

CHECKLIST FOR YOUR NEXT MEETING

4 questions before hiring whoever builds your AI.

Before choosing a solution, define what you need to solve and ask for concrete answers. Use these four questions to compare proposals.

01. What process will we improve?

Pick a concrete task: qualify enquiries, check orders or organise documents. Identify who does it today, how long it takes and where errors happen.

Ask for: a map of the current process, the agent's scope and the situations that still require a person.

02. Where does the data live and who can access it?

Ask for an explanation of the processing environment, the vendors involved, permissions, action logs and how data is used.

Ask for: a data-flow diagram and written rules for access, retention and deletion.

03. How does it integrate and who is responsible?

List the systems the agent needs to query or update. Define who approves actions, tracks failures and maintains the solution after delivery.

Ask for: a demo with a relevant process, a test plan and support responsibilities.

04. How will we measure if it was worth it?

Record the baseline and choose indicators: time per task, errors, completed requests or conversion. Include implementation, usage and maintenance in the cost.

Ask for: acceptance criteria, a budget with recurring costs and a date to review results.

Next step: pick one process, gather an example and take this checklist to the conversation with the team that will build it.