



Checked 13 October 2026

Second AI agent checklist

Review what the first workflow leaves for the next build.

- ☐ Review excluded cases

List the first workflow's excluded inputs and manual exceptions. Check whether each exclusion still applies and whether the second workflow depends on it.

- ☐ Review connections and permissions

Record connected tools, mapped fields, missing fields, and access limits. Identify any write permission the new workflow needs.

- ☐ Check manual exception paths

Confirm what happens after a flag, who handles it, and whether the process is documented. Put needed changes in the second brief before building.

- ☐ Review current outputs

Compare representative recent outputs with the business's current definition of correct. Address drift before reusing shared rules.

- ☐ Assign shared-field ownership

Define which agent may change each shared field, which state wins, when it must be rechecked, and who resolves conflicts. Test both on the same example record.

- ☐ Test reuse without broader access

Keep each agent's permissions limited to its job. Log which workflow changed a record, hold ambiguous updates, and retest the first workflow after shared changes.