mimansa
RESEARCH & ADVISORY

PLAYBOOK · BRING AGENTS INTO A TEAM



Agent Permission Card

Fill this in before the agent starts. Keep it with the agent's owner. Review it every 90 days.

AGENT NAME
e.g. Payment Reminder Agent

TEAM
e.g. Accounts receivable team, 9 people, Bengaluru

OWNER
e.g. Priya R., AR lead

BACKUP OWNER
e.g. Arjun M., senior analyst

IT MAY DO THIS

IT MUST NEVER DO THIS

MONEY LIMIT
e.g. It cannot commit any money.

REVIEW DATE
e.g. 90 days after go-live

IT MUST FLAG DOUBT WHEN

IT MUST STOP AND ASK A PERSON WHEN

SIGNED BY THE MANAGER

CHECKED BY THE HRBP

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