30-Day AI pilot plan.

Build your AI pilot

Start with one acceptable use case, use the AI Use Case Evaluator if you aren't sure where to start. Build and run a pilot to test, measure, learn, and decide what to do next.

Use case _____

Expected/ideal outcomes _____

Pilot owner _____

Pilot start date _____

AI tools used _____

Success metrics _____

Week 1: Define	Week 2: Test	Week 3: Refine	Week 4: Measure
Define the workflow and set guardrails. ☐ Confirm the business problem and desired outcome ☐ Assign an owner and small pilot group ☐ Review and approve the tool and human review process ☐ Capture the current baseline	**Run the workflow in a controlled setting.** ☐ Train users on the workflow and prompts ☐ Use AI on real, approved tasks ☐ Track time, quality, issues, and feedback ☐ Keep sensitive data out unless approved	**Improve the process for consistency.** ☐ Adjust prompts and workflow steps ☐ Resolve quality, risk, or adoption gaps ☐ Document the repeatable process ☐ Confirm outputs meet expectations	**Review results and decide.** ☐ Compare results with the baseline ☐ Capture lessons and training needs ☐ Share outcomes with leadership ☐ Decide to use, refine, pause, or stop

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Pilot results

Day 30 decision:

☐ Use ☐ Refine ☐ Pause ☐ Stop

Decision notes:

Success metrics	Pre-AI	Post-AI

User feedback:

Next steps:

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