Trigger:
- Expected output:
- Accountable owner:

1. Ambiguity

- Can fixed rules map every valid input to one action? **Yes / No**
- Which cases require context or interpretation?

2. Data access

- Which approved systems, objects, fields and definitions are required?
- Can one system supply the full context? **Yes / No**

3. Action risk

- What happens if the output is wrong, late or incomplete?
- Is any customer-facing or commercial record affected? **Yes / No**

4. Reversibility

- Can every change be undone? **Yes / No**
- Who owns rollback or corrective action?

5. Human judgment

- Which decision must remain with an accountable person?
- Who may approve, edit, reject or escalate?

Operating owner

- Who monitors, repairs and improves the workflow after launch?
- Who owns integrations, evaluation, permissions and incident response?

Measures

- Quality baseline and target:
- Workflow completion baseline and target:
- Business KPI baseline and target:
- Pause or rollback trigger:

Primary fit

- ☐ **Workflow automation** — stable rules, low ambiguity, reversible action.
- ☐ **AI assistance** — one person requests, reviews and applies one output.
- ☐ **Governed agent** — recurring contextual work across steps and systems.

Use the least complex operating model that can complete the work safely. Agents do the repeatable work; humans manage the last mile.

RevTech provides fully managed AI agents for GTM: RevTech runs the agents, your team governs them. This worksheet accompanies revtech.ai/blog/revenue-ai-agents-vs-automation and is an operating template, not legal, regulatory or security advice.