Digital **Flows**

PMO READINESS GUIDE

The AI Governance Readiness Checklist for PMOs

A practical, self-scoring framework for governing AI agents in project and portfolio delivery — before governance becomes the reason your AI investment stalls.

Smartsheet Aligned Partner

WHY THIS CHECKLIST EXISTS

AI adoption is outrunning AI governance

In September 2026 alone, five independent sources — McKinsey, Gartner, UiPath, Atlassian and PMI — separately measured the same pattern: organisations are rolling out AI agents faster than they are building the structure to govern them. The gap isn't theoretical. It shows up as lost EBIT, stalled pilots, and portfolios nobody can fully account for.

94% vs 6%

of leaders say they're using AI, but only 6% have systems in place to scale it (Atlassian, Sept 2026)

$140–240M

estimated annual cost of workflow-interface latency at one manufacturer running AI without redesigned handoffs (McKinsey, Sept 2026)

60%

of organisations are predicted to fail at governing AI by 2027 — due to culture, not budget (Gartner, Sept 2026)

This checklist exists to close that gap before it costs your PMO the way it has cost the organisations above. It is built from Digital Flows' analysis of six converging pieces of evidence published in September 2026 (full list on the last page), combined with what we consistently observe inside real PMO and portfolio transformations.

DIGITAL FLOWS PERSPECTIVE

Most of the PMOs we work with don't have an AI governance problem because they lack policy. They have one because the policy that exists was written before anyone had deployed an actual agent — and nobody has gone back to check whether it survived contact with reality. This checklist is designed to be checked against what is actually running today, not what was approved on paper twelve months ago.

HOW TO USE THIS CHECKLIST

Score each item honestly: **0** = not in place, **1** = partially in place or inconsistent, **2** = fully in place and consistently followed. Total each section, then use the scoring guide on the final page to place your PMO on the maturity band. This is a diagnostic, not an audit — its value comes from being specific about gaps, not from a high score.

A Risk & Accountability

Extending your existing risk register to cover AI

- [ ] We have identified and documented every AI agent currently touching project or portfolio data — not only the ones formally "approved."
- [ ] Each agent's risk is classified across seven categories: data, model, autonomy, explainability, governance, ethical, and AI-cybersecurity risk.
- [ ] Every AI-assisted decision above a defined threshold requires a documented human sign-off.
- [ ] We maintain an AI risk register as a living extension of our existing project risk register — not a separate document nobody revisits.
- [ ] Risk classifications are reviewed on a fixed cadence (e.g. quarterly), not only after something has already gone wrong.

> **DIGITAL FLOWS OBSERVES**
>
> Almost every PMO we've audited has a mature risk register for people, budget and schedule. Almost none have extended it to cover what an AI agent is allowed to decide without a person in the loop. The register isn't wrong — it's incomplete, and incompleteness is exactly what a 60%-failure-by-2027 prediction is measuring.

Framework basis: PMI, "Rebuilding the Risk Breakdown Structure for AI-Enabled Project Teams," 15 Sept 2026

B Permission & Autonomy Tiers

Bounding what each agent is allowed to do alone

- [ ] Every AI agent is assigned to one of three tiers: low (recommends only), moderate (acts within pre-approved bounds), or high (acts, then reports).
- [ ] Each agent's autonomy tier is documented and visible to anyone who needs to know what it's allowed to do — not only to the person who configured it.
- [ ] High-autonomy agents are restricted to reversible, low-blast-radius actions only.
- [ ] There is a named process for promoting or demoting an agent's autonomy tier as trust is earned or lost.
- [ ] No agent operates above its assigned tier by default configuration or vendor setting.

> **DIGITAL FLOWS OBSERVES**
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> The vendor default is almost always the most permissive setting available, because permissiveness demos well. We've yet to see a client whose actual risk appetite matched the out-of-the-box configuration of the tool they bought.

Framework basis: PMI, "Rebuilding the Risk Breakdown Structure for AI-Enabled Project Teams," 15 Sept 2026

C Culture & Ownership

Why governance actually fails — and it isn't budget

- [ ] Governance is treated as a shared responsibility across business, IT and the PMO — not an IT-only checkbox.
- [ ] Every AI agent has a single named human owner, not a team or a department.
- [ ] Staff know exactly who to contact when an agent produces a wrong or unexpected result.
- [ ] Leadership has explicitly stated that using an AI agent does not remove accountability for the outcome.
- [ ] Governance is part of onboarding for anyone who configures or approves an agent — not only for compliance staff.

> **DIGITAL FLOWS OBSERVES**
>
> Governance documents are easy to write and easy to ignore. What actually holds under pressure is a name attached to every agent — someone who will get the phone call at 6pm when it does something nobody expected. If no one can answer "whose agent is this," the document was theatre.

Evidence basis: Gartner, "60% of organizations that ignore data governance culture challenges will fail to govern AI successfully by 2027," 21 Sept 2026

D Agent Lifecycle & Offboarding

Closing the gap that creates "orphaned" agents

- [ ] We maintain a live inventory of every AI agent in production, including who configured it and when it was last reviewed.
- [ ] Agent permissions are automatically reviewed or revoked when the owning employee changes role or leaves the organisation.
- [ ] We can answer, at any time, "which agents are currently running with no active human owner" — and act on the answer.
- [ ] Agent access is provisioned and de-provisioned through the same process as system and user access, not a side channel.
- [ ] We have a defined retirement process for agents that are no longer needed, rather than letting them run indefinitely.

> **DIGITAL FLOWS OBSERVES**
>
> "Orphaned agent" is a new phrase for an old failure mode: access that outlives the person who requested it. The only thing that has changed is that the orphan can now take actions on its own, which is precisely why Smartsheet's own security leadership named this as a resilience risk this quarter, not a hypothetical one.

Evidence basis: InformationWeek, "Intuit, Smartsheet, ETS CISOs on ensuring enterprise resilience before 'AI orphans' emerge," 31 Aug 2026

E Scale Readiness

Getting out of pilot purgatory

- [ ] We can name the specific governance gap currently preventing an AI pilot from moving to production.
- [ ] Agents touching multiple systems or workflows are coordinated through a shared orchestration layer, not left to operate independently.
- [ ] We track adoption beyond the pilot team — whether other teams can adopt the same agent without reconfiguring it from scratch.
- [ ] Governance requirements are built into new agent deployments from day one, not retrofitted after a pilot succeeds.
- [ ] Leadership reviews which agents are stuck in pilot, and why, on a recurring basis.

> **DIGITAL FLOWS OBSERVES**
>
> Organisations with mature orchestration report agentic AI implementations meeting or beating ROI expectations far more often than those without it. The difference was never the agent's capability — it was whether anything coordinated what the agent was allowed to touch.

Evidence basis: UiPath, "Agentic AI Pilot Purgatory" enterprise survey, 9 Sept 2026; Gartner Magic Quadrant for Business Orchestration and Automation Technology, 18 Sept 2026

F Measurement & Reporting

Proving the ROI you're claiming

- [ ] We can distinguish AI-generated work from human-generated work in our reporting, in practice, not only in theory.
- [ ] We measure where in the workflow — not just whether — an agent is creating or destroying time (handoffs, approvals, reconciliation).
- [ ] AI-related ROI is measured against a defined baseline, not asserted anecdotally.
- [ ] Portfolio-level reporting includes AI-agent activity, not only human-resourced work.
- [ ] AI governance metrics are reviewed at the same cadence and in the same forum as other portfolio health metrics.

> **DIGITAL FLOWS OBSERVES**
>
> The most expensive AI failures we've seen were never visible in a status report, because nobody was measuring the handoff where the time was actually being lost. A dashboard that only tracks task completion will tell you the AI is working right up until the moment the portfolio review reveals it wasn't.

Evidence basis: McKinsey, "Cutting the 'Coordination Tax': How Agentic AI Can Reshape Workflows," 18 Sept 2026

SCORE YOUR PMO

Where does your governance actually stand?

Six sections, five items each, scored 0–2 per item (60 points maximum). Add up your totals below.

Section	Score (of 10)
A — Risk & Accountability	____ / 10
B — Permission & Autonomy Tiers	____ / 10
C — Culture & Ownership	____ / 10
D — Agent Lifecycle & Offboarding	____ / 10
E — Scale Readiness	____ / 10
F — Measurement & Reporting	____ / 10
Total	**____ / 60**

MATURITY BANDS

0–20 — Ad hoc	AI agents are in active use with little to no formal governance. This is the highest-exposure band: the organisations Gartner predicts will fail to govern AI by 2027 sit here today.
21–35 — Emerging	Foundational elements exist — a policy, a register, a few named owners — but they are inconsistent, undocumented in places, or not consistently followed under pressure.
36–50 — Managed	Governance is structured and largely followed. Gaps typically remain in culture (Section C) or lifecycle management (Section D) rather than in the written framework itself.
51–60 — Optimised	Governance is embedded, owned, and measured as part of normal portfolio operations — the band associated with the 89% ROI-achievement rate UiPath found among orchestration-mature organisations.

Where does your PMO score?

Digital Flows helps PMO and Operations leaders in regulated industries — pharma, biotech, automotive — turn this checklist into a working governance framework, mapped to the tools you already run, including Smartsheet. If your score surprised you, that's the conversation worth having.

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EVIDENCE BASE

Sources

This checklist synthesises Digital Flows' own PMO and workflow-governance experience with six pieces of evidence, all published in September 2026. It does not reproduce any single source; frameworks are adapted and re-applied to a PMO/portfolio context.

McKinsey & Company, "Cutting the 'Coordination Tax': How Agentic AI Can Reshape Workflows," 18 September 2026.

Atlassian, "Governed Agent Loops" (Jira AI-native SDLC announcement), 10 September 2026.

Gartner Newsroom, "60% of Organizations That Ignore Data Governance Culture Challenges Will Fail to Govern AI Successfully by 2027," 21 September 2026.

UiPath, "Agentic AI Pilot Purgatory" enterprise survey, 9 September 2026; and "UiPath Named a Leader in Gartner's Magic Quadrant for Business Orchestration and Automation Technology," 18 September 2026.

PMI Blog, "Rebuilding the Risk Breakdown Structure for AI-Enabled Project Teams," 15 September 2026.

InformationWeek, "Intuit, Smartsheet, ETS CISOs on Ensuring Enterprise Resilience Before 'AI Orphans' Emerge," 31 August 2026.

Digital Flows helps organisations structure how work is planned, executed, governed and reported — with Smartsheet as an aligned Silver Partner delivery platform. Ce n'est pas l'outil qui crée l'ordre, c'est l'ordre qui donne son pouvoir à l'outil.