

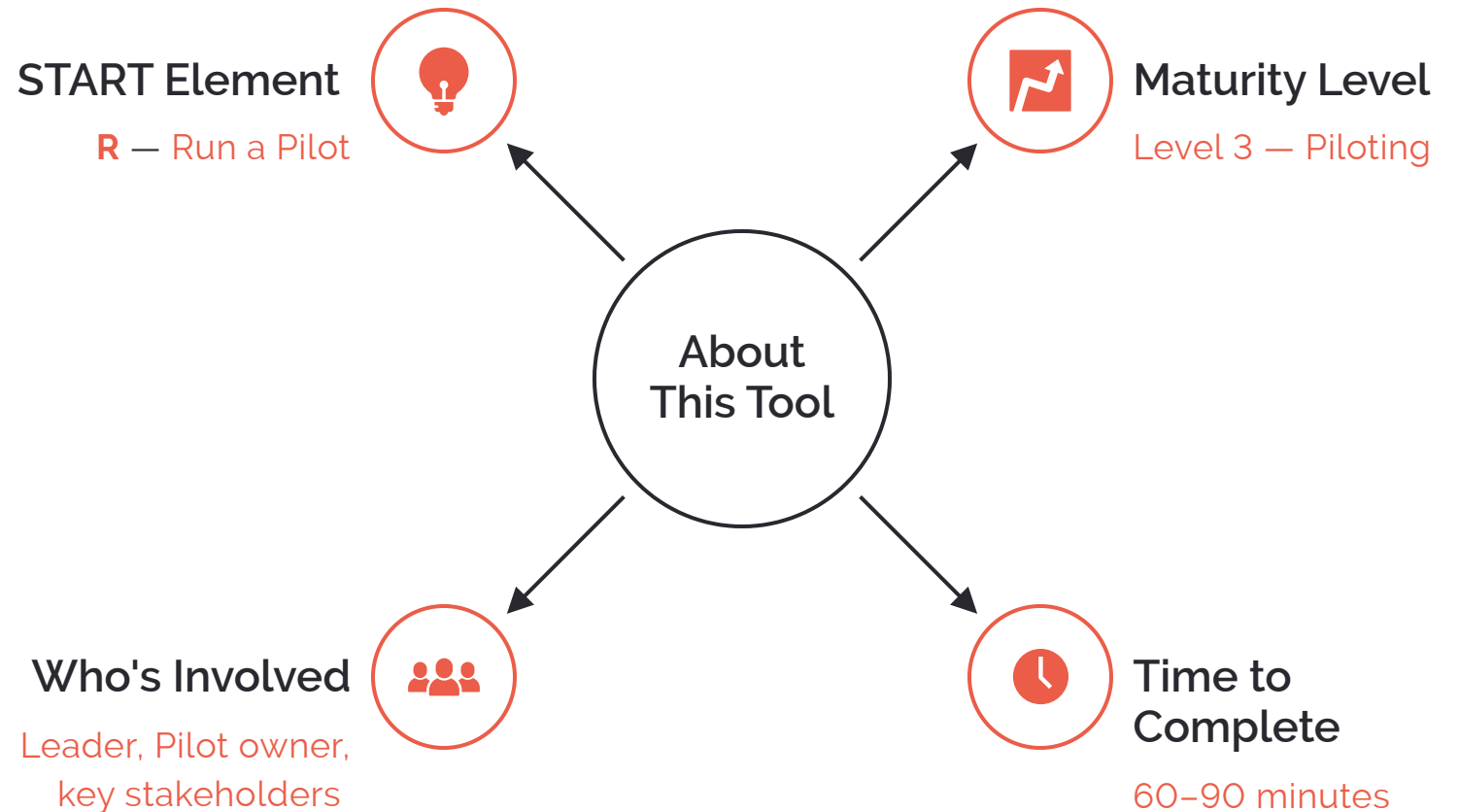


Pilot Review Template

A structured review of what your pilot delivered — and a clear decision on what comes next.

Pilot Review Template

Your pilot produced evidence.
This template turns that
evidence into a clear decision.



A structured summary of your pilot — and a clear evidence-based decision on what to do next.

Pilot Review Template

Turn your pilot evidence into a clear structured decision — before momentum fades.



What is it?

A structured review template completed at the end of your pilot — bringing together your Experiment Log, ROI Tracker, and team observations into one clear picture and one binary decision.



Why Use it?

Without a structured review, the end of a pilot becomes a debate about opinions rather than a decision based on evidence. Research shows pilots that stall at the review stage almost never recover significant value.



Benefits

A concise proof pack — measurable value, organisational learning, decision-ready data, and a clear recommendation — that makes the next step obvious for everyone in the room.

Small vs. Medium Business Note

The review looks different depending on your size.

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

The review meeting is often just two people — the owner and the pilot owner. Keep it focused. One hour. Four sections. One decision. The proof pack is a shared document, not a presentation. The decision is made in the conversation — written down immediately after.

- **Medium Business (15–200 people)**

The review involves leader, pilot owner, and one or two affected team members. The pilot owner presents the evidence. The leader facilitates the decision. The proof pack is shared with stakeholders before the meeting — not presented cold on the day. The decision is documented formally and communicated to the wider team within 48 hours.

The format changes. The four sections don't. Evidence. Learning. Decision. Every time.

AI Pilot Review Session Preparation



AI Experiment Log

Ensure all entries are complete, including value indicators, adoption signals, flags, and weekly health checks. This serves as your primary evidence.



AI ROI Tracker

Complete ROI calculation with all five cost components, value delivered, payback period, and confidence rating. Use direct figures from your spreadsheet.



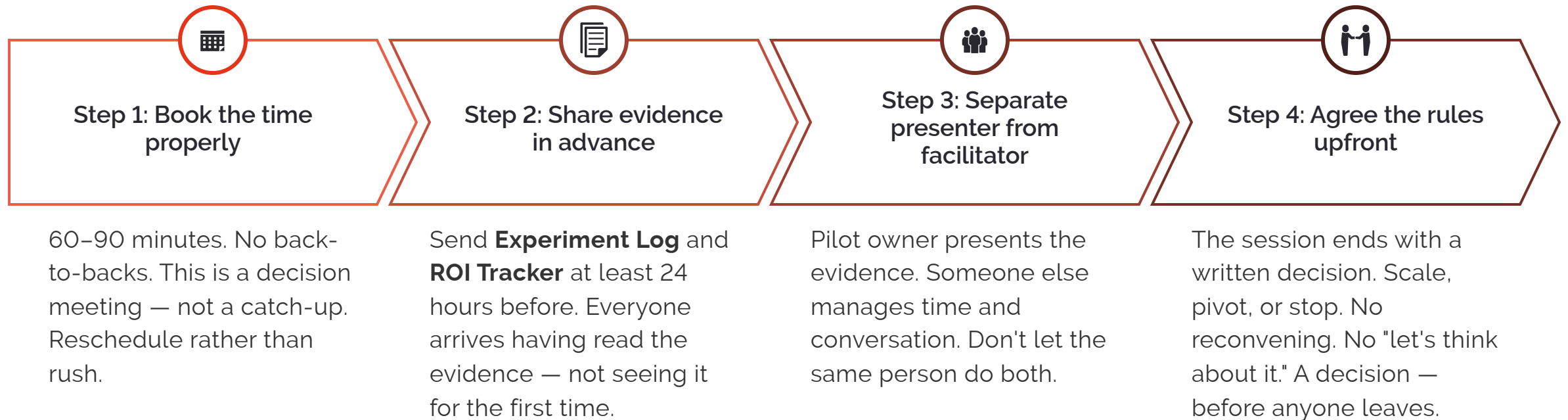
Pilot Brief (Lite)

Summarize your original hypothesis and success metric. This helps compare actual results against your initial goals.

The quality of your review reflects the quality of your documentation. Log your progress consistently throughout the pilot.

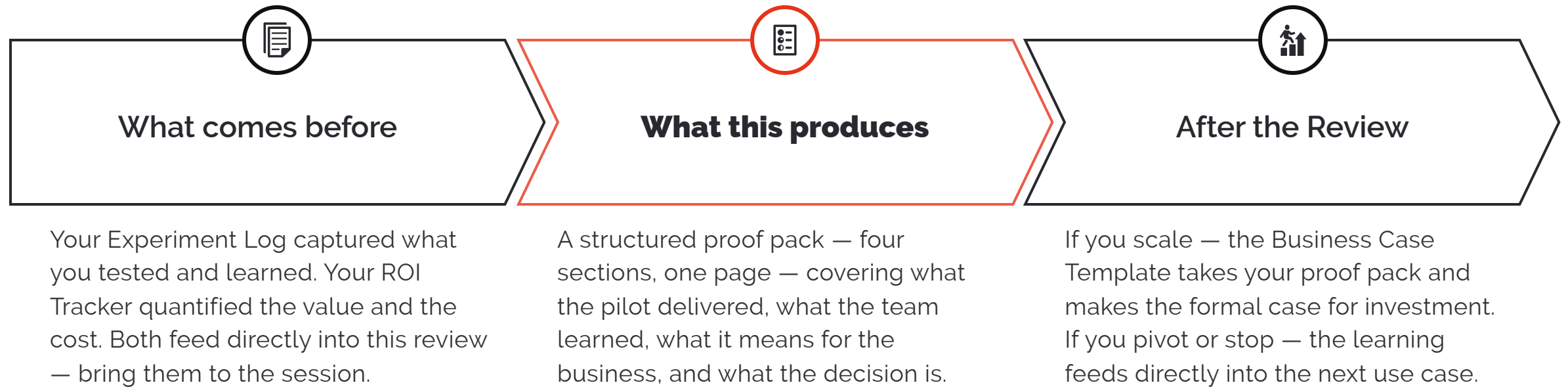
How to Run Your Review Session.

Whether you're in the room or on a call — run it the same way.



The best review sessions feel slightly uncomfortable. That means the evidence is being taken seriously.

The Review Is the Moment Your Pilot Becomes a Decision



Aim to run the review within one week of the pilot end date — not when it's convenient.

Setting the Stage



Hypothesis

State it exactly as written in the Pilot Brief. This is the benchmark everything else is measured against.



Success Metric

The specific number from your Value Definition Worksheet. Time saved, cost reduced, quality improved, or revenue enabled.



Failure Condition

The point at which we agreed to stop and review. Did the pilot reach this point — or did it stay above it?

The pilot's initial conditions set the framework for evaluation.

Four sections to capture your pilot's outcome

1 What did we set out to do?

Your original hypothesis and success metric — stated exactly as written in the Pilot Brief.

2 What did the pilot deliver?

The evidence. Value, cost, ROI, adoption, and confidence — from your ROI Tracker.

3 What did we learn?

What the team now knows that it didn't before — about AI, about the process, and about the organisation.

4 What is the decision?

Scale, pivot, or stop. One sentence of rationale. Written down before the session ends.

Complete all four. In order. The decision comes last — after the evidence.

What did we set out to do?



Original Hypothesis

State it exactly as written in the Pilot Brief: "We believed that [AI solution] would [outcome] for [process] — confirmed if [measurable result]." This is the benchmark.



Success Metric

The specific number from your Value Definition Worksheet: Time saved, cost reduced, quality improved, or revenue enabled — and the target you set.



Failure Condition

The point at which you agreed to stop and review. Did the pilot stay above this threshold or did it hit it?

Comparing actual results against the original plan — not against your current expectations — is the only honest way to review a pilot.

What did the pilot deliver?

From Your ROI Tracker and Experiment Log



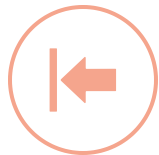
Value delivered

Primary value type and quantified result. Compare directly against your minimum viable target and stretch target.



Total pilot cost

All five components. Compare against projected cost from the Pilot Brief.



ROI and payback period

From your ROI Tracker calculation. State the figure — and the confidence rating.



Value indicator pattern

Ratio of green to amber to red entries in the Experiment Log. What does the overall pattern tell you?



Adoption signal

Did the team actually use the tool consistently? Or did adoption drift? High usage with low value is as much a problem as low usage.

Numbers from the ROI Tracker spreadsheet only. No estimates. No recollections. The data tells the story.

What did we learn?

The learning is as valuable as the result.

- **What worked better than expected?**

Specific prompts, workflows, or use case elements that outperformed the hypothesis. These are your scaling priorities — and the starting point for the next pilot.

- **What worked less well than expected?**

Specific elements that underperformed. Root cause — was it the tool, the prompt, the process, or the data? This distinction matters for what you do next.

- **What does the team now know about using AI?**

Confidence levels, prompting skills, attitude change. Culture shifts are often the most valuable and least measured pilot outcome.

- **What would we do differently?**

If you ran this pilot again — what would change? This is your playbook for the next pilot. Write it down before anyone leaves the room.

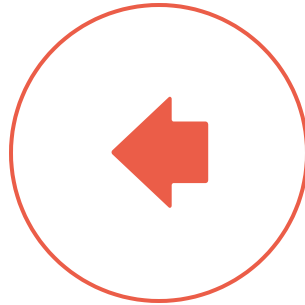
A pilot that proves non-viability is a success. It's the cheapest way to avoid a slow demoralising failure. Capture the learning — don't bury it.

What is the decision?



Scale

Strong positive ROI. High confidence. Consistent adoption. Team ready. Take the proof pack to the Business Case Template. Make the formal case for investment. Prompt library documented. Governance reviewed. Rollout planned.



Pivot

Results underwhelming but learning is strong. The use case needs refining — or a different approach. Go back to the Prioritisation Matrix. Apply the learning to the next use case. Don't abandon AI — abandon this specific approach.



Stop

Negative ROI. Persistent adoption issues. Or a governance concern that can't be resolved. Document the learning. Apply it to the next use case selection. A stopped pilot with a clear learning is not a failure.

Scale. Pivot. Stop. Pick one. Write it down. Move forward.

What to do next

Whatever the decision — here's what happens now.



If scaling

Your proof pack is the primary input. The Business Case Template takes your evidence and builds the formal case for investment — in a format your decision maker can act on.



If pivoting

Use your learning to refine the use case or identify a stronger candidate. Apply everything you learned — better hypothesis, tighter scope, stronger measurement.



If stopping

Write a one-paragraph summary of what you tested, what you learned, and why you stopped. File it with your Experiment Log. That document is more valuable than it looks — especially when you revisit this use case in six months.

Start Smart. Stay Strategic.

The Strategic Mind

— START SMART. STAY STRATEGIC —