

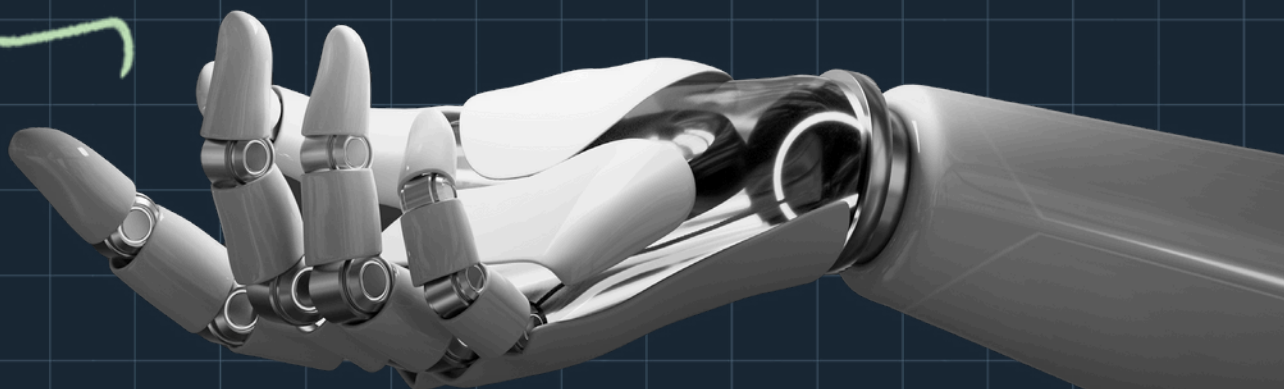
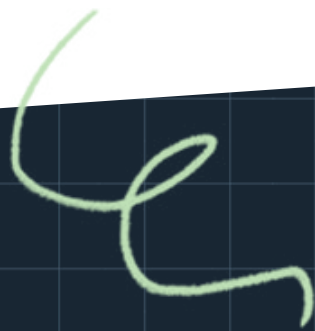
How To Use AI Agents In

2025



- ✓ Automate
- ✓ Optimise
- ✓ Scale

Use this practical checklist to guide your organisation through each phase of implementing AI agents. Check off items as you complete them to ensure a thorough, methodical approach to deployment.



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Phase 1: Assessment

Identify Opportunities

- Map out all potential tasks and workflows that could benefit from agent automation
- Classify each task as low-precision (90% accuracy acceptable) or high-precision (near-perfect accuracy required)
- Prioritise low-precision, high-frequency tasks for initial implementation
- Evaluate time intensity of tasks relative to their strategic value

Evaluate Data Readiness

- Audit data accessibility for each potential use case
- Ensure necessary APIs and integrations are available
- Assess data quality and completeness
- Identify any compliance or privacy considerations

Define Success Metrics

- Establish baseline metrics for current performance
- Define specific efficiency targets (time saved, volume processed)
- Establish quality metrics (accuracy, error rates)
- Identify business impact indicators (revenue influence, customer satisfaction)

Phase 2: Implementation

Start Small

- Select a single, well-defined use case for initial implementation
- Create detailed process documentation for the selected workflow
- Define clear boundaries for agent responsibilities
- Set specific success criteria for the pilot project

Select Technology Approach

- Evaluate no-code, low-code, and custom development options
- Choose appropriate AI models and platforms
- Consider vendor stability and support options
- Assess scalability for future expansion

Design Human Oversight

- Establish review protocols for agent outputs
- Create clear escalation paths for exceptions
- Define approval workflows where necessary
- Document human-in-the-loop processes

Test Thoroughly

- Create test scenarios with historical data
- Conduct simulated runs in controlled environments
- Compare agent outputs to human benchmarks
- Identify and address performance gaps before full deployment

Phase 3: Integration

Establish Data Access

- Configure secure connections to required data sources
- Set up appropriate authentication mechanisms
- Document data flows and usage
- Implement audit trails for sensitive information

Connect to Workflows

- Integrate agent outputs with existing systems
- Configure handoffs between agents and human team members
- Ensure compatibility with current tools and platforms
- Minimise disruption to existing processes

Design User Experience

- Create intuitive interfaces for human-agent interaction
- Provide appropriate visibility into agent activities
- Balance automation with human control
- Consider user feedback mechanisms

Ensure Security

- Review security implications of agent access
- Implement appropriate permissions and controls
- Document security protocols for agent operations
- Conduct security review before full deployment

Phase 4: Measurement

Track Efficiency Metrics

- Measure time saved compared to baseline
- Monitor volume of work processed
- Calculate cost per transaction
- Document productivity improvements

Monitor Quality Metrics

- Regularly audit agent output accuracy
- Track error rates and types
- Compare consistency to human benchmarks
- Identify opportunities for quality improvement

Measure Business Impact

- Assess revenue influence of agent-supported activities
- Monitor customer satisfaction in affected areas
- Track employee satisfaction with agent collaboration
- Calculate ROI based on costs and benefits

Refine and Iterate

- Collect ongoing feedback from users
- Implement regular agent performance reviews
- Make continuous improvements to agents and processes
- Document learnings for future implementations

Expansion Planning

Scale Successfully

- Identify additional use cases based on initial success
- Prioritise next implementations using assessment criteria
- Apply learnings from initial deployment
- Create roadmap for organisation-wide agent strategy

Build Organisational Capability

- Develop internal training on effective agent collaboration
- Share success stories and best practices
- Create community of practice for agent implementation
- Establish governance framework for expanding agent use



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