Pilot Phase Project Plan

Project: ADDIE Prompt Management & Agent Retrieval (Pilot)
Duration: ~4–6 weeks
Methodology: Lightweight Agile (time-boxed pilot)
Primary Goal: Validate value, trust, and usability of agent-based prompt retrieval

1. Pilot Objectives

Primary Objectives

- Validate structured prompt capture aligned to ADDIE
- Establish a human review and governance loop
- Prove that a Vertex AI Agent can retrieve prompts effectively
- Build organizational trust before automation

Success Definition (Pilot Exit Criteria)

- Users can ask an Agent for prompts by ADDIE phase
- Agent returns only approved prompts
- Reviewers confirm quality and non-duplication
- Stakeholders agree automation is safe to introduce

2. Scope (Pilot Phase Only)

In Scope

- Google Forms for prompt submission
- Google Sheets for staging and review
- Manual human review (quality + similarity)
- Google Cloud Storage as agent data source
- Vertex AI Agent configured for retrieval
- ADDIE-based metadata and filtering

Explicitly Out of Scope

- Automated similarity detection
- BigQuery-based lifecycle management
- Versioning automation
- Prompt testing automation

3. Roles & Responsibilities

Role	Responsibility
Product Owner	Vision, scope, pilot success criteria
Prompt Authors	Submit prompts via Google Forms
Reviewers / SMEs	Quality + similarity vetting
Cloud Architect	GCS + Agent configuration
Agent Engineer	Vertex AI Agent setup
Project Lead	Timeline, coordination, delivery

4. Work Breakdown Structure (WBS)

Phase 0 — Planning & Alignment (Week 0)

Deliverables

- Pilot BRD (approved)
- Architecture diagram (pilot)
- Success metrics defined

Tasks

- Confirm ADDIE metadata fields
- Define reviewer approval criteria
- Define agent response expectations

Phase 1 — Prompt Capture Setup (Week 1)

Deliverables

- Google Form (Prompt Submission)
- Google Sheet (Responses + Review columns)

Tasks

- Design Google Form:
  - Prompt text
  - ADDIE phase
  - Intended use

- - ○ Tags
    - ○ Author
  - Configure Sheet:
    - ○ Status (Submitted / Approved / Rejected)
    - ○ Reviewer comments
    - ○ Similarity notes
  - Pilot with 5–10 sample prompts

Acceptance Criteria

- Authors can submit prompts in <2 minutes
- Prompts land consistently in Sheets

Phase 2 — Human Review & Governance (Week 2)

Deliverables

- Review workflow defined
- Approved prompt checklist

Tasks

- Define review rubric:
  - ○ ADDIE alignment
  - ○ Clarity and reuse potential
  - ○ Similarity to existing prompts
- Train reviewers on process
- Review first batch of prompts

Acceptance Criteria

- Review decisions are consistent across reviewers
- Review turnaround <48 hours

Phase 3 — Approved Prompt Repository (Week 3)

Deliverables

- Google Cloud Storage bucket
- Prompt file format standard (JSON or Markdown)

Tasks

- Design prompt file schema:
  - ○ Metadata header
  - ○ Prompt text body

- Manual export of approved prompts to GCS
- Folder structure by ADDIE phase

Acceptance Criteria

- Each approved prompt exists as a single file
- Metadata is machine-readable

Phase 4 — Vertex AI Agent Configuration (Week 4)

Deliverables

- Vertex AI Agent (Agentspace)
- Cloud Storage configured as data source

Tasks

- Configure Agent instructions:
  - ADDIE filtering
  - Approved-only rule
  - Explainable responses
- Connect GCS as retrieval source
- Test basic queries:
  - "Design phase prompt"
  - "Analyze phase prompt"

Acceptance Criteria

- Agent retrieves correct prompts
- Agent does not hallucinate or invent prompts
- Responses include explanation

Phase 5 — Pilot Validation & Feedback (Week 5)

Deliverables

- Pilot feedback summary
- Go / No-Go decision for Phase 2

Tasks

- Run user testing sessions
- Capture:
  - Retrieval accuracy
  - Ease of use
  - Trust feedback

- Document gaps and automation opportunities

Acceptance Criteria

- ≥80% user satisfaction
- Clear Phase 2 automation roadmap agreed

5. Timeline Overview

Week	Focus
0	Planning & alignment
1	Prompt capture (Forms/Sheets)
2	Human review & governance
3	GCS repository
4	Vertex AI Agent
5	Validation & decision

6. Risks & Mitigations (Pilot)

Risk	Mitigation
Low prompt quality	Strong human review
Reviewer bottleneck	Small prompt volume
Agent hallucination	Approved-only datasource
Overengineering	Manual steps by design

7. Pilot Metrics

Operational

- Number of prompts submitted
- Approval rate
- Review turnaround time
- Prompt usage

User Experience

- Time to find a prompt
- Agent response satisfaction
- Reuse rate of prompts

8. Pilot → Production Transition Criteria

Pilot moves to Phase 2 only if:

- Users trust agent responses
- Review rubric is stable
- Similarity checks are well understood
- Stakeholders approve automation

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9. Executive Summary

Pilot Phase Goal:

Prove that structured prompt governance combined with agent-based retrieval improves consistency, reuse, and trust—before introducing full automation.