# AI-Agent Workflow Quick Check

Use this page before expanding an AI-agent workflow. Mark each item Yes, No, or Not Applicable, then record the owner and next action. A blank or No is a prompt for review—not an automatic reason to stop.

## 1. Governance and operating review

| Review item | Yes / No / N/A | Owner + next action |
|---|---|---|
| [ ] The workflow has a named business owner. | | |
| [ ] Permitted and prohibited uses are documented. | | |
| [ ] Allowed data types and restricted data are identified. | | |
| [ ] Human-review points are defined for consequential outputs. | | |
| [ ] Access to tools, accounts, and credentials is limited appropriately. | | |
| [ ] Failures, corrections, and incidents have a recording process. | | |
| [ ] A reviewer can pause or roll back the workflow. | | |
| [ ] A date is set to reassess the workflow and its assumptions. | | |

## 2. Decision record

| | | | |
|---|---|---|---|
| **Workflow** | | **Review date** | |
| **Decision** | [ ] Continue [ ] Change [ ] Pause | **Owner** | |
| **Next review** | | **Evidence location** | |

This quick check is a general business resource, not legal, compliance, financial, or security advice.

# ROI Assumptions Worksheet

Write down the assumptions before discussing a return. Use your own observed figures where possible and compare conservative, base, and optimistic cases rather than relying on one estimate.

## 1. Inputs to document

| Input | Your assumption | Source / note |
|---|---|---|
| Tasks per month | | |
| Minutes per task before AI | | |
| Minutes per task with AI, including review | | |
| Loaded labor cost per hour (USD) | | |
| AI subscription + usage cost per month (USD) | | |
| Setup, integration, and training cost (USD) | | |
| Ongoing review, maintenance, and other costs (USD) | | |
| Expected adoption / usable-output rate | | |

## 2. Compare three cases

| Measure | Conservative | Base | Optimistic |
|---|---|---|---|
| Annual gross benefit (USD) | | | |
| Annual operating cost (USD) | | | |
| First-year total cost (USD) | | | |
| First-year net result (USD) | | | |
| Payback period (months) | | | |

Basic relationship: annual time benefit = tasks per year × minutes saved per task ÷ 60 × loaded hourly cost. Adjust for adoption, usable output, review time, and all relevant costs. Results depend on your assumptions; no savings or positive return is guaranteed.

## 3. Continue with the full kit

The **AI Agent Governance + ROI Kit** includes a 12-page editable DOCX with policies, risk and approval worksheets, incident records, and a 30-day rollout plan, plus a formula-driven XLSX with three scenarios, annual economics, first-year ROI, payback, and a comparison chart.

| PRODUCT | FORMAT | PRICE |
|---|---|---|
| AI Agent Governance + ROI Kit | DOCX + XLSX in ZIP | $19 USD · one-time purchase |