12–24 Month Roadmap

Bounding Agency: Identity, Authority, and Trust in the Age of AI Agents

The AI-IAM Practitioner Series · Book 1 · Rahul Bhardwaj · Arvik Press

Tool, version and date	12–24 Month Roadmap v1.0, September 2026
Purpose	Turns assessment findings into initiatives ordered by risk, dependency, business value and feasibility, as NOW, NEXT and THEN capability logic rather than dates.
Source in the book	Chapter 15 (Table 15.2 fields and worked entry; Table 15.1 segments; Figure 15.1).
When to use it	For planning beyond the first quarter, once the assessment has produced findings.
What it produces	Initiatives with an accountable owner, target evidence and a decision gate; revalidated at least every six months.
Scope	Fill in: which agents, use cases, environments and business units this record covers.
Completed by / reviewed by	Fill in: who completed it, who reviewed it, and when.
How to use this workbook	Cells shaded pale yellow are for you to fill in; drop-down lists appear where the book defines the options. Example rows are shaded blue-grey and written in italics: replace or delete them. Reference sheets reproduce the book's tables.
Evidence conventions	For every evaluative entry record the evidence source and date. Evidence strength, strongest first: tested control or log; configuration; documented policy; interview. Use N/A only with a reason. Record Unknown as a finding, never as zero.
Two planning tools, two levels	The 90-Day Action Plan is for the practitioner and the workstream (an action, about a quarter). The Roadmap is for the organization’s capabilities (an initiative, illustrative 12–24 months). Collapsing them produces a plan nobody owns.
Sequence is not calendar law	A single high-impact use case can pull later controls forward, or wait until they exist.
Status	**A working diagnostic. Not a certification, audit opinion or compliance attestation.**
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Updates	Check arvikpress.com/bounding-agency for newer versions and corrections.
Examples	Initiatives row 2 is the worked entry from Table 15.2. CrystalSoft Energy and its people, agents and systems are fictional, created to illustrate the book. Values marked with an asterisk (*) are illustrative.

Initiative	KEEP / ADAPT / BUILD	Use case / risk driver	Prerequisite	Accountable owner	Participating capabilities	Target outcome / evidence	Technology maturity	Maturity as of (date)	Standard / technology dependency	Timing window	Decision gate	Status	Review date
Narrow the Billing Resolution Agent's CRM write scope to the task's customer	*ADAPT*	*Billing resolution: injected content could steer writes to other customers (Ch10)*	*CRM supports record-level scoping, or a gateway enforces it*	*Head of Customer Operations (sponsor); IAM implements*	*Trust & Access; Authority & Delegation*	*Test showing a write to another customer's record is denied; policy log*	*Established*	*September 28, 2026 (Chapter 9 legend)*	*CRM vendor capability*	*NOW*	*Sponsor sign-off on the test result*	*Planned*	*Next roadmap review*

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NOW / NEXT / THEN — one page (Figure 15.1 layout)

Capability lane	NOW — visibility and control	NEXT — adapt the IAM stack	THEN — build only what is needed
Identity and inventory			
Trust and access			
Authority and delegation			
Lifecycle, PAM and IGA			
Runtime assurance			
Governance			
Enterprise integration			

Columns are capability logic, not dates; phases overlap. Mark BUILD or OPEN items as needed only if a use case requires them, and tag items a high-risk use case pulls forward.

Table 15.1 — Use-Case Segments and What They Pull Forward

Segment	Example	Typical emphasis	Pull forward when…
Bounded assistant	Knowledge-base assistant, read-only	Inventory; access scope	Rarely
Assistant acting with delegated user access	Workplace assistant using a person's mailbox or files	Inventory; consent and scope; data exposure	It can send, share or change on the user's behalf
Tool-using agent	Billing Resolution Agent	Task-scoped authority; lifecycle; injection paths	It writes to systems of record or touches regulated data
Privileged or high-impact agent	Payments Agent	PAM; approval design; blast radius	Actions are irreversible or externally visible
Multi-agent ecosystem	Agents invoking agents across teams or trust domains	Delegation governance; provenance; revocation	Authority crosses a team or trust boundary