



DELPHI ADVISORY FIRM
STRATEGY AND SYSTEMS FOR THE AI ERA

The Company Brain Checklist

What your business needs to organize before AI agents can work effectively.

Every company needs a Company Brain. Every employee needs an AI Agent.

Prepared by Delphi Advisory Firm

The Company Brain Checklist

A practical readiness guide for companies preparing to deploy AI agents, approval gates, and a future AI operating system.

How to use this checklist

For each section, mark one of three states:

- **Ready:** documented, accurate, easy to access, and current.
- **Partial:** exists somewhere, but scattered, outdated, or incomplete.
- **Missing:** mostly undocumented or trapped in people's heads.

The goal is not perfection. The goal is to see what your AI agents would need to know before they can work inside your business.

1. Company Identity

Your AI agents need to understand the business before they can support the team.

- ☐ Company overview: what the business does, who it serves, and where it operates.
- ☐ Core positioning: what makes the company different.
- ☐ Ideal customer profile: best-fit clients, customers, or accounts.
- ☐ Poor-fit customers: who should not be pursued or accepted.
- ☐ Company values and standards.
- ☐ Key leadership contacts and decision-makers.
- ☐ Locations, service areas, hours, and basic operating facts.
- ☐ Approved public description of the company.

Notes:

2. Offers, Products, and Pricing

An agent cannot sell, answer questions, or support customers if it does not understand what the company offers.

- ☐ Current services or products.
- ☐ Package names and descriptions.
- ☐ Pricing, price ranges, or quoting rules.
- ☐ Discounts, promotions, and approval requirements.
- ☐ What is included and not included.
- ☐ Eligibility rules or qualification criteria.
- ☐ Common add-ons, upgrades, or cross-sells.
- ☐ Refund, cancellation, return, or rescheduling policies.
- ☐ Internal notes on what offers are most profitable.

Notes:

3. Sales Process

A Sales Agent needs the company's real sales process, not generic sales advice.

- ☐ Lead qualification questions.
- ☐ Sales scripts or call frameworks.
- ☐ Objection handling.
- ☐ Follow-up sequences.
- ☐ Proposal or estimate templates.
- ☐ CRM stages and definitions.
- ☐ Handoff rules from marketing to sales.
- ☐ Handoff rules from sales to operations or fulfillment.
- ☐ Approval rules for special pricing or custom deals.
- ☐ Lost-deal reasons and recovery process.

Notes:

4. Customer Questions and Communication Rules

Customer-facing agents need approved answers and escalation rules.

- ☐ Frequently asked questions.
- ☐ Approved answers to sensitive questions.
- ☐ Tone and brand voice guidelines.
- ☐ Words or claims to avoid.
- ☐ When to ask for more information.
- ☐ When to route to a human.
- ☐ What the agent can say without approval.
- ☐ What the agent must draft for approval first.
- ☐ Emergency or urgent escalation rules.
- ☐ Channel-specific rules for email, SMS, phone, chat, and social.

Notes:

5. Operations and Fulfillment

Operational agents need the steps behind the promise.

- ☐ Fulfillment process from sale to delivery.
- ☐ Internal checklists.
- ☐ Scheduling rules.
- ☐ Inventory, capacity, or availability rules.
- ☐ Vendor or partner instructions.
- ☐ Quality-control process.
- ☐ Common delays, exceptions, and edge cases.
- ☐ Internal task ownership by role.
- ☐ What requires manager approval.
- ☐ How completion is tracked.

Notes:

6. SOPs and Internal Processes

Scattered SOPs create scattered AI results.

- ☐ SOPs are stored in one known place.
- ☐ SOPs are current and assigned to owners.
- ☐ New employee onboarding docs exist.
- ☐ Repeated tasks have written steps.
- ☐ Internal tools have usage instructions.
- ☐ Exceptions and edge cases are documented.
- ☐ Employees know where to find official answers.
- ☐ Old or conflicting SOPs are archived.
- ☐ SOPs are written clearly enough for a new employee to follow.
- ☐ SOPs are clear enough for an AI agent to assist with.

Notes:

7. Employee Roles and Department Knowledge

Every employee agent should be trained around the job it supports.

- ☐ Role descriptions for key employees.
- ☐ Department responsibilities.
- ☐ Recurring tasks by role.
- ☐ Tools each role uses.

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- ☐ Decisions each role can make.
 - ☐ Questions each role asks repeatedly.
 - ☐ Documents each role needs access to.
 - ☐ Department-specific rules and constraints.
 - ☐ Manager escalation paths.
 - ☐ Cross-department handoff rules.

Notes:

8. Tools, Data, and Integrations

A Company Brain should map where work actually happens.

- ☐ CRM or lead management system.
- ☐ Email and calendar systems.
- ☐ Google Drive, Docs, Sheets, or Microsoft equivalents.
- ☐ Project management tools.
- ☐ Scheduling or booking tools.
- ☐ Phone, SMS, chat, or support platforms.
- ☐ Payment, invoice, or accounting systems.
- ☐ Website forms and landing pages.
- ☐ Social platforms used for business.
- ☐ Login/access ownership for each major tool.

Notes:

9. Old Leads, Past Customers, and Lost Opportunities

Many companies do not need more leads first. They need to recover the ones they already paid for.

- ☐ Old CRM contacts.
- ☐ Missed calls.
- ☐ Old quotes or estimates.
- ☐ No-shows.
- ☐ Abandoned inquiries.
- ☐ Past customers due for follow-up.
- ☐ Denied, cold, or non-responsive leads.
- ☐ Unfinished proposals.
- ☐ Unworked website form submissions.

☐ Clear rules for who should and should not be contacted again.

Notes:

10. AI Policy and Approval Gates

The safest AI systems define what agents may read, draft, recommend, and execute.

☐ Employee AI usage policy.

☐ Sensitive data rules.

☐ Customer communication approval rules.

☐ Financial, legal, HR, or medical-topic restrictions if relevant.

☐ Permission levels by role.

☐ Read-only actions defined.

☐ Draft-only actions defined.

☐ Approval-required actions defined.

☐ Disabled actions defined.

☐ Audit log and review process.

Recommended permission model:

1. **Read-only:** the agent may search, summarize, and answer.

2. **Draft only:** the agent may prepare messages, documents, or updates for review.

3. **Approval required:** the agent may act only after a manager approves.

4. **Pre-approved low-risk action:** the agent may perform narrow routine tasks.

5. **Disabled:** the agent may not perform the action.

Notes:

11. Executive Visibility

Leadership needs a command layer, not a black box.

☐ Leadership has visibility into agent usage.

☐ Managers can review sensitive actions.

☐ Escalations are tracked.

☐ Bottlenecks are summarized.

☐ Sales pipeline status is visible.

☐ Team questions and recurring confusion are visible.

☐ AI system health is monitored.

☐ Approvals and decisions are searchable.

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- ☐ Weekly or daily executive briefings are possible.
 - ☐ Improvement opportunities are reviewed regularly.

Notes:

Quick Score

Count how many sections are mostly Ready, Partial, or Missing.

- **Mostly Ready:** Your company may be prepared for role-specific AI agents.
- **Mostly Partial:** Your company likely needs a Company Brain buildout before deploying agents at scale.
- **Mostly Missing:** Your biggest AI opportunity may be organizing company knowledge first.

Section	Ready	Partial	Missing
Company Identity	☐	☐	☐
Offers, Products, and Pricing	☐	☐	☐
Sales Process	☐	☐	☐
Customer Communication	☐	☐	☐
Operations and Fulfillment	☐	☐	☐
SOPs and Internal Processes	☐	☐	☐
Employee Roles and Departments	☐	☐	☐
Tools, Data, and Integrations	☐	☐	☐
Old Leads and Lost Opportunities	☐	☐	☐
AI Policy and Approval Gates	☐	☐	☐
Executive Visibility	☐	☐	☐

What this means

If your company knowledge is scattered, your AI will be scattered too.

The next step is to turn your documents, workflows, roles, tools, rules, and customer knowledge into a structured Company Brain. From there, Delphi can help deploy role-specific AI agents for your employees and, when the company is ready, the full Delphi AI OS.

Next step

Request a Company Brain Readiness Assessment from Delphi Advisory Firm.

Email: sebastian@delphiadvisoryfirm.com

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Delphi Advisory Firm

Strategy and systems for the AI era.

The next step

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Delphi Advisory Firm helps companies turn documents, roles, workflows, tools, policies, approvals, and customer knowledge into a structured Company Brain. From there, your team can deploy role-specific AI agents and eventually the full Delphi AI OS.

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