

## 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       |
|------------------------------|------------------|--------------------------------------|------------------------|
| <i>e.g., Resolution rate</i> | <i>e.g., 60%</i> | <i>e.g., Resolved / total convos</i> | <i>e.g., N/A (new)</i> |
|                              |                  |                                      |                        |
|                              |                  |                                      |                        |

### 4. ESCALATION PLAN

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

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

- ☐ **Internal testing complete** (≥20 conversations)
- ☐ **Stakeholder sign-off obtained**
- ☐ **Monitoring dashboard live**
- ☐ **Rollback plan documented**
- ☐ **Support team briefed**
- ☐ **Review date scheduled:** \_\_\_\_\_

**DECISION:** ☐ **GO** ☐ **NO-GO** **Signed:** \_\_\_\_\_