



AI Agent Pre-Implementation Checklist

Opportunity Assessment

- ☐ Identify current operational inefficiencies or areas that could be enhanced
- ☐ Understand what AI agents can and cannot do
- ☐ Map specific problems that AI agents could potentially solve
- ☐ Prioritize problems based on complexity vs. potential impact

Process Documentation & Requirements

- ☐ Document current process steps for prioritized tasks in detail
- ☐ List required inputs/outputs for each task
- ☐ Identify what success looks like for each task
- ☐ Map critical decision points and requirements

Technical Readiness

- ☐ Verify that data is organized and complies with privacy standards
- ☐ Select the Infra/base that your agents will run on
- ☐ Identify what data/system/tools(s) the AI agent needs access to
- ☐ Choose the right models for specific processes
- ☐ Evaluate the agentic framework
- ☐ Review orchestration capabilities
- ☐ Select the best monitoring tools for visibility
- ☐ Outline expected usage patterns to plan for scalability

Implementation & Operation Planning

- ☐ Select a specific pilot task with a clear scope
- ☐ Assign team roles and responsibilities

Budget & Resource Planning

- ☐ Calculate initial setup costs
- ☐ Estimate ongoing operational costs
- ☐ Plan for potential scaling costs
- ☐ Account for training and support costs

When starting your AI agent journey, you'll likely navigate between building in-house capabilities and leveraging external solutions. To successfully build an AI agent in-house, you need to connect many different components, such as models by providers like OpenAI and Anthropic, orchestration frameworks like CrewAI, monitoring tools like LangSmith, and many more. However, combining components from different vendors often leads to hidden complexities and challenges.

As your AI initiatives scale, a fragmented multi-vendor approach can increase technical overhead, introduce security vulnerabilities from distributed data handling, and create reliability issues at integration points.

Consider comprehensive platform solutions like [Arcee Orchestra](#), a turnkey platform powered by industry-leading language models that provide everything you need to build agent networks and workflows. The entire solution can also be deployed in the customer's environment to meet the most strict security and compliance requirements.