

GOVERNANCE CHECKLIST

AI agent governance checklist

One worksheet per agent workflow, from the workflow contract through to the decision to widen scope.

1. Workflow contract

- ☐ Objective and recurring trigger are explicit.
- ☐ Expected output and accountable business owner are named.
- ☐ Approved systems, records, fields and definitions are documented.
- ☐ Prohibited actions are explicit.
- ☐ Quality, completion and business measures have a baseline.

2. Risk tier

- ☐ Impact of a wrong or late output is understood.
- ☐ Customer and commercial exposure are recorded.
- ☐ Reversibility is known for every proposed action.
- ☐ Required human judgment is named.
- ☐ Risk tier determines the approval posture.

3. Permissions

- ☐ System access is limited to the named workflow.
- ☐ Object, field and record-population boundaries are documented.
- ☐ Read, prepare and write permissions are separated.
- ☐ Rate or volume limits are set where appropriate.
- ☐ Approvers follow existing roles and access rights.

4. Review and evidence

- ☐ Review items show the proposal, evidence and affected records.
- ☐ Approve, edit, reject and escalate paths are tested.
- ☐ Review deadlines and escalation owners are named.
- ☐ Consequential or hard-to-reverse actions retain a human gate.

5. Audit and recovery

- ☐ Inputs, policy, proposal, approver, edits and final action are recorded.

- ☐ Pause control and incident owner are documented.
- ☐ Affected records and time windows can be isolated.
- ☐ Rollback or corrective action is defined for reversible changes.
- ☐ Restart requires an approved rule, permission or evaluation change.

6. Scale decision

- ☐ Acceptance, edit, rejection and exception rates are reviewed.
- ☐ Workflow completion and business outcomes are reviewed together.
- ☐ Scope widens only when evidence supports it.
- ☐ The next governance review has an owner and date.

Review record

Workflow	Risk tier	Governance owner	Review date	Decision	Next review

RevTech provides fully managed AI agents for GTM. RevTech runs the agents; customers govern the objectives, permissions, approvals and outcomes.

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