

AI Pilot Go / No-Go Checklist

A gate for authorizing a bounded workflow pilot.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

How this asset operates

Funnel stage	Qualification to decision
Audience	Executive sponsors, operating owners, technology, security and finance
Trigger	A team is considering an AI pilot or proof of concept
Objective	Prevent a pilot from starting without a decision, baseline, boundary and control plan
Primary CTA	Resolve every critical gap or record a no-go decision
Delivery method	PDF checklist and pilot-design workshop
CRM action	Attach completed checklist to the opportunity and record gate decision
Follow-up	Pilot-design consultation or evidence work
Compliance	Passing this checklist does not establish production approval or guaranteed feasibility, savings, security or compliance.
KPI	Pilots with explicit acceptance criteria, low scope drift and decisive exits

A responsible pilot answers a business question. Check an item only when evidence exists and the accountable owner confirms it.

Decision and sponsor

- ☐ A specific build / revise / stop / learn decision is named
- ☐ Executive sponsor and operating owner are named
- ☐ Decision date and decision authority are confirmed
- ☐ Pilot budget and internal capacity are available

Workflow boundary

- ☐ One workflow and user group are defined
- ☐ In-scope and out-of-scope cases are documented
- ☐ Systems, data and environments are named
- ☐ Production actions prohibited during the pilot are explicit

Baseline and evaluation

- ☐ Current performance is measured or a baseline plan exists
- ☐ Representative test cases are available
- ☐ Quality, failure, latency, cost and adoption measures are defined

☐ Acceptance thresholds and stop rules are approved

Risk and control

- ☐ Data use is authorized
- ☐ Security and privacy review requirements are known
- ☐ Human approvals and escalation are explicit
- ☐ Errors can be detected, contained and reversed
- ☐ Incident and issue reporting paths are defined

Operating readiness

- ☐ Frontline users will participate
- ☐ Technical and systems owners are available
- ☐ Pilot results will be documented and reproducible
- ☐ A production operating owner has been identified

Gate decision

Decision: GO / CONDITIONAL GO / NO-GO

Conditions before start

Decision owner

Date

Signature / approval record

Decision record and limitations

Decision or conclusion

Evidence supporting the decision

Material limitations and assumptions

Accountable owner

Review date

Important

Passing this checklist does not establish production approval or guaranteed feasibility, savings, security or compliance.

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