

## AI Pilot Launch Scorecard

Complete each section before launching your AI pilot. Every unchecked item is a risk — address or explicitly accept it.

### 1. KNOWLEDGE SOURCE INVENTORY

- Data sources identified** — list all knowledge bases, docs, FAQs, and APIs the AI will use
- Data quality verified** — sources are current, accurate, and free of contradictions
- Access & permissions confirmed** — you have rights to use all data in an AI context
- Freshness plan documented** — schedule for updating/syncing knowledge sources
- Gap analysis complete** — known gaps in knowledge documented with fallback plan

### 2. GUARDRAILS & BOUNDARIES

- Scope defined** — topics the AI will/won't address
- Tone & persona set** — voice guidelines documented
- Hallucination controls** — "I don't know" behavior configured
- PII handling defined** — how personal data is treated
- Content moderation active** — filters for harmful/off-topic output
- Rate limits set** — abuse prevention measures in place

### 3. SUCCESS METRICS

Define 2-3 measurable outcomes. If you can't measure it, you can't prove the pilot worked.

METRIC	TARGET	HOW YOU'LL MEASURE	CURRENT BASELINE
e.g., Resolution rate	e.g., 60%	e.g., Resolved / total convos	e.g., N/A (new)

### 4. ESCALATION PLAN

TRIGGER	WHAT HAPPENS
<b>Low confidence</b> Threshold: _____ %	Action: route to human / show disclaimer / ...
<b>Sensitive topic detected</b>	Topics: _____ Action: _____
<b>User requests human</b>	Channel: _____ SLA: _____
<b>System error / outage</b>	Fallback: _____ Alert to: _____

### 5. LAUNCH READINESS — FINAL GO/NO-GO

<input type="checkbox"/> Internal testing complete ( $\geq 20$ conversations)	<input type="checkbox"/> Rollback plan documented
<input type="checkbox"/> Stakeholder sign-off obtained	<input type="checkbox"/> Support team briefed
<input type="checkbox"/> Monitoring dashboard live	<input type="checkbox"/> Review date scheduled: _____
DECISION: <input type="checkbox"/> GO <input type="checkbox"/> NO-GO    Signed: _____	