AI-Agent Pilot Scope Worksheet

Use this page to give a proposed pilot a clear owner, task boundary, and stop condition. Blank fields are intentional: complete them with your own workflow details before testing.

1. Pilot charter

Workflow and business problem	
Business owner and technical owner	
Pilot users, reviewers, and approver	
Start, end, and decision-review dates	

2. Boundary review

Review item	Yes / No / N/A	Owner + next action
The trigger, inputs, tasks, and output destination are defined.		
Prohibited actions and content are explicit.		
Approved data sources and restrictions are identified.		
Tool permissions are limited to the pilot’s needs.		
Human review and approval points are assigned.		
Pause, rollback, and change-control responsibilities are clear.		

3. Handoff and stop record

Handoff recipient and verification required	
Conditions that pause the pilot	
Rollback owner, method, and evidence location	

This worksheet supports planning; it is not automated approval or proof of safety, compliance, savings, or fitness for a particular workflow.

Pilot Test + Readiness Worksheet

Record executed tests and current evidence. Use reviewer and readiness scores from 1 (weak) to 5 (strong). The full workbook calculates the weighted 0–100 result after all eight readiness criteria are scored.

1. Pilot test log

Test ID	Scenario	Expected / actual result	Score (1–5)

2. Eight readiness criteria

Criterion	Score (1–5)	Evidence / next action
Task fit		
Output quality		
Review effort		
Data readiness		
Integration		
Reliability		
User adoption		
Economics		

3. Decision record

Decision	[ ] Stop [ ] Revise [ ] Bounded pilot [ ] Separate expansion review	**Owner**	
Required changes		**Next review**	

4. Continue with the full kit

The **AI-Agent Pilot Planning Kit** includes an 8-page editable DOCX with charter, boundary, acceptance, review, exception, evidence, decision, and 30-day planning templates, plus a formula-driven XLSX with editable weights, a 100-row test log, summary metrics, and a readiness chart.

PRODUCT	FORMAT	PRICE
AI-Agent Pilot Planning Kit	DOCX + XLSX in ZIP	$15 USD · one-time purchase