



AI Pilot Decision Brief

Use this editable worksheet to agree the scope, safeguards, responsibilities, and evidence for an AI pilot. Replace each response prompt with your team's decisions. Record unresolved questions and an owner before starting.

Assess and X Map Select the work

Business problem and decision this trial informs:

[Enter response]

Accountable owner and sponsor:

[Enter response]

Workflow, users, and time boundary:

[Enter response]

Approved tools and information:

[Enter response]

Excluded activities or information:

[Enter response]

Dependencies and approvals needed before starting:

[Enter response]

Infrastructure Confirm what the trial needs

Approved data, tools, access, and dependencies:

[Enter response]

Required approvals and readiness gaps:

[Enter response]



AI Pilot Decision Brief continued

Safeguards and CAL conditions

Capability

Skills and practice required:

[Enter response]

User support and manager preparation:

[Enter response]

Authority

Permitted AI actions:

[Enter response]

Human approvals and escalation owner:

[Enter response]

Stop conditions and response process:

[Enter response]

Leadership

Communication and feedback plan:

[Enter response]

How concerns will be raised and addressed:

[Enter response]



AI Pilot Decision Brief continued

Integrate Test the workflow and prepare users

Test scenarios, including errors and exceptions:

[Enter response]

Baseline, target, measurement method, and evidence owner:

[Enter response]

Quality and risk review:

[Enter response]

User feedback and actual use:

[Enter response]

Decision meeting date and required reviewers:

[Enter response]

Evidence required to proceed, revise, or stop:

[Enter response]

Sustain Measure, review, and reinforce

Recorded decision and rationale:

[Enter response]

Rollout, training, and handoff responsibilities:

[Enter response]

Monitoring cadence and issue owner:

[Enter response]

Next review date:

[Enter response]