

The Agent Handoff Map

PATHPATRON · DELEGATE, AUTOMATE, OR KEEP HUMAN — ONE ROW PER STEP

ASK THESE FIVE BEFORE YOU ASSIGN A MODE

1

Is the task bounded, repeatable and understandable from permitted inputs?

2

What can go wrong — customer harm, financial loss, a legal problem, an unfair result, an irreversible action?

3

Who has authority to make, challenge or stop the decision?

4

What is the recovery path if the system is uncertain, wrong or working from outdated information?

5

Does this mode improve the outcome or capacity enough to justify its cost and control load?

THE THREE MODES

A Agent

Interpretation across variable but controlled information, where the output stays reviewable or reversible. Prepares a decision; does not inherit the authority to make one.

W Workflow

Stable rules: route, create, check, notify, execute an approved action. Executes a decision that has been made — it must not invent one.

H Human-led

Accountable judgement, negotiation, ambiguous evidence, irreversible consequence. Technology supports the judgement rather than disguising who owns it.

| STEP<br><i>the work, in plain language</i> | TRIGGER<br><i>what starts it</i> | ALLOWED INPUTS<br><i>systems · access identity · what is logged</i> | MODE<br><i>tick one</i>                                                                                           | ALLOWED ACTION<br><i>draft · classify · route · send · change · approve</i> | HUMAN DECISION RIGHT<br><i>who may approve, challenge, override, stop</i> | ESCALATION TRIGGER<br><i>what must reach a person</i> | FINAL OWNER<br><i>accountable for the outcome</i> | FEEDBACK & MAINTENANCE<br><i>updates sources, tests changes, monitors</i> |
|--------------------------------------------|----------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------|-------------------------------------------------------|---------------------------------------------------|---------------------------------------------------------------------------|
| 1                                          |                                  |                                                                     | <div><input type="checkbox"/> A</div> <div><input type="checkbox"/> W</div> <div><input type="checkbox"/> H</div> |                                                                             |                                                                           |                                                       |                                                   |                                                                           |
| 2                                          |                                  |                                                                     | <div><input type="checkbox"/> A</div> <div><input type="checkbox"/> W</div> <div><input type="checkbox"/> H</div> |                                                                             |                                                                           |                                                       |                                                   |                                                                           |
| 3                                          |                                  |                                                                     | <div><input type="checkbox"/> A</div> <div><input type="checkbox"/> W</div> <div><input type="checkbox"/> H</div> |                                                                             |                                                                           |                                                       |                                                   |                                                                           |
| 4                                          |                                  |                                                                     | <div><input type="checkbox"/> A</div> <div><input type="checkbox"/> W</div> <div><input type="checkbox"/> H</div> |                                                                             |                                                                           |                                                       |                                                   |                                                                           |
| 5                                          |                                  |                                                                     | <div><input type="checkbox"/> A</div> <div><input type="checkbox"/> W</div> <div><input type="checkbox"/> H</div> |                                                                             |                                                                           |                                                       |                                                   |                                                                           |

WORKED EXAMPLE · A DELAYED-DELIVERY REFUND

One customer request is not one task. It is a chain of tasks with different levels of judgement — so it gets a chain of authorities.

Automation → agent → human decision → automation

W Ticket creation

Create and route only. Escalate if order data is missing. Service operations owns the flow.

→

A Case preparation

Summarise, draft, flag uncertainty. Escalate if policy and case facts conflict. Service lead owns output quality.

→

H Refund decision

An authorised service owner decides. Escalate above a defined value or outside policy. Customer-service manager owns the outcome.

→

W Approved execution

Execute the recorded approval only. Escalate if execution fails. Finance operations owns the recovery path.