

AI-workflow RACI template

For agency teams running AI-augmented client delivery

How to use this template

- Fill in one of these for each client engagement at project kickoff. It takes about 20 minutes.
- The four accountability areas are the four steps in your AI-augmented delivery process.
- Label each column with a team member and their role. Then, in each column, mark how they relate to each accountability area: R, A, C, or I.
- Assign one R and one A per row. The A is the single name attached to the outcome when the work ships.
- On long engagements, redo it if your team or AI tools change mid-project.

R Responsible
Does the work

A Accountable
Owns outcome, signs off

C Consulted
Two-way input

I Informed
Kept in the loop

Accountability Area	Name:	Name:	Name:	Name:	Name:	Name:
	_____	_____	_____	_____	_____	_____
	Role:	Role:	Role:	Role:	Role:	Role:
	_____	_____	_____	_____	_____	_____
1. AI output review Who checks AI-assisted work before it moves forward. Whoever ran the prompt does not sign off on it.						
2. Client comms on AI use Who tells the client AI was used, and when. The whole team gives the same answer.						
3. Quality gate before delivery Human sign-off before AI-assisted output reaches the client.						
4. Sensitive content escalation Who decides whether AI touches sensitive work at all. The call gets made before the tool runs.						

Default assignments shown. "Informed" on client communication is the full project team. Adjust any cell to match how your team actually works.

Project information

Agency _____ Client / project _____ Completed by _____ Date _____

Sensitive content trigger list

If a task hits any of the following, escalate to the delivery lead before running any tools.

- Brand voice work (e.g., taglines or core voice guidelines)
- Regulated content (including HIPAA, FERPA, financial services, legal, or government work)
- Any task handling client PII, customer data, or internal confidential info.
- Ghostwritten content or materials shipping directly under the client's name without their sign-off
- Code touching production systems, payment flows, authentication, or compliance-bound infrastructure
- Anything the client has asked to be handled without AI involvement

Kickoff checklist

Complete these steps during project kickoff and log the details in the project notes.

- Confirm which AI tools the team plans to use on this project.
- Map out the RACI roles above for each of the four accountability areas.
- Disclose AI use to the client and note their preferred disclosure standard.
- Identify any tasks that hit the sensitive content trigger list.
- Name the human reviewer for each AI-assisted deliverable type.
- Add this line to the project plan: "AI-assisted output reviewed by [role] before client delivery."
- Confirm the client's compliance contact if any work is in a regulated sector.

Sign-off

Delivery lead	_____
Date	_____
Account lead	_____
Date	_____
Next review	_____

Companion to: The AI-era agency RACI: how top teams are restructuring client delivery