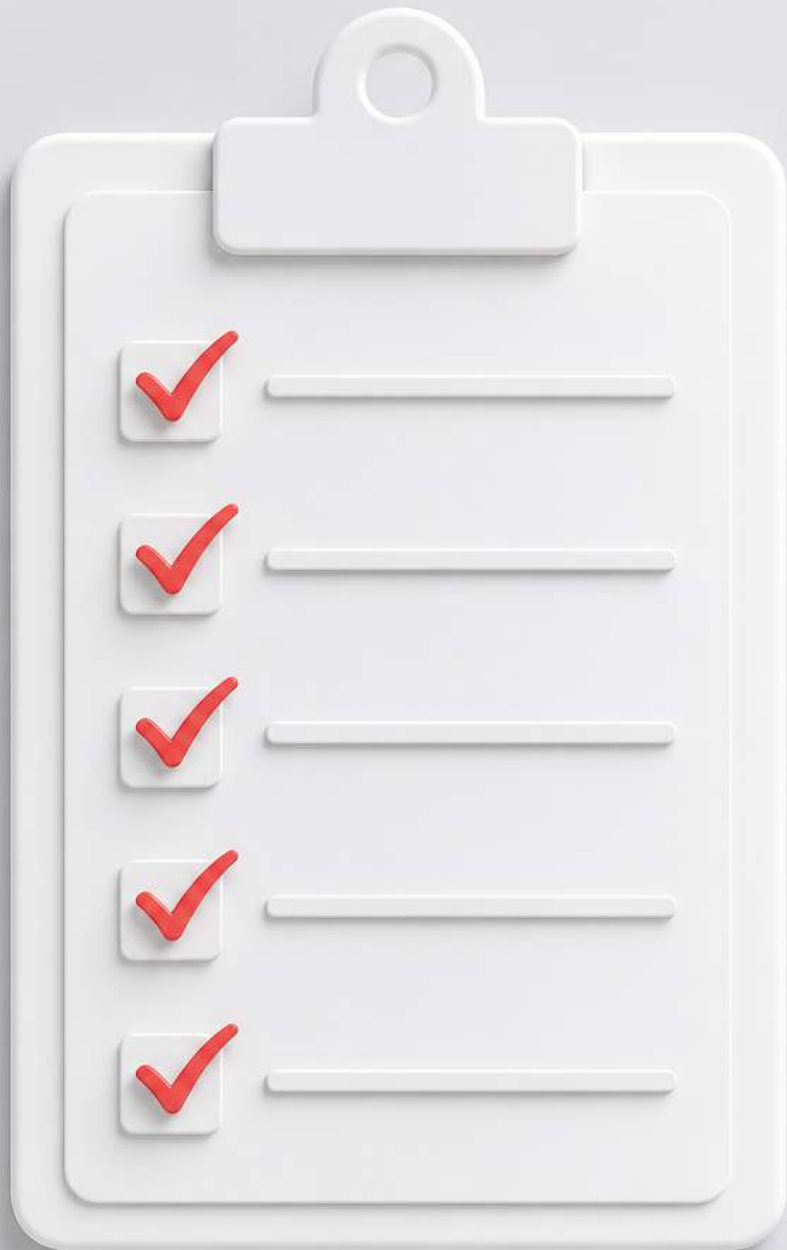


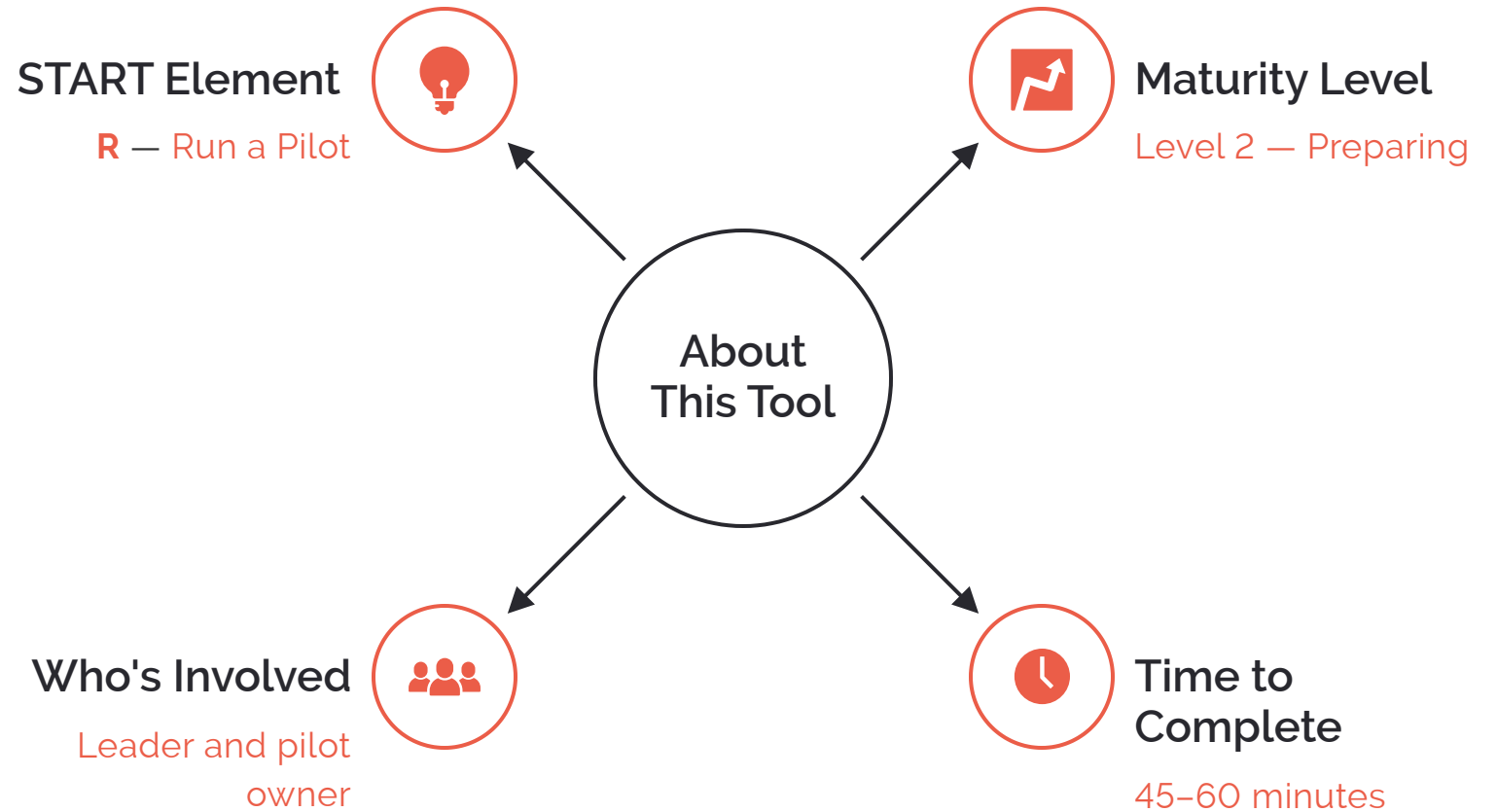
Pilot Readiness Checklist

Five questions. All must be yes. Before a single experiment runs.



Pilot Readiness Checklist

The go/no-go check that protects your pilot before it starts.



What you'll leave with: A clear, honest picture of where your leadership team is aligned on AI — and where the gaps are that need addressing before you commit to a pilot

The Pilot Readiness Checklist

The **last check before you start** — and the most important one..



What is it?

A structured go/no-go check completed immediately before your pilot begins. Five questions. All must be yes. If any answer is no — resolve it before a single experiment runs..



Why Use it?

42% of AI pilots were abandoned before reaching production in 2025. Most failed not because the idea was wrong — but because the foundations weren't in place before they started. This checklist catches those gaps before they become failures.



Benefits

Confidence that your pilot is genuinely ready to run — or complete clarity on exactly what needs fixing before you commit time and resource.

The Final Checkpoint



What Comes Before

Confirms that your **Pilot Brief**, **Value Definition Worksheet**, and **Governance Guardrails** are complete and ready.



What This Produces

A clear **go/no-go signal** with all five questions answered, and any 'no' answers assigned to an owner with a deadline.



What Comes After

If 'yes' to all, open the **AI Experiment Log** and start the pilot. If 'no' to any, resolve issues first before opening the log.

A delayed start is always better than a failed pilot.

Prerequisites for Using This Checklist

This checklist assumes three things are already done.



- ✓ **Pilot Brief (Lite)**
Your hypothesis, success metric, scope, data rules, and pilot owner are all defined and signed off.
- ✓ **Value Definition Worksheet**
Your baseline is measured, your target is set, and your tracking method is agreed.
- ✓ **AI Governance Guardrails**
Your minimum governance rules are in place. Data classification is complete. Review process is defined.

If any of these are not complete — complete them first. This checklist cannot replace them.

Five questions. All must be yes.

✓ **Is our hypothesis specific and agreed?**

Not 'we think AI will help.' A written, testable statement that both leader and pilot owner have signed off.

✓ **Is our baseline measured and recorded?**

Not estimated — measured. Stored somewhere both parties can access.

✓ **Is our data classified and safe to use?**

Every data source in scope classified as safe, check first, or never. Nothing sensitive in a public AI tool.

✓ **Is our pilot owner named and available?**

One person. Named. With protected time to actually run this. Not on top of a full workload with no adjustment.

✓ **Is our review date in both diaries?**

A fixed end date. A scheduled review meeting. The decision that will be made at that meeting is agreed in advance.

All five yes — your pilot can start. Any no — resolve it first.

Interpreting a 'No'

A 'no' isn't a failure. It's a flag worth heeding.

- **'No' on hypothesis**

The use case isn't defined precisely enough yet. Go back to the Pilot Brief.

- **'No' on baseline**

Start measuring now. Allow one to two weeks before the pilot begins.

- **'No' on data**

Complete the data classification section of your Governance Guardrails Checklist before proceeding.

- **'No' on pilot owner**

Resolve the capacity question before committing. A pilot owner without time is a pilot without a future.

- **'No' on review date**

Put it in both diaries before you leave this session. The end date is not negotiable.

A delayed start is always better than a failed pilot.

Small vs. Medium Businesses

The checklist is the same. The context is different.



- **Small Business (under 15 people)**

The pilot owner and leader are often the same person. The go/no-go check is a self-assessment. Be honest with yourself — the most common failure is overcommitment. One pilot. One owner. One clear task. The baseline is often a simple time log. The review date is a diary entry.

- **Medium Business (15-200 people)**

The go/no-go check is a joint sign-off between leader and pilot owner. Both must be confident before starting. The most common failure is unclear ownership — "we all own this" means nobody does. The baseline needs a named data owner. The review date needs a formal meeting invitation sent before the pilot starts.

Size doesn't change the questions. It changes who answers them — and how.

Go/No-Go Summary

Where do you stand?

Question	 Yes	 Not yet	Action needed
Hypothesis agreed			
Baseline measured			
Data classified			
Pilot owner named and available			
Review date set			

All green — start your pilot. Any red — fix it first.

A few things that make the difference.



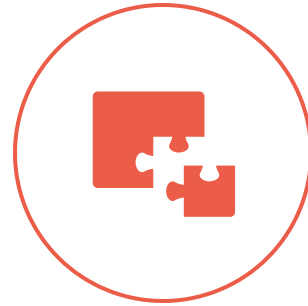
Complete it together

Leader and pilot owner complete this checklist in the same session — not separately. Disagreement on any question is a signal worth exploring before the pilot starts.



Score honestly — not optimistically

If you're unsure whether the answer is yes — it isn't yes yet. Uncertainty is a signal. A confident no is more useful than an optimistic yes that falls apart in week one.



Don't skip questions

Every question exists because its absence has caused a pilot to fail. There are no optional questions. All five. Every time.



Revisit if the pilot is delayed

If more than two weeks pass between completing this checklist and starting the pilot — complete it again. A stale go/no-go is no go/no-go at all.

The five minutes this checklist takes is the best investment you'll make before your pilot starts.

Next Steps After Checklist Completion

Start Smart. Stay Strategic.



Option 1: All Yes

Begin the pilot, open the AI Experiment Log, brief the pilot owner, and commence on the agreed start date.



Option 2: Some No

Address each 'no' with a named action and deadline. Rerun the checklist before starting; do not begin until all five are 'yes'.



Option 3: Unsure on Any Question

Treat uncertainty as a 'no'. If you cannot confidently say 'yes', it isn't 'yes' yet. Resolve the uncertainty before committing.

Start Smart. Stay Strategic.

The Strategic Mind

— START SMART. STAY STRATEGIC —