

The Jonesi Consultancy | Houston, TX

EXECUTIVE AI ADOPTION · WORKING SESSION CANVAS

AGENT DESIGN CANVAS



Design with Purpose. Build with Clarity. Deploy with
Confidence.

*Every blank block is a decision that will otherwise get made by default,
in production.*

1

Agent Design Canvas

Complete this canvas before anyone writes a line of configuration. Blocks 1–6 here; blocks 7–12 overleaf.

AGENT NAME

DESIGNED BY

DEPARTMENT
OR TEAM

DATE

VERSION

PURPOSE, IN ONE SENTENCE

1 GOAL

What is the primary objective this agent is designed to achieve?

2 RESPONSIBILITIES

What tasks and decisions is this agent responsible for?

3 INPUTS

What information does the agent need in order to function?

4 TOOLS AND INTEGRATIONS

What tools, systems, and connections will the agent use?

5 PERMISSIONS

What data can it access, and what actions is it allowed to take?

6 OUTPUTS

What does the agent produce, and how is that output delivered?

7 WORKFLOW

How will the agent work? Outline the key steps in order.

8 GUARDRAILS

What rules, constraints, and safety measures must the agent follow?

9 SUCCESS MEASURES

How will we know whether this agent is actually working?

10 METRICS

What will we track to assess performance over time?

11 RISKS AND MITIGATIONS

What could go wrong, and how will we reduce or contain it?

12 NOTES

Anything else the build team needs to know.

2 Readiness Check *All Six Before Build Begins*

DEFINED

- ☐ A clear goal is written down
- ☐ Expected outputs are identified

CONTROLLED

- ☐ Tools and permissions are set
- ☐ Guardrails are in place and documented

MEASURABLE

- ☐ Success measures are defined
- ☐ An owner is named and accountable

3 Review and Approval *Sign Before Configuration Begins*

DESIGNED BY

Name & date

TECHNICAL REVIEWER

Name & date

BUSINESS OWNER

Name & date

APPROVAL DATE

Name & date

DEFINE CLEARLY. DESIGN INTENTIONALLY. DEPLOY RESPONSIBLY.

An agent takes action, which means every blank on this canvas is a decision someone will make later under pressure. Test thoroughly, start narrow, and improve continuously.

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We help organizations set the lines, train to them, and put governance behind them.

