

90-Day AI Workflow Pilot Timeline

A planning sequence from decision design to evidence and exit.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

How this asset operates

Funnel stage	Decision to pilot
Audience	Pilot sponsors and delivery teams
Trigger	A bounded workflow pilot is being planned
Objective	Sequence decisions, evidence, controls and responsibilities
Primary CTA	Assign owners and dates before kickoff
Delivery method	PDF timeline
CRM action	Create pilot milestones and gate dates
Follow-up	Weekly pilot review and formal exit decision
Compliance	Actual timing depends on scope, access, integrations and reviews. This is not a delivery guarantee.
KPI	Gate completion, evidence quality, schedule variance and decisive exit

Compress or extend the timeline only when the evidence and review requirements support it.

Days 1-15 | Define

- ☐ Confirm sponsor, owner and decision Owner: _____ Date: _____
- ☐ Map workflow and exceptions Owner: _____ Date: _____
- ☐ Establish baseline and test cases Owner: _____ Date: _____
- ☐ Approve scope, data and environments Owner: _____ Date: _____
- ☐ Define human authority and stop rules Owner: _____ Date: _____

Days 16-30 | Design

- ☐ Select architecture and controlled interfaces Owner: _____ Date: _____
- ☐ Build evaluation plan Owner: _____ Date: _____
- ☐ Complete security / privacy / legal review gates Owner: _____ Date: _____
- ☐ Prepare users and operating procedures Owner: _____ Date: _____
- ☐ Approve pilot design Owner: _____ Date: _____

Days 31-60 | Build and test

- ☐ Build the bounded vertical slice Owner: _____ Date: _____

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- ☐ Integrate approved data and systems Owner: _____ Date: _____
 - ☐ Run functional, evaluation and control tests Owner: _____ Date: _____
 - ☐ Review failures and refine Owner: _____ Date: _____
 - ☐ Maintain decision and issue logs Owner: _____ Date: _____

Days 61-75 | User evidence

- ☐ Conduct controlled user testing Owner: _____ Date: _____
- ☐ Measure workflow results and hidden work Owner: _____ Date: _____
- ☐ Review exceptions, adoption and operating load Owner: _____ Date: _____
- ☐ Test monitoring and incident response Owner: _____ Date: _____
- ☐ Freeze evaluation version Owner: _____ Date: _____

Days 76-90 | Decide

- ☐ Run final evaluation Owner: _____ Date: _____
- ☐ Compare with baseline Owner: _____ Date: _____
- ☐ Document limitations and residual risk Owner: _____ Date: _____
- ☐ Decide build / revise / stop / learn Owner: _____ Date: _____
- ☐ Define handoff or production requirements Owner: _____ Date: _____

Owner plan

Executive sponsor

Operating owner

Technical owner

Security/privacy reviewers

Acceptance owner

Decision date

Decision record and limitations

Decision or conclusion

Evidence supporting the decision

Material limitations and assumptions

Accountable owner

Review date

Important

Actual timing depends on scope, access, integrations and reviews. This is not a delivery guarantee.

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