

5-Day Sprint Readiness Checklist

The five business days begin once API documentation, a test environment, platform permissions, access and scope are agreed. Use this checklist to confirm you're ready. Items you can't tick yet are fine. We'll work through them with you on the fit call.

1. Agreed scope

- ☐ One bounded business workflow is named and described step by step.
e.g. 'Customer checks stock and reserves an item for pickup.'
- ☐ The single business system the agent will act on is identified.
- ☐ The single AI assistant or channel for the pilot is chosen and confirmed eligible.
Connector support varies by assistant, plan and region.
- ☐ Allowed actions, limits and approval rules are written down.
Which actions need a human approval, and by whom.
- ☐ Success criteria for the test report are agreed.
e.g. completion time, failed action rate, escalations.
- ☐ A named business owner and technical contact are assigned on your side.

2. API documentation

- ☐ Current API reference for the endpoints the workflow needs (read and write).
- ☐ Authentication method documented (OAuth, API keys, service accounts).
- ☐ Rate limits, error codes and pagination behaviour documented.
- ☐ Data fields and validation rules for each action are listed.
- ☐ Any idempotency or duplicate-prevention support in the API is noted.

3. Test environment

- ☐ A sandbox or test instance of the system is available.
Production systems are not used during the sprint.
- ☐ Synthetic or sample test data is loaded (no live PHI or regulated data).
- ☐ Test environment behaves like production for the chosen workflow.
- ☐ Test users or accounts exist for each role in the workflow.

4. Access and credentials

- ☐ Test credentials issued with the minimum scopes the workflow needs.
- ☐ Network access confirmed (IP allow-listing, VPN or firewall rules if required).
- ☐ Secure method agreed for sharing credentials (never by plain email).
- ☐ Access duration and revocation plan agreed for after the sprint.

5. Platform permissions and approvals

- ☐ Admin access or approval to register an app or connector on the chosen AI platform.
- ☐ Your security team has reviewed and approved the sprint scope.
- ☐ Any required agreements are signed (NDA, data processing; BAA where applicable).
- ☐ Internal approvers for the workflow's policy rules are available during the sprint.

What the sprint is, and isn't

A pilot of one governed workflow on one system and one channel, tested with synthetic or sandbox data, with a handover and test report. It is not an enterprise production go-live or a HIPAA compliance certification. External API, hosting, license and usage costs are excluded. Non-API legacy systems, multiple systems or channels, security certification, live PHI or other regulated integrations, and marketplace approval are outside the standard sprint.

Ready, or want to check? Book a fit call: calendly.com/connect-honestai/new-meeting · growth@honestai.us · honestai.us/services/ai-agent-integration