



90-Day AI Pilot Program Blueprint

The 90-Day AI Pilot Program Blueprint is a comprehensive project management framework designed to help organizations successfully launch, execute, and evaluate AI initiatives with minimal risk and maximum learning. This template transforms AI ambition into executable action through a structured, time-bound pilot that validates assumptions, builds capabilities, and creates momentum for broader AI adoption.

Why This Template Matters

Most AI initiatives fail not from technical limitations, but from poor planning, misaligned stakeholders, unclear success criteria, and inadequate risk management. This blueprint addresses these failure modes by providing:

- **Structure without rigidity:** A phased approach that adapts to your context
- **Stakeholder clarity:** Explicit mapping of roles, responsibilities, and decision rights
- **Measurable outcomes:** Concrete metrics that separate signal from noise
- **Risk anticipation:** Proactive identification and mitigation of common AI pilot pitfalls
- **Institutional learning:** Documentation practices that capture insights for scaling

When to Use This Template

Use this blueprint when you are:



- **Launching your first AI initiative** and need to prove value before significant investment
- **Testing a specific AI use case** with defined business impact potential
- **Building organizational AI literacy** through hands-on experimentation
- **De-risking AI adoption** by validating technical feasibility and business value
- **Creating a template** for future AI pilots across different business units

Who Should Participate

Required Roles:

- **Executive Sponsor:** Senior leader with budget authority and strategic interest
- **Pilot Lead/Program Manager:** Day-to-day coordinator (50-75% time commitment)
- **Technical Lead:** AI/ML expert or data scientist responsible for implementation
- **Business Owner:** Person accountable for the business process being enhanced
- **End Users:** 3-5 representatives who will actually use the AI solution

Optional but Recommended:

- Legal/Compliance representative (if dealing with sensitive data)
- IT/Infrastructure representative (for integration requirements)
- Change management specialist (for organizations new to AI)

Time Required



- **Initial Planning (Pre-Day 1):** 2-3 weeks for stakeholder alignment and scoping
- **Active Pilot Duration:** 90 days (divided into three 30-day phases)
- **Weekly Time Commitment:**
 - Pilot Lead: 20-30 hours/week
 - Technical Lead: 15-25 hours/week
 - Executive Sponsor: 2-3 hours/week
 - Business Owner: 5-10 hours/week
 - End Users: 2-5 hours/week

How to Use This Template

Step 1: Complete Section 1 (Foundation) – Define your pilot scope, assemble your team, and establish governance structures *before* Day 1.

Step 2: Populate Section 2 (Timeline) – Customize the 90-day timeline to your specific use case, adding task owners and dependencies.

Step 3: Map Section 3 (Stakeholders) – Identify all stakeholders, document their interests, and create your engagement plan.

Step 4: Define Section 5 (Success Metrics) – Establish baseline measurements and set realistic targets before pilot launch.

Step 5: Conduct Section 6 (Risk Assessment) – Identify risks proactively and document mitigation strategies.

Step 6: Execute with Weekly Reviews – Use the checkpoint templates to maintain momentum and course-correct.



Step 7: Complete Section 7 (Evaluation) – Document learnings comprehensively at pilot conclusion.

SECTION 1: PILOT FOUNDATION & SCOPING

1.1 Pilot Definition Canvas

Instructions: Complete this section collaboratively with your core team during initial planning. Be specific and realistic; narrowing the scope increases the probability of success.

Element	Enter Details	Hints
Pilot Name	<i>(Example: "AI-Powered Customer Support Ticket Routing Pilot")</i>	What will you call this initiative internally?
Business Problem Statement	<i>(Describe the specific problem in 2-3 sentences)</i>	What business pain point does this address? What happens if we don't solve it?
Proposed AI Solution	<i>(Describe the AI approach in plain language)</i>	What will AI actually do? What type of AI (generative, predictive, computer vision, etc.)?
Measurable Business Outcome	<i>(Example: "Reduce average ticket")</i>	What specific business result will demonstrate success?



Element	Enter Details	Hints
	<i>resolution time by 25%)</i>	
Scope Boundaries - IN SCOPE	<i>(List what IS included)</i>	What specific processes, departments, or use cases are included?
Scope Boundaries - OUT OF SCOPE	<i>(List what is NOT included)</i>	What related areas are explicitly excluded to keep pilot manageable?
Hypothesis to Test	<i>(Example: "AI can accurately categorize 80% of incoming support tickets")</i>	What core assumption must be validated?
Pilot Duration	Start Date: _____ End Date: _____	Is 90 days realistic given complexity?
Budget Allocation	Total Budget: \$_____	Include software, consulting, personnel time, infrastructure

1.2 Pre-Flight Readiness Checklist



Instructions: Complete this checklist before officially launching Day 1. All items should be checked "Yes" or have documented mitigation plans.

Readiness Criteria	Status (Y/N)	Evidence/Notes	Risk if Not done
Strategic Alignment			
Executive sponsor formally committed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Sponsor name: -----	Pilot gets deprioritized
Pilot outcomes align with strategic priorities?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Which priority: -----	Viewed as distraction
Budget approved and allocated?	<input type="checkbox"/> Yes <input type="checkbox"/> No	PO/budget code: -----	Delays and scope cuts
Data Readiness			
Required data identified and accessible?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Data sources: -----	Technical blockers
Data quality assessed as sufficient?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Quality score: -----	Poor AI performance



Readiness Criteria	Status (Y/N)	Evidence/Notes	Risk if Not done
Data privacy/compliance reviewed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Reviewer: -----	Legal/regulatory risk
Technical Capability			
Technical lead with AI expertise assigned?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Name: -----	Implementation failures
Infrastructure/platform selected?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Platform: -----	Technology delays
Integration points documented?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Systems: -----	Deployment blockers
Organizational Readiness			
End users identified and committed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Number of users: -----	Adoption resistance
Change management plan exists?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Plan owner: -----	User pushback



Readiness Criteria	Status (Y/N)	Evidence/Notes	Risk if Not done
Success metrics defined and baselined?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Baseline measured: -----	Can't prove impact

Pre-Flight Decision:

- GREEN LIGHT** - Proceed to Day 1
- YELLOW LIGHT** - Address gaps before launch
- RED LIGHT** - Fundamental issues require resolution

SECTION 2: 90-DAY PILOT TIMELINE

2.1 Three-Phase Structure Overview

The 90-day pilot is divided into three distinct 30-day phases, each with specific objectives:

Phase	Duration	Primary Objective	Key Deliverable
Phase 1: Foundation	Days 1-30	Validate technical feasibility and establish baseline	Working prototype with initial test results



Phase	Duration	Primary Objective	Key Deliverable
Phase 2: Refinement	Days 31-60	Optimize performance and expand user testing	Production-ready solution with documented accuracy
Phase 3: Validation	Days 61-90	Measure business impact and prepare scaling roadmap	Evaluation report with go/no-go recommendation

2.2 Detailed Phase 1: Foundation (Days 1-30)

Phase Objective: Build and validate that the AI solution can technically perform the intended task with acceptable accuracy.

Week	Key Activities	Deliverables	Owner	Success Criteria
Week 1 (Days 1-7)	<ul style="list-style-type: none"> • Kickoff meeting with all stakeholders • Finalize data access and pipelines • Set up 	<ul style="list-style-type: none"> • Kickoff deck • Data access confirmed • Dev environmen 	Pilot Lead Technical Lead	All team members aligned on scope and timeline

Week	Key Activities	Deliverables	Owner	Success Criteria
	<ul style="list-style-type: none"> development environment Establish communication cadences 	<ul style="list-style-type: none"> live Weekly meeting schedule 		
Week 2 (Days 8-14)	<ul style="list-style-type: none"> Data exploration and quality assessment Select/configure AI model approach Build data preprocessing pipeline Create evaluation framework 	<ul style="list-style-type: none"> Data quality report Model selection rationale Evaluation metrics defined 	Technical Lead	Data deemed sufficient; model approach agreed
Week 3 (Days 15-21)	<ul style="list-style-type: none"> Develop initial AI model Conduct first round of 	<ul style="list-style-type: none"> Working prototype (v0.1) Initial test 	Technical Lead	Prototype demonstrates core capability

Week	Key Activities	Deliverables	Owner	Success Criteria
	testing • Document technical architecture • Identify integration requirements	results • Architecture diagram • Integration spec		
Week 4 (Days 22-30)	• Refine model based on test results • Begin limited user testing (3-5 users) • Gather initial user feedback • Phase 1 review meeting	• Prototype v0.2 • User feedback summary • Phase 1 evaluation report • Go/adjust decision	Pilot Lead Technical Lead	GATE DECISION: Technical feasibility confirmed

Phase 1 Gate Criteria (Must achieve to proceed):

- AI solution demonstrates core capability with $\geq 60\%$ accuracy on test set
- No fundamental technical blockers identified
- Initial user feedback is cautiously positive



- Executive sponsor confirms continuation

2.3 Detailed Phase 2: Refinement (Days 31-60)

Phase Objective: Optimize AI performance, expand user testing, and validate solution stability.

Week	Key Activities	Deliverables	Owner	Success Criteria
Week 5 (Days 31-37)	<ul style="list-style-type: none"> • Implement Phase 1 learnings • Expand training data if needed • Optimize model performance • Develop user interface/integration 	<ul style="list-style-type: none"> • Model v0.3 with improved accuracy • Expanded dataset • Basic UI/integration 	Technical Lead	Measurable accuracy improvement
Week 6 (Days 38-44)	<ul style="list-style-type: none"> • Expand user testing (10-15 users) • Monitor AI performance in live contexts • Document edge cases and failures 	<ul style="list-style-type: none"> • Expanded user feedback • Performance monitoring dashboard • Edge case log 	Business Owner Technical Lead	Solution stable under expanded use

Week	Key Activities	Deliverables	Owner	Success Criteria
	<ul style="list-style-type: none"> • Begin tracking business metrics 	<ul style="list-style-type: none"> • Initial business metric data 		
Week 7 (Days 45-51)	<ul style="list-style-type: none"> • Refine based on expanded feedback • Implement guardrails and error handling • Train users on proper usage • Document standard operating procedures 	<ul style="list-style-type: none"> • Model v0.4 • Error handling system • User training materials • SOPs drafted 	Pilot Lead Technical Lead	Users can operate solution independently
Week 8 (Days 52-60)	<ul style="list-style-type: none"> • Full user deployment (all pilot users) • Intensive monitoring and support • Gather comparative 	<ul style="list-style-type: none"> • Production-ready solution (v1.0) • Full user adoption • Business 	Pilot Lead Business Owner	GATE DECISION: Business value trajectory confirmed



Week	Key Activities	Deliverables	Owner	Success Criteria
	business metrics • Phase 2 review meeting	metrics report • Phase 2 evaluation		

Phase 2 Gate Criteria (Must achieve to proceed):

- AI solution meets target accuracy (typically $\geq 75-80\%$)
- Users can successfully complete tasks with AI assistance
- Business metrics show positive trend (even if not yet at target)
- No critical bugs or risks identified

2.4 Detailed Phase 3: Validation (Days 61-90)

Phase Objective: Measure sustained business impact, capture learnings, and create scaling roadmap.

Week	Key Activities	Deliverables	Owner	Success Criteria
Week 9 (Days 61-67)	• Continue full deployment operation • Collect	• Continuous performance data • Stability report • Workflow documentation	Technical Lead Business Owner	Consistent AI performance; stable operations

Week	Key Activities	Deliverables	Owner	Success Criteria
	<p>sustained performance data</p> <ul style="list-style-type: none"> • Monitor for performance degradation • Document user workflow changes 			
<p>Week 10 (Days 68-74)</p>	<ul style="list-style-type: none"> • Conduct user satisfaction surveys • Analyze business impact vs. baseline • Document 	<ul style="list-style-type: none"> • User satisfaction scores • Business impact analysis • TCO model • Optimization recommendations 	<p>Pilot Lead Business Owner</p>	<p>Quantified business value confirmed</p>

Week	Key Activities	Deliverables	Owner	Success Criteria
	total cost of ownership <ul style="list-style-type: none"> • Identify optimization opportunities 			
Week 11 (Days 75-81)	<ul style="list-style-type: none"> • Synthesize all learnings • Develop scaling roadmap (if successful) • Calculate ROI and business case • Draft final 	<ul style="list-style-type: none"> • Comprehensive learnings document • Scaling roadmap • ROI analysis • Draft final report 	Pilot Lead	Clear recommendation formed

Week	Key Activities	Deliverables	Owner	Success Criteria
	evaluation report			
Week 12 (Days 82-90)	<ul style="list-style-type: none"> • Finalize evaluation report • Present to executive sponsor • Make go/no-go/pivot decision • Conduct team retrospective 	<ul style="list-style-type: none"> • Final Evaluation Report • Executive presentation • Go-forward decision • Retrospective notes 	Pilot Lead Executive Sponsor	FINAL DECISION: Scale, pivot, or stop

Phase 3 Success Criteria (for "GO" decision):

- Business metrics meet or exceed targets
- User adoption rate $\geq 70\%$ and satisfaction positive
- Technical solution is stable and maintainable
- ROI justifies scaling investment
- No unresolved regulatory/ethical concerns



2.5 Weekly Checkpoint Template

Instructions: Complete this brief checkpoint every Friday. Use for status reporting and early warning detection.

Week #: _____ | **Phase:** _____ | **Date:** _____

Checkpoint Item	Status	Details
Overall Health	● On Track / ● At Risk / ● Blocked	<i>(Brief explanation)</i>
This Week's Accomplishments		• <i>(Bullet list of completed items)</i>
Next Week's Priorities		• <i>(Bullet list of planned items)</i>
Blockers/Risks		• <i>(Any issues requiring escalation)</i>
Metrics Update		<i>(Key metrics: accuracy, usage, business KPIs)</i>
Decision Needed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>(What decision from whom?)</i>
Budget Status	% Spent: _____	On budget? <input type="checkbox"/> Yes <input type="checkbox"/> No



SECTION 3: STAKEHOLDER MAPPING & ENGAGEMENT

3.1 Stakeholder Identification Matrix

Instructions: Identify all individuals or groups who have influence over or are affected by the pilot. Be comprehensive—missing stakeholders is a top cause of pilot failure.

Stakeholder Name/Group	Role/Department	Relationship to Pilot	Influence Level (High/Med/Low)	Impact Level (High/Med/Low)	Current Stance (Supporter/Neutral/Skeptic/Blocker)
<i>(Example: Jane Smith)</i>	<i>(VP of Customer Service)</i>	<i>(Executive Sponsor)</i>	High	High	Supporter

3.2 Stakeholder Analysis & Engagement Strategy

Instructions: For each high-influence or high-impact stakeholder, document their interests and design a tailored engagement approach.

Stakeholder #1



Element	Details
Name & Role	<i>(Example: Jane Smith, VP Customer Service)</i>
Primary Interests	<i>(What do they care about? What are their goals?)</i>
Key Concerns/Objections	<i>(What might they worry about with this pilot?)</i>
Engagement Frequency	<input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Milestone-based
Communication Channel	<input type="checkbox"/> Email <input type="checkbox"/> 1:1 meetings <input type="checkbox"/> Team meetings <input type="checkbox"/> Slack/Teams <input type="checkbox"/> Dashboard
Information Needs	<i>(What do they need to know? In what format?)</i>
Engagement Strategy	<i>(How will you keep them informed, involved, and supportive?)</i>
Success Looks Like	<i>(What would make them an enthusiastic advocate?)</i>

Stakeholder #2



Element	Details
Name & Role	
Primary Interests	
Key Concerns/Objections	
Engagement Frequency	<input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Milestone-based
Communication Channel	<input type="checkbox"/> Email <input type="checkbox"/> 1:1 meetings <input type="checkbox"/> Team meetings <input type="checkbox"/> Slack/Teams <input type="checkbox"/> Dashboard
Information Needs	
Engagement Strategy	
Success Looks Like	

(Repeat for all key stakeholders)

3.3 RACI Matrix (Responsibility Assignment)

Instructions: Define who is Responsible, Accountable, Consulted, and Informed for key pilot activities. Only one person can be Accountable for each activity.

Key Activity/Decision	Responsible (Does the work)	Accountable (Final approval)	Consulted (Provides input)	Informed (Kept updated)
Overall pilot success	<i>(Example: Pilot Lead)</i>	<i>(Example: Executive Sponsor)</i>	<i>(Technical Lead, Business Owner)</i>	<i>(Entire team)</i>
AI model development				
User training				
Data access/governance				
Budget management				
Risk escalation				



Key Activity/Decision	Responsible (Does the work)	Accountable (Final approval)	Consulted (Provides input)	Informed (Kept updated)
Go/no-go decision at gates				
Weekly status reporting				
Final evaluation report				
Scaling roadmap				

3.4 Communication Plan

Instructions: Establish regular communication rhythms to maintain alignment and momentum.

Communication Type	Frequency	Participants	Format	Purpose	Owner
Core Team Standup	<i>(Example: Daily)</i>	<i>(Core team: Pilot Lead, Tech Lead, Business Owner)</i>	<i>(15-min Zoom)</i>	<i>(Quick sync on progress and blockers)</i>	<i>(Pilot Lead)</i>
Executive Sponsor Check-in					
User Feedback Sessions					
Stakeholder Update					
Phase Gate Reviews					
Monthly Newsletter					

SECTION 4: GOVERNANCE & DECISION-MAKING FRAMEWORK



4.1 Decision Authority Matrix

Instructions: Pre-define who has authority to make different types of decisions. This prevents delays and confusion.

Decision Type	Decision Authority	Consultation Required?	Escalation Path
Day-to-day technical implementation choices	<i>(Example: Technical Lead)</i>	<i>(No)</i>	<i>(To Pilot Lead if budget impact)</i>
Scope changes <10% of budget			
Scope changes >10% of budget			
Adding/removing pilot users			
Technology platform changes			
Phase gate go/no-go decisions			



Decision Type	Decision Authority	Consultation Required?	Escalation Path
Timeline extensions <1 week			
Timeline extensions >1 week			
Risk mitigation approach			
Final pilot evaluation and recommendation			

4.2 Issue Escalation Protocol

Instructions: Define how issues are raised and resolved to prevent bottlenecks.

Issue Severity	Definition	Response Time	Escalation Path	Resolution Authority
CRITICAL	<i>(Example: Pilot completely blocked; security)</i>	<i>(Immediate - within 2 hours)</i>	<i>(Directly to Executive Sponsor)</i>	<i>(Executive Sponsor)</i>

Issue Severity	Definition	Response Time	Escalation Path	Resolution Authority
	<i>breach; regulatory violation)</i>			
HIGH	<i>(Example: Major delay risk; key stakeholder blocking; technical failure)</i>	<i>(Same business day)</i>		
MEDIUM	<i>(Example: Minor delays; resource constraints; user resistance)</i>	<i>(Within 2 business days)</i>		
LOW	<i>(Example: Process improvements; documentatio</i>	<i>(Within 1 week)</i>		



Issue Severity	Definition	Response Time	Escalation Path	Resolution Authority
	<i>n gaps; minor bugs)</i>			

Issue Log Template (maintain throughout pilot):

Issue #	Date Raised	Severity	Description	Owner	Status	Resolution/Notes
001					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Resolved	
002					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Resolved	



SECTION 5: SUCCESS METRICS & MEASUREMENT FRAMEWORK

5.1 Metric Categories

A successful AI pilot measures impact across four dimensions:

1. **Technical Performance Metrics:** How well does the AI work?
2. **User Adoption Metrics:** Are users actually using it?
3. **Business Impact Metrics:** Does it improve business outcomes?
4. **Operational Metrics:** Is it sustainable and maintainable?

5.2 Technical Performance Metrics

Instructions: Define how you'll measure AI solution quality. Metrics vary by use case (classification, prediction, generation, etc.).

Metric	Definition	Baseline (Before AI)	Target (End of Pilot)	Measurement Method	Measurement Frequency
Accuracy	<i>(Example: % of correct classifications)</i>	<i>(N/A - no previous automation)</i>	<i>(≥80%)</i>	<i>(Automated evaluation on test set)</i>	<i>(Daily)</i>
Precision					

Metri c	Definitio n	Baseline (Before AI)	Target (End of Pilot)	Measure ment Method	Measure ment Frequen cy
Recall					
Respo nse Time					
Error Rate					
False Positi ve Rate					
User Overri de Rate	<i>(% of times users reject AI suggestio n)</i>				

Primary Technical Success Criterion: (Example: "Achieve $\geq 80\%$ accuracy with $< 10\%$ user override rate")

5.3 User Adoption Metrics



Instructions: Track whether users actually embrace the AI solution.
Technology that isn't used has zero value.

Metric	Definition	Target	Measurement Method	Measurement Frequency
Adoption Rate	<i>(% of eligible users actively using AI solution)</i>	<i>(≥70% by Day 90)</i>	<i>(Usage logs from system)</i>	<i>(Weekly)</i>
Daily Active Users				
Feature Utilization Rate				
User Satisfaction Score				
Net Promoter Score				



Metric	Definition	Target	Measurement Method	Measurement Frequency
Time to Competency	<i>(How long until users can effectively use the tool)</i>			
Support Tickets Generated				

Primary Adoption Success Criterion: *(Example: "≥70% adoption rate with satisfaction score >4.0/5.0")*

5.4 Business Impact Metrics

Instructions: Define the specific business outcomes you're trying to improve. These justify the pilot investment.

Metric	Definition	Baseline (Pre-Pilot)	Target (End of Pilot)	Measurement Method	Measurement Frequency
Primary Business Metric	<i>(Example: Avera)</i>	<i>(45 minutes)</i>	<i>(≤34 minutes = 25%)</i>	<i>(From ticketing system)</i>	<i>(Weekly)</i>

Metric	Definit ion	Baseline (Pre- Pilot)	Target (End of Pilot)	Measure ment Method	Measure ment Frequenc y
	<i>ge ticket resolut ion time)</i>		<i>reducti on)</i>		
Second ary Busines s Metric 1					
Second ary Busines s Metric 2					
Cost Savings					



Metric	Definition	Baseline (Pre-Pilot)	Target (End of Pilot)	Measurement Method	Measurement Frequency
Revenue Impact					
Customer Satisfaction					
Employee Productivity					

Primary Business Success Criterion: (Example: "Reduce average ticket resolution time by $\geq 20\%$ ")

5.5 Operational Metrics

Instructions: Assess whether the AI solution is sustainable and scalable.



Metric	Definition	Target	Measurement Method
Total Cost of Ownership (TCO)	<i>(All costs: software, infrastructure, maintenance, support)</i>	<i>(\$ per month)</i>	<i>(Budget tracking + vendor invoices)</i>
Cost per Transaction/User			
System Uptime		<i>(≥99%)</i>	
Mean Time to Resolve Issues			
Maintenance Effort	<i>(Hours per week required for maintenance)</i>	<i>(≤5 hours/week)</i>	
Scalability Assessment	<i>(Can system handle 10x users?)</i>	<i>(Yes)</i>	<i>(Load testing)</i>

Primary Operational Success Criterion: *(Example: "TCO ≤\$5,000/month with <5 hours weekly maintenance")*

5.6 Integrated Success Scorecard



Instructions: At pilot end, score your results across all dimensions. This provides a holistic view for the go/no-go decision.

Dimension	Weight	Score (1-5)	Weighted Score	Evidence
Technical Performance	25%	<i>(Rate 1-5)</i>	<i>(Weight × Score)</i>	<i>(Key metrics achieved)</i>
User Adoption	25%			
Business Impact	35%			
Operational Viability	15%			
TOTAL WEIGHTED SCORE	100%		----- / 5.0	

Scoring Guide:

- **5:** Exceeded all targets significantly
- **4:** Met all targets, exceeded some
- **3:** Met most targets
- **2:** Partially met targets
- **1:** Failed to meet most targets



Decision Thresholds:

- **≥4.0:** Strong GO for scaling
- **3.0–3.9:** Conditional GO (address gaps before scaling)
- **2.0–2.9:** PIVOT (redesign and re-pilot)
- **<2.0:** NO-GO (stop this approach)

SECTION 6: RISK ASSESSMENT & MITIGATION STRATEGIES

6.1 Comprehensive Risk Register

Instructions: Identify risks proactively across all categories. Rate each risk's probability and impact, then document mitigation strategies.

Risk Rating Scale:

- **Probability:** High (>50% chance), Medium (20–50%), Low (<20%)
- **Impact:** High (pilot failure), Medium (significant delay/cost), Low (minor inconvenience)
- **Risk Score:** High Probability + High Impact = CRITICAL priority

Risk #	Risk Category	Risk Description	Probability	Impact	Risk Score	Mitigation Strategy	Contingency Plan	Owner
R01	(Example: Tech)	(Data quality too)	(Medium)	(High)	(HIGH)	(Conduct data quality)	(Source alternative)	(Technical)

Ri s k #	Risk Cate gory	Risk Desc ription	Prob abilit y	Im pa ct	Ris k Sc or e	Miti gati on Strat egy	Conti ngen cy Plan	Own er
	<i>nical)</i>	<i>poor for AI accu racy)</i>				<i>ty audi t in Wee k 1; plan data clea ning pipel ine)</i>	<i>datas et; reduc e scope to data- rich subse t)</i>	<i>Lead)</i>
R 0 2								
R 0 3								



Risk #	Risk Category	Risk Description	Probability	Impact	Risk Score	Mitigation Strategy	Contingency Plan	Owner
R04								
R05								

6.2 Risk Categorization

Identify risks systematically:

Technical Risks

Risk Area	Prompt Questions	Your Identified Risks
Data Risks	<ul style="list-style-type: none"> • Is data accessible, sufficient, and high-quality? • Are there data privacy or 	



Risk Area	Prompt Questions	Your Identified Risks
	compliance issues? • Could data pipelines break?	
Model Risks	• What if AI accuracy is insufficient? • Could the model behave unpredictably? • What if it doesn't generalize to real-world usage?	
Integration Risks	• Are legacy systems compatible? • What if APIs change or break? • Could integration take longer than expected?	
Infrastructure Risks	• Is compute capacity sufficient? • What about system downtime? • Could costs exceed budget?	

Organizational Risks



Risk Area	Prompt Questions	Your Identified Risks
Stakeholder Risks	<ul style="list-style-type: none"> • Could sponsor support waver? • Might key stakeholders resist? • What if leadership changes mid-pilot? 	
User Adoption Risks	<ul style="list-style-type: none"> • Will users resist the AI tool? • Could training be inadequate? • Might workload prevent adoption? 	
Resource Risks	<ul style="list-style-type: none"> • Could key team members leave? • What if competing priorities emerge? • Might budget get cut? 	
Change Management Risks	<ul style="list-style-type: none"> • Is change fatigue an issue? • Could culture reject AI? • Might processes resist change? 	



Business Risks

Risk Area	Prompt Questions	Your Identified Risks
Value Risks	<ul style="list-style-type: none"> • What if business impact is less than expected? • Could ROI be insufficient? • Might benefits take longer to materialize? 	
Scope Risks	<ul style="list-style-type: none"> • Could scope creep derail the pilot? • What if requirements change? • Might we discover we solved the wrong problem? 	
Competitive Risks	<ul style="list-style-type: none"> • Could competitors move faster? • Might market conditions change? • What if the business problem becomes irrelevant? 	

External Risks

Risk Area	Prompt Questions	Your Identified Risks
Regulatory Risks	<ul style="list-style-type: none"> • Could new regulations affect AI use? • Might compliance requirements change? • What about ethical concerns? 	
Vendor Risks	<ul style="list-style-type: none"> • Could AI platform provider fail? • Might pricing models change? • What if vendor doesn't meet SLAs? 	
Market Risks	<ul style="list-style-type: none"> • Could economic conditions affect budget? • Might customer needs shift? • What about competitive pressure? 	

6.3 Risk Monitoring Plan

Instructions: High-priority risks require active monitoring. Define how you'll track each critical risk.



Risk #	Risk Description	Leading Indicators (Early warning signs)	Monitoring Method	Review Frequency	Escalation Trigger
<i>(Example: R01)</i>	<i>(Data quality insufficient)</i>	<i>(Initial accuracy tests below 50%; high error rates in data audits)</i>	<i>(Weekly accuracy testing; data quality dashboard)</i>	<i>(Weekly)</i>	<i>(If accuracy <50% after 2 weeks)</i>

SECTION 7: PILOT EVALUATION & DECISION FRAMEWORK

7.1 Final Evaluation Report Template

Instructions: Complete this comprehensive evaluation during Days 82-90. This is your primary decision-making document.

90-DAY AI PILOT PROGRAM: FINAL EVALUATION REPORT

Pilot Name: _____

Report Date: _____

Prepared By: _____



Executive Sponsor: _____

EXECUTIVE SUMMARY

Pilot Objective: *(Restate original business problem and proposed AI solution)*

Overall Outcome: Exceeded Expectations Met Expectations Partially Met Expectations Did Not Meet Expectations

Recommendation: **SCALE** (Expand to production) **PIVOT** (Redesign and re-pilot) **PAUSE** (Table for now) **STOP** (Discontinue)

One-Paragraph Summary: *(Provide a concise summary suitable for executives: What did we test? What did we learn? What are we recommending and why?)*

SECTION A: RESULTS AGAINST SUCCESS METRICS

AI. Technical Performance

Metric	Target	Achieved	Variance	Assessment
Primary accuracy metric				<input type="checkbox"/> Exceeded <input type="checkbox"/> Met <input type="checkbox"/> Missed



Technical Performance Commentary: *(Explain results, surprising findings, technical constraints discovered)*

A2. User Adoption

Metric	Target	Achieved	Variance	Assessment
Adoption rate				<input type="checkbox"/> Exceeded <input type="checkbox"/> Met <input type="checkbox"/> Missed
User satisfaction				

User Adoption Commentary: *(Describe user experience, resistance encountered, training effectiveness)*

A3. Business Impact

Metric	Baseline	Target	Achieved	% Improvement	Assessment
Primary business metric					<input type="checkbox"/> Exceeded <input type="checkbox"/> Met <input type="checkbox"/> Missed



Business Impact Commentary: *(Quantify business value, explain causality, note any confounding factors)*

Projected Annual Value (if scaled): \$_____

A4. Operational Viability

Metric	Target	Achieved	Assessment
Total Cost of Ownership			<input type="checkbox"/> On budget <input type="checkbox"/> Over budget
Maintenance effort			
Scalability			<input type="checkbox"/> Scalable <input type="checkbox"/> Limited <input type="checkbox"/> Not scalable

Operational Viability Commentary: *(Assess sustainability, hidden costs discovered, infrastructure requirements for scale)*

SECTION B: KEY LEARNINGS

B1. What Worked Well *(List 3-5 factors that contributed to success)*

- 1.
- 2.
- 3.

B2. What Didn't Work *(List 3-5 challenges, failures, or disappointments)*



- 1.
- 2.
- 3.

B3. Surprises & Unexpected Findings (*What did you learn that you didn't anticipate?*)

- 1.
- 2.
- 3.

B4. User Insights (*What did users teach you about how AI should/shouldn't work in this context?*)

SECTION C: RISKS & ISSUES ENCOUNTERED

C1. Materialized Risks (*Which risks from your register actually occurred? How were they handled?*)

Risk	Impact	How Mitigated	Lessons Learned

C2. Unidentified Risks That Emerged (*What risks did you NOT anticipate? How would you plan for them next time?*)

SECTION D: SCALING CONSIDERATIONS

D1. What Would Change at Scale?



Factor	At Pilot Scale	At Production Scale	Implications
Number of Users	<i>(e.g., 15 users)</i>	<i>(e.g., 500 users)</i>	<i>(More training required; support infrastructure needed)</i>
Data Volume			
System Integration			
Cost Structure			
Support Model			

D2. Prerequisites for Scaling

(What must be in place before expanding to production?)

- Technical prerequisites: _____
- Organizational prerequisites: _____
- Process prerequisites: _____
- Governance prerequisites: _____

D3. Estimated Timeline to Production



- Planning & preparation: _____ weeks
- Development & integration: _____ weeks
- Training & change management: _____ weeks
- Phased rollout: _____ weeks
- **Total estimated timeline:** _____ weeks (approximately _____ months)

D4. Estimated Investment Required for Scaling

Cost Category	One-Time Costs	Ongoing Annual Costs
Technology/platform	\$ _____	\$ _____
Infrastructure	\$ _____	\$ _____
Personnel	\$ _____	\$ _____
Training	\$ _____	\$ _____
Change management	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

D5. Projected Return on Investment (ROI)

- **Total 3-year investment:** \$ _____
- **Projected 3-year value:** \$ _____
- **Net benefit:** \$ _____



- **ROI %:** _____%
- **Payback period:** _____ months

SECTION E: RECOMMENDATION & NEXT STEPS

E1. Final Recommendation

SCALE: Expand to full production deployment

Rationale: *(Why scale? What evidence supports this decision?)*

Proposed approach: *(Phased rollout? Immediate full deployment? Other?)*

PIVOT: Redesign and conduct another pilot

Rationale: *(What didn't work? What would you change?)*

Proposed changes: *(Different use case? Different technology? Different approach?)*

Re-pilot timeline: _____ weeks

PAUSE: Table this initiative for now

Rationale: *(Why pause? What conditions would trigger resumption?)*

Recommended revisit date: _____

STOP: Discontinue this AI initiative

Rationale: *(Why stop? What did we learn that can be applied elsewhere?)*

E2. Immediate Next Steps (if recommending SCALE)



Action	Owner	Timeline	Dependencies
1.			
2.			
3.			
4.			
5.			

E3. Lessons for Future AI Pilots

(What should the organization carry forward to future AI initiatives?)

- 1.
- 2.
- 3.

APPROVAL

This evaluation report and recommendation have been reviewed and approved by:

Pilot Lead: _____ **Date:** _____

Technical Lead: _____ **Date:** _____

Business Owner: _____ **Date:** _____

Executive Sponsor: _____ **Date:** _____



Decision: Approved as Recommended Approved with Modifications Rejected

Executive Comments:

7.2 Retrospective Workshop Template

Instructions: Conduct this 90-minute workshop with the core team after completing the evaluation report. Capture honest feedback for organizational learning.

Retrospective Facilitator: _____

Date: _____ **Participants:** _____

Retrospective Format: Use "Start, Stop, Continue" framework

Category	Team Input	Action Items
START (<i>What should we start doing in future pilots that we didn't do this time?</i>)	<ul style="list-style-type: none"> • (e.g., "Start involving legal earlier") • • 	
STOP (<i>What should we stop doing because it didn't add value or caused problems?</i>)	<ul style="list-style-type: none"> • (e.g., "Stop trying to perfect the model before user testing") 	



Category	Team Input	Action Items
	<ul style="list-style-type: none"> • • 	
<p>CONTINUE (<i>What worked well and should be repeated in future pilots?</i>)</p>	<ul style="list-style-type: none"> • (<i>e.g., "Continue daily standups—kept us aligned"</i>) • • 	

Key Retrospective Questions:

1. **Team Dynamics:** How well did the team collaborate? Any communication breakdowns?
2. **Process Effectiveness:** Was the 90-day timeline appropriate? Were phase gates valuable?
3. **Stakeholder Management:** Were the right people involved at the right times?
4. **Resource Adequacy:** Did we have sufficient budget, tools, and time?
5. **Risk Management:** Did our risk identification and mitigation work? What blindsided us?
6. **Measurement:** Were our success metrics the right ones? Did we measure what mattered?



SECTION 8: APPENDICES & SUPPORTING TOOLS

8.1 Data Inventory & Assessment Template

Instructions: Complete during pre-flight planning to assess data readiness.

Data Source	Description	Volume	Quality Score (1-5)	Accessibility	Privacy/Compliance Status	Owner
<i>(Example: CRM database)</i>	<i>(Customer support ticket history)</i>	<i>(50,000 records)</i>	<i>(4/5 - mostly clean)</i>	<i>(API available)</i>	<i>(GDPR compliant; approved by legal)</i>	<i>(IT Ops)</i>

Data Quality Assessment Criteria:

- **5:** Complete, accurate, consistent, timely
- **4:** Minor gaps or inconsistencies (<10%)
- **3:** Moderate issues (10-30% problematic)
- **2:** Significant issues (30-50% problematic)
- **1:** Poor quality (>50% problematic)

8.2 User Training Plan Template



Training Component	Target Audience	Format	Duration	Timing	Owner	Materials Needed
Overview & Context	<i>(All pilot users)</i>	<i>(Group presentation)</i>	<i>(30 min)</i>	<i>(Day 1)</i>	<i>(Pilot Lead)</i>	<i>(Slides, use case examples)</i>
Hands-on Practice						
Advanced Features						
Troubleshooting						

8.3 Budget Tracking Template



Budget Category	Planned Budget	Actual Spend	Variance	Variance %	Notes
AI Platform/Software	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	
Cloud Infrastructure	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	
Consulting Services	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	
Internal Personnel Time	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	
Training & Change Mgmt	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	
Tools & Licenses	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	
Contingency (10-15%)	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ %	



Budget Category	Planned Budget	Actual Spend	Variance	Variance %	Notes
TOTAL	\$ _____ ---	\$ _____ ---	\$ _____ ---	_____ _%	

8.4 User Feedback Survey Template

Instructions: Deploy this survey at the end of each phase and at pilot conclusion.

90-Day AI Pilot User Feedback Survey

Your Role: _____ **Date:** _____

Phase: Phase 1 (Day 30) Phase 2 (Day 60) Phase 3 (Day 90)

1. How frequently have you used the AI solution? Daily Several times per week Weekly Rarely Never

2. The AI solution is easy to use. Strongly Agree Agree Neutral Disagree Strongly Disagree

3. The AI solution helps me complete my work faster. Strongly Agree Agree Neutral Disagree Strongly Disagree

4. The AI solution produces accurate/reliable results. Strongly Agree Agree Neutral Disagree Strongly Disagree

5. I trust the AI solution's recommendations. Strongly Agree Agree Neutral Disagree Strongly Disagree



6. The training I received was adequate. Strongly Agree Agree Neutral
 Disagree Strongly Disagree

7. How likely are you to recommend this AI solution to colleagues? (Net Promoter Score) 0 1 2 3 4 5 6 7 8 9 10

8. What is the BEST thing about this AI solution?

9. What is the WORST thing about this AI solution?

10. What improvements would make you use this solution more?

11. Any other comments or suggestions?

8.5 Quick Reference: Common AI Pilot Failure Modes & Prevention

Failure Mode	Warning Signs	Prevention Strategy
"Boiling the Ocean" - Scope too broad	<ul style="list-style-type: none">• Pilot encompasses multiple use cases• No clear primary	<ul style="list-style-type: none">• Ruthlessly narrow scope to ONE use case• Use "out of scope" list

Failure Mode	Warning Signs	Prevention Strategy
	metric <ul style="list-style-type: none"> • Timeline keeps extending 	proactively <ul style="list-style-type: none"> • Resist feature creep
"Science Project Syndrome" - Technical focus without business value	<ul style="list-style-type: none"> • Team obsessed with model accuracy • No business stakeholder involvement • Metrics are all technical 	<ul style="list-style-type: none"> • Appoint strong business owner • Lead with business metrics • Connect AI performance to business outcomes
"Build It and They Won't Come" - User adoption failure	<ul style="list-style-type: none"> • Users not involved in design • Training treated as afterthought • No change management 	<ul style="list-style-type: none"> • Involve users from Day 1 • Co-design with end users • Invest in change management
"Perfect Is the Enemy of Done" - Perpetual refinement	<ul style="list-style-type: none"> • Team keeps delaying user testing • "Just one more week" to improve 	<ul style="list-style-type: none"> • Enforce phase gate discipline • Timebox refinement efforts • Launch with "good enough"



Failure Mode	Warning Signs	Prevention Strategy
	<ul style="list-style-type: none"> • Phase gates keep sliding 	
<p>"Data Swamp" - Poor data quality</p>	<ul style="list-style-type: none"> • Data quality issues discovered late • Model accuracy plateaus • Constant data debugging 	<ul style="list-style-type: none"> • Assess data quality in Week 1 • Budget time for data cleaning • Be realistic about data limitations
<p>"Stakeholder Surprise" - Misaligned expectations</p>	<ul style="list-style-type: none"> • Executive sponsor loses interest • Unexpected objections emerge • Politics derail pilot 	<ul style="list-style-type: none"> • Map stakeholders comprehensively • Communicate proactively and frequently • Manage expectations from Day 1

YOUR PATH TO AI PILOT SUCCESS

This 90-Day AI Pilot Program Blueprint provides the structure, tools, and frameworks to transform AI ambition into validated results. By following this template, you will:

- ✔ **Reduce risk** through structured planning and phased validation



✅ **Build stakeholder confidence** with clear metrics and transparent communication ✅ **Capture institutional learning** that accelerates future AI initiatives

✅ **Make evidence-based decisions** about scaling AI investments

✅ **Establish repeatable patterns** for AI adoption across your organization

Remember: The goal of a pilot is not to achieve perfection—it's to **learn fast, fail fast, or succeed fast**. Use this blueprint as your guide, but adapt it to your context. The best AI pilots balance structure with flexibility, rigor with pragmatism, and ambition with realism.

Now go launch your AI pilot with confidence. 🚀