

Automation or AI decision checklist

Compare a rules-based workflow, a bounded AI step and an agent against the same task.

Task / desired outcome

Decision owner

☐**Describe the task before the tool**

Name the trigger, output, users and current operational problem.

☐**Check whether rules are stable**

List decisions that can be explicitly defined and tested.

☐**Check the input variability**

Identify unstructured information that actually needs interpretation.

☐**Test the need for autonomy**

Explain why selecting tools or next actions is necessary, if proposing an agent.

☐**Set action boundaries**

List permitted reads, writes and actions requiring human approval.

☐**Compare failure consequences**

Assess wrong outputs, unauthorized actions, repeated steps and recovery.

☐**Compare total operating cost**

Include review, model usage, integrations, monitoring and maintenance.

☐**Evaluate the simplest viable option**

Test representative cases against agreed operational criteria.

MAKE THE NEXT DECISION

Next decision: process redesign, rules-based automation, an AI-assisted workflow, or a bounded agent pilot.
Explain why the simpler options do or do not meet the need.

Which approach meets the outcome with the least unnecessary autonomy and complexity?