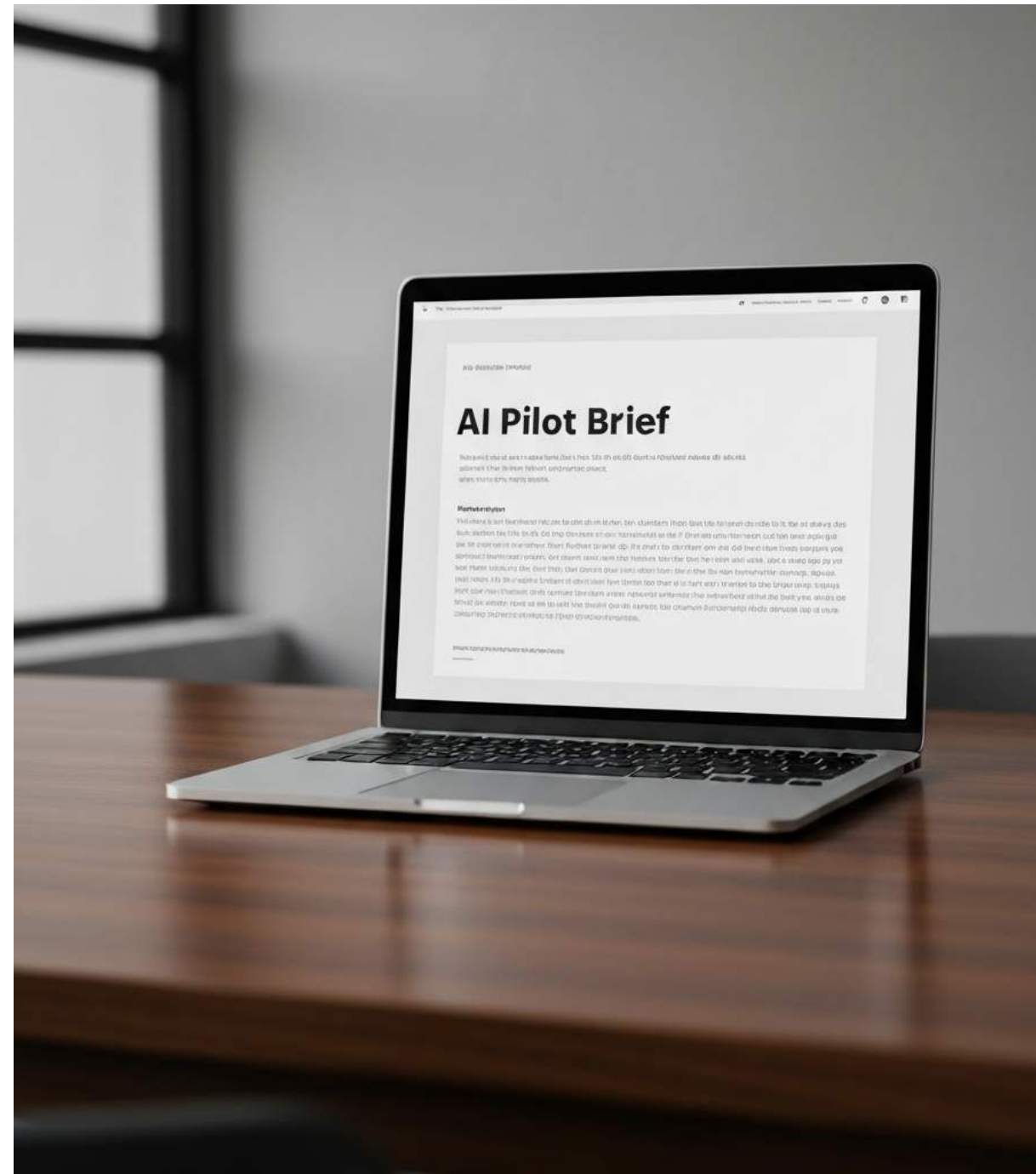


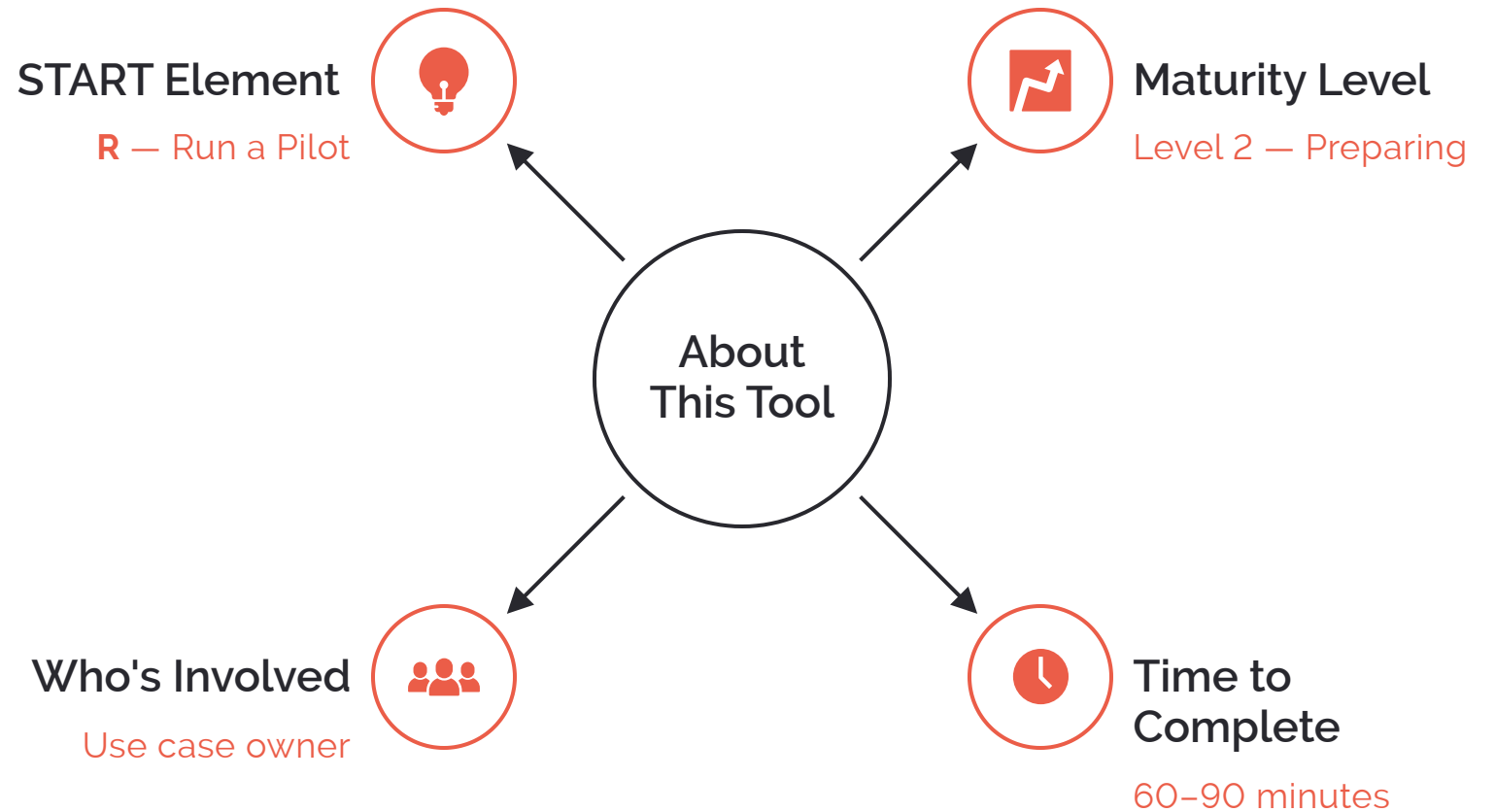
Pilot Brief (Lite)

Define what you're testing, how you'll measure it, and who owns it — before you start



Pilot Brief (Lite)

From a prioritised use case to a structured, measurable pilot — in one focused session



What you'll leave with: A structured list of AI opportunities across your business — ready to prioritise.

Pilot Brief (Lite)

Define what you're testing, how you'll measure it, and who owns it — before you start



What is it?

A lightweight structured brief defining your hypothesis, success metrics, scope, data handling, and ownership before a single test is run.



Why Use it?

68% of pilots fail not because of poor ideas — but poor implementation. Unclear objectives, undefined success, and no ownership are the top three causes.

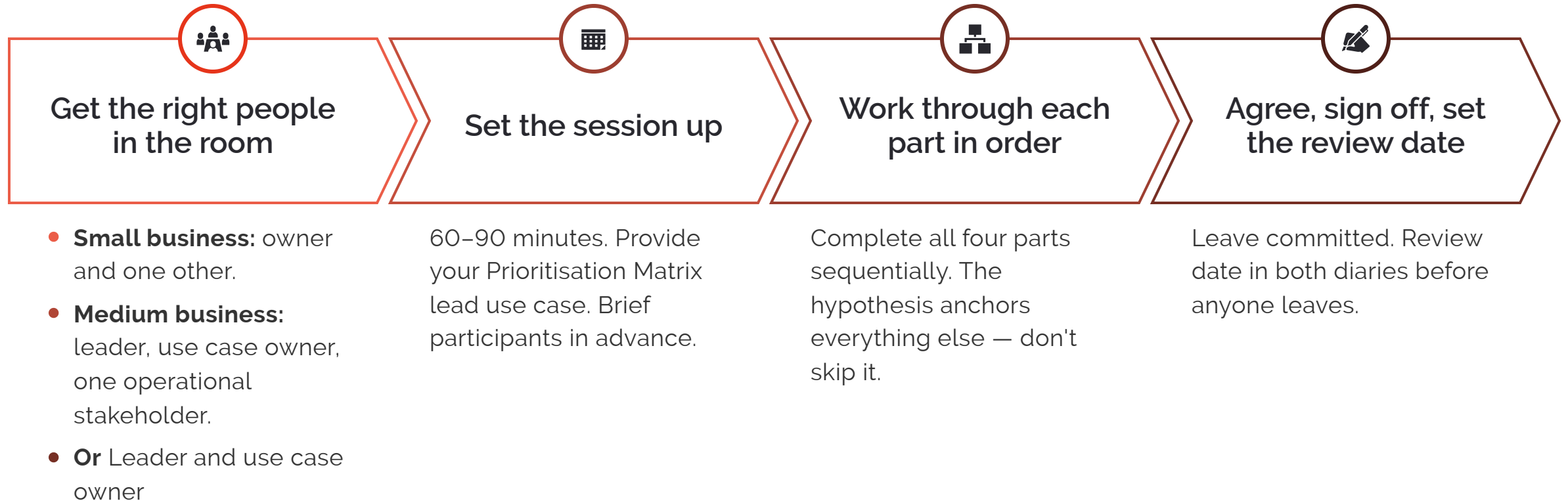


What you'll gain

A signed, shared brief that gives your pilot the best possible chance of producing something you can actually act on.

How to Run Your Session

Two people. One session. One signed brief.



An unsigned brief is not a brief.

Structured Pilot Briefs

Maximizing Success



What is a Structured Pilot Brief?

A lightweight, structured brief that defines your hypothesis, success metrics, scope, data handling, and ownership before any test is run.



Why Use a Structured Pilot Brief?

Pilot projects often fail due to poor implementation, characterized by unclear objectives, undefined success criteria, and lack of clear ownership.



Benefits of Using a Structured Pilot Brief

Gain a signed, shared brief that gives your pilot the best chance of producing actionable insights and results.

A signed, shared brief provides the best foundation for successful pilot projects.

Your Brief Has Four Parts

Each one builds on the last

1 State Your Hypothesis

What do you believe AI will do — and how will you know if you're right?

2 Define Success

What does winning look like — in numbers, not feelings?

3 Scope and Data

What exactly are you testing — and what are the rules around data?

4 Ownership and Stakeholders

Who owns this — and who needs to know what?

Why Most Pilots Fail

The difference between a pilot and a distraction is structure.

1

No Clear Hypothesis

Most pilots start with "let's try this" rather than "we believe this will produce that." Without a testable hypothesis, there's no way to know if it succeeded.

2

No Defined Success Metric

If you haven't agreed on what winning looks like before you start, you'll argue about it afterward.

3

No Named Owner

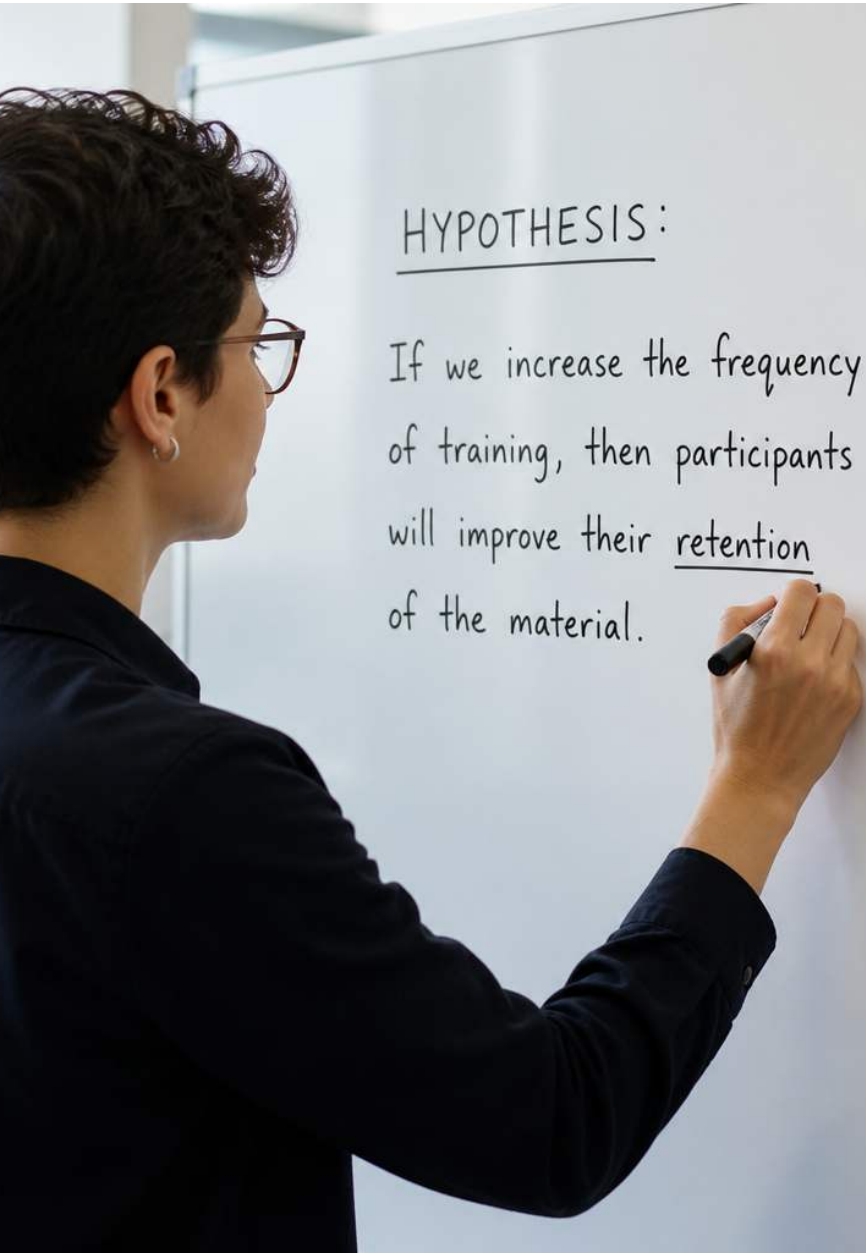
Pilots owned by "the team" are owned by nobody. Assign one person to be accountable.

4

No Fixed End Date

Open-ended pilots drift. Set a non-negotiable end date.

This brief addresses all four points. That's why it exists.

A person with dark curly hair and glasses is writing on a whiteboard. The whiteboard has the word "HYPOTHESIS:" written at the top. Below it, the person is writing a hypothesis about training frequency and retention. The person is wearing a dark blue shirt and is holding a black marker.

HYPOTHESIS:

If we increase the frequency of training, then participants will improve their retention of the material.

State Your Hypothesis

Start with a testable hypothesis — not a vague intention. *We believe that [AI solution] will [expected outcome] for [specific process] — and we'll know it worked if [measurable result].*

Small business example:

Using Claude to draft proposals will cut drafting time from 3 hours to under 1 hour — confirmed if we save 8+ hours across the team in two weeks.

Medium business example:

AI summarizing sales call recordings will halve reporting time for 12 reps — confirmed if each spends under 30 minutes on summaries by week 4.

If you can't write this in one sentence — the use case isn't defined enough yet.

Define Success: Quantify Your Wins

Agree what winning looks like — in numbers, not feelings.



- **Target Outcome**
Must be quantifiable and directly from your hypothesis (e.g., 'Reduce processing time by 15%').
- **Measurement Plan**
Detail what data to collect, how often, and who is responsible.
- **Failure Condition**
Define what signifies failure before the pilot begins.
- **Scale Accordingly**
Adjust measurement complexity based on business size (e.g., time log for small, data owner for medium).

Scale Accordingly: For small businesses, a simple time log might suffice. For medium businesses, designate a specific data owner distinct from the pilot owner.

Scope and Data

Define what's in — and what's out. Especially for data.



Scope Definition

Clearly define the specific tool, task, and workflow being tested, including precise boundaries.



Pilot Duration

Establish a fixed, non-negotiable end date for the pilot, with durations varying by business size (2-3 weeks for small, 3-6 weeks for medium).



Data Classification

Categorize data into 'Safe to use' (general), 'Use with care' (anonymize first), and 'Never use' (client, financial, personal data).



Applicable Guardrails

Reference the AI Governance Guardrails Checklist and specify rules relevant to this pilot.

Data classification is a common area where SME pilots falter. Ensure rigorous adherence.

What a Good Brief Looks Like

Example — Meridian Advisory



Project: Meridian Advisory AI Proposal Drafting Pilot

A 15-person consultancy is piloting the use of AI for proposal drafting.



Hypothesis

Using Claude to draft proposals will reduce drafting time from 3 hours to under 1 hour, confirmed if the team saves 24 hours of senior time across 4 weeks.



Success Metrics

Target: Under 1 hour per proposal. Tracking: Weekly time log. Failure Condition: Average draft time remains above 2 hours by week 3.



Scope & Data

Tool: Claude AI. Stage: First drafts only. Review: Senior review before sending. Duration: 4 weeks. Data Privacy: No client names or financials in prompts.



Ownership & Escalation

Owner: Sarah Chen. Reporting: MD receives weekly updates. Escalation: MD for any client-facing error. Review: Fixed at week 5.

Specific. Measurable. Bounded. Signed. That's what makes a brief.



Ownership & Stakeholders

Pilot Ownership: Designate a single, named individual responsible for execution, data capture, and reporting. Accountability rests with one person, not a collective.

Stakeholder Map:

- Decision Maker: Receives weekly updates.
- Pilot Owner: Full brief and daily access.
- Affected Team: Briefed at the start and end.

Escalation Path: Define a clear process for handling unexpected AI outputs, with one designated decision-maker.

Stakeholder Tiers:

- Small Business: 2–3 stakeholders (including owner).
- Medium Business: Add governance contact and IT/Data Lead.

Ownership without accountability is just a name on a slide.

Pre-Pilot Go/No-Go Check

Before you start — five critical questions. All must be answered 'Yes'.



Hypothesis Agreed

Is our testable hypothesis documented and signed off by both parties?



Success Metric Defined

Have we established a clear, measurable success metric with defined collection methods and responsibilities?



Data Classification Complete

Is all data classified, ensuring no sensitive information is exposed to public AI tools?



Pilot Owner Committed

Is a single, dedicated owner identified with the necessary time and authority to manage the pilot?



Review Date Scheduled

Is a fixed end date set, with the review meeting confirmed in both parties' calendars?

If any answer is 'No' - do not proceed. Resolve the outstanding issues first.

Before You Commit: Key Considerations

Four critical questions to ask before starting your pilot.

- **Commitment Capacity**

Honestly assess if you have the necessary time, resources, and approvals to support the pilot. Avoid over-commitment by ensuring a dedicated owner and realistic timelines.

- **Focus Scope**

Ensure the pilot's focus is narrow, concentrating on one tool, task, team, and metric. This allows for deeper learning and a clear decision.

- **Time Allocation**

Confirm that dedicated time has been allocated for the pilot, especially for the owner. AI adoption requires focused effort, so protect this time from conflicting workloads.

- **Governance and Risk**

Before launch, review your AI Governance Guardrails Checklist. Address potential regulatory, contractual, data protection, or reputational risks.

The go/no-go check confirms you're ready to start. This slide confirms you've thought about whether you should.

What To Do Next

Brief agreed. Now move forward.



- **Option 1 — I'm ready to start**

Brief is signed, owner is committed, and review date is set. Use the AI Experiment Log to capture what you test and learn.

- **Option 2 — I need approval first**

Your brief serves as your business case, providing the hypothesis, success metric, and go/no-go check for your decision-maker.

- **Option 3 — Something isn't ready yet**

This is normal. The go/no-go check identifies potential issues. Fix what's missing and return later.

A delayed start is better than a failed pilot.

The Strategic Mind

— START SMART. STAY STRATEGIC —